



Meat Shopper Monitor

January 2024

BORD BIA
**Thinking
House**



1. What is the Meat Shopper Monitor?



Meat Shopper Monitor



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What is the Meat Shopper Monitor?

- Research monitoring shopper behaviour in the meat category at the point of purchase.
- Conducted on a monthly basis in 7 core markets, with a sample size of n=500 interviews being completed in each market each month.



**Protein
Category
Engagement**

**Beef
Purchase
Behaviour**

**Potential Drivers
of Purchase**

**Store
Perceptions &
Performance**

**Previous and
Future
Purchase
Behaviour**

3. Snapshot of Q4 2023

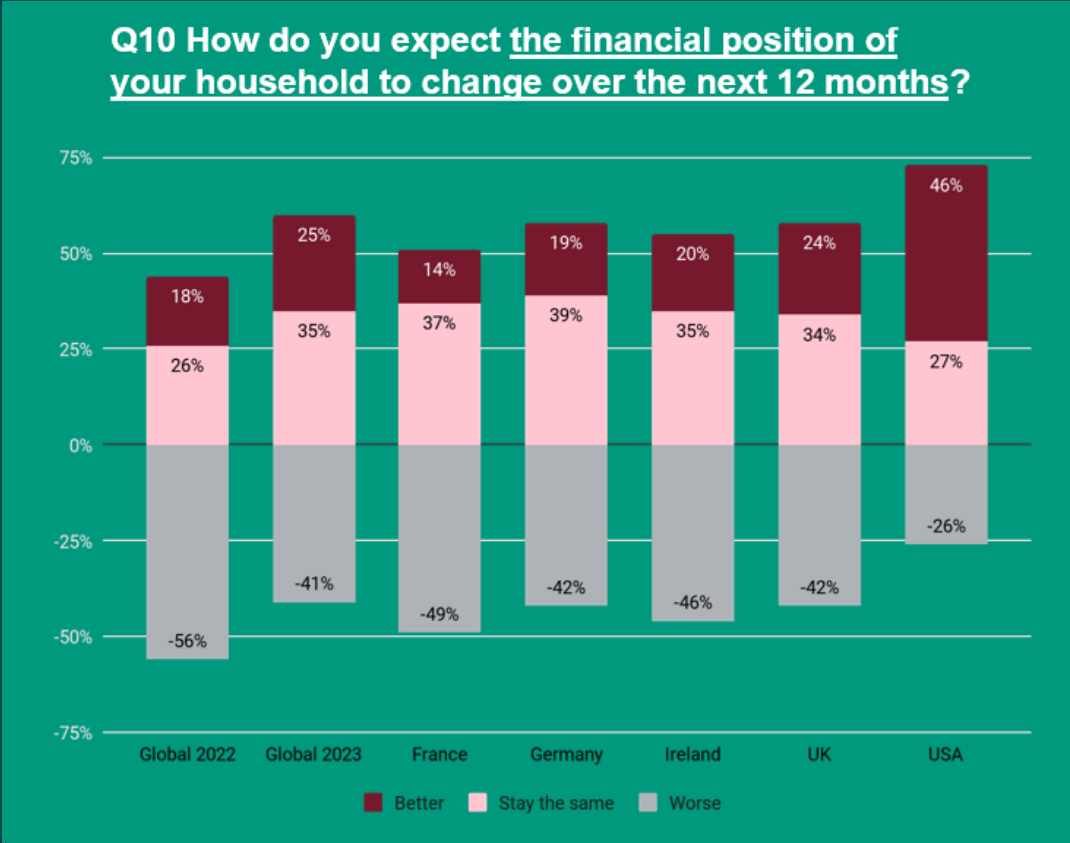


Meat Shopper Monitor



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Inflation continues to hit people's spending, and while a significant cohort are feeling worse off, there is slightly more optimism than last year



Buying only the essentials continues to be important for all, both the worse-off and well-off and for many, if it's not 'essential' it's not part of the everyday shop

Buying only the essentials

continues to be a growing behaviour, and in 2023 this has become more important for half of those surveyed, two-thirds of the Just Surviving segment and for half of Carefree Consumers

(Global avg.)

+50%
-12%



JUST
SURVIVING

+65%
-11%



CAREFREE
CONSUMERS

+51%
-12%

However, as people become better at budgeting, there's a little bit more room for alternative considerations - and a treat here and there or buying ethically as and when they can!

How to Engage



Weekday Consumer



Trade up Consumer



Conscious Consumer



Weekday Consumer

LEVERAGE KEY USAGE TRENDS IN

- Meal Planning
- Bulk Cooking
- Convenience
- Recipe Inspiration



47% of
people in Ireland
are cooking from
scratch more

38% of
people are bulk
cooking/meal
prepping more

**The homecook is now
firmly entrenched**

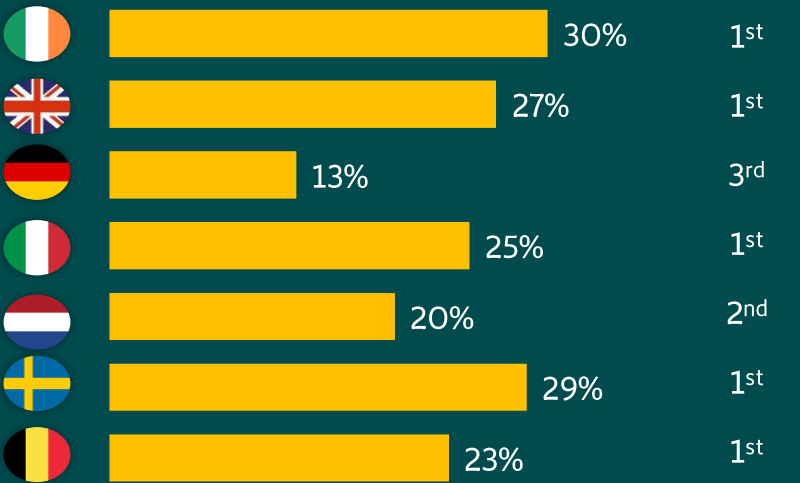
**People are also likely to be
minimising their food
waste through meal
prepping**

Not being in meal plans continues to be a key barrier to consideration of beef on the last occasion

Barrier to Considerations

Q4 2023

"It simply wasn't in my meal plans"



The importance of being on meal plans in each market is clear as this is a key aspect shaping overall consideration pre-store

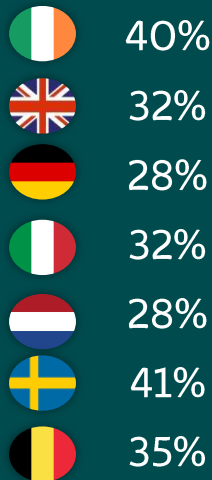


To impact meal plans, we need to re-engage with consumers and reduce auto-pilot purchase



Beef Engagement

Reviewing what's available



Beef Purchase

Actually Purchasing



Q4 2023

In all markets the level of last occasion purchase is higher than the proportion who reviewed the types of beef available.



Need to disrupt the level of 'auto-pilot' purchase decisions to re-engage shoppers with the types of beef we want them to purchase

Similar Situation for Chicken and Pork

CHICKEN

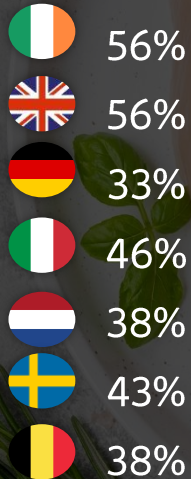
Q4 2023

PORK

Engagement



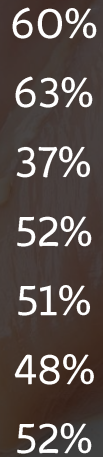
Reviewing Offering



Purchase



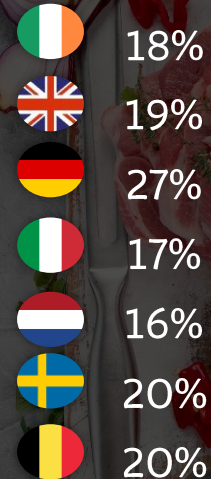
Actually Purchasing



Engagement



Reviewing Offering



Purchase



Actually Purchasing

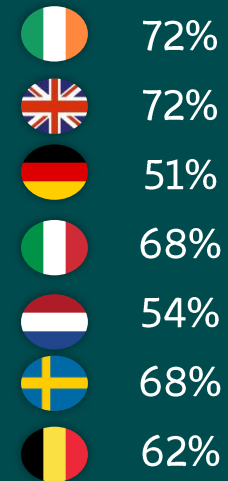
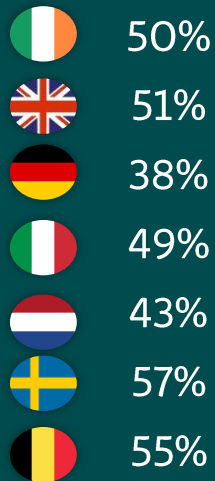


Shoppers are definitely looking to cooking approaches which can make their meals go further and reduce expenditure

I'm buying cheaper types/formats of meat to reduce my household expenditure

Q4 2023

I'm looking to make meals go further nowadays



The desire to cook something easy, is also clearly apparent

Q4 2023

Barrier to Considerations

'I wanted something easier to cook

RANK



15%

3



13%

4



13%

4



17%

3



14%

3



12%

4



11%

5

Barrier to Purchase

'I wanted something easier to cook

RANK

19%

3

16%

4

9%

8

19%

3

17%

4

12%

6

14%

7



60%

of UK consumers admit they cook
the same meals on repeat at
dinner time

Source: [Mirror, 2023](#)

32% of UK
consumers say that they
frequently end up with a
boring meal in the middle
of the week

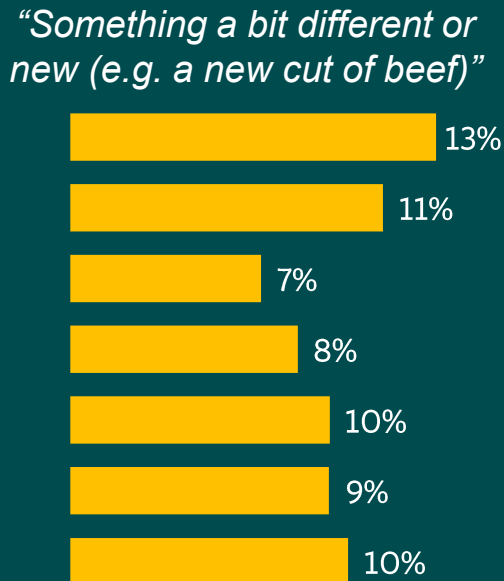
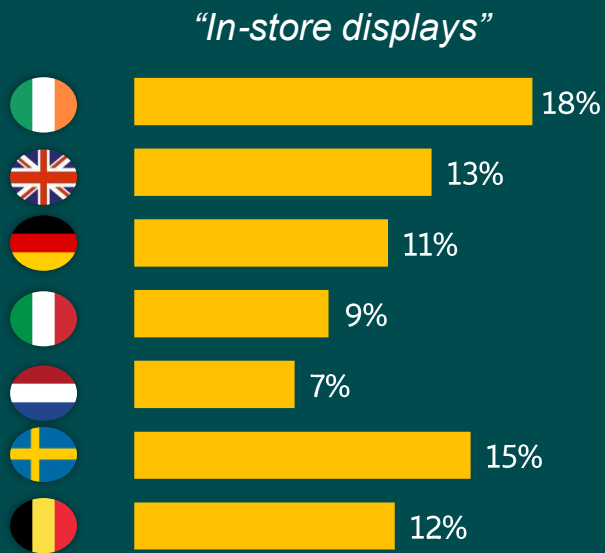
Source: [McCain](#)

All this budget and meal planning is at risk of making cooking feel laborious and boring

Providing inspiration and engaging in-store displays can help entice shoppers to trade-up

Influence on trading-up to more premium formats of beef

Q4 2023



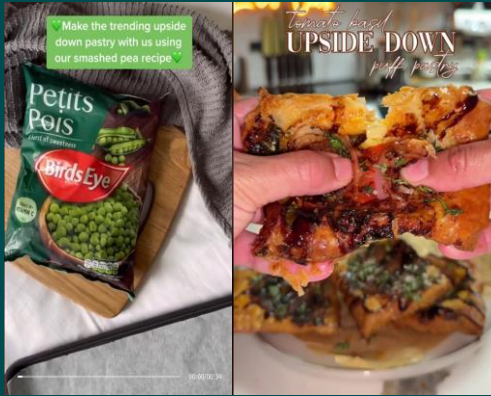
To find some needed inspiration, people are also turning to social media for creative meal ideas

29%

of consumers are doing more browsing on social media for cheaper meal ideas

Source: Bord Bia Inflation Impact 2023

Brand Inspiration



TikTok: #Upsidedownpastry

#Upsidedownpastry now has over 64M views on TikTok, breathing new life into an established recipe. Brands such as [Kroger](#) and [Birds Eye](#) jumped on the upside down pastry wagon to demonstrate how their products could enhance this trend.



Nando's: Not available at Nando's
Nando's 'Not available at Nando's' campaign stars at-home cooks creating their own dishes with Nando's' range of condiments, spices and rubs. The spot encourages consumers to get creative with their own interpretations of the Nando's brand, while positioning its grocery range as a way of adding excitement and colour to home-cooked meals.



Tesco: Adding spice to meal-times

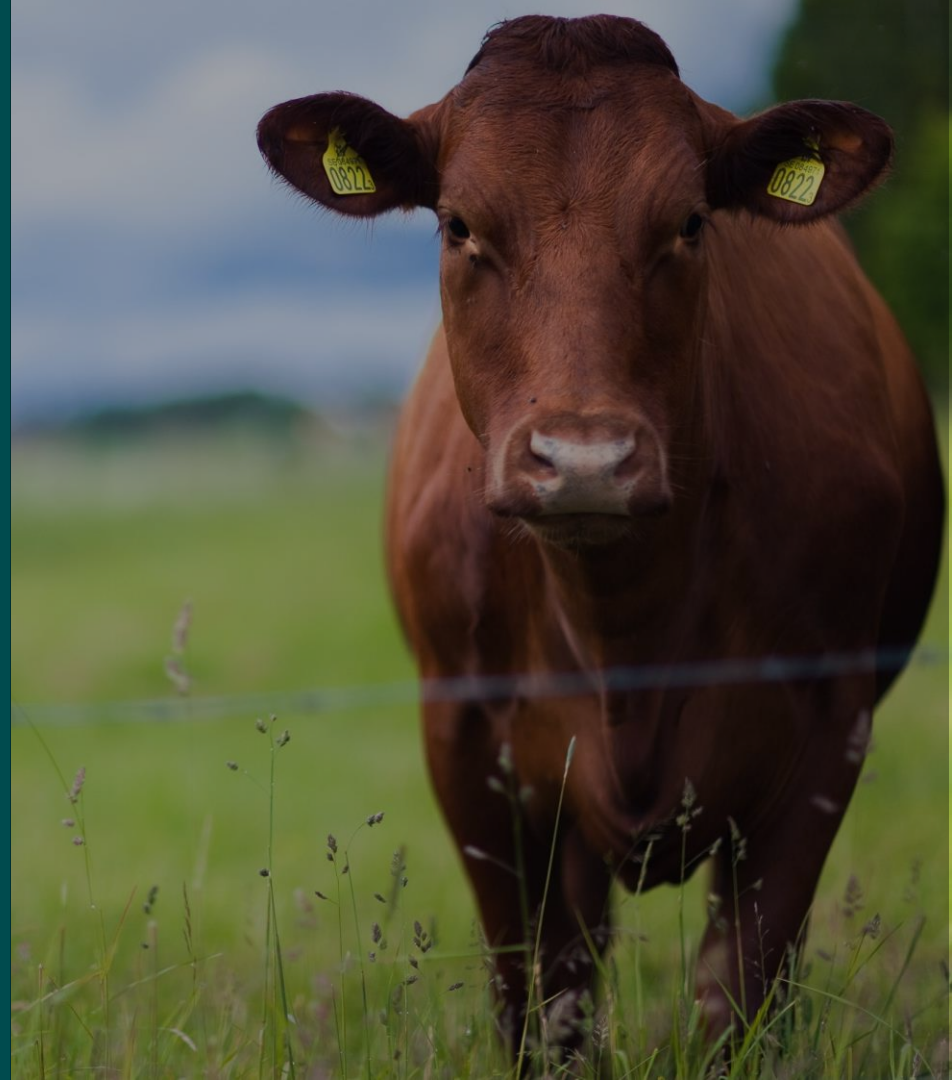
Tesco saw sales of global cuisine ingredients consistently rise in 2022. And they've responded by expanding their World Foods aisle by 35%, helping people to experiment with flavours they may have been missing as they cut back on meals out and takeaways.



Trade up Consumer

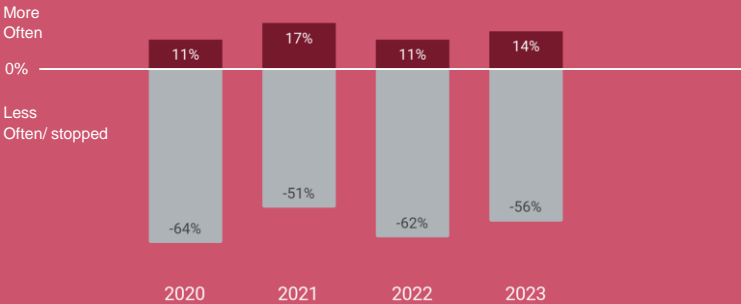
LEVERAGE KEY TRENDS IN

- Weekend Treating
- Quality and Taste Perceptions
- Value for Money

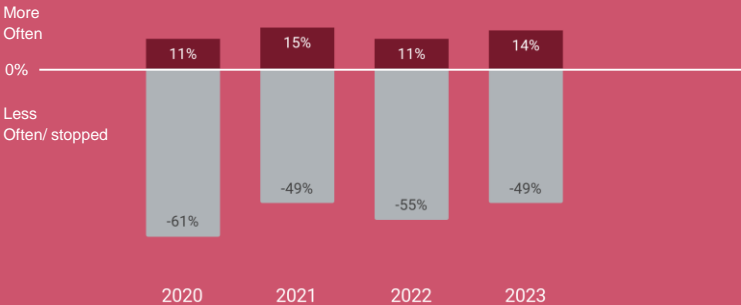


People continue to spend less time on food occasions outside of the home, though numbers show a slight improvement on last year

% of consumers eating out at restaurants more or less often/ stopped in recent months



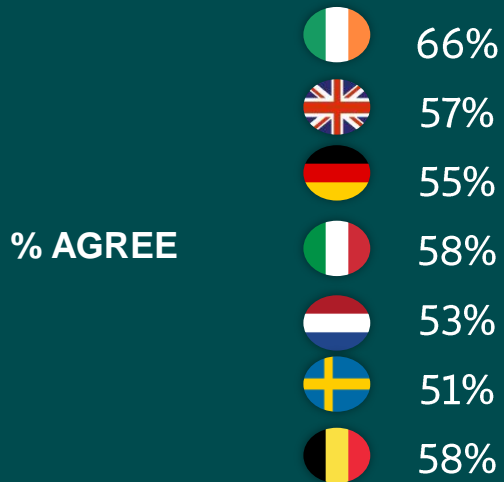
% of consumers spending time in cafes and casual eateries more or less often/ stopped in recent months



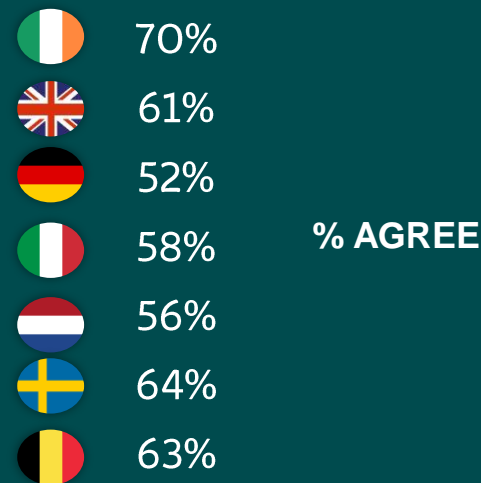
There is a clear opportunity to give shoppers the permission to trade-up for weekend occasions

Q4 2023

I purchase nicer foods to consume at home at the weekend instead of eating out



Offers/promotions on beef which is of high quality would entice me to spend a little more at the weekend



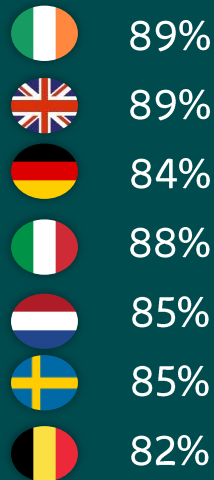
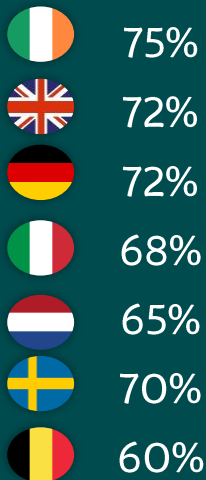
Shoppers can clearly see the benefits of buying beef!

'Beef is a protein that is worth paying more for'

'I think Beef tastes great; it's a real treat'

Q4 2023

% AGREE










However, many shoppers are impacted in their desire to purchase beef because of perceptions that it is too expensive – it's also impacting consideration!

Q4 2023

Barrier to Considerations

'It is too expensive'

		RANK
	13%	4
	27%	2
	29%	1
	13%	5
	20%	1
	25%	2
	21%	2



Barrier to Purchase

'It is too expensive'

	RANK
22%	1
21%	1
40%	1
27%	1
23%	1
29%	1
27%	2

70%

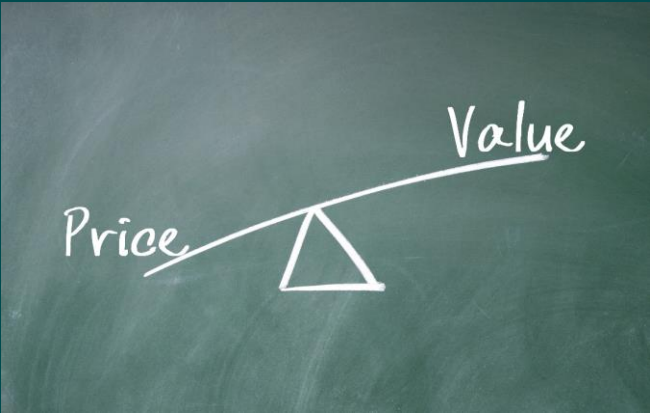
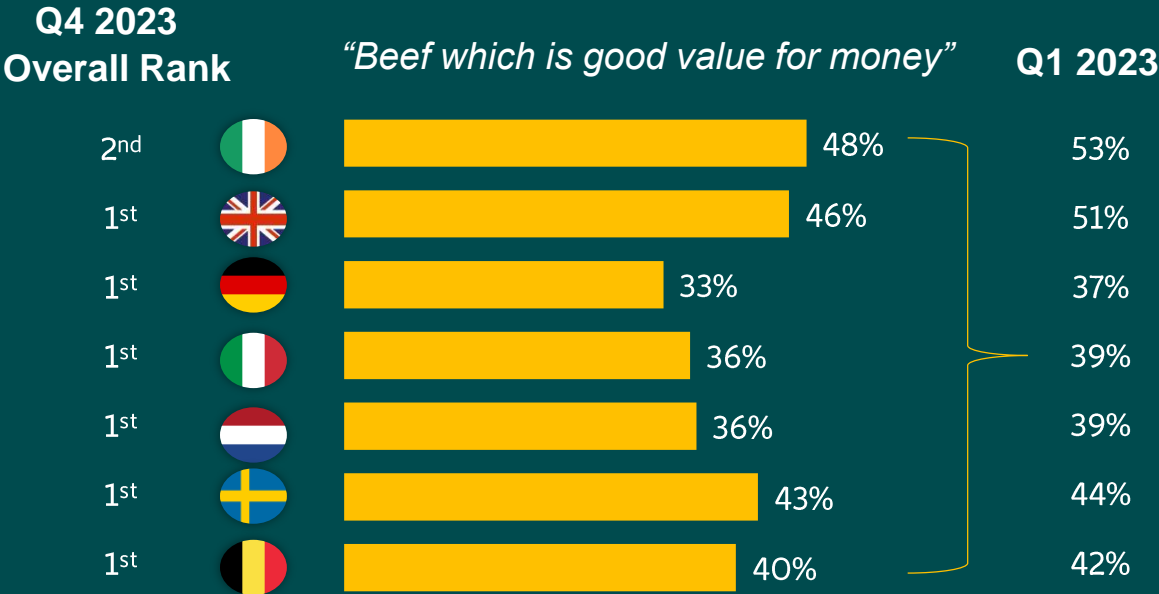
Of UK shoppers have noticed that some food packages contain a smaller amount of the actual product than suggested by the size of the packaging, known as slack-filling.

Source: [Barclays 2023](#)

And there's a growing sense of scepticism amongst consumers.... they are feeling a little cheated...

Demonstrating value for money is crucial in all markets, and while high, the importance placed on VFM is subsiding from Q1 2023 levels

Impact on Future Purchase of Beef



Brand Inspiration



Tasty UK: Fiver Feasts

The enormous popularity of the series attests to the desire for simple and affordable ways to diversify cooking repertoires.



Organic Beef Launch leaning on rise of slow cooked trend

Organic beef launch from Australian brand Cleaver's specifically calls out front of pack that it is to be cooked low and slow.



M&S RECIPE INSPIRATION

Tom Kerridge's sirloin steak with chimichurri and potato wedges

Want to serve up a steak-night feast for the family? Fresh, zingy chimichurri and crispy potato wedges make this recipe a real crowd-pleaser

Serves
4



Conscious Consumer

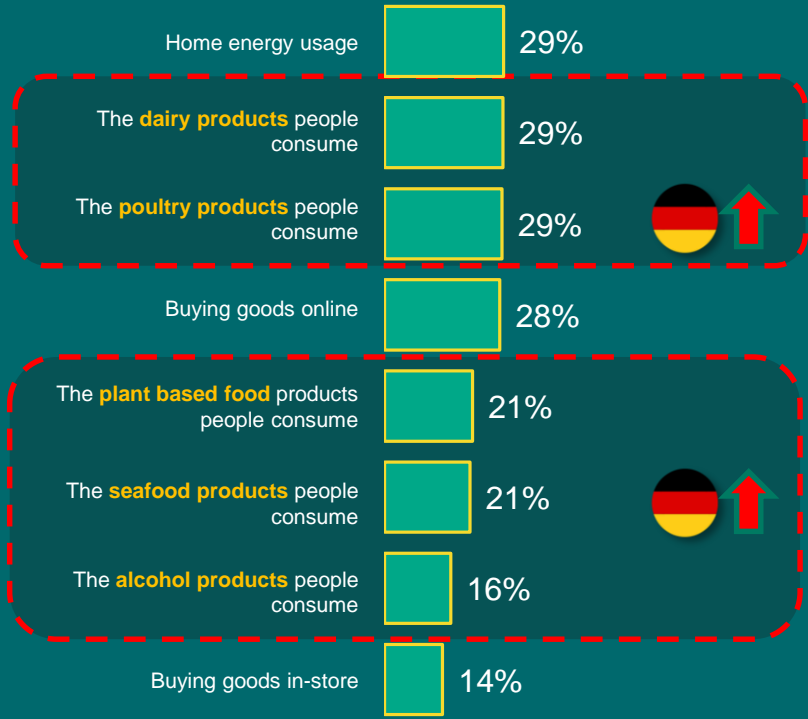
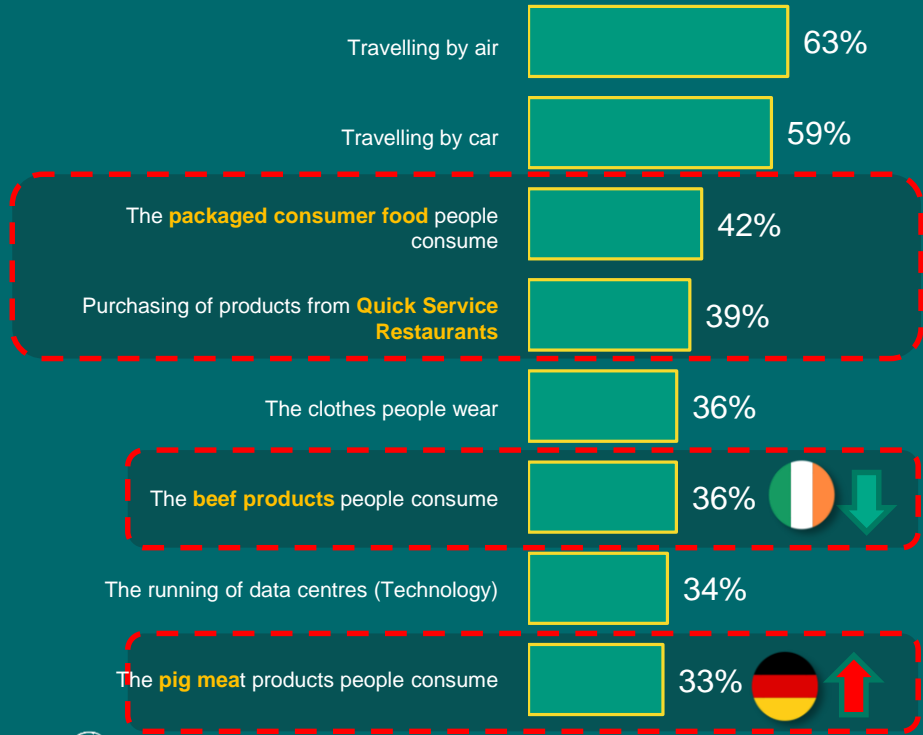
EDUCATE CONSUMERS ON

- Production & Sourcing
- Nutrition



Beef and pig meat ranked lower than PCF and travel in top ten perceived contributors to carbon emissions, but there is still work to be done.....

High Impact - is a significant contributor to carbon emissions (8-10)



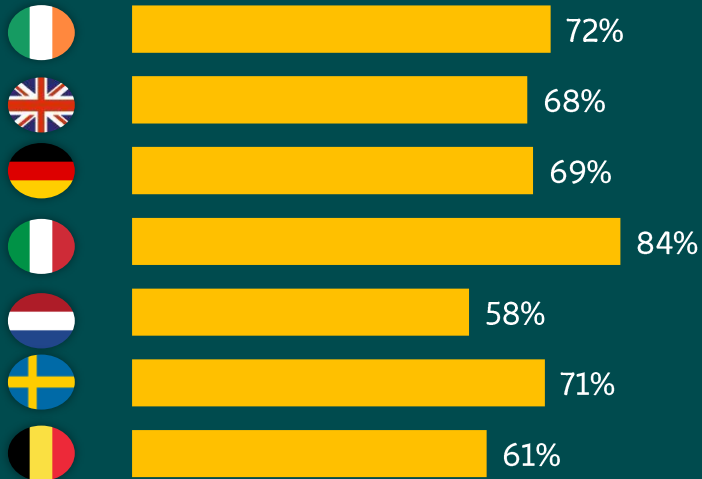
And there are certainly opportunities to engage with shoppers and highlight how beef is produced

Q4 2023

Attitudes towards beef production

% AGREE

"I want to know more about how my beef has been produced"





Processed Obsessed?

People are also scrutinising what it means for food and drink to be 'natural'

Interest in 'whole' ingredients is seeing a resurgence, as are **clean labels**. But consumers are looking for **more trustworthy signs and reassurances** that they have the permission to eat 'clean'.

The Guardian

Ultra-processed food linked to higher risk of depression, research finds

67%

of global consumers care more about ingredient sourcing than they did a year ago

Innova, 2023

TREND



They're looking for **simple and intuitive** ways to navigate being healthy and being good to the planet – whether that's via transparent labelling or more honest approaches to diets

50%

of consumers surveyed stated that healthy eating is a top priority, which included reducing their consumption of processed foods

[Mckinsey, 2022](#)

62%

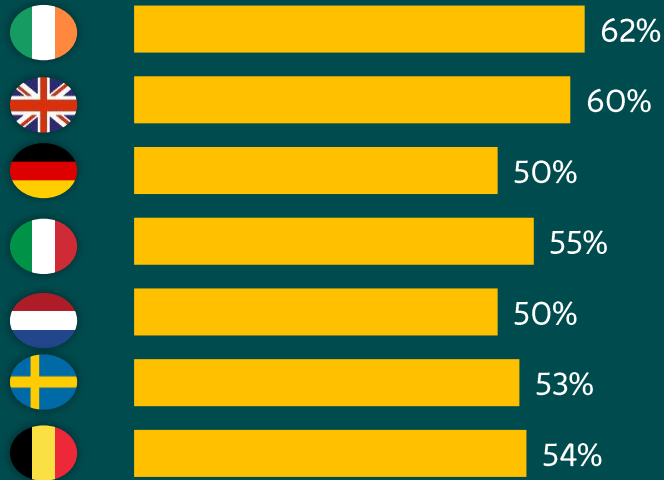
of French consumers consider cutting back on processed foods as a top priority for a healthy diet

Source: [Mckinsey](#) 2022

High agreement across markets that beef is the least processed of all meats

Q4 2023
% AGREE

*"I think beef is the least processed
of all meats"*



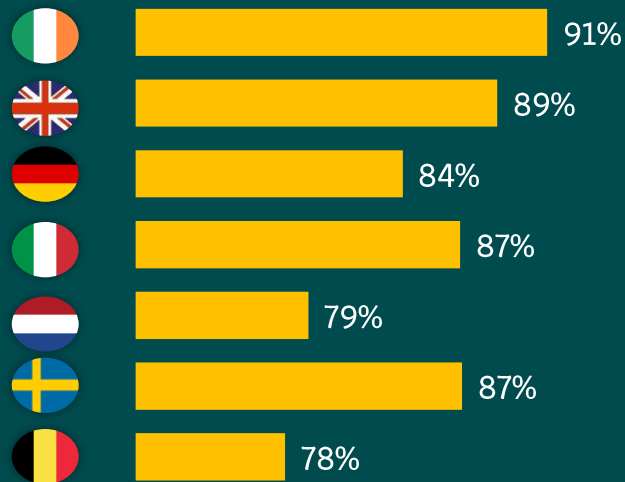
And there is definite recognition that beef is a good source of protein, with strong health credentials and dialling up the health benefits can really impact purchase

Recognition of Health Associations

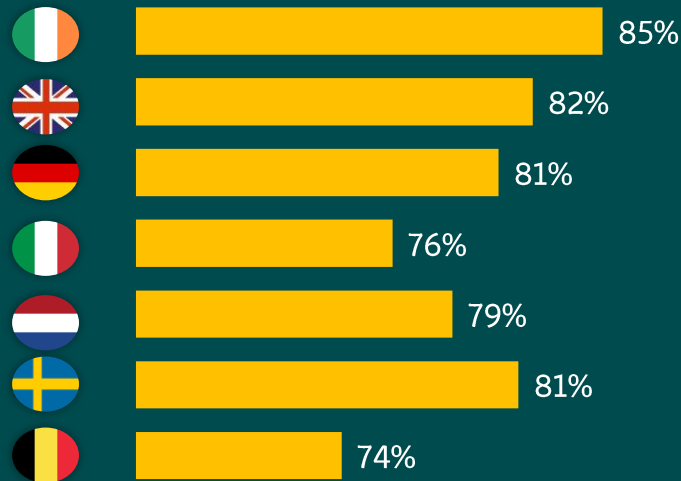
Q4 2023

Influence on trading-up to more premium formats of beef

"Beef is a great source of protein"



"I think Beef is a relatively healthy protein"



Brand Inspiration



Certified Piedmontese from Great Plains Beef in the US has brand cues tied to naturalness, health, sustainability, and animal welfare, while leaning on the heritage of the breed.



Argyle Nurture Rump Steak is described as 100% grass fed, hormone- and antibiotic-free sustainable beef. The brand claims to capture emitted carbon and put it back into the land (Australia).



SixtyForty is an Amsterdam-based restaurant that promotes plant-based food alongside traditional animal proteins. They prioritise **whole ingredients** and aim to educate people on quality, sourced ingredients, instead of alienating audiences with strict animal or plant-based diets

3. What will be different in 2024 ?

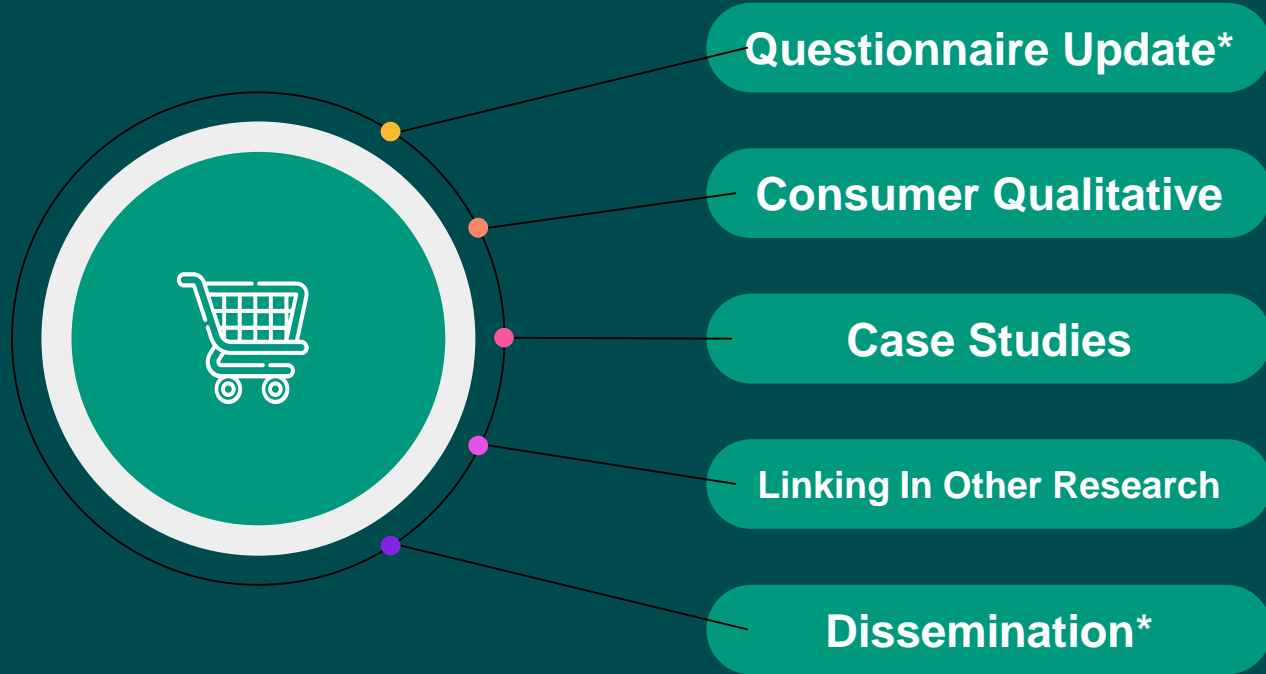


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What will be different ?



Unlocking Category Growth – 2024 Questionnaire Refinements



Pre-Purchase



Purchase



Post-Purchase



What's motivating **shopper choices** before purchase and how can we engage with shoppers to influence?



What's important to shoppers at the point of purchase?



What type of displays, offers and messaging is **most impactful** at the point of purchase? Role of convenience?



How are shoppers using the meat they purchase; how does this change across the week and what are the **opportunities** for future purchase?

What we can deliver and do for you and your customer !



Quarterly Europe Overview Report



Quarterly Webinar of Results



Quarterly Market Specific Reports



Video recording of results



Bespoke Reports



Insight to Action workshops

Dig Deeper with bespoke reports for your customer meetings !



Thank You

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