Decoding consumer data to maximise category opportunity
THE SHOPPING DECISION PROCESS FOR MEAT

CONTENTS

FOREWORD ....................................... 1
THE SHOPPING DECISION TREE ............... 2
KEY OBSERVATIONS ............................... 3
PRE-PURCHASE ..................................... 4
AT THE FIXTURE .................................... 10
POST-PURCHASE .................................... 18
DECISION TREE CRITERIA BY CUT ............. 22
THE CONJOINT RESEARCH ANALYSIS .......... 24
THE PURCHASE INTENTION DECISION TREE .... 24
SIMULATING SHOPPER CONCEPT PREFERENCES ... 26
APPENDIX I ........................................... 30
IN-STORE DECISION TREE QUESTIONNAIRE
FOREWORD

Understanding the consumer lies at the heart of all retailing strategies and it is only with such knowledge and insight that we can effectively stimulate demand and deliver customer satisfaction.

The shopping decision tree process for meat outlined in this report provides precisely such a valuable overview of purchasing behaviour in-store for one of the food sector’s most valuable categories. It explores the influences that prompt shoppers to choose one particular meat cut in preference to another. Understanding these influences will help to define - and, indeed, refine – the merchandising, marketing and promotional strategies designed to drive category growth.

In addition to the observational research conducted in-store, which analysed the factors that determined what shoppers actually bought (the purchase outcome), the decision tree research has been enriched by conjoint research. This analyses the factors consumers take into account before they go shopping – the so-called purchase intention hierarchy.

By applying numerical values to the purchase hierarchy when there is a range of overlapping variables which consumers consider when deciding what to buy, it is possible to deduce the product features and associated attributes which have the most impact on choice. By reflecting these priorities in the meat offer, retailers can maximise both purchase potential and customer satisfaction.

It is the combination of the decision tree and conjoint techniques that makes this research so compelling and potentially so valuable. That it can be tailored to apply to specific markets makes it a potentially powerful management tool.

I know my colleagues in EBLEX look forward to working with retailers and processors to apply the insight derived from this research. It enables EBLEX to work with our partners in the supply chain to fine tune their strategies for growth in the red meat category.

JOHN CROSS
CHAIRMAN
EBLEX
The first part of the EBLEX shopping decision tree research consisted of nearly 1,200 face-to-face interviews conducted in-store. The research was conducted in outlets operated by four of the UK’s largest grocery retailers with all interviews taking place in larger store formats. The in-store intercept interviews, which were conducted at the pre-pack meat fixture, were complemented with observational research before selection of meat.

Questioning was designed to establish pre-purchase criteria (such as whether the purchase was pre-planned, main shop or top-up); shoppers’ behaviour at the fixture (how long they took to decide what to buy, how easy they found the fixture to navigate and whether they would buy a substitute product if their first choice was not available); and post-purchase information (such as when and how the product bought was to be used).

The key findings for each of these three phases can be summarised as shown below (Chart 1).

**THE SHOPPING DECISION TREE**

**PRE-PURCHASE**
- The decision to buy is made in store by 53%, 46% at the fixture. A further 28% decided earlier the same day
- For 50% it was their main shop, for 38% a top-up
- Almost two-thirds (64%) do not use a shopping list but meat cut is included on 66% of lists of those who have a list
- 23% said they were eating less meat these days and 9% said they were eating more

**AT THE FIXTURE**
- 37% buy once a week, 10% more frequently
- They take, on average, 74 seconds in the meat aisle and admit that the meat and vegetable aisles are where they spend longest time. For 55%, the meat aisle is in the first three aisles they visit, for 37%, in the middle part of their shop
- 93% find it very or quite easy to find the meat they want and 89% are satisfied with the range available
- 80% know what price they just paid for their meat, of those who do, pack price is dominant – 90%
- 57% recall no signage at the fixture
- Main factors driving purchase outcome are appearance (31%) followed by price (23%) and then cut (11%)
- If unavailable, 35% of shoppers will substitute a different species, while 30% will look for a different cut within the same species

**POST-PURCHASE**
- 28% will use on the same day, 56% will use in the next few days. 9% buy to freeze
- Family (67%) and Simple adult (34%) are the dominant meal occasions

**CHART 1**
**KEY OBSERVATIONS**

Meat cut and lifestage group are the two variables that most influence shopping dynamics. For instance, when it comes to the specific meat cut, the dynamics alter significantly between staple choices such as mince or diced meat and premium choices such as steak or roasting joints.

There is a marked difference in the pre-purchase process and in purchase frequency between older and younger respondents, as there is in their respective responses to the influence of signage and promotions.

Shoppers spend the longest time in the meat and vegetable aisles than in any other parts of the supermarket and take, on average, 74 seconds in the meat aisle to choose their purchase. This is significantly longer than the average time recorded in similar research undertaken 10 years ago. While this, in part, may be due to the fact that processed products (sausages, bacon and sliced cooked meats, for example) are not featured in this research it may, arguably, be due to the increased complexity of the category. Additional tiering and the introduction of ready-to-cook products in recent years has given shoppers greater choices to consider.

At the point of purchase, it is noteworthy that shoppers take longer to choose when buying healthy tier products, ready-to-cook products and when buying for someone else, in which cases the dwell time in the aisle is longer than average.

The dwell time in the meat aisle is shorter for those buying standard quality, chicken products and when buying meat for that evening’s meal.

Shoppers generally have little difficulty in finding the product they want - 70% claiming it ‘very easy’. This ranges from 64% for those buying chicken legs or thighs to 79% for those buying a whole bird. Satisfaction with and ease of finding lamb is generally lower than for other meats.

The key factor affecting the purchase outcome in-store is the appearance of the meat (56% of all mentions) followed by price (25%). It is worth pointing out that appearance becomes a critical factor only at the point of purchase but is key to the purchase outcome. As will be shown later in this report (see the chapter on Conjoint Research Analysis on page 24) appearance is afforded much less consideration when consumers are planning their purchase and they are remote from the store.

If shoppers’ first-choice product is not available, 35% would buy the same cut but from a different species while 30% would stick with their chosen species but switch cut.

Signage recall is very low with 57% of respondents ‘not really remembering seeing anything’. Of those that do recall signage, price offers and a species sign are most frequently remembered at 18% and 15%, respectively.

Price recall is considerably higher – with 80% of shoppers claiming to remember the price. Of these, the vast majority recalled the pack price while only 2% remembered the price per kg.

36% of shoppers bought an item that was on promotion at the time of the shop, half of which were for 2/3/4 for £x offers. The second most popular mechanic was money off.

The role of the 2/3/4 for £x varies significantly across meat cuts: 20% for roasting joints and 77% for ready-to-cook meats.

While 56% of meat cuts bought will be used within two to three days of purchase, almost one purchase in three (28%) will be used the same day.

A more detailed look at the key data by cut is contained in the next chapter (see page 22). Before that, it is important to examine the in-store research in more detail.
PRE-PURCHASE

SHOPPING MISSION

Our research showed that, for those buying meat, half of all shopping trips are a main shop with nearly 4 in 10 shoppers (38%) topping up. One shopper in 10 is buying for a meal to be eaten the same day with a further 2% shopping specifically for a special meal (Chart 2).

There is little discernible difference by species other than that lamb is less often chosen as part of a top-up shop than other meats and features more than the others as being bought “for tonight” (Chart 3).

A high percentage of shopping missions undertaken by pre-family lifestage groups are for meals to be eaten that same day (Chart 4). Most trips made by the family lifestage groups are main shopping missions.

When it comes to particular cuts, minced products and whole chicken birds feature very much as main shop items (Chart 5). Interestingly though, roasting joints, while featuring as a main shop item, also feature strongly as a top-up choice – perhaps a reflection of the volume sold on promotion and appealing to shoppers as an impulse buy.
The shopping mission - by species

The shopping mission - by lifestage

The shopping mission - by meat cut
MAKING YOUR MIND UP

Less than half of all meat purchases are planned ahead of the shopping trip. Most decisions are made at the fixture where 46% of shoppers decide, with a further 7% making up their minds when they enter the store. Nearly 3 in 10 shoppers decide earlier in the day of purchase to buy meat (Chart 6).

For 8% of shoppers, their choice of meat cut is an ‘always buy’ item.

This pattern of decision-making is consistent across all species (Chart 7). There are, however, some significant differences when it comes to choosing cuts (Chart 8), with a high percentage of shoppers (72%) deciding to buy ready-to-cook products at the fixture - an indication, perhaps, that impulse buying could be prompted by an attractive fixture.

It’s also the case that decisions to buy roasting joints are more influenced at the fixture. Almost 1 in 5 shoppers (18%) claims always to buy a whole bird every time they shop. The empty nester and retired life-stage groups, more than others, tend to leave their buying decisions until they reach the fixture (Chart 9); pre-Family lifestage are more likely to have planned their purchase earlier that day.
Timing of decision to buy - by meat species

Timing of decision to buy - by meat cut

Timing of decision to buy - by lifestage
USING A SHOPPING LIST

Only one-third of shoppers profess to use a shopping list but, of those who do, two-thirds have itemised their meat selection (Chart 10).

Beef is likely to feature more than other meats on shopping lists (Chart 11), though a closer analysis by cut (Chart 12) shows that whole birds are very much a shopping list item and that minced and diced cuts feature strongly, too. Steak features on fewer shopping lists, as do ready-to-cook products.

**Use of shopping list**

<table>
<thead>
<tr>
<th>Use of shopping list?</th>
<th>CHART 10</th>
<th>BASE 1100</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>No</td>
<td>64%</td>
<td></td>
</tr>
</tbody>
</table>

**Meat selection on list?**

<table>
<thead>
<tr>
<th>Meat selection on list?</th>
<th>No 30%</th>
<th>Not on list 4%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>66%</td>
<td></td>
</tr>
</tbody>
</table>

**Use of shopping list - by species**

<table>
<thead>
<tr>
<th>Use of shopping list - by species</th>
<th>CHART 11</th>
<th>BASE 424</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BEEF</td>
<td>4</td>
<td>10</td>
</tr>
<tr>
<td>LAMB</td>
<td>30</td>
<td>74</td>
</tr>
<tr>
<td>PORK</td>
<td>66</td>
<td>55</td>
</tr>
<tr>
<td>POULTRY</td>
<td>5</td>
<td>10</td>
</tr>
<tr>
<td>CHICKEN/TURKEY</td>
<td>1</td>
<td>99</td>
</tr>
</tbody>
</table>

**Did you use a shopping list today?**

<table>
<thead>
<tr>
<th>Did you use a shopping list today?</th>
<th>Yes 36%</th>
<th>No 64%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Figures in %</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No meat on list</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Use of shopping list - by meat cut**

<table>
<thead>
<tr>
<th>Use of shopping list - by meat cut</th>
<th>CHART 12</th>
<th>BASE 424</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MINCED</td>
<td>4</td>
<td>30</td>
</tr>
<tr>
<td>ROASTING</td>
<td>6</td>
<td>71</td>
</tr>
<tr>
<td>STEAK</td>
<td>5</td>
<td>67</td>
</tr>
<tr>
<td>CHOPS</td>
<td>5</td>
<td>67</td>
</tr>
<tr>
<td>DICED</td>
<td>2</td>
<td>57</td>
</tr>
<tr>
<td>WHOLE BIRD</td>
<td>14</td>
<td>70</td>
</tr>
<tr>
<td>BREAST/FILLETS</td>
<td>3</td>
<td>68</td>
</tr>
<tr>
<td>LEG/THIGH</td>
<td>14</td>
<td>71</td>
</tr>
<tr>
<td>READY-TO-COOK</td>
<td>14</td>
<td>56</td>
</tr>
</tbody>
</table>
PURCHASE FREQUENCY

The most common purchasing pattern is for shoppers to shop once a week - 37% do so - (Chart 13) with a further 20% of consumers shopping two or three times a month. One in 10 shops two or three times a week.

All of the meat species are essentially part of a weekly shop, with beef, pork and chicken especially so (Chart 14). Lamb features less than the average for a weekly shop and more as a monthly purchase.

When it comes to cuts, mince, steak and chops tend to follow a weekly pattern whereas diced cuts and roasting joints feature more on a monthly basis.

**Purchase frequency - by species**

![Bar chart showing purchase frequency by species](chart.png)

**Figures in %**
- First time
- Less often
- Once a month
- 2/3 month
- Once a week
- 2/3 week
- 4/5 week

**Chart 13**
**Base 1188**
AT THE FIXTURE

EVERY SECOND COUNTS

Our research shows that shoppers spend, on average, 74 seconds in the meat aisle choosing their purchases. This overall average varies between species, with shoppers spending, on average, 70 seconds buying chicken/turkey but 82 seconds to decide on a lamb purchase (Chart 15).

Shoppers take longest to decide when buying ready-to-cook meals (96 seconds) but breast/fillets can be chosen relatively quickly (60 seconds). It takes longer than average to complete a choice of roasting joint (79 seconds) but mince decisions are made quicker than average (67 seconds).

Older family lifestage shoppers spend longer than other groups in the meat aisle; pre-family groups spend the least time.

Dwell time in meat aisle

<table>
<thead>
<tr>
<th>Species</th>
<th>BEEF</th>
<th>LAMB</th>
<th>PORK</th>
<th>WHOLE BIRD</th>
<th>READY-TO-COOK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dwell time</td>
<td>71</td>
<td>82</td>
<td>77</td>
<td>70</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Cut</th>
<th>MINCED</th>
<th>ROASTING</th>
<th>STEAK</th>
<th>CHOPS</th>
<th>DICED</th>
<th>WHOLE BIRD</th>
<th>BREAST/FILLETS</th>
<th>LEG/THIGH</th>
<th>LEAN/BONELESS</th>
<th>READY-TO-COOK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dwell time</td>
<td>89</td>
<td>78</td>
<td>74</td>
<td>70</td>
<td>87</td>
<td>82</td>
<td>64</td>
<td>64</td>
<td>70</td>
<td>70</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lifestage</th>
<th>PRE-FAMILY</th>
<th>YOUNGER FAMILY</th>
<th>OLDER FAMILY</th>
<th>EMPTY NESTER</th>
<th>RETIRED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dwell time</td>
<td>62</td>
<td>73</td>
<td>77</td>
<td>74</td>
<td>71</td>
</tr>
</tbody>
</table>

**CHART 15**

THE SHOPPING DECISION PROCESS FOR MEAT

Shoppers take 96 seconds to choose a ready-to-cook product – possibly because most have additional ingredients to peruse, eg glaze/sauce.
EVERY SECOND COUNTS CONTINUED

It is possible to analyse the time spent in the meat aisle in more detail (Chart 16, where all criteria have been indexed against the shopping average of 74 seconds) to glean a better insight into the time shoppers take to make up their minds over their purchases.

For example, beef and chicken are relatively quickly-made purchasing decisions; lamb takes more time than the average. Within each species, there are points of difference worth noting. Beef steaks are decided upon as quickly as beef mince; but lamb steaks take even longer to choose at the fixture than lamb roasts. All chicken cuts are bought relatively speedily.

Further analysis shows that shoppers spend less time than average choosing standard and economy tier products and take most time when buying healthy ranges or ready-to-cook products.

It seems an obvious link that it takes consumers longer than average to decide when buying meat for a healthy meal occasion. A special adult meal gets longer consideration but, surprisingly, purchases for entertaining are decided relatively quickly – indicating perhaps that when entertaining, shoppers have decided in advance what to buy. Shoppers spend most time when buying meat to freeze than for other meal occasions.

Younger shoppers spend less time than older age groups making their purchasing decisions, as do those at either end of the socio-economic scale compared with C1 and C2 groups.
### Shopping Mission – by Meat Cut

<table>
<thead>
<tr>
<th>Cut</th>
<th>CHOPS</th>
<th>33</th>
<th>substitute a different</th>
<th>66 71 67 57 65 70 86 68 71</th>
<th>CHICKEN/TURKEY</th>
<th>32</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROMOTION</td>
<td>BREAST/FILLETS</td>
<td>22</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>PORK</td>
<td>2</td>
</tr>
<tr>
<td>ROASTING</td>
<td></td>
<td>39</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>DICE</td>
<td>70</td>
</tr>
<tr>
<td>STEAK</td>
<td></td>
<td>36</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>Ready-to-Cook</td>
<td>34</td>
</tr>
<tr>
<td>HEALTHY</td>
<td></td>
<td>19</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>Frozen</td>
<td>7</td>
</tr>
<tr>
<td>FOR SOMEONE ELSE</td>
<td></td>
<td>19</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>50%</td>
<td>62</td>
</tr>
<tr>
<td>FOR SPECIAL MEAL</td>
<td></td>
<td>19</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>50%</td>
<td>62</td>
</tr>
</tbody>
</table>

### Use of Shopping List – by Meat Cut

<table>
<thead>
<tr>
<th>Cut</th>
<th>CHOPS</th>
<th>33</th>
<th>substitute a different</th>
<th>66 71 67 57 65 70 86 68 71</th>
<th>CHICKEN/TURKEY</th>
<th>32</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROMOTION</td>
<td>BREAST/FILLETS</td>
<td>22</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>PORK</td>
<td>2</td>
</tr>
<tr>
<td>ROASTING</td>
<td></td>
<td>39</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>DICE</td>
<td>70</td>
</tr>
<tr>
<td>STEAK</td>
<td></td>
<td>36</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>Ready-to-Cook</td>
<td>34</td>
</tr>
<tr>
<td>HEALTHY</td>
<td></td>
<td>19</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>Frozen</td>
<td>7</td>
</tr>
<tr>
<td>FOR SOMEONE ELSE</td>
<td></td>
<td>19</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>50%</td>
<td>62</td>
</tr>
<tr>
<td>FOR SPECIAL MEAL</td>
<td></td>
<td>19</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>50%</td>
<td>62</td>
</tr>
</tbody>
</table>

### Quality Level

<table>
<thead>
<tr>
<th>Cut</th>
<th>CHOPS</th>
<th>33</th>
<th>substitute a different</th>
<th>66 71 67 57 65 70 86 68 71</th>
<th>CHICKEN/TURKEY</th>
<th>32</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROMOTION</td>
<td>BREAST/FILLETS</td>
<td>22</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>PORK</td>
<td>2</td>
</tr>
<tr>
<td>ROASTING</td>
<td></td>
<td>39</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>DICE</td>
<td>70</td>
</tr>
<tr>
<td>STEAK</td>
<td></td>
<td>36</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>Ready-to-Cook</td>
<td>34</td>
</tr>
<tr>
<td>HEALTHY</td>
<td></td>
<td>19</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>Frozen</td>
<td>7</td>
</tr>
<tr>
<td>FOR SOMEONE ELSE</td>
<td></td>
<td>19</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>50%</td>
<td>62</td>
</tr>
<tr>
<td>FOR SPECIAL MEAL</td>
<td></td>
<td>19</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>50%</td>
<td>62</td>
</tr>
</tbody>
</table>

### Dwelling Time in Meat Sale

<table>
<thead>
<tr>
<th>Cut</th>
<th>CHOPS</th>
<th>33</th>
<th>substitute a different</th>
<th>66 71 67 57 65 70 86 68 71</th>
<th>CHICKEN/TURKEY</th>
<th>32</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROMOTION</td>
<td>BREAST/FILLETS</td>
<td>22</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>PORK</td>
<td>2</td>
</tr>
<tr>
<td>ROASTING</td>
<td></td>
<td>39</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>DICE</td>
<td>70</td>
</tr>
<tr>
<td>STEAK</td>
<td></td>
<td>36</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>Ready-to-Cook</td>
<td>34</td>
</tr>
<tr>
<td>HEALTHY</td>
<td></td>
<td>19</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>Frozen</td>
<td>7</td>
</tr>
<tr>
<td>FOR SOMEONE ELSE</td>
<td></td>
<td>19</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>50%</td>
<td>62</td>
</tr>
<tr>
<td>FOR SPECIAL MEAL</td>
<td></td>
<td>19</td>
<td>Same cut, recipe</td>
<td>43</td>
<td>50%</td>
<td>62</td>
</tr>
</tbody>
</table>
THE SHOPPING EXPERIENCE

Shoppers overwhelmingly say it is easy to find the particular cut they want (Chart 17) in the meat aisles of British supermarkets. Our research also shows that older shoppers find it slightly easier than younger shoppers and women find it easier than men to identify the cuts they want.

Of the species, Lamb is perhaps the fixture which is most difficult to navigate, chicken and turkey the simplest (Chart 18). When it comes to cuts (Chart 19), whole birds are found easily by shoppers, as are minced cuts and even ready-to-cook products, over which shoppers take most time in choosing, are still not difficult to find in the aisles.
THE DECISION MAKING CRITERIA

When it comes to the buying decision at the fixture, the appearance of meat is critical (Chart 20) – it is cited by more than half of all shoppers and is the most important factor for one in three of them. It is worth remembering that, while appearance is so important at the point of purchase, consumers attach relatively little thought to appearance when planning their shopping at home: this confirms the premise that, especially for meat, people shop with their eyes.

Price ranks next in importance – it’s the most important factor for one shopper in four. Having available the particular cut wanted and having it in the right pack size is deemed more important to shoppers than quality.

There are differences between the species worth noting when it comes to the criteria driving shoppers’ purchasing decisions. Appearance, for example, is relatively more important when buying beef than it is for chicken, where price is a relatively greater influence than it is for beef (Chart 21). Price also appears to be a stronger determinant for pork.

Shoppers do become more discriminating depending on the particular cut purchased. For example (Chart 22), price and appearance take on more significance for shoppers buying roasting joints, price is particularly important when buying steak; appearance more than price is important for diced cuts while price is the dominant factor for leg/thigh purchases but of less importance on ready-to-cook products.
WILL SUBSTITUTES DO?

If the particular cut a shopper wants is not in stock, 35% of them will choose the same cut from a different species while slightly fewer (30%) will stick with their original choice of species but opt for a different cut (Chart 23). However, almost one shopper in five will leave without buying any cut if their first choice is not available, pointing to the importance of range and availability.

It’s worth exploring substitution by species. Beef shoppers are more inclined to stay within the beef category and substitute another beef cut if their preferred cut is out of stock (Chart 24). Lamb shoppers are more prepared to opt for a different species while those chicken shoppers whose particular preference is not available are most likely to leave the fixture without buying anything.

When it comes to specific cuts, shoppers may be more inclined to choose a roasting joint from another species if their original preference is not available than they would for, say, a minced product – when, if that is not available, one in four shoppers would not buy anything (Chart 25). With mince considered a must-buy, store-cupboard item it is important to ensure availability.

**Top 5 substitution solutions if preference is not available - by meat cut**
POST-PURCHASE

RECALLING SIGNAGE, PRICE AND PROMOTIONS

Is shopping done on automatic pilot?
Having shopped the meat aisles, most customers cannot recall any of the signage displayed at the meat fixture; fewer than one shopper in five can recall price or any signage linked to species; only one in 10 can recall the offers available in-store (Chart 26).

Shoppers who have bought beef have the lowest recall of signage (Chart 27) while those who have bought lamb have best recall of species-specific signage. When shoppers were able to recall the price they had paid, it applied to steak and breast/fillet cuts more than any other cut (Chart 28).

Where shoppers were able to recall the price they paid for meat, it was generally the pack price, with a small minority able to recall the price per kg (Chart 29).

Shoppers who bought chicken were most likely to recall the exact price they paid (Chart 30), pork shoppers the least likely – though, in truth, the difference by species is minimal.

The highest price recall figure was recorded for whole birds, with cuts such as roasting joints at the bottom of the recall league table (Chart 31, opposite page).
Just over one-third of shoppers (36%) could recall buying their meat item on promotion and, of these, half had opted for a 2/3/4 for Ex type promotion and a further one-third of shoppers taking advantage of money-off promotions (Chart 32). The 2/3/4 for Ex promotions appealed more to younger shoppers while the over 45 year-olds preferred money-off offers. This may indicate that younger shoppers, and especially those with families, will be more attracted to being able to buy more of the product for the same outlay while older consumers may not necessarily want more product, they simply want it cheaper.

Money-off offers featured prominently on purchases of steak and roasting joints; 2/3/4 for Ex promotions featured more on leg/thigh cuts and ready-to-cook (Chart 33).
USE OF MEAT BOUGHT

The overwhelming percentage of shoppers bought their meat for consumption within two to three days of purchase – with 28% eating it on the day it was bought (Chart 34). Almost one in 10 purchases was for freezing – that is especially the case with consumers aged over 45 years.

Chicken, especially, and beef are more likely to be used on the day of purchase than is the case for pork and lamb (Chart 35). Indeed, Lamb, more than the other species, is bought for use up to five days after purchase.

While almost half (45%) of meat is eaten at the weekend (Chart 36), those consumers buying chicken are almost as likely to eat it during the week while those who bought pork are more likely to eat it at weekends.

Figures in %

<table>
<thead>
<tr>
<th>When will it be used?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Store/freeze</td>
</tr>
<tr>
<td>TOTAL</td>
</tr>
<tr>
<td>-------</td>
</tr>
<tr>
<td>28%</td>
</tr>
<tr>
<td>56%</td>
</tr>
<tr>
<td>29%</td>
</tr>
</tbody>
</table>

Time of week purchase to be used for – by species

Figures in %

<table>
<thead>
<tr>
<th>Time of week</th>
<th>TOTAL</th>
<th>BEEF</th>
<th>LAMB</th>
<th>PORK</th>
<th>CHICKEN/TURKEY</th>
</tr>
</thead>
<tbody>
<tr>
<td>General purpose</td>
<td>45%</td>
<td>37%</td>
<td>39%</td>
<td>34%</td>
<td>41%</td>
</tr>
<tr>
<td>Weekend</td>
<td>17%</td>
<td>17%</td>
<td>16%</td>
<td>18%</td>
<td>15%</td>
</tr>
<tr>
<td>Weekday</td>
<td>44%</td>
<td>46%</td>
<td>47%</td>
<td>44%</td>
<td></td>
</tr>
</tbody>
</table>
Roasting joints and whole bird purchases were intended primarily for weekend use (Chart 37). Mince and diced cuts, as could be expected, were bought for weekday use but so also were steak, chops, breast/fillets and leg/thigh cuts.

Family meals and simple adult meals dominate the usage occasions for meat shoppers (Chart 38). Roasting joints in particular are bought for family meal occasions with steak, chops and diced cuts featuring strongly on simple adult meal occasions (Chart 39).
**DECISION TREE CRITERIA BY CUT**

It is possible to analyse shopper decision tree criteria by cut, establishing how each cut performs within the overall fixture and understanding what differences exist between everyday, staple cuts such as mince and stewing/diced meat and more premium cuts such as steaks and joints. The detail can be summarised in the following ‘dashboard’ charts (Charts 40 to 45).

**Beef mince** is a frequently purchased cut, with 62% buying once a week or more, predominantly for weekday family meal usage. As such, it is a cut with one of the shortest dwell times – 68 seconds and one that is less likely to be substituted than other cuts - 28% would buy nothing if it was unavailable. Appearance (29%) and price (22%) are the key purchase factors. 44% purchased on promotion.

68% of **beef roasts** are purchased for the family meal occasion and for usage mainly at the weekend (81%). Appearance (46%) is the key purchasing consideration and dwell time at the fixture tends to be longer (82 seconds). Nearly half (46%) of respondents would substitute for a different species if not available. More purchasers of beef roasting joints, along with those for beef steak, are dissatisfied with the range of meat available (9%) than purchasers of other cuts.

Appearance (34%) and price (22%) are the two most important decision variables for **beef steak**. If shoppers can’t buy the steak they want, results suggest they are happy to substitute and either look for another cut of beef (32%) or look at a different species (32%). They take, on average, 67 seconds dwell time which, in comparison with other meat cuts, is at the lower end of the spectrum. 43% decide to buy at the fixture, 30% earlier in the day. It is a cut that is more likely to be bought for a special meal than most others and 42% will use on the day of purchase.
Lamb roast is bought mainly for the family meal occasion for consumption at the weekend (70%). 56% would substitute for another species if not available suggesting perhaps that other roasting joints are somewhat interchangeable. In terms of purchase drivers at the fixture, appearance (21%) and cut (21%) are equally important, followed closely by price (20%). The most common purchasing pattern is monthly (36%).

Lamb chops will be used by 50% of buyers during the week for a simple adult meal, with the decision to buy made equally either earlier in the day or once at the fixture (50%). Where shopping lists are used, it is likely to be on 70% of them. Price recall is higher than most cuts at 86%. 52% of shoppers would look at another species if lamb chops were not available. 58% buy weekly or more often.

Chicken breast/fillet is the cut with the lowest average dwell time at the fixture and the highest purchase frequency. It is also the cut most likely to be bought on promotion.
The Purchase Intention Decision Tree

The second strand of research undertaken as part of this project consisted of conjoint research. Conjoint research is designed to show consumers’ purchase intention hierarchy and from there to deduce the product features and attributes which have the most impact on choice. By reflecting these priorities in the meat offer, retailers can maximise both purchase potential and customer satisfaction.

There is a clear hierarchy of importance for the meat purchase intention (Chart 46) which can be classified under four tiers:

- **Tier 1**: Meat type
- **Tier 2**: Who cooking for/promotion
- **Tier 3**: Specific cut/quality (tier)/pack size
- **Tier 4**: Usage/store type/packaging/appearance

While it must be acknowledged that the patterns of demand for fresh meat are very consistent between demographic groups, across the lifestages and even between different retail groups, it is nevertheless possible to analyse the differences that do exist to deliver a platform for differentiating the offer within the meat category.

EBLEX, therefore, has invested in market simulator software that uses the conjoint analysis to define specific competitive contexts and to test a variety of “what-if” scenarios to project shoppers’ likely preferences. It can be tailored to apply to specific retailers, making it a powerful management tool.

While conjoint research is increasingly being used across many business sectors, it is believed that EBLEX is the first to apply this type of conjoint to the red meat retail category.

![Chart 46: Conjoint Research Analysis]

**Chart 46**

<table>
<thead>
<tr>
<th>Tier 1</th>
<th>Meat Type</th>
<th>30</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier 2</td>
<td>Who cooking for</td>
<td>17</td>
</tr>
<tr>
<td></td>
<td>Promotion</td>
<td>11</td>
</tr>
<tr>
<td>Tier 3</td>
<td>Meat Cut</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Quality level</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>Pack size</td>
<td>7</td>
</tr>
<tr>
<td>Tier 4</td>
<td>Usage</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>Store Type</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Packaging</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>Appearance</td>
<td>5</td>
</tr>
</tbody>
</table>

**All occasions, stores, consumers, lifestages & demographics**
THE SHOPPING DECISION PROCESS FOR MEAT

Meat type (species) is the primary driver of meat purchase intention across all occasions, consumer groups and retailers, followed by who cooking for and promotional offer.
The market simulator capability now available to EBLEX can be used to test a variety of ‘what-if’ scenarios to project shoppers’ likely purchase preferences. There are literally millions of possible combinations that can be modelled and for illustrative purposes a number are detailed below.

The simulator is built around the 10 hierarchy of importance factors detailed in the previous chapter with a number of options available to consumers to choose under each factor. These are overlaid with a sub-cell menu covering demographic profiles, lifestage groups, meal occasions and retailer group of choice – all as illustrated in Chart 47.
Simulator chart

**Cell Menu**
- Meat type
- Who cooking for
- Quality level
- Pack size
- Store type
- Meat cut
- Promotion
  - Cut to order
  - Packaging
  - Appearance

**Meat Type**
- Chicken
- Pork
- Lamb
- Beef
- Gammon

**Who Cooking For**
- Myself
- Couple
- Family under 10
- Family over 10
- Family Adults
- Friends

**Quality Level**
- Premium
- Standard
- Economy
- Organic
- Healthy

**Pack Size**
- To feed 4 or more
- To feed 3
- To feed 2
- Single portion

**Store Type**
- Supermarket
- Convenience store
- Independent butcher
- Supermarket meat counter
- Online

**Meat Cut**
- Minced
- Joint or whole bird
- Steak or chicken fillets
- Chop or chicken leg/thigh
- Stewing, diced or cubed

**Promotion**
- 2, 3 or 4 for £x amount
- Money off
- Extra points
- Meal deals
- 3 for price of 2

**Packaging**
- Store or freeze
- Use within a week
- Use within the next few days
- Use same day

**Appearance**
- Colour
- Trim
- Shape

**Chart 47**

- All
- Weekday meal
- Special occasion
- Retailer A
- Retailer B
- Retailer C
- Retailer D
- ABC1
- C20E
- 18-44
- 45 or older
- Male
- Female
- Under 35 no kids
- Kids aged 10 or younger
- Kids aged 11 or older
- Over 35 no kids
- Retired
It is possible to simulate a comparison between different lifestage groups – both on their likely preferences for type of meat and also how they might compare with each other. For example, Chart 48 models a young family life stage group and their propensity to buy standard tier quality, pre-pack lamb or beef steak cuts from a supermarket with a money-off promotion (other variables are consistent in this instance).

It can be seen that 61% of those consumers would buy the lamb product and that 79% would be inclined to buy the beef, while a combined 85% of that demographic would buy either.

However, if the cut were to be changed to stewing, diced or cubed, the percentage of young family lifestage shoppers who would buy lamb falls to 45% with beef dropping to 61% - a clear indication that, when feeding a young family, steaks are more appealing than stewing cuts.

Chart 49 illustrates the simulated preference of the under 35 with no kids lifestage group for beef and lamb joints pre-packed to feed two. The simulator illustrates that this group has a propensity to buy premium tier quality rather than standard – almost certainly because they have more disposable income. When premium tier is selected 86% of consumers in this group would buy the beef joint and 56% would buy the lamb product. However, when the tier is changed to standard, the percentage of intending buyers drops back to 78% for beef and 54% for lamb, with a combined 90% happy to buy either product.

The simulator can also be used to model shoppers’ intention to purchase according to their retailer of choice. The subtlety of the simulator and the complexity involved in analysing the differences in the relative importance shoppers attach to the choices available to them makes it such a fascinating tool.

EBLEX is able to work with retailers and processors to model a wide range of variables, relevant to the individual to establish likely consumer purchase intentions from which the fine-tuning of the category may be possible. That it can be tailored to apply to specific markets makes it a potentially powerful management tool.
The subtlety of the simulator and the complexity involved in analysing the differences in the relative importance shoppers attach to the choices available to them makes it such a fascinating and potentially powerful tool.
Sample profile

Gender

- Female: 76%
- Male: 24%

Working status

- Retired: 28%
- Full time: 37%
- Not working: 14%
- Part time: 21%

Age

- 65+: 23%
- 55-64: 22%
- 45-54: 26%
- 35-44: 17%
- 18-24: 9%

Lifestage

- Empty nester: 27%
- Older family: 27%
- Younger family: 15%
- Pre family: 5%
- Retired: 26%

Social group

- DE: 28%
- AB: 28%
- C1: 29%
- C2: 23%
1. What meat did you purchase – if a choice, check quotas

<table>
<thead>
<tr>
<th>SPECIES</th>
<th>CUT</th>
<th>PACK SIZE</th>
<th>QUALITY LEVEL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beef</td>
<td>Minced</td>
<td>To feed 4 or more</td>
<td>Premium</td>
</tr>
<tr>
<td>Lamb</td>
<td>Roasting</td>
<td>To feed 3</td>
<td>Standard</td>
</tr>
<tr>
<td>Pork</td>
<td>Steak</td>
<td>To feed 2</td>
<td>Economy</td>
</tr>
<tr>
<td>Gammon</td>
<td>Chop</td>
<td>Single portion</td>
<td>Organic</td>
</tr>
<tr>
<td>Chicken</td>
<td>Stewing/diced/cubed</td>
<td>Healthy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Whole bird [chicken only]</td>
<td>Ready-to-cook [with added ingredients]</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Breast/lillets [chicken only]</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Leg/thigh [chicken only]</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. Do you know the exact price of the meat you have just purchased?

3. If yes, do you remember the pack price or the price per kilogram?

4. When do you expect to use this meat?

5. Which of the following occasions do you expect to use this meat for?

<table>
<thead>
<tr>
<th>DAY</th>
<th>OCCASION – IF NOT GENERAL PURPOSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekday meal</td>
<td>Healthy meal</td>
</tr>
<tr>
<td>Weekend meal</td>
<td>Simple kids meal</td>
</tr>
<tr>
<td>General purpose/no particular occasion</td>
<td>Simple adult meal</td>
</tr>
<tr>
<td>Gammon</td>
<td>Special adult meal</td>
</tr>
<tr>
<td>Chicken</td>
<td>Family meal</td>
</tr>
<tr>
<td></td>
<td>Entertaining friends</td>
</tr>
<tr>
<td></td>
<td>Purchase to freeze</td>
</tr>
<tr>
<td></td>
<td>Other</td>
</tr>
</tbody>
</table>

6. When did you make the decision to buy this particular type of meat?

7. How often do you purchase? (current selection)

8. Did you use a shopping list for today’s visit?

9. If yes, is the (current selection) the same as on your shopping list?

10. If the (current selection) you were planning to buy today was not available what would you do instead?

11. At what point in your shop are you visiting the meat aisles?

12. Which aisles in the supermarket do you usually spend most time browsing – multiple answers?
   a. Fresh vegetables
   b. Fresh meat
   c. Fresh fish
   d. Dairy produce
   e. Ready meals
   f. Packaged and canned foods
   g. Delicatessen
   h. Frozen foods
   i. Bread and cakes
   j. Confectionery
   k. Wine
   l. Snacks
   m. Other

13. Looking at the following list, could you tell me the three most important considerations that lead you to make this purchase? Saying which was first, second and third most important:
   a. The appearance of the meat, eg colour/trim
   b. The price of the meat
   c. The pack size – it was the weight I wanted
   d. It was the cut I wanted
   e. It was on promotion
   f. It was for a specific recipe/meal
   g. It was the quality I wanted, eg standard, value, premium, etc
   h. It had a long usage date – (sell by/best until)
   i. It was from a local producer
   j. Because I always buy the same
   k. It is convenient/easy to cook
   l. It is unusual/different/novel
   m. I had a sudden impulse
   n. It’s British meat
   o. It is healthy
   p. It had the Red Tractor mark on it
   q. I keep it as a stock item in the freezer

14. Without looking at the fixture what signage can you remember seeing to help with your choice, eg signage/point of sale/promotional material?

15. How easy or difficult would you say it was to find the meat you wanted?

16. How satisfied were you with the range of meat available today?

17. Was the item you bought on promotion?

18. If yes, what promotion was it?
   a. 2, 3 or 4 for £xx
   b. Money off
   c. Buy 1 get 1 free
   d. Extra Points
   e. Meal deals
   f. 3 for the price of two
   g. Other
   h. Don’t know

19. Which of these best describes your shopping occasion today?
   a. Main household shop
   b. Picking up something for tonight
   c. Tip-up shop
   d. Shopping for a special meal
   e. Shopping for somebody else
   f. Other

20. Overall, do you think you and your family are eating more or less meat these days?
To see how we work to enhance the profitability and sustainability of the English beef and lamb sector, visit www.eblex.org.uk

If it’s inspiration you want for delicious beef and lamb meals, just go to www.simplybeefandlamb.co.uk

We’re adding value and improving efficiency in the supply chain – to find out how, go to www.eblextrade.co.uk