

12th November 2020

Changing consumer landscapes: How have consumer attitudes to red meat shifted during the coronavirus pandemic?

Steven Evans

Rebecca Gladman

Liam Byrne

Welcome

Housekeeping



The presentation will be recorded and slides will be available once a quick feedback form is completed

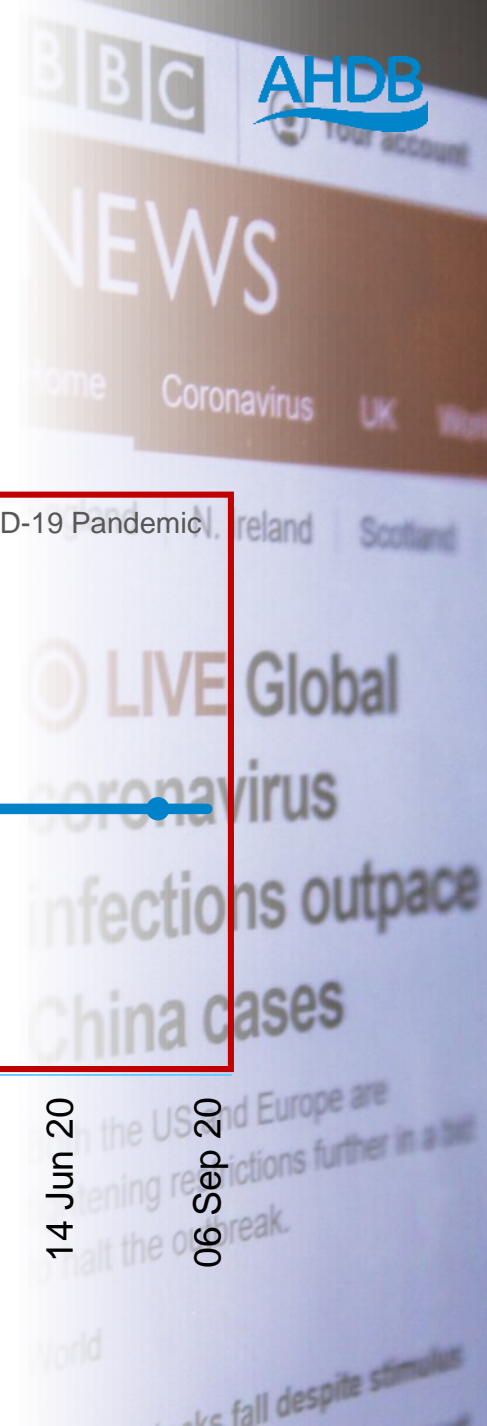
Speakers & Agenda

Rebecca Gladman
Retail Insight Manager

Liam Byrne
Head of Domestic Marketing

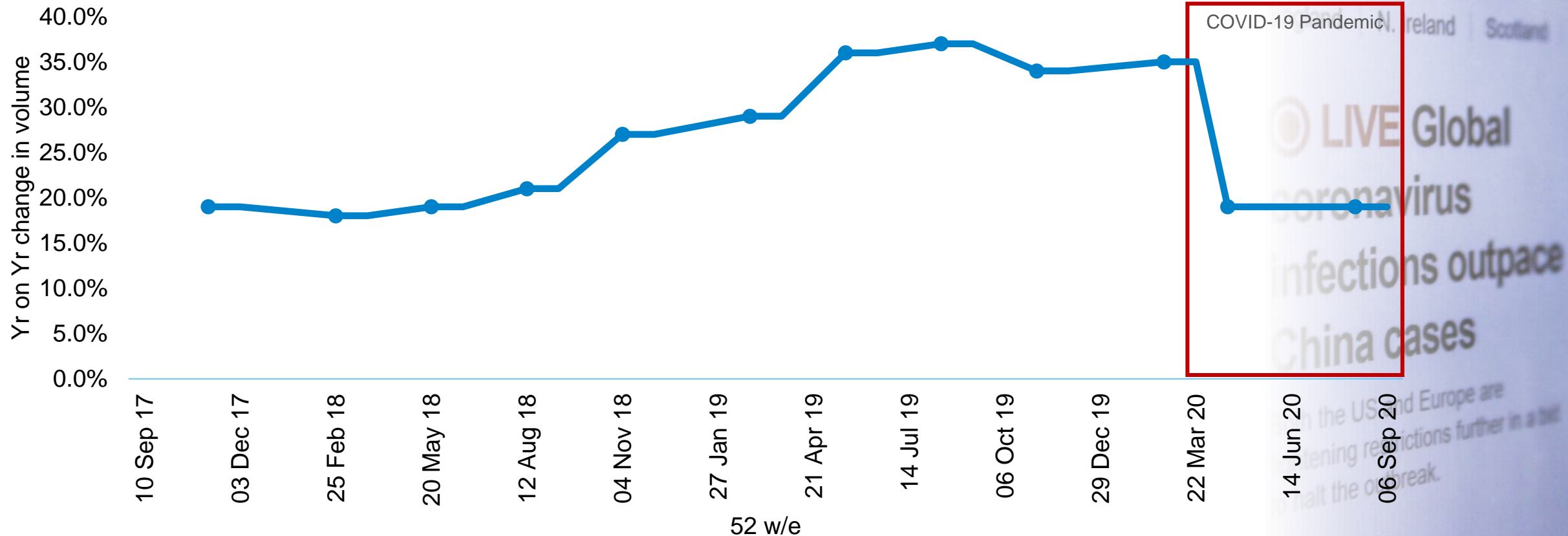
How has the consumer landscape changed?

Awareness of red meat in the media has taken a step back during the pandemic



Media noise around red meat

— Seen, heard or read anything about red meat

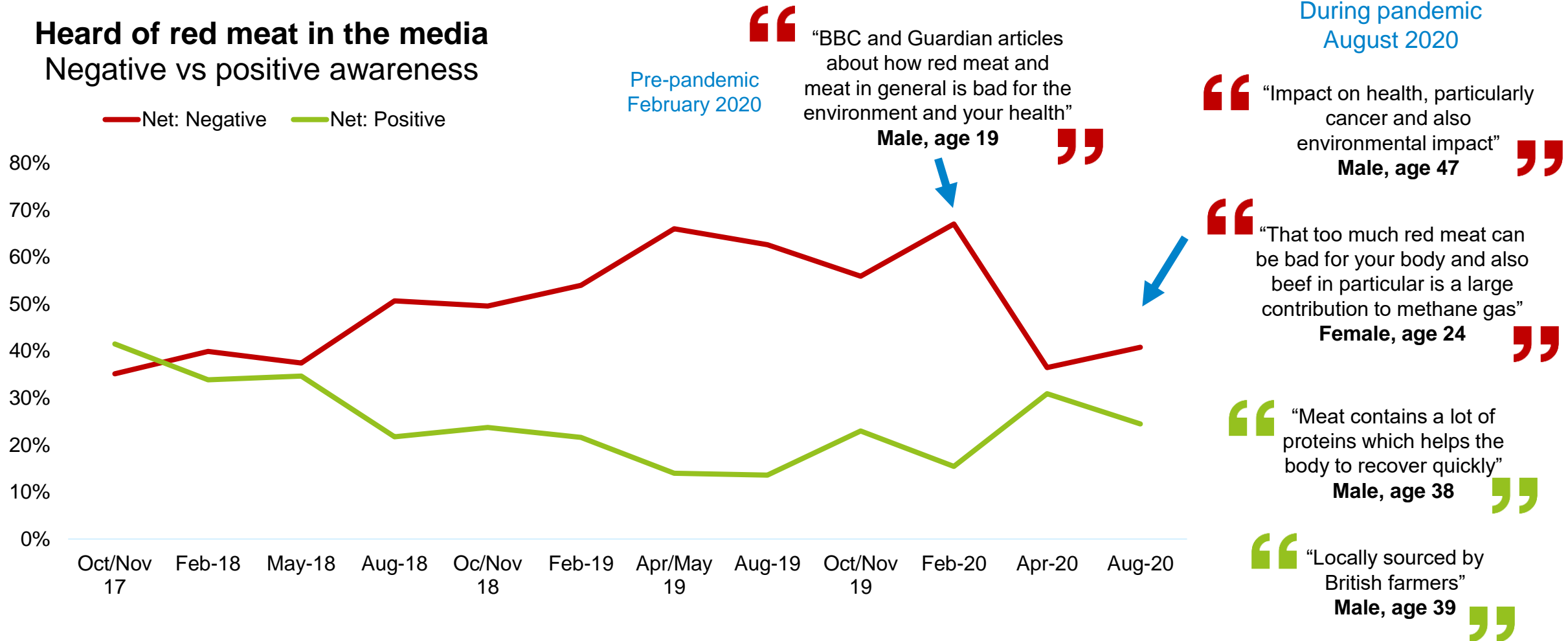


Source: AHDB Consumer Tracker conducted by YouGov.

MQ2: Have you seen, heard or read anything about red meat anywhere recently? Aug-20

The drop back in awareness comes from reduced recall of negative mentions of red meat in the media

Heard of red meat in the media Negative vs positive awareness



Source: AHDB Consumer Tracker conducted by YouGov

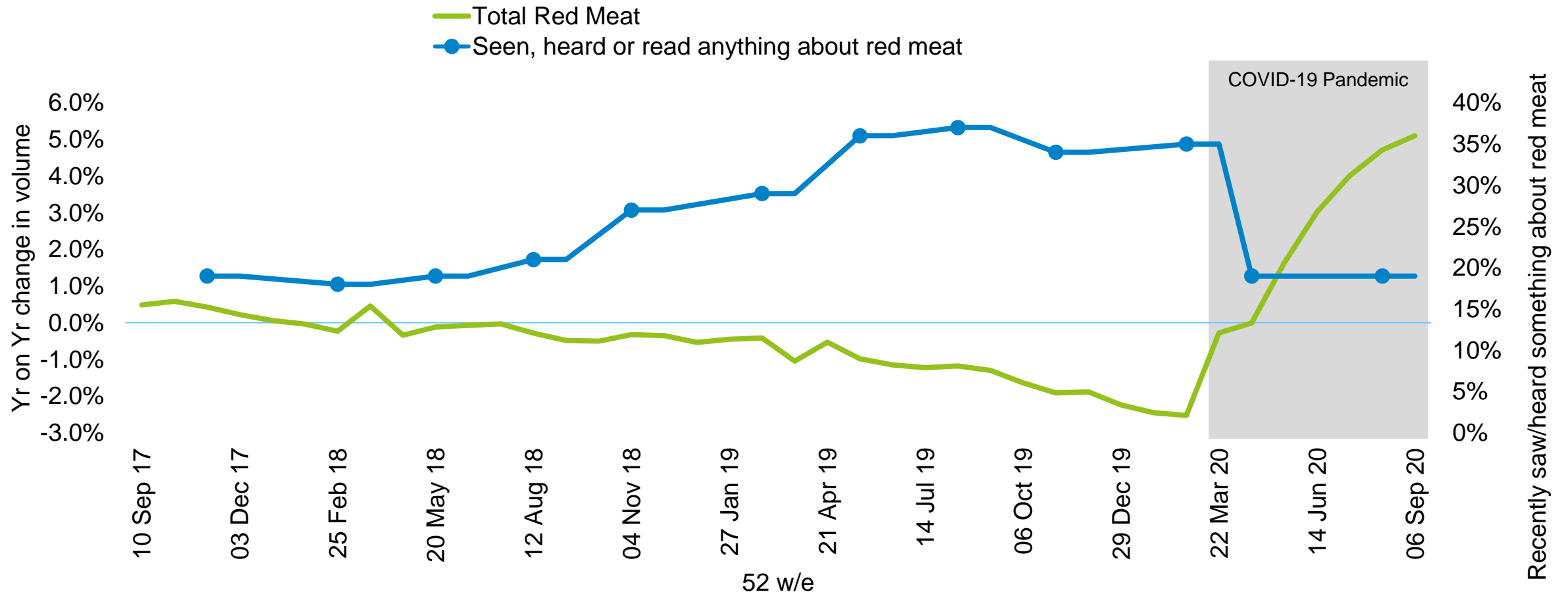
MQ4b_1. On a scale of 1 to 5, where 1 is 'very negative' and 5 is 'very positive', please rate the information you saw or heard about Red meat All in Meat 2 section who saw or heard something positive/negative about meats in the media in the last 3 months.

YGq29: Please write in the box below what the **positive** meat stories were that you remember hearing or seeing in the last 3 months.

YGq28: Please write in the box below what the **negative** meat stories were that you remember hearing or seeing in the last 3 months.

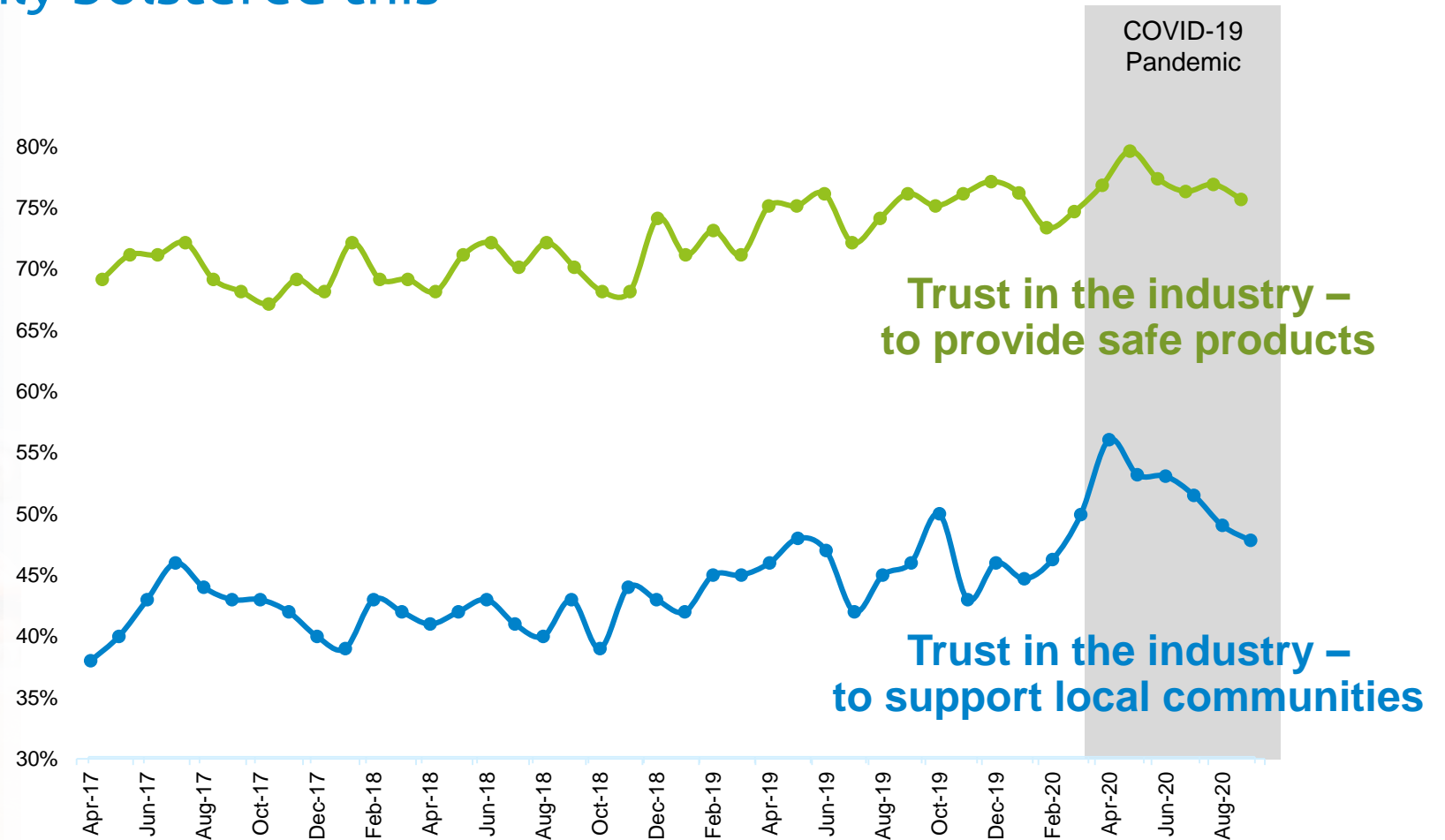
At the same time, sales of red meat have seen significant growth

Red meat volumes vs Media noise around red meat





There was already a general feeling of trust in our supply chains and the challenges faced this year have only bolstered this



The desire to buy local and British meat has also been growing

Changing importance of factors when buying meat compared to early lockdown (Aug-20)

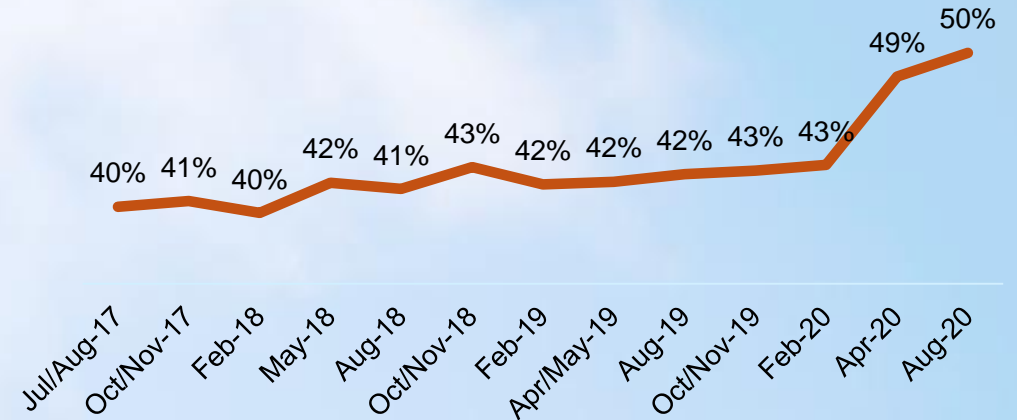
British/local

Become less important, -5%

Become more important, 24%

Source: AHDB Consumer Tracker conducted by YouGov, August 2020
Compared to early lockdown (end of March/April) which of the following factors have become more or less important when buying meat?

“Purchasing **red meat** helps to support local farmers”



Source: AHDB Consumer Tracker conducted by YouGov, August 2020
Thinking now about different types of meat or fish, which of these would you say purchasing them helps to support local farmers

“I feel that particularly during these times of uncertainty - **Brexit and COVID-19**, it is especially important to support our UK producers”

Female, 42. Living alone, North West.
(Talking about grocery shopping, not meat specific)

(Source: IGD Shoppers of Our Time)

But British alone is not enough

74%

Of shoppers would buy more British and local foods if they were better value for money

IGD ShopperVista, June 2020

I will buy British/local food and groceries but **only if they are a similar price** to alternatives

IGD ShopperVista, September 2020

44%

I will buy British/local food and groceries even if it means they **are more expensive than alternatives**

27%

"I feel that it's extremely important with fresh food in particular to support British farmers and keep the carbon footprint as low as possible, as well as the food being fresher...would always choose British if it was clearly labelled and there was

little difference in the packaging and price."

Female, 59. Boomeranger, South East.

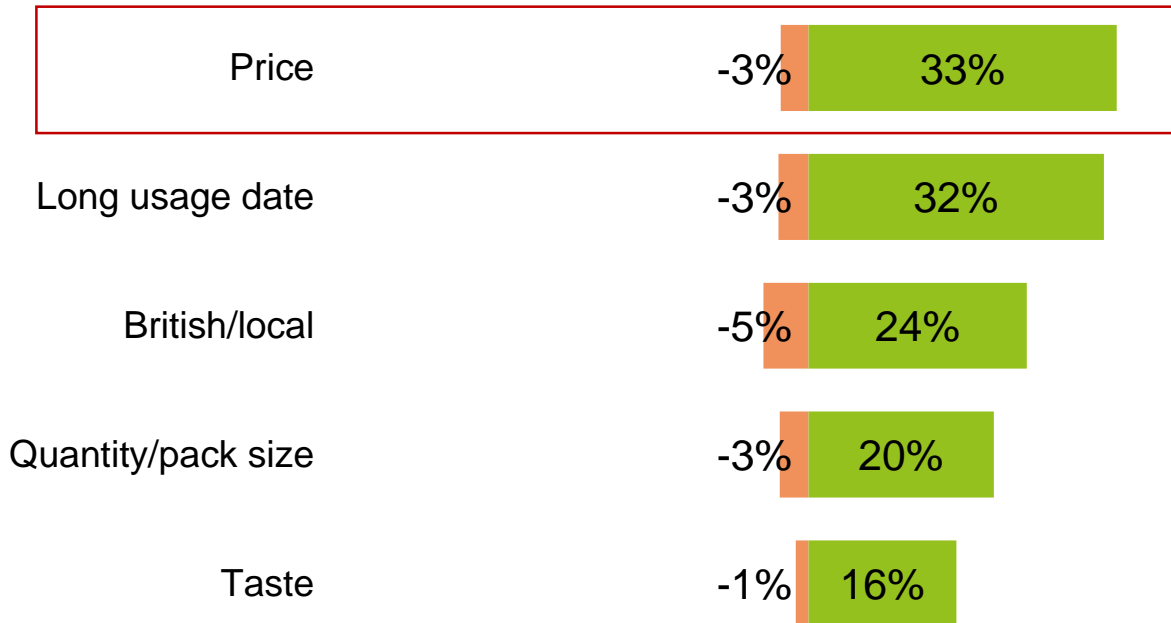
IGD Shoppers of Our Time community, October 2020 report



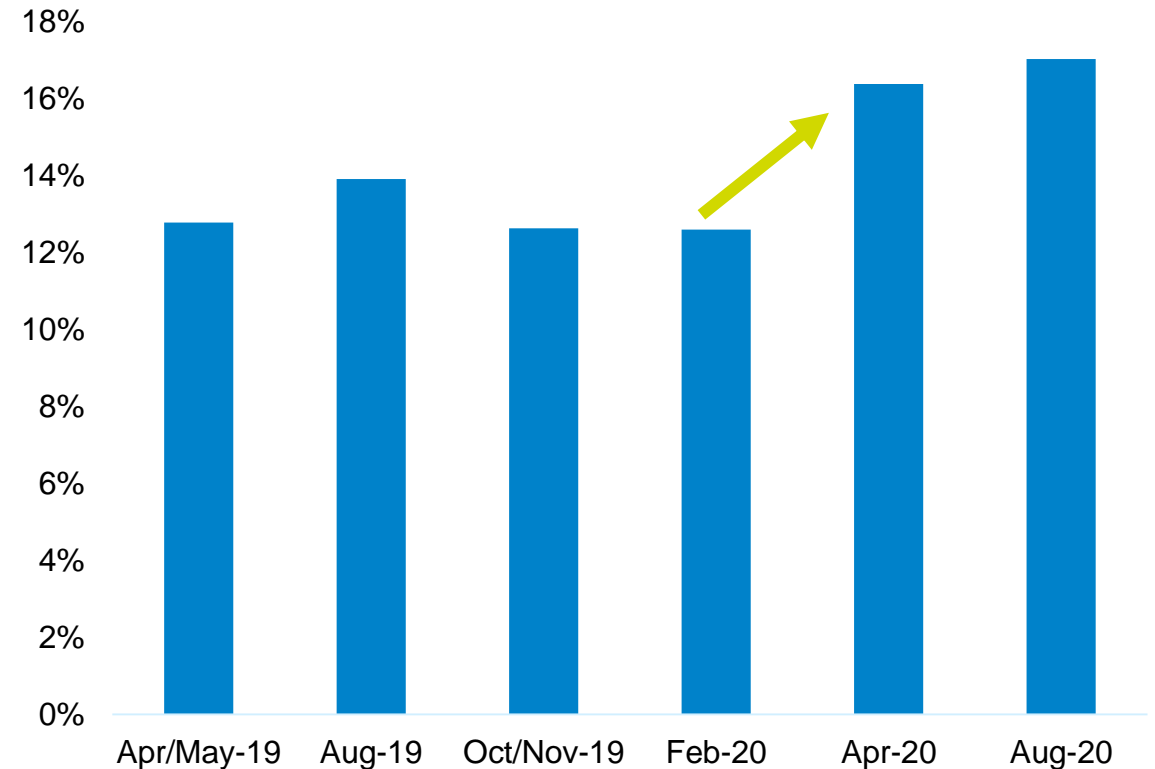
Particularly at the current time, when household budgets are being squeezed

Changing importance of factors when buying meat compared to early lockdown

■ Become less important ■ Become more important



Reason for reducing meat consumption “I allocate my shopping budget differently”



Source: AHDB Consumer Tracker conducted by YouGov, Aug 20

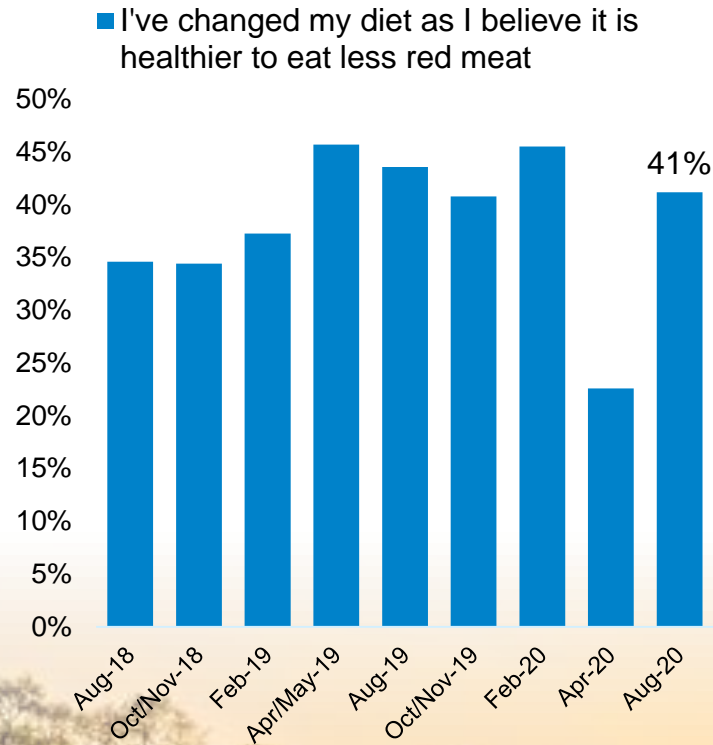
Compared to early lockdown (end of March/April) which of the following factors have become more or less important when buying meat?

Which, if any, of the following are reasons why your consumption of red meat has changed over the last month? (asked to those who in the last month ate red meat less than previously)

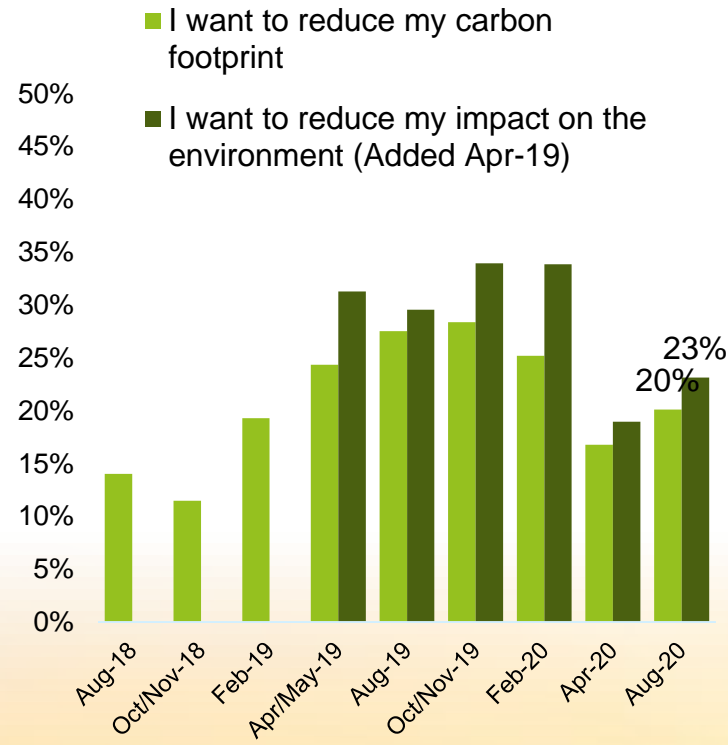
And we mustn't become complacent. The pandemic created a short-term shift in focus, but there are still key concerns

Top 4 reasons for reducing meat consumption

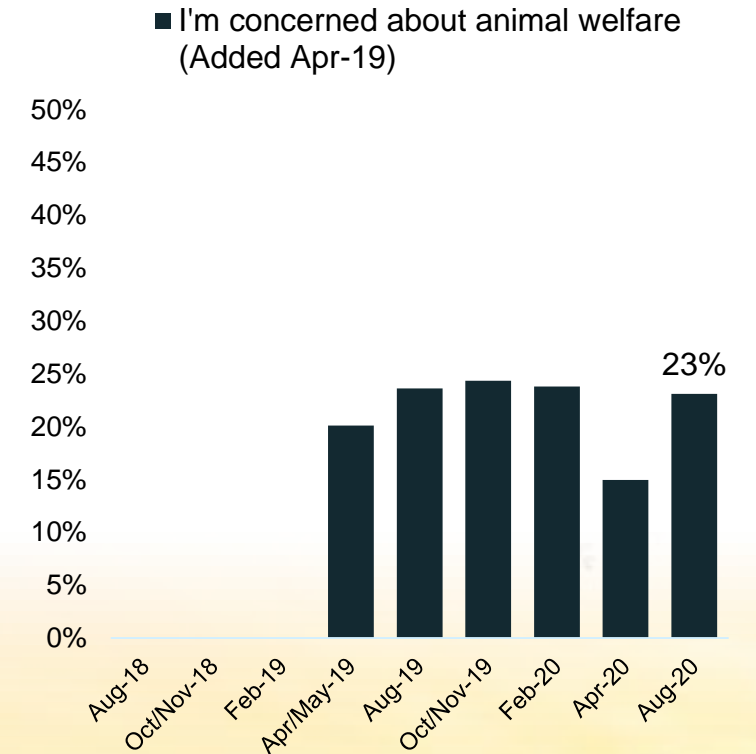
Health



Environment



Welfare

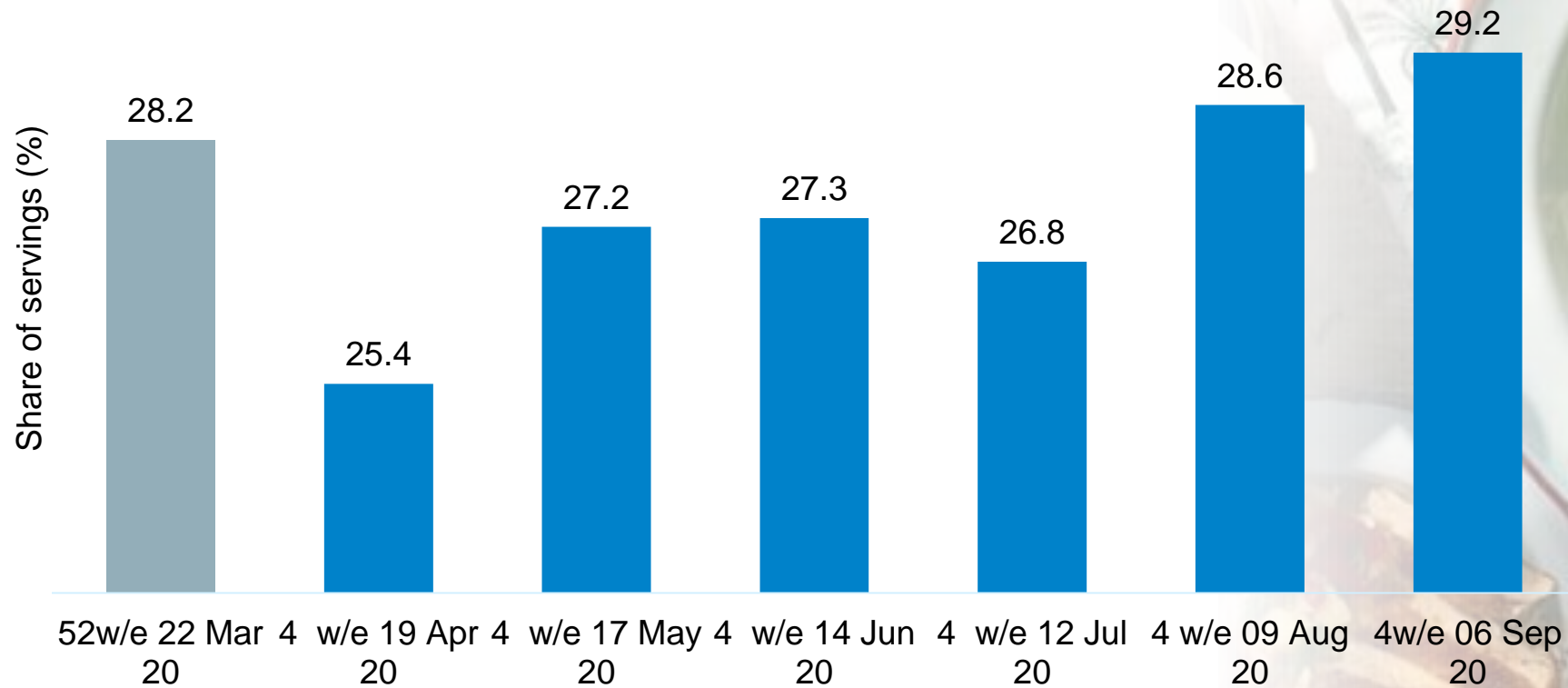


A close-up photograph of a person's hands holding a large, sesame-seeded burger. The burger is filled with a dark patty, melted cheese, and pickles. The person's hands are visible, with light-colored nail polish. The background is a warm, out-of-focus yellow. The word "Health" is overlaid in white, bold, sans-serif font across the center of the burger. At the bottom of the image, there are several thin, wavy lines in white and green.

Health

Health briefly became less important, but is back on the agenda

In-home meal servings chosen for health needs

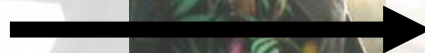
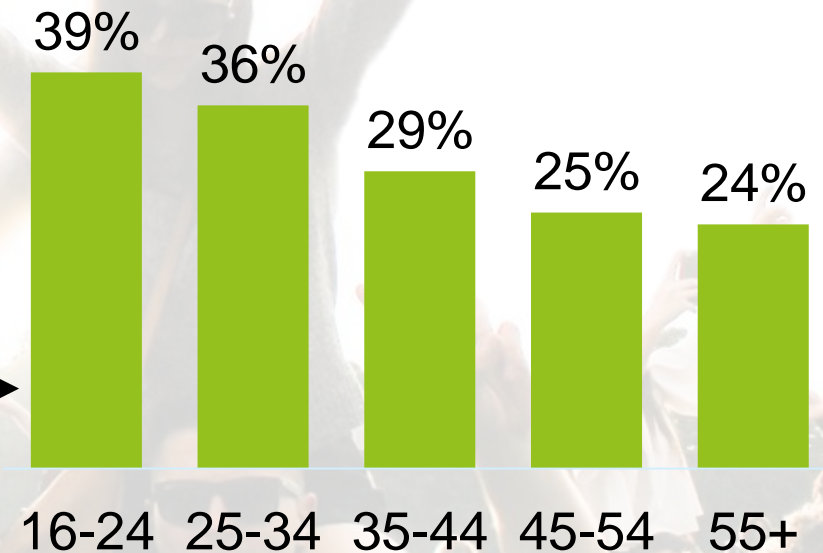


It remains more important for younger consumers

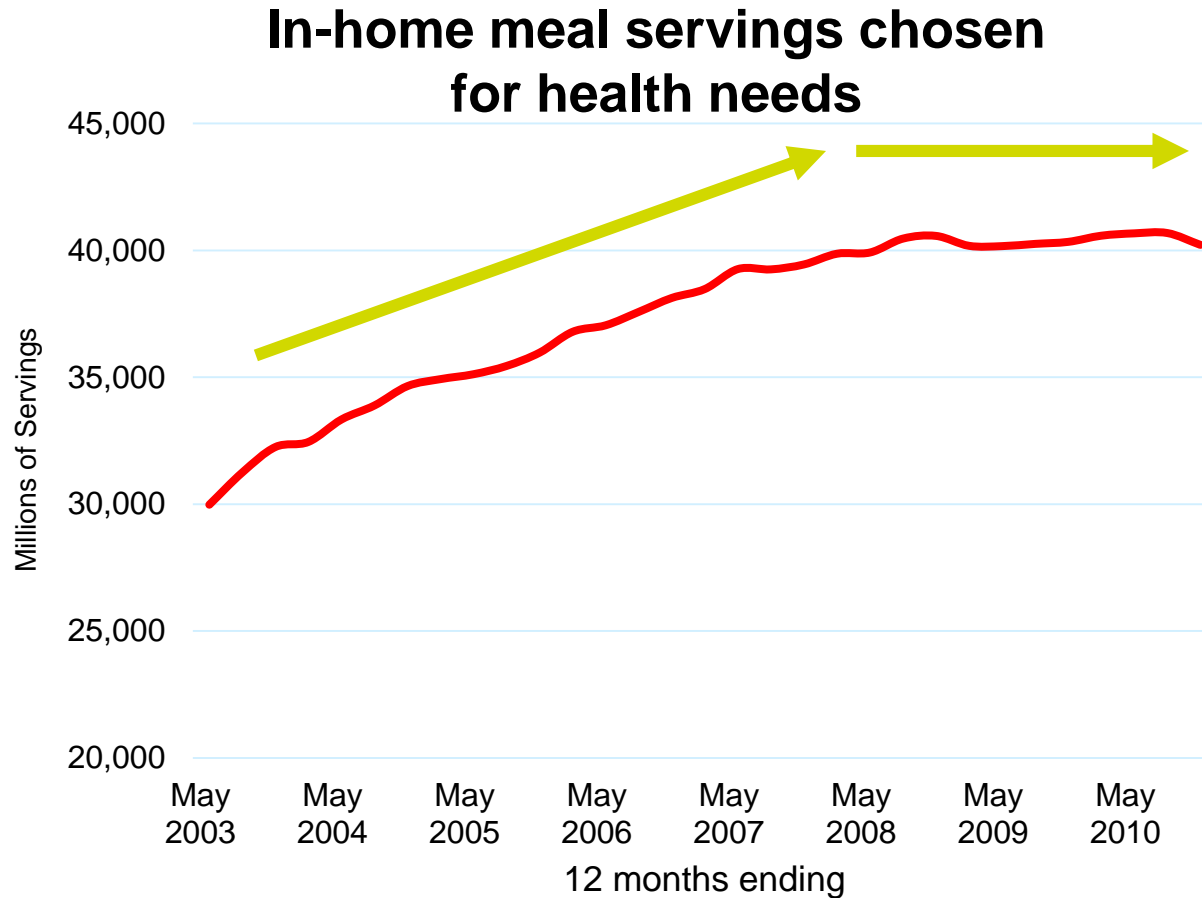
Changes in food shopping behaviour during the pandemic

"I am consuming more healthy foods"

Disagree Agree



In previous times of low consumer confidence, the importance of health as a driver for consumers tends to level off and reduce



But things are different this time round

UK set to bring in strict new junk food rules including pre-9pm ad ban

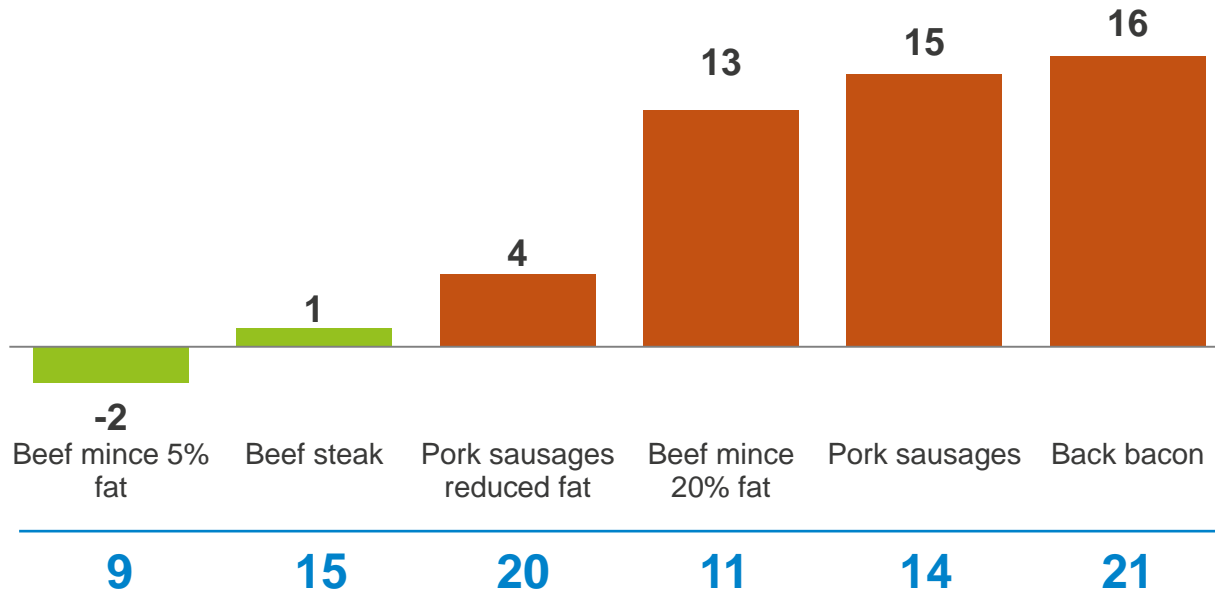
New obesity strategy unveiled as country urged to lose weight to beat coronavirus (COVID-19) and protect the NHS



The new obesity strategy will affect red meat in both grocery and out of home settings

HFSS score for typical products*

Volume-driving promotions will no longer be permitted on products with a HFSS score of 4 or above. These products will also be banned from key selling locations such as end of aisle displays, checkout areas and front of store. HFSS scores calculated by AHDB based on typical products.



% of total volume sold on volume-driving promotion
Kantar 52 weeks ending 23 Feb 2020



The strategy taps into top consumer concerns relating to Covid-19 and the NHS

Top consumer concerns

Covid-19

**The UK
economy**

**Pollution from
plastic waste**

**Global
warming/
climate
change**

**State of the
NHS**

A vibrant field of yellow and purple wildflowers with the word "Environment" overlaid in white text. The background is a lush, green field filled with numerous small, bright yellow daisies and scattered purple flowers. The text "Environment" is centered in a large, white, sans-serif font. At the bottom of the image, there are several thin, white, wavy lines that sweep across the frame from left to right.

Environment

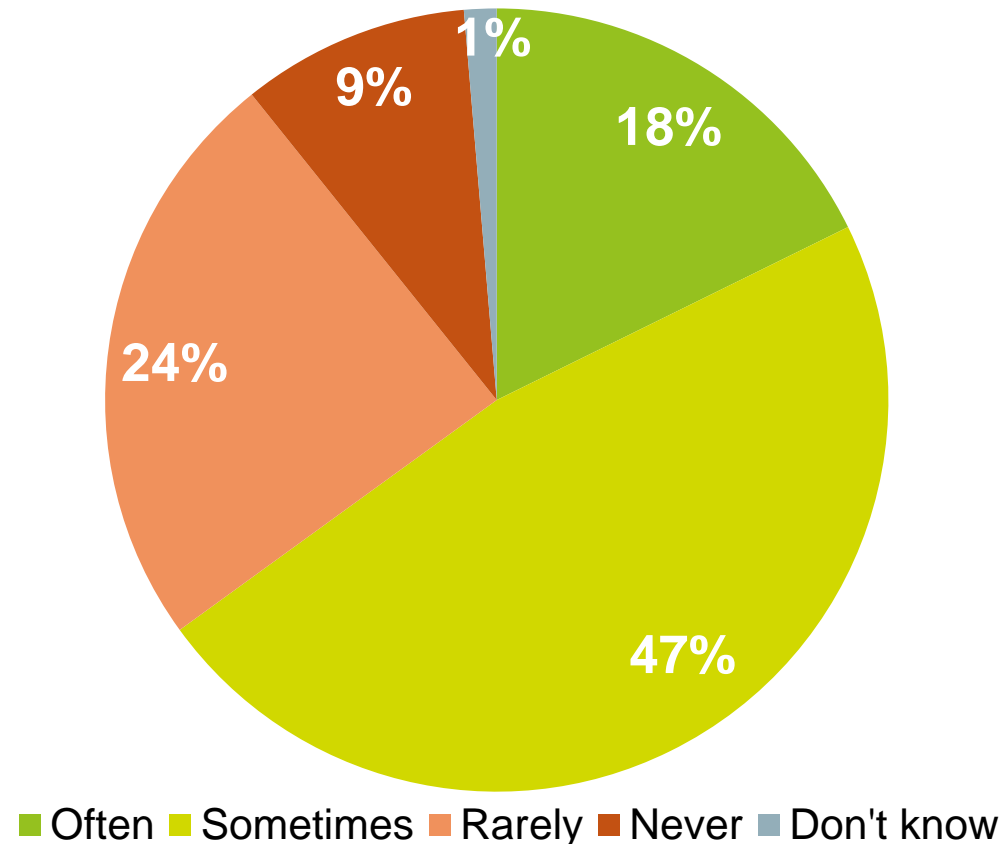
Most consumers think farmers care about the planet

Farmers care about the planet

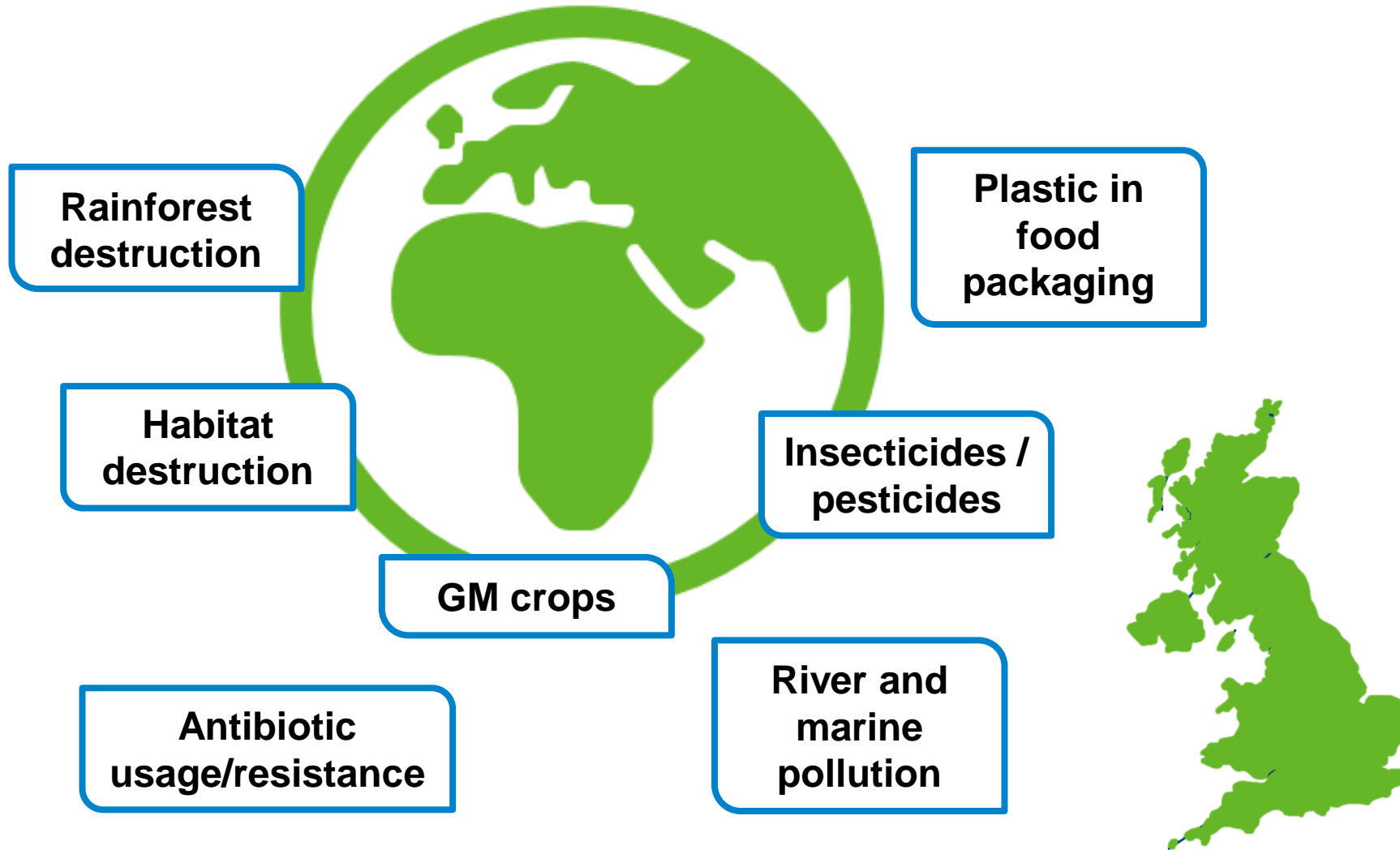


Two thirds of consumers say they consider the environmental impact of the food they eat at least sometimes

Consider environmental impact of food eaten



Plastic remains a key environmental worry for consumers, but in general their concerns tend to have a global focus



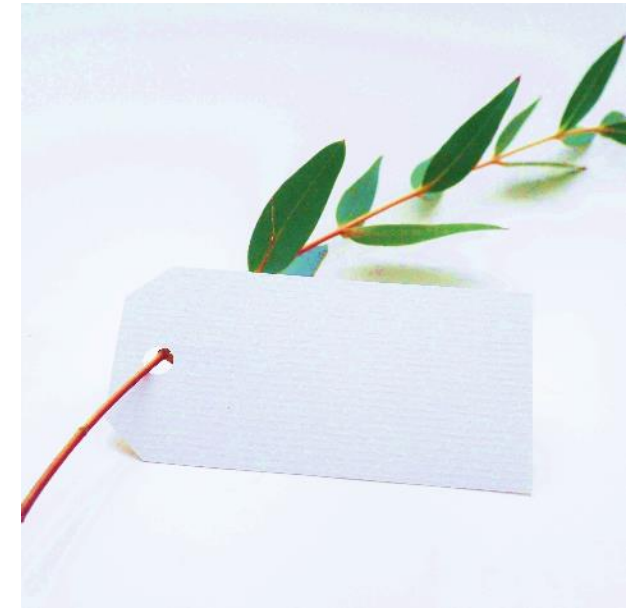
It's challenging for consumers to disconnect the global and local images, so there's still demand for a range of initiatives



Non-plastic packaging on food

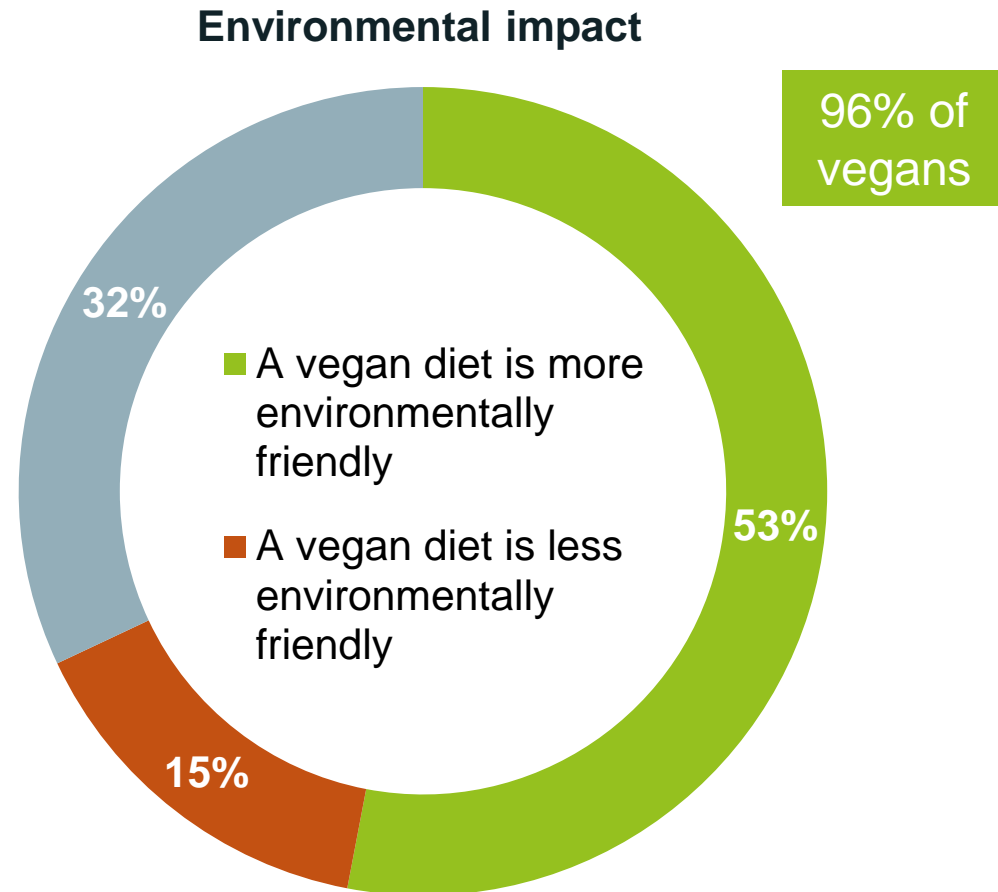


Plant more trees and hedgerows



Food labelling certifies sustainable farming

Acting on these initiatives is important as a majority think that a vegan diet is more environmentally friendly



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Science & Environment

Plant-based diet can fight climate change - UN

By Roger Harrabin
BBC environment analyst, Geneva



Go vegetarian to save wildlife and the planet, Sir David Attenborough urges

'We must change our diet. The planet can't support billions of meat-eaters,' says legendary naturalist

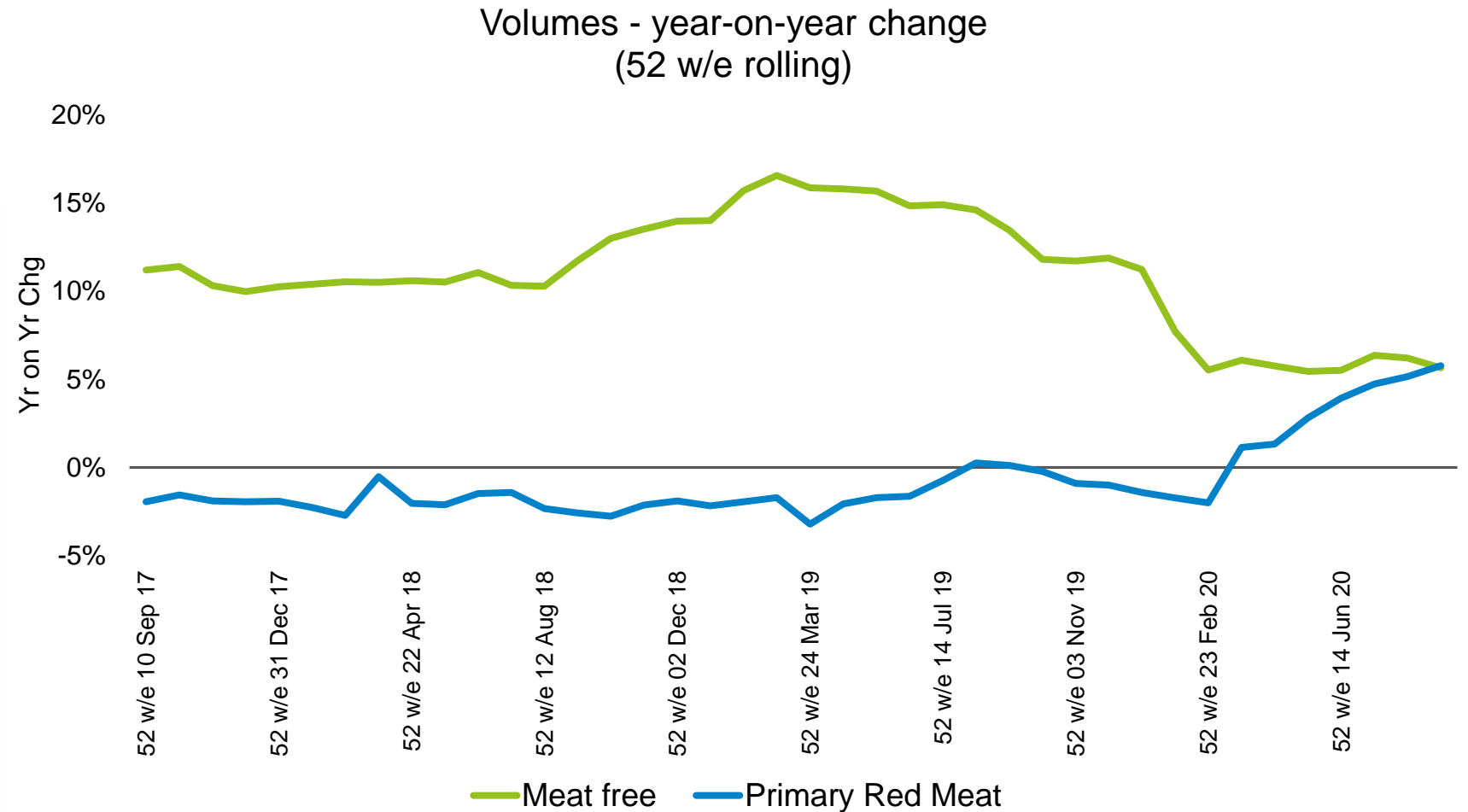
Jane Dalton | @JournoJane | Wednesday 26 August 2020 16:52



Category impact



Such concerns have contributed to the rise of meat-free products over recent years



The meat-free market is still small by comparison, but will continue to grow

Despite a short-term blip

Category spend (£m)
52 w/e 6 Sep 20

Meat free,
435

Total MFP,
20,609

52 w/e 6 Sep 20
Household penetration
+ YOY Chg

Meat free

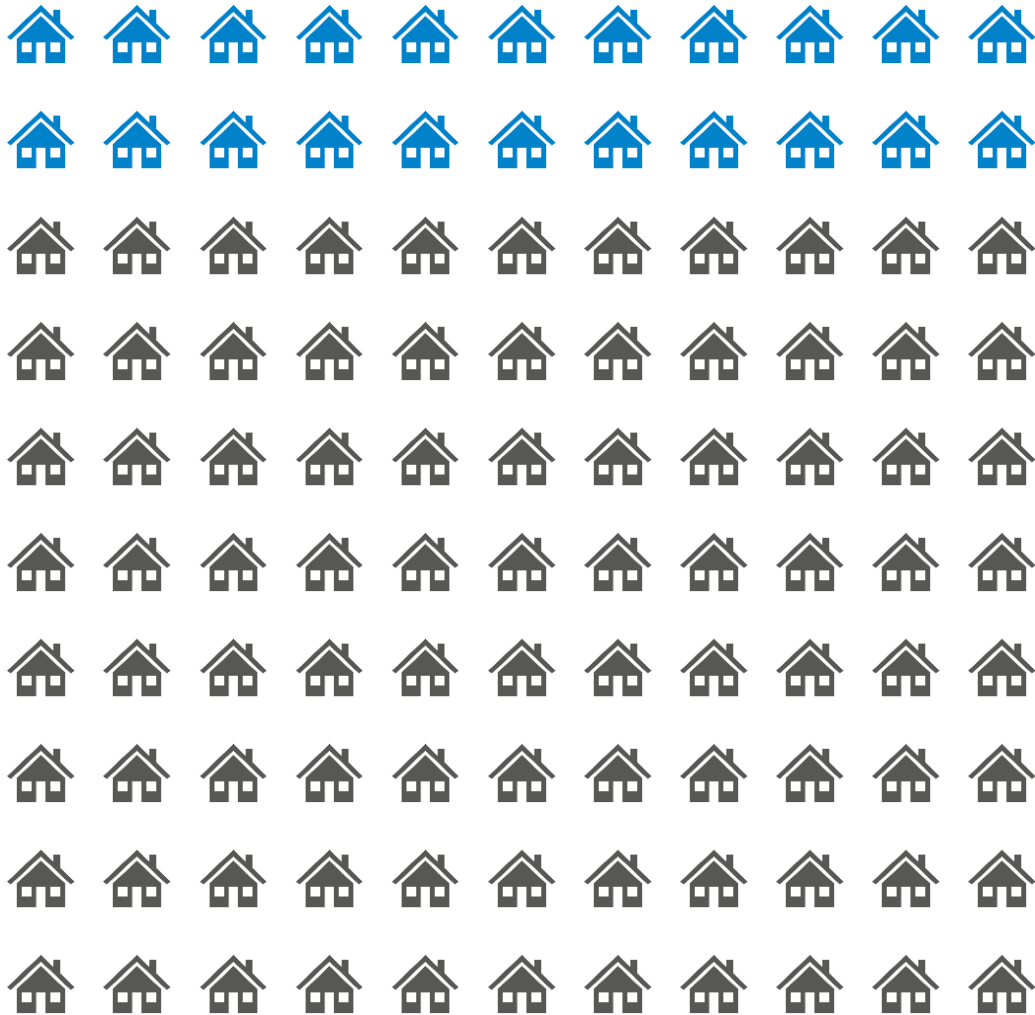
37.5%
-1.6pp

Primary red meat

91.1%
+0.6pp



One in five households has at least one conscious meat reducer



Households with a conscious reducer



12% Flexitarian

5% Vegetarian

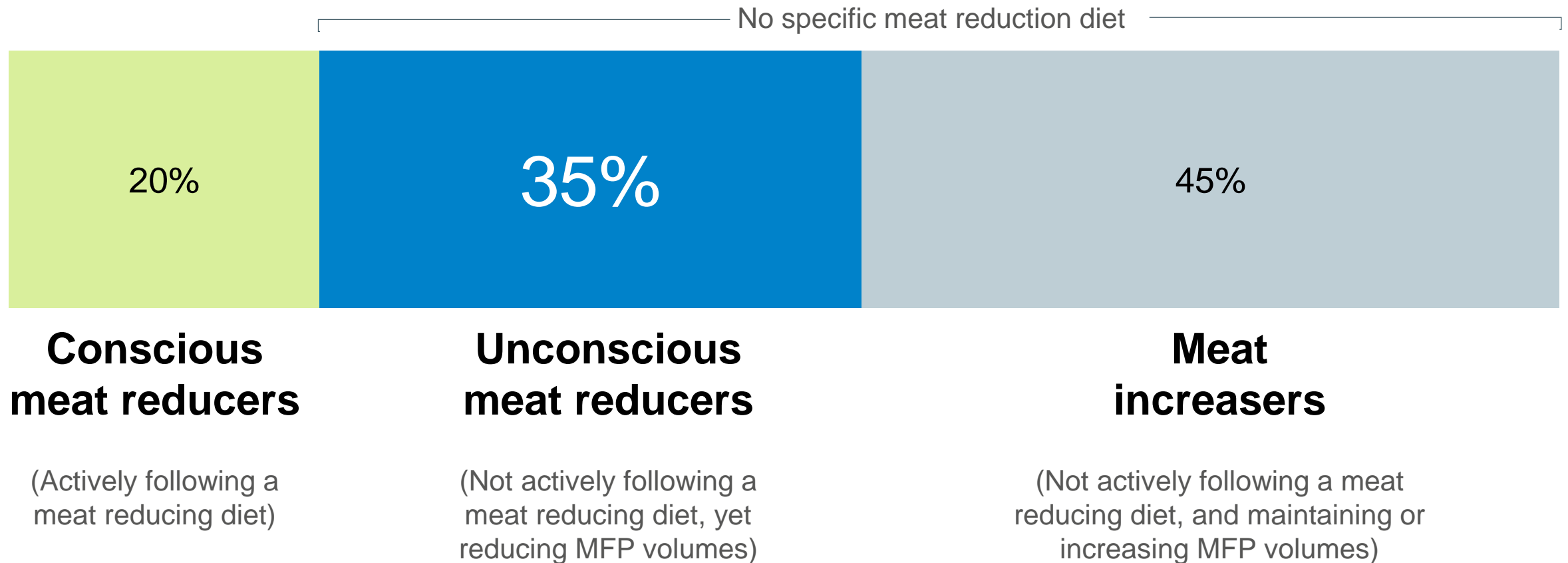
4% Pescatarian

2% Vegan

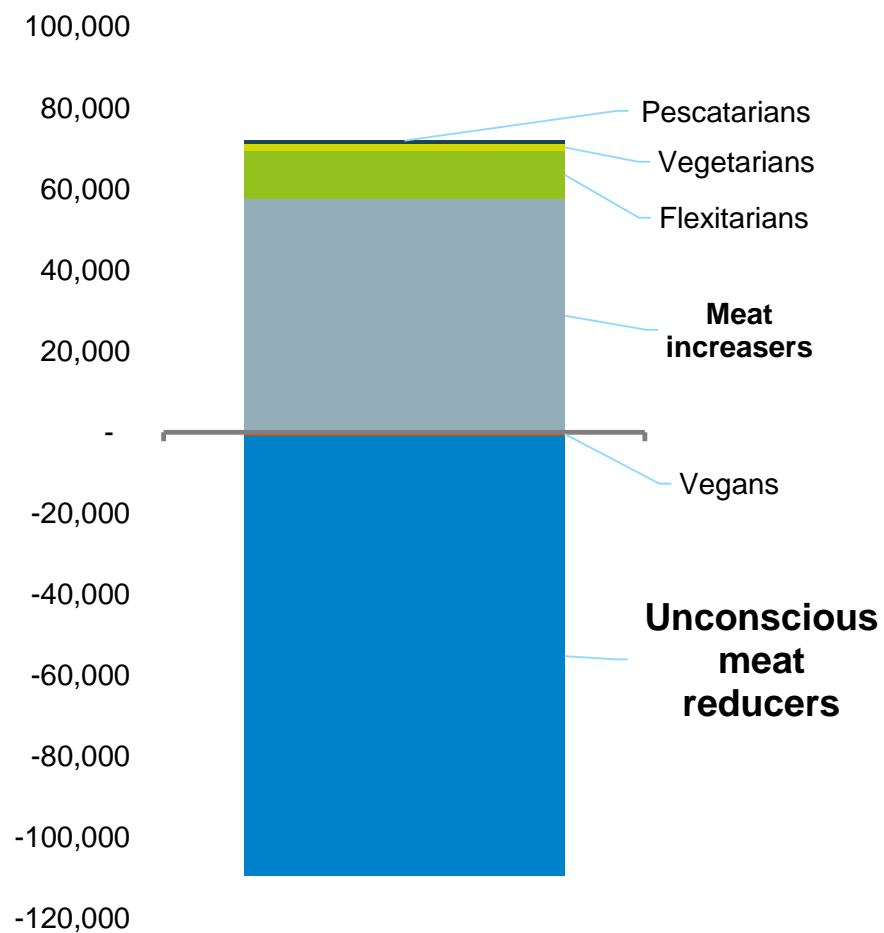
**Add up to more than 20% as one household may have more than one meat reduction dieter*

However, of the 80% do not claim to follow any specific meat reduction diet, some are still reducing the amount they eat

Share of GB households



Total MFP volume change actual
(000kg) in GB retail



99%

of total MFP
declines in 2019
were due to
**Unconscious
Meat Reducers**



They generally tend to be more traditional and less engaged with food overall

More likely to be older/retired

Less likely to have children present

Smaller households

Just

23% agree

“I would consider myself a **foodie**”

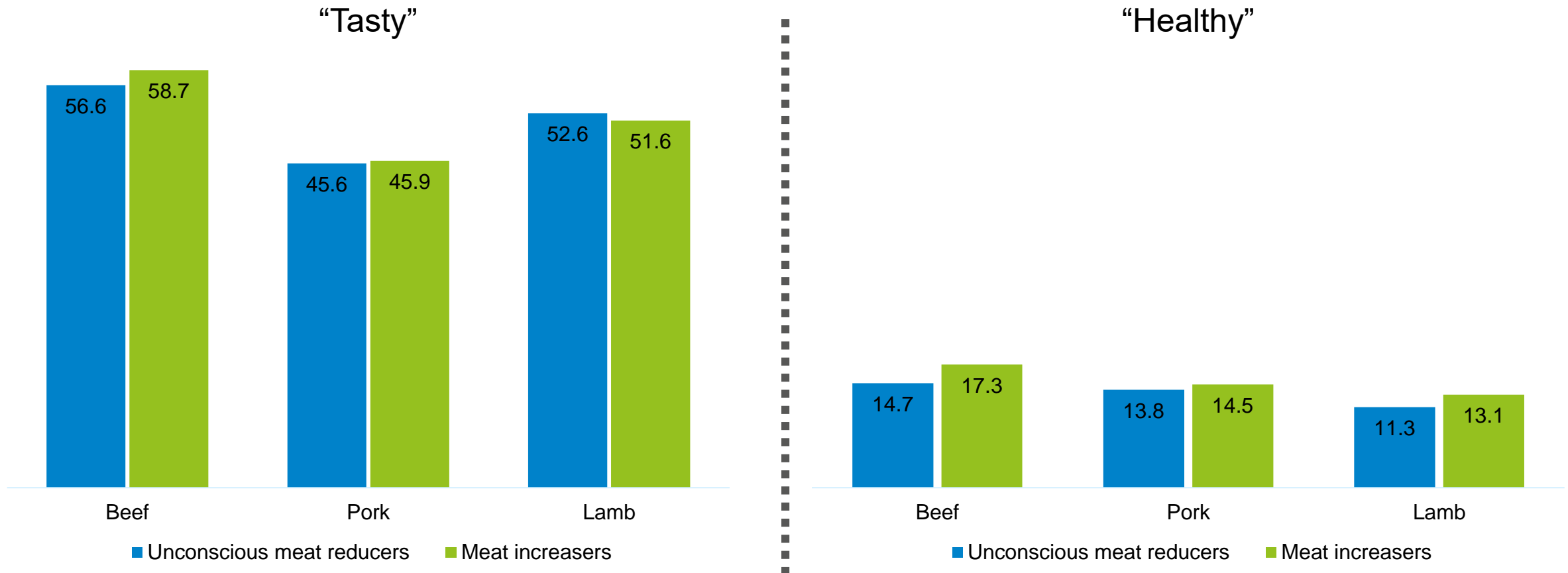
And

43% agree

“I eat the foods I grew up eating”

Unconscious reducers are no less likely to think red meat is tasty, but overall both groups need reassurance around health

Associations with beef/pork/lamb



Health is a key focus regardless of shopper type

“I actively look for information on **how healthy** the meals I cook are”

“I actively look for information about the **environmental or welfare impact** of the food I buy and eat”

Unconscious meat reducers

41%

23%

Conscious meat reducers

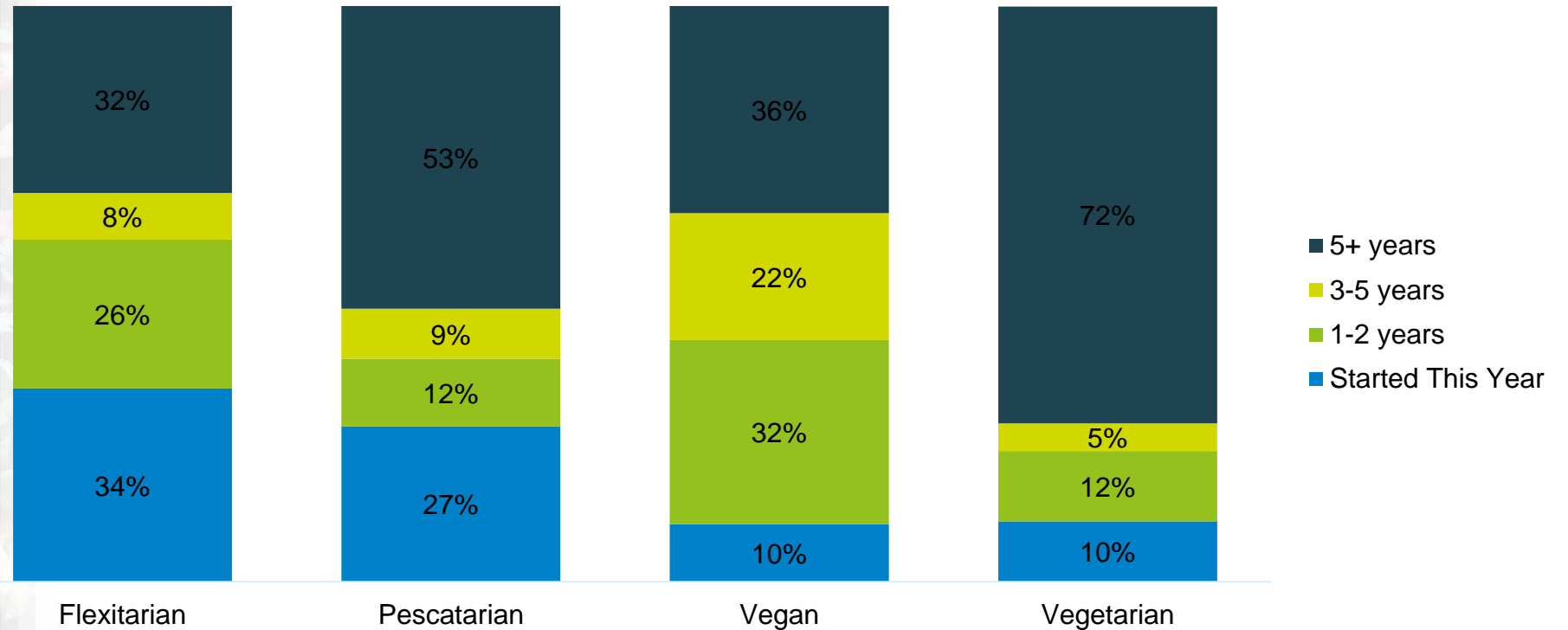
51%

42%



We must reassure flexitarians, particularly around the theme of health so they don't become meat avoiders altogether

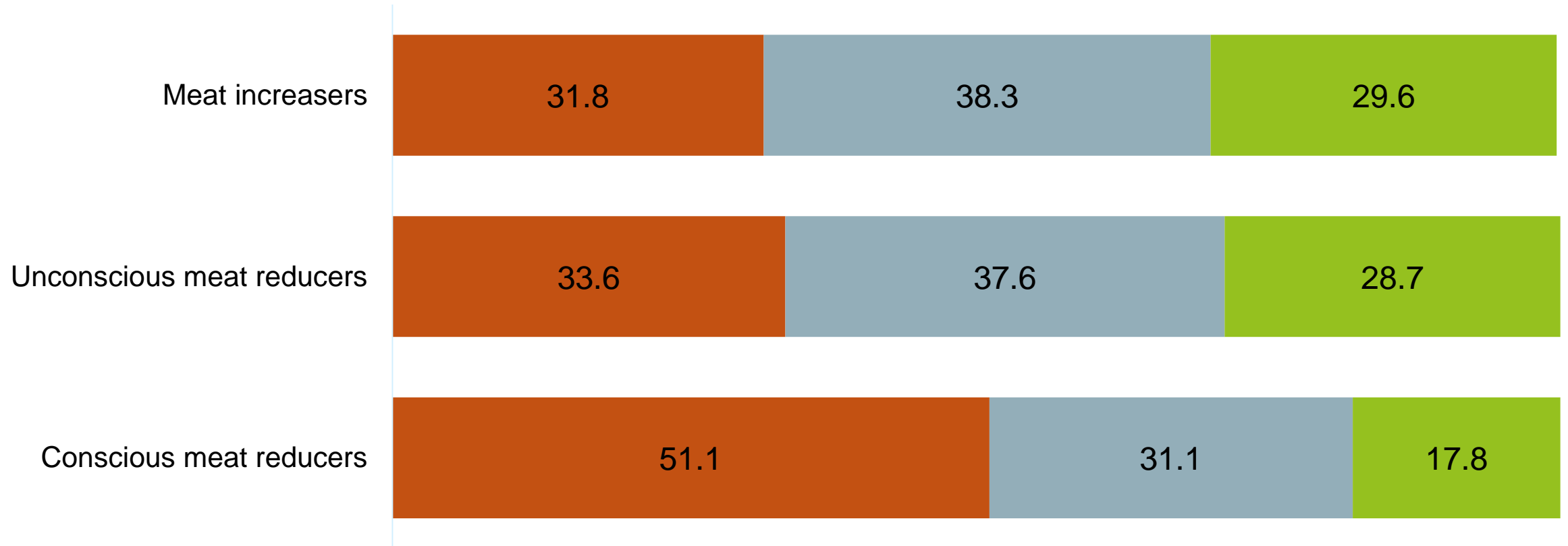
Share of GB households by diet by length of time



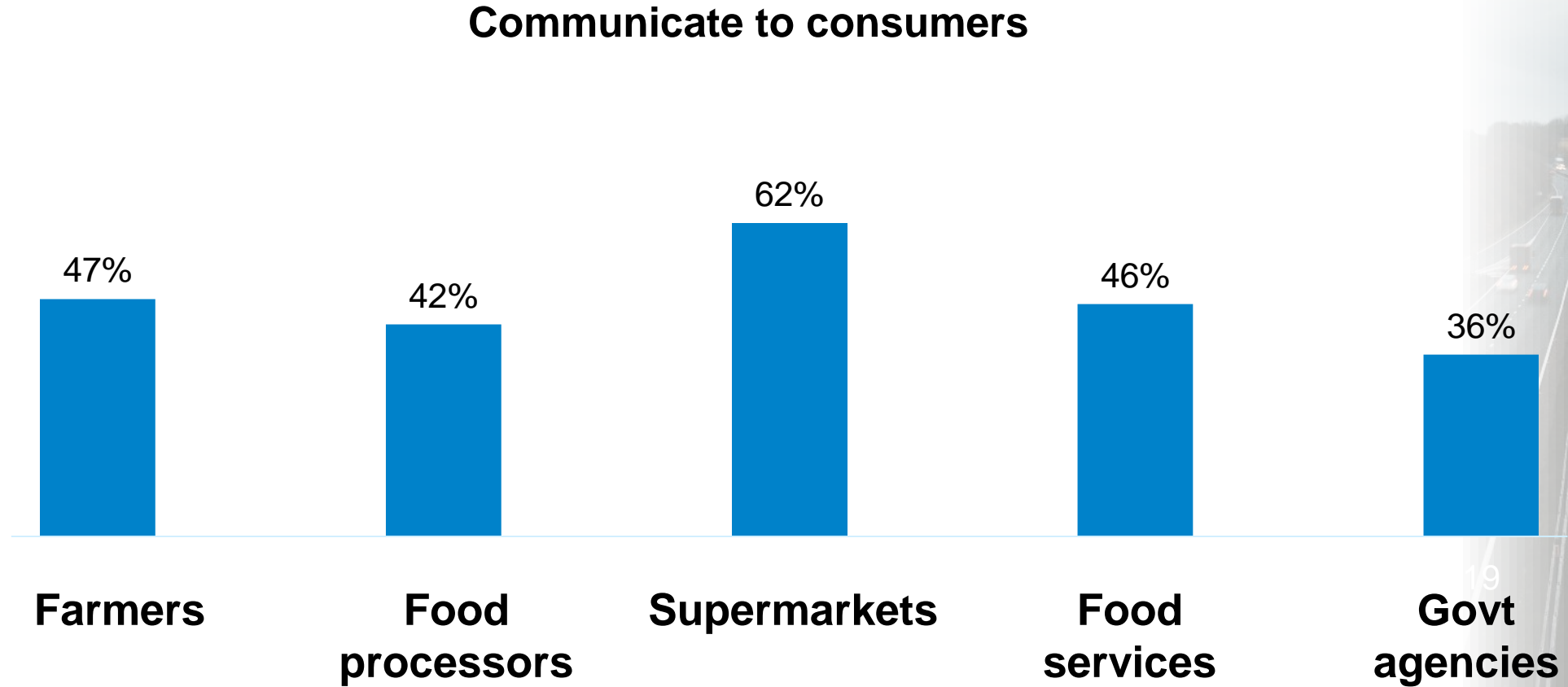
There's an opportunity to dial up this messaging in store, as the meat aisle is not an inspiring place for shoppers at present

"I enjoy browsing the meat aisle"

■ Disagree/Strongly disagree ■ Neither agree nor disagree ■ Agree/strongly agree



But we mustn't forget the opportunity in all parts of the supply chain communicating to consumers



Source: AHDB research conducted by Blue Marble, 2019

Thinking about all elements of the food system, how much would you agree or disagree with the following statements about each group on a scale of 1-5, where 1 is strongly disagree and 5 is strongly agree? Communicate to consumers - Net agreement

The background image shows a person in a grey sweater and blue jeans standing at a meat counter in a grocery store. They are using metal tongs to select a piece of red meat from a display case. The display case is filled with various cuts of red meat, including steaks and roasts, which are garnished with green herbs. A red plastic shopping basket is visible in the foreground, containing a loaf of bread in a paper bag and some green leafy vegetables. The text 'Opportunities for red meat' is overlaid in the center of the image in a large, white, sans-serif font.

Opportunities for red meat

Health

There tends to be less focus on health during recession (but this time round it's pandemic-driven)

Innovate around 'healthy indulgence' and provide reassurance about the nutritional benefits of red meat

Environment

Despite a short-term distraction, environmental concerns are growing

Show all efforts to address concerns – however small the initiative is, and however small the gains

Provenance

Tap into increased interest in supporting British businesses

Remember British alone isn't enough – communicating other benefits and remaining price competitive are key

Inspiration

Regardless of shopper type, the meat aisle lacks inspiration

It's time for better experience in-store, whether that be in-aisle, or in other relevant aisles that complement meat



How AHDB is addressing reputational issues

Liam Byrne

Understanding what consumers want and adding value to farm businesses



Gather and
interpret
evidence

Develop
informed
programmes

Work
intrinsically
with supply
chain

Focus on
long-term
gains but
pivot for short
term impacts



Make it STEAKS Campaign

93%

campaign reach*

+£9.4m
revenue generated
(+742 to 1000 jobs)



Coronavirus:
People urged to eat
more steak, chips



Subscribe to our FREE newsletter Your e-mail address

AHDB launches steak night to combat drop in eating out

By Aidan Fortune
13-Apr-2020 - Last updated on 13-Apr-2020 at 12:22 GMT

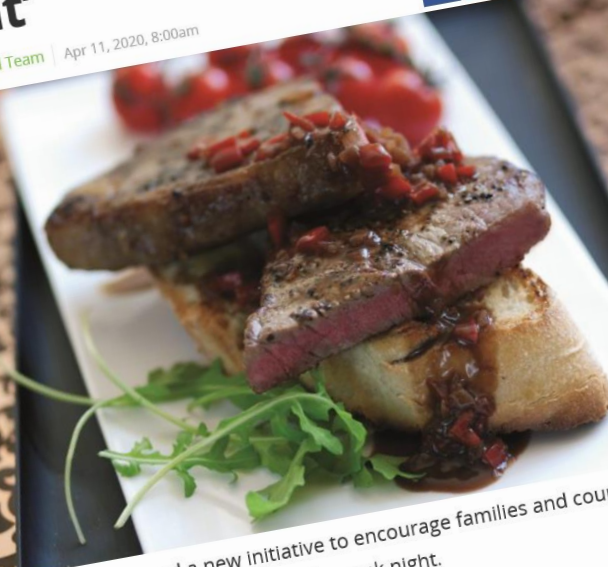


AHDB encourage families to 'stay home and celebrate steak night'

Agriland Team | Apr 11, 2020, 8:00am



1 Share



Let's not mince words, we need to eat steak

Dishing up one of our favourite restaurant meals could protect the future of beef farming



XANTHE CLAY

Could it be our patriotic duty to eat steak? Not that I generally need much encouragement, but it turns out that our farmers and meat producers could really do with our help. The issue is that there has been a rush on mince, that reliable staple of British home cooking, with the Agriculture and Horticulture Development Board (AHDB), which represents the beef industry in England, reporting a 40 per cent rise in sales in the week leading up to April 19. In the meantime, steak

This leaves farmers and processors with what's known as "carcass imbalance". Usually, around two thirds of meat on the carcass is used as mince, with the remaining being a combination of roasts, braising joints, and steak. Now sales more or less match the suddenly we want more mince – less of the posh stuff.

Processors could simply use the whole carcass, steaks and roasts with mince fetching only a fifth of the price of fillet steaks, but they'd lose huge chunks of profit and the farmer might not even recoup their costs. In practice, some processors around the country have been hitting the headlines – resulting in a loss of income for everyone involved.

Another solution would be to process more cattle to meet

*Source: Make it steak – Kantar

**Number of times the adverts

AHDB has launched a new initiative to encourage families and couples to eat steak at home with a weekly steak night.

Around 20% of the UK's beef is consumed in the eating-out market, with

Managing reputation

Consumers are increasingly seeking **reassurance**

The food I buy is

- Good for me & my family
- Farmed sustainably
- Farmed with care



January 2021 and beyond



New campaign

Reach



Increased targeting

Relevance



Collaboration

Reassurance

Thank you

Further information on the Retail and
Consumer Insight pages

ahdb.org.uk/retail-and-consumer-insight

*Where you can also find the
recordings of our October webinars*



A vibrant landscape photograph featuring a lush green field in the foreground, with a narrow path or furrow leading towards the horizon. The sun is low on the horizon, creating a warm, golden glow and casting long, soft shadows. The sky is filled with scattered clouds, some of which are illuminated by the setting or rising sun. In the distance, rolling hills and a few small buildings are visible. The overall mood is peaceful and inspiring.

**‘Inspiring our farmers, growers
and industry to succeed in a
rapidly changing world’**