

Summary

- Meat remains a weekly planned purchase
- Species and segment variety in all three core proteins (pork, beef, and chicken) is critical for consumers as many purchase across species
- Pork consumers are loyal to product and not price-driven; taste is the key attribute
- Consumers rely on a variety of aids, including lists, flyers and in-store communication vehicles to assist with shopping



Implications

- Retailers can impact sales by further optimizing flyers, in-store signage, recipes and store specials – all of which influence the purchase decision
- Promoting pork, beef and chicken each week helps boost sales by providing consumers the variety they are looking for in meal preparation
- Strong item assortment is particularly important within fresh pork as pork consumers are not highly price-driven but rather interested primarily in variety
- To maximize potential sales, retailers should merchandise a strong assortment of pork items (e.g. chops, roasts, ribs, tenderloins and processed products) to capitalize on pork's strong consumer loyalty, particularly among heavy users

Methodology

Phase 1 (2001) Three hundred consumers in three geographically dispersed markets and several stores per markets. First, through an observational analysis, consumer shopping behavior was observed and measures including time spent in the meatcase and perceived purchase influences were recorded. This was followed up with a brief intercept survey once shoppers made a meat selection. Baseline food norm data was furnished by Meyers Research based on a three-year composite of shopping observations for other food categories.

Phase 2 (2004) Part 1: Thirty consumers in three geographically dispersed markets. Consumers were met by a moderator at a retail store entrance who observed and asked questions throughout an entire shopping trip. Part 2: Two hundred and twenty interviews in five geographically dispersed markets. Consumers were first observed shopping the fresh meat case then information was recorded for shoppers who made a fresh pork purchase.



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Don't be blah.®

Fresh Meat

Point of Decision Research



Shopping the meatcase is different from shopping any other part of the store.

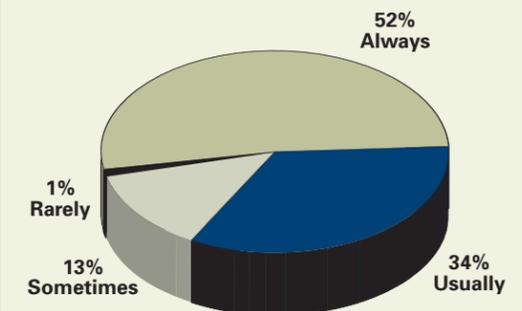
It's time-consuming, highly involved and yet it's a destination on virtually every shopping trip. In order to fully understand the factors that influence a person's purchase decision at the meatcase, the National Pork Board sought to gain further insight into consumer shopping behavior. The research highlighted here captured behavior as it was happening in the supermarket... rather than traditional market research that is conducted in a controlled environment. (See back panel for more about research methodology.)

Grocery shopping is a weekly activity for 83% of consumers.

Since meat is part of most every major meal (3-7 days a week), it is not surprising to learn that most consumers (86%) usually or always shop the meatcase during their trips to the supermarket. While most plan on buying "meat" before arriving at the store, many don't know which cut they will purchase until they get to the meatcase. Household staples

such as ground beef and chicken breast, however, are mentioned specifically more often than pork and fish. Fresh beef and pork purchasers are more likely to decide on a specific cut at the meatcase, perhaps because of the large variety of cuts to consider. Pork is purchased more on impulse (32%) than beef (24%) or chicken (18%), driven mostly, in consumers' words, by feature activity and in-store displays.

"How often do you shop the meatcase on grocery trips?"



86% usually or always shop the meatcase

While 60% of shoppers carry grocery lists, these function only as a guide or a reminder, especially regarding brands or specific cuts of meat. Consumers typically shop the perimeter of the store first, then specific center-store aisles as needed. Meat is among the last items shopped for due to temperature and freshness concerns. Consumers shop more frequently for meat, fish and produce, as compared to other regular groceries.



Consumers spend four minutes, on average, making their purchase decisions at the meatcase. This compares to only one minute for all other food categories. Meat is a high-involvement purchase in which 82% of shoppers spend time physically examining and comparing packages before making a decision. This is unlike the center of store grocery aisles, which are stocked with uniform packages and national brands. Only 15% of grocery aisle shoppers pursue this detailed examination.

Light pork purchasers spend 54% more time shopping the fresh pork section than heavy pork purchasers. Two thirds (67%) of those purchasing fresh pork appear to consider several packages before making their purchase decision.

More than a third of consumers who purchased fresh pork also purchased another species on the same shopping trip.

This underscores consumers' need for variety across species. In fact, 18% of consumers purchased all three of the core species (pork, beef and chicken) on the same trip. While chops are selected most often, heavy pork purchasers buy a wider variety of fresh pork products including ribs, roasts and tenderloins.

Pork consumers are very loyal. When asked what they would do if the fresh pork products they wanted were not available, only 16% would purchase a different meat other than fresh pork.

- 34% would purchase a different fresh pork product
- 31% would not purchase at this time, but come back in the future
- 19% would go to a different store to purchase the preferred pork product

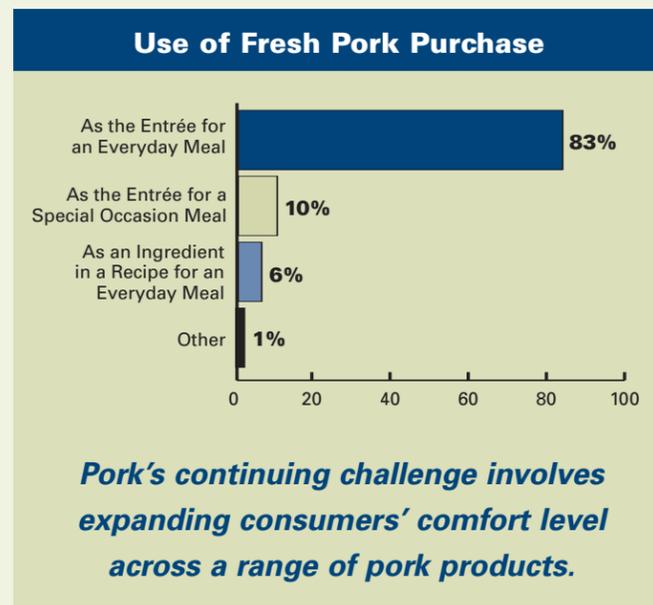


When arriving at the meatcase, product selection is related to quality, convenience, familiarity and family preference.

While consumers report that decisions are not usually related to specific recipes, 83% plan to use pork as an entrée for an everyday meal.

Cooking method has a significantly higher impact on planned versus unplanned purchases – 34% and 21% respectively.

Segment (chops, roasts, ribs...) availability is the most important factor when consumers are actually at the meatcase. Price is reported to play a role in selection but when asked, only 28% of shoppers actually knew what price they had paid for the fresh pork item they chose.



Few consumers seek assistance at the meatcase.

In fact, only 3% of consumers reported asking for help in product evaluation or cooking/preparation tips. This creates a real need in store to ensure information is available either on pack or close to the point of purchase.

Furthermore, the research revealed that only 24% of shoppers interviewed had purchased fresh pork from the service center in the last three months.

Reasons cited for using self serve rather than full service included points such as:

Available at self serve/prefer	21%
Self serve is easier/convenient	16%
Self serve is faster	12%
Better price is self serve	9%



Taste and convenience are top reasons for pork purchases. For pork consumers, 79% agree that pork has a great taste/flavor that their family enjoys. Seventy-eight percent of these consumers also agree that pork is easy and convenient to prepare. And 64% of pork consumers believe pork is good for everyday meals and can be prepared in a variety of ways, thus providing their families with many tasty options at mealtime.