Top Findings of the Power of Meat 2014

1. **First indications of a return to higher spending** — While still below the pre-recession average, home-cooked dinners featuring a portion of meat or poultry recovered from 3.6 to 3.8 in a typical week. Additionally, among those who changed their meat purchase in 2013, 36 percent *increased* their spending, up from 9 percent last year.
2. **Customer service is key in shopper satisfaction —** Shoppers are highly satisfied with their meat department. Not price, but good quality, customer service excellence, in-stock performance and good variety are the main drivers of meat department satisfaction. This underscores the notion that few companies, if any, can compete on price alone.
3. **27 percent of shoppers switch channels when buying meat/poultry** — The primary beneficiary of channel switching are supermarkets, with the three top reasons being quality, variety and the presence of full-service counters.
4. **Price remains important, but loses dominance** — While price per pound and total package price remain the number one and two factors in the meat and poultry decision-making process, the dominance of price is waning in favor of higher rankings for nutrition, knowledge and preparation time.
5. **Natural/organic segment continues growth —** Up from 26 percent, 34 percent of respondents have purchased natural or organic meat/poultry in the past three months. The growth outlook is accelerating, with 38 percent of current users expecting to increase purchases. Full-service supermarkets currently capture the largest share, but the purchase is becoming increasingly scattered across formats due to wider availability.
6. **Health and wellness is coming out of hibernation —**The share of shoppers who care about making healthful meat and poultry decisions is increasing following a recession plateau, even though the majority of shoppers still only put “some” effort into nutritious choices (47 percent) versus “a lot” (31 percent).
7. **Brands gain ground —** Outright preference for national and private brands rose over 2013, leaving a smaller share of ‘switchers’ —consumers who are brand neutral. However, for both fresh and processed meat, switchers remain the largest group, at 57 percent and 47 percent, respectively. National and private brands can enjoy mutual growth by providing a balanced assortment, targeted at the store level, through strategic collaborative initiatives.
8. **A planned purchase —** For most shoppers, meat and poultry are very much a planned purchase. In general, 85 percent of shoppers create shopping lists before heading to the store. Forty-three percent list specific species and cuts, such as chicken breasts or pork chops, and an additional 34 percent list meat and poultry generically. The grocery circular is shoppers’ most commonly used tool to research meat and poultry promotions.
9. **The mealtime opportunity —** In a typical week, one-third of shoppers is undecided at least half the time whether they will cook or eat out as little as two hours before dinnertime. Likewise, when shoppers have decided to cook, 38 percent do not know what they will prepare two hours out. This presents an enormous opportunity for food retailers to increase their share of mealtime. Currently, food service wins the majority of last-minute dinner decision trips, even though the consumption of heat-and-eat and ready-to-eat meat and poultry increased.
10. **Convenience is a rising star —** Heat-and-eat and ready-to-eat items are being consumed at higher frequencies and more shoppers are buying them. This desire for convenience is also reflected in the types of meals people cook more. One-pot meals increased a net 22 percentage points compared with five years ago. Accelerated growth is also seen for pastas and casseroles and international/ethnic dishes.

Additional Resources

- To download your free copy of the report and/or presentation, visit: www.meatconference.com/POM2014
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