

# TABLE OF CONTENTS

<b>STUDY HIGHLIGHTS</b>	<b>3</b>
THE REIGN OF VALUE CONTINUES	3
MEAT CONSUMPTION AND MEAL PREPARATION	4
IN-STORE SIGNAGE TOP MARKETING MEASURE	4
MEAT CASE VERSUS THE SERVICE COUNTER	4
ECONO-SIZING MEETS RIGHTSIZING?	5
IMPROVING THE MEAT DEPARTMENT	5
ORGANIC AND NATURAL MEAT	5
<b>INTRODUCTION</b>	<b>8</b>
ABOUT THIS REPORT	8
CONSUMER INSIGHTS	8
MARKET REVIEW	9
DOING MORE WITH LESS	12
VALUE-BASED FORMATS SHOW STRENGTH IN FACE OF RECESSION	13
SHOPPING TRIPS PER WEEK	14
AVERAGE SPENDING	15
<b>NUTRITION</b>	<b>16</b>
RECESSION NOT UNDERMINING INTENTION TO EAT HEALTHFULLY	16
RIGHTSIZING IS THE MOST POPULAR HEALTHY-EATING STRATEGY	16
SATISFACTION WITH NUTRITION INFORMATION IS GROWING	18
NUTRITION FACTS PANEL MOST IMPORTANT FOR PROCESSED MEAT	18
SODIUM CONCERNS SURPASS IMPORTANCE OF SATURATED AND TRANS FATS	19
<b>MEAT SHOPPING</b>	<b>23</b>
FEWER SHOPPERS ARE CHANGING THEIR MEAT PURCHASES	23
SHOPPERS REMAIN DILIGENT IN FINDING WAYS TO SAVE	23
MEAT BUSINESS REMAINS STRONG FOR SUPERMARKETS	25
ECONOMIC IMPACT FELT IN MEAT CASE	29
CHICKEN AND BEEF CONTINUE TO DOMINATE THE DINNER PLATE	30
FRESH MEAT TOPS READY-TO-EAT AND READY-TO-HEAT	31
MARINATED MEATS	33
PURCHASE FOR OVER-TIME USAGE CONTINUES TO GROW	34
IN-STORE SIGNAGE KEY PURCHASE DRIVER	34
PRICE PER POUND DOMINATES PURCHASE DECISION	36
IN-STORE SIGNAGE GROWING EVEN MORE IMPORTANT	36
BRAND PREFERENCE STRONGER FOR PROCESSED MEAT	38
<b>ORGANIC AND NATURAL MEAT</b>	<b>40</b>
NATURAL AND ORGANIC MEATS FAIRLY STABLE DESPITE ECONOMY	40
CONVENTIONAL SUPERMARKET MAIN OUTLET FOR ORGANIC MEAT	42
MOST ONLY PURCHASE ORGANIC/NATURAL FOR CERTAIN MEATS OR CUTS	44
BETTER LONG-TERM HEALTH EFFECTS AND NUTRITIONAL VALUE KEY IN ORGANIC PURCHASE	44
CHICKEN BY FAR MOST POPULAR ORGANIC VARIETY	45
<b>THE MEAT CASE VERSUS SERVICE COUNTER</b>	<b>47</b>
CASE-READY CONCEPT WIDELY KNOWN AND ACCEPTED AMONG SHOPPERS	47

USDA-CERTIFICATION WOULD HELP WITH QUALITY PERCEPTION	47
MOST SHOPPERS HAVE ACCESS TO MEAT SERVICE COUNTER	47
MAJORITY OF PURCHASES FROM MEAT CASE	48
SERVICE COUNTER EQUALED WITH SPECIALTY CUTS AND SPECIAL OCCASIONS	48

## **PACKAGING INSIGHTS** **51**

---

INSIGHTS INTO BUYING IN BULK	51
LEAK-PROOF WOULD ENCOURAGE INCREASED CASE-READY SALES	52
LEAK-PROOF CONCEPT LARGELY UNKNOWN AMONG SHOPPERS	52
INFLUENCE OF ENVIRONMENTALLY FRIENDLY PACKAGING	54

## **IMPROVING THE MEAT DEPARTMENT** **55**

---

BETTER QUALITY WOULD PROMPT INCREASED MEAT PURCHASES	55
SHOPPERS' SUGGESTIONS CENTER ON VARIETY AND VALUE	56

## **DETAILED TABLES** **59**

---

TABLE 1: RESPONDENT PROFILE	60
TABLE 2: STORE FORMAT OF PRIMARY LOCATION SHOPPED FOR GROCERIES	62
TABLE 3: AVERAGE GROCERY SPENDING PER WEEK	63
TABLE 4: MEASURES USED REGULARLY TO IMPROVE EATING HABITS	64
TABLE 5: CHANGED MEAT PURCHASING BEHAVIOR RELATIVE TO THE ECONOMY	65
TABLE 6: MEASURES TAKEN TO STRETCH THE MEAT DOLLAR EVERY TIME OR FREQUENTLY	66
TABLE 7: PRIMARY LOCATION TO PURCHASE MEAT AND POULTRY	67
TABLE 8: THE NUMBER OF MEALS PREPARED AT HOME IN AN AVERAGE WEEK THAT INCLUDE A MEAT ITEM	68
TABLE 9: IMMEDIATE CONSUMPTION VERSUS USAGE OVER TIME	69
TABLE 10: CHECKING UNIT PRICING ACROSS STORES AND WITHIN THE STORE	70
TABLE 11: IMPORTANCE OF FACTORS WHEN SELECTING AND PURCHASING MEAT PRODUCTS	71
TABLE 12: INFLUENCE OF FACTORS ON THE KIND OF MEAT PURCHASED	71
TABLE 13: INFLUENCE OF FACTORS ON THE QUANTITY OF MEAT PURCHASED	71
TABLE 14: BRAND PREFERENCE WHEN PURCHASING FRESH MEAT AND PROCESSED MEAT	72
TABLE 15: PURCHASING NATURAL AND ORGANIC MEAT AND POULTRY	73
TABLE 16: PRIMARY LOCATION FOR PURCHASING ORGANIC MEAT AND POULTRY	75
TABLE 17: INFLUENCE OF ENVIRONMENTALLY-FRIENDLY PACKAGING ON MEAT PURCHASING DECISION	76

## **METHODOLOGY** **77**

---

SAMPLE SELECTION	77
------------------	----

## **FMI RESEARCH AND BENCHMARKING RESOURCES** **78**

---