



Consumer attitudes to Halal meat and purchasing patterns in the UK

Results from online research

April 2013



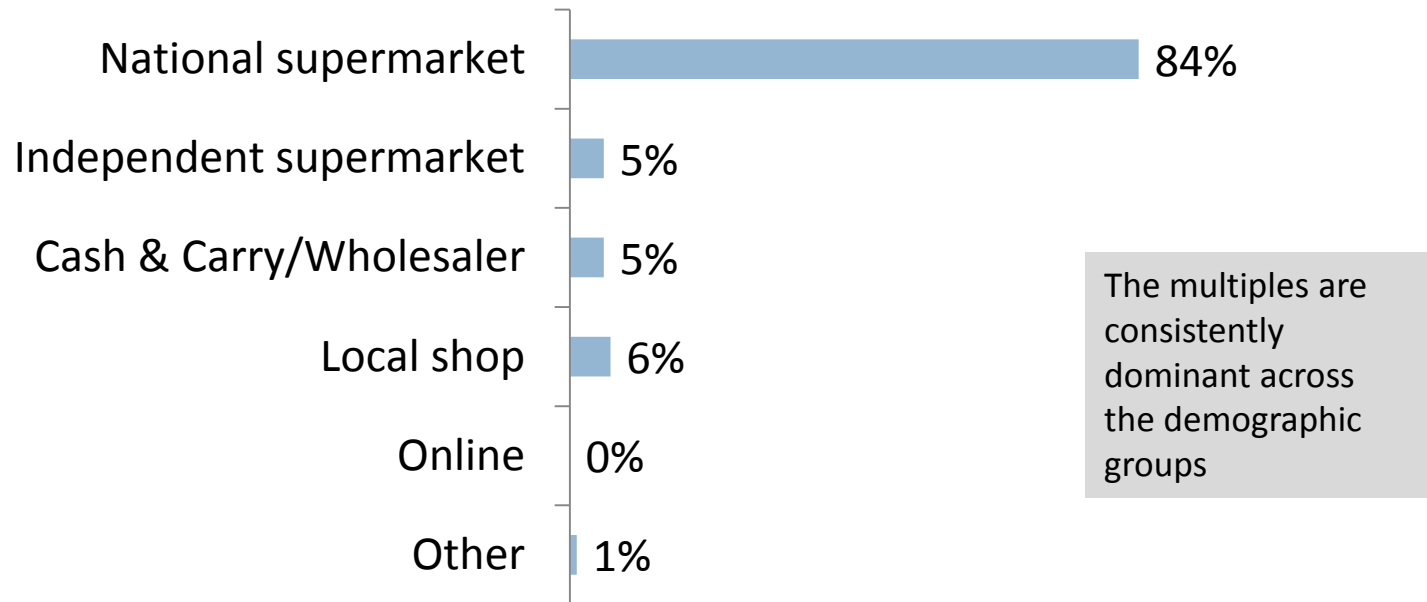
Background

- Objective – to gain a deeper understanding of the purchasing behaviour and attitudes towards slaughter methods and assurance schemes of Muslim Halal meat eaters/shoppers
- Two surveys - one to investigate Halal meat purchasing behaviour and attitudes and one specifically for conjoint analysis looking at purchasing trade offs across a variety of variables
- Online questionnaire through an online panel provider. Fieldwork took place in April 2013
- 500 interviews were achieved in the regular survey and 489 in the conjoint survey
- The sample profile achieved closely mirrors the Muslim national profile for the UK from the latest census and so no weighting was used in the resulting data
- Results are shown as percentages in the charts unless otherwise specified

Shopping behaviour

Household grocery shopping

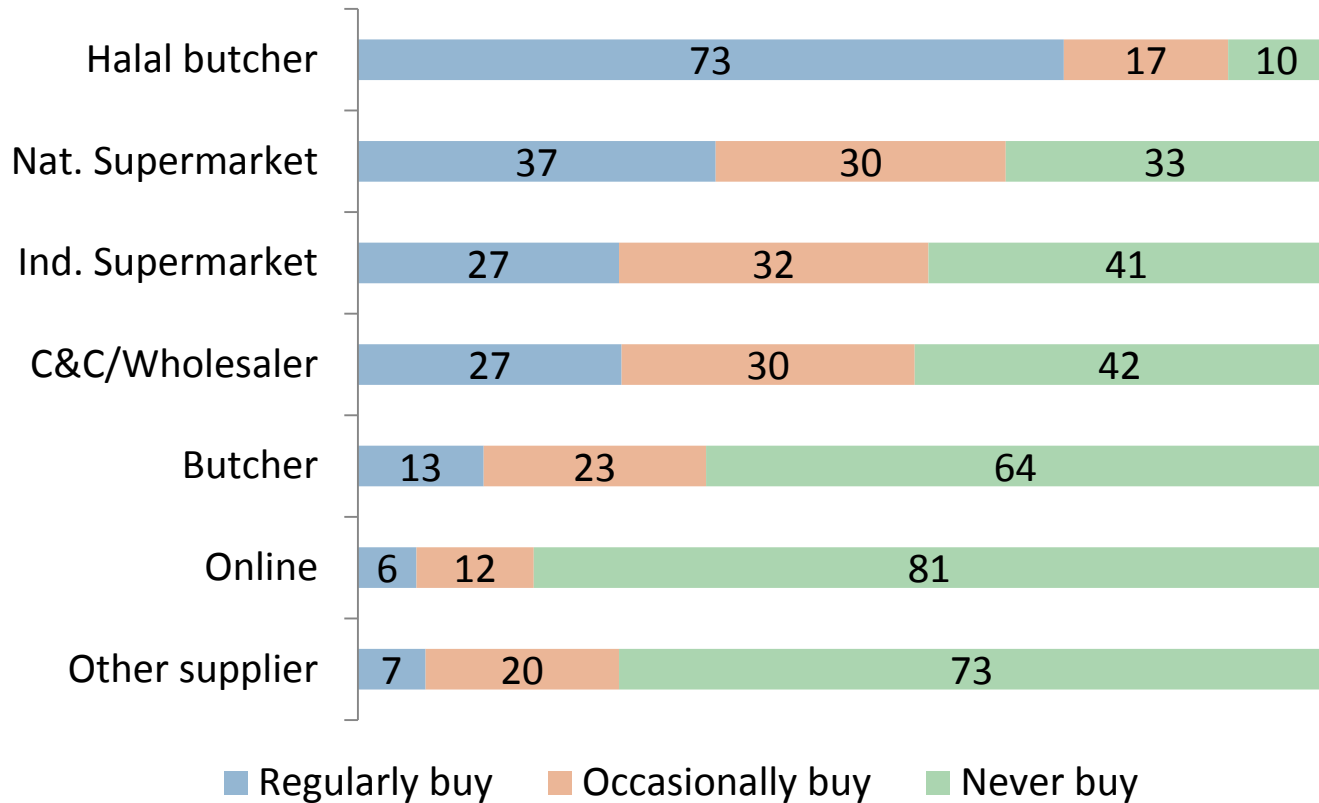
Q - Where do you/your family buy the bulk of your grocery shopping?



BASE – All respondents

Meat/poultry shopping

Q – Which of these outlets do you/your family buy meat/poultry from?



BASE – All respondents

Meat/poultry shopping – main outlet used

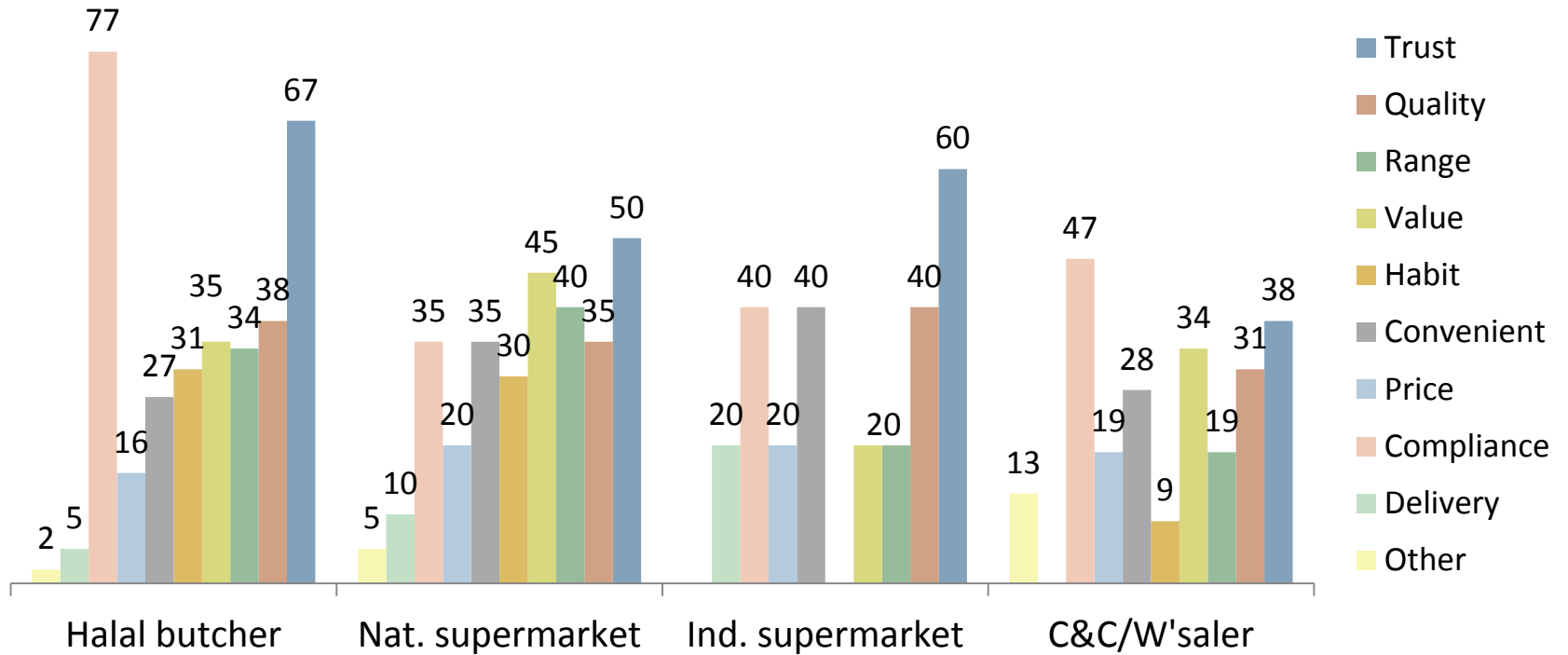
Q – Which of these is the **main** outlet you/your family buy meat/poultry from?

	<u>Main outlet</u>	
Halal butcher	60%	More likely to be the main outlet for Asian Muslims, lower social groups, younger age groups and more frequent mosque visitors
Nat. supermarket	23%	More likely to be the main outlet for UK and Middle eastern Muslims, higher social groups and less frequent mosque visitors
Ind. supermarket	5%	More likely to be the main outlet for UK Muslims and less frequent mosque visitors
C&C/wholesaler	9%	No real differences across the groups

BASE – All respondents

Main reason for choosing outlet

Q – What is the main reason you prefer to use this outlet?



BASE – Those using as main outlet

Top 5 reasons for choosing outlet

HALAL
BUTCHER

Compliance
Trust
Quality
Value
Habit

NATIONAL
S'MARKET

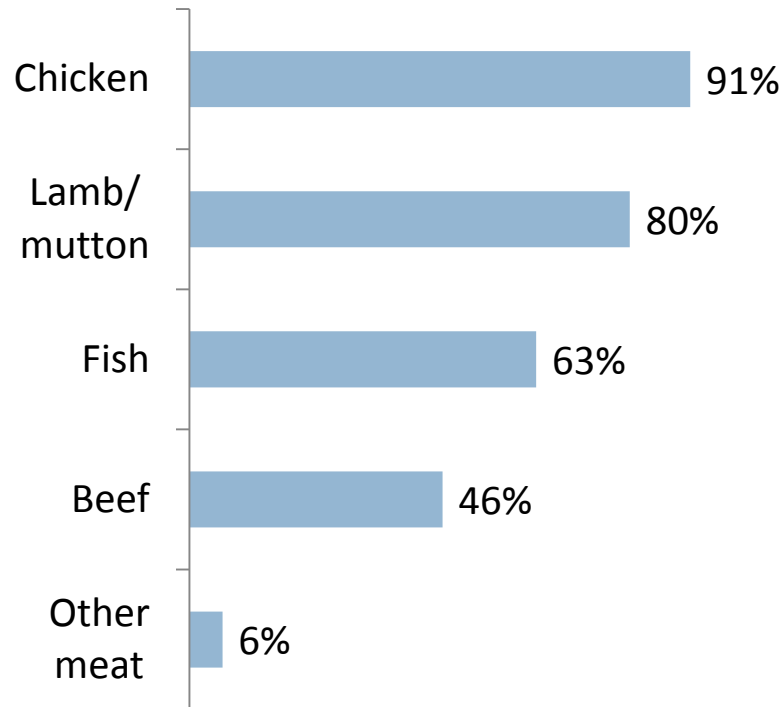
Trust
Value
Range
=Convenience
=Compliance
=Quality

C&C/
W'SALER

Compliance
Trust
Value
Quality
Convenience

Meats purchased in last 3 months

Q – Which of the following meats have you bought most of in the last three months?

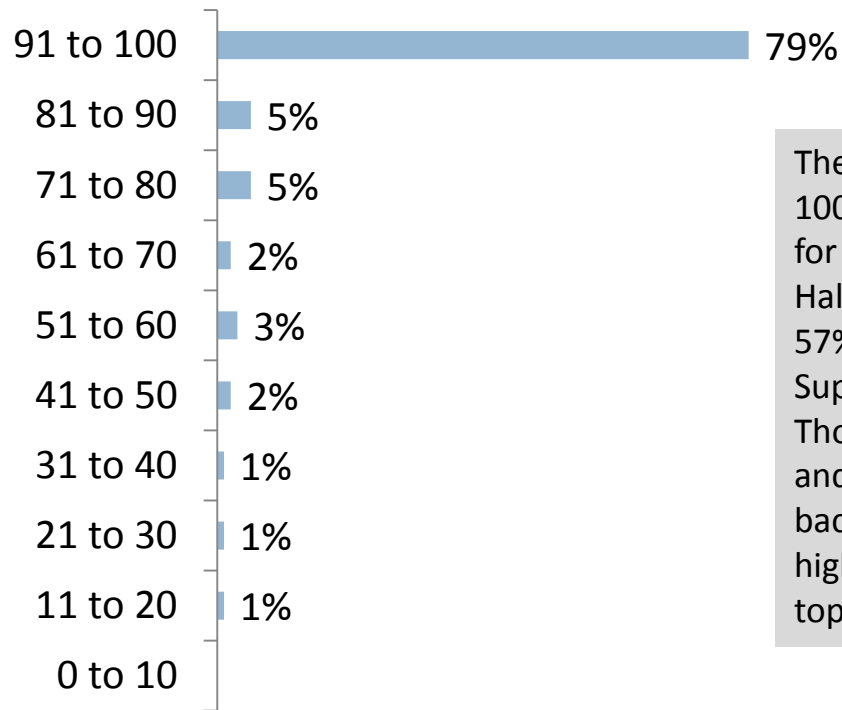


Chicken is the most popular meat across the demographic groups although lamb/mutton is a closer second choice for Indians and Bangladeshi's

BASE – All respondents

% Halal meat purchased

Q – Approximately what percentage of the meat you purchase is Halal ?



The percentage in the 91-100% tier increases to 89% for those regularly using a Halal butcher and falls to 57% for those using a Nat. Supermarket. Those with Pakistani, Indian and Bangladeshi backgrounds also have the highest percentages in the top tiers.

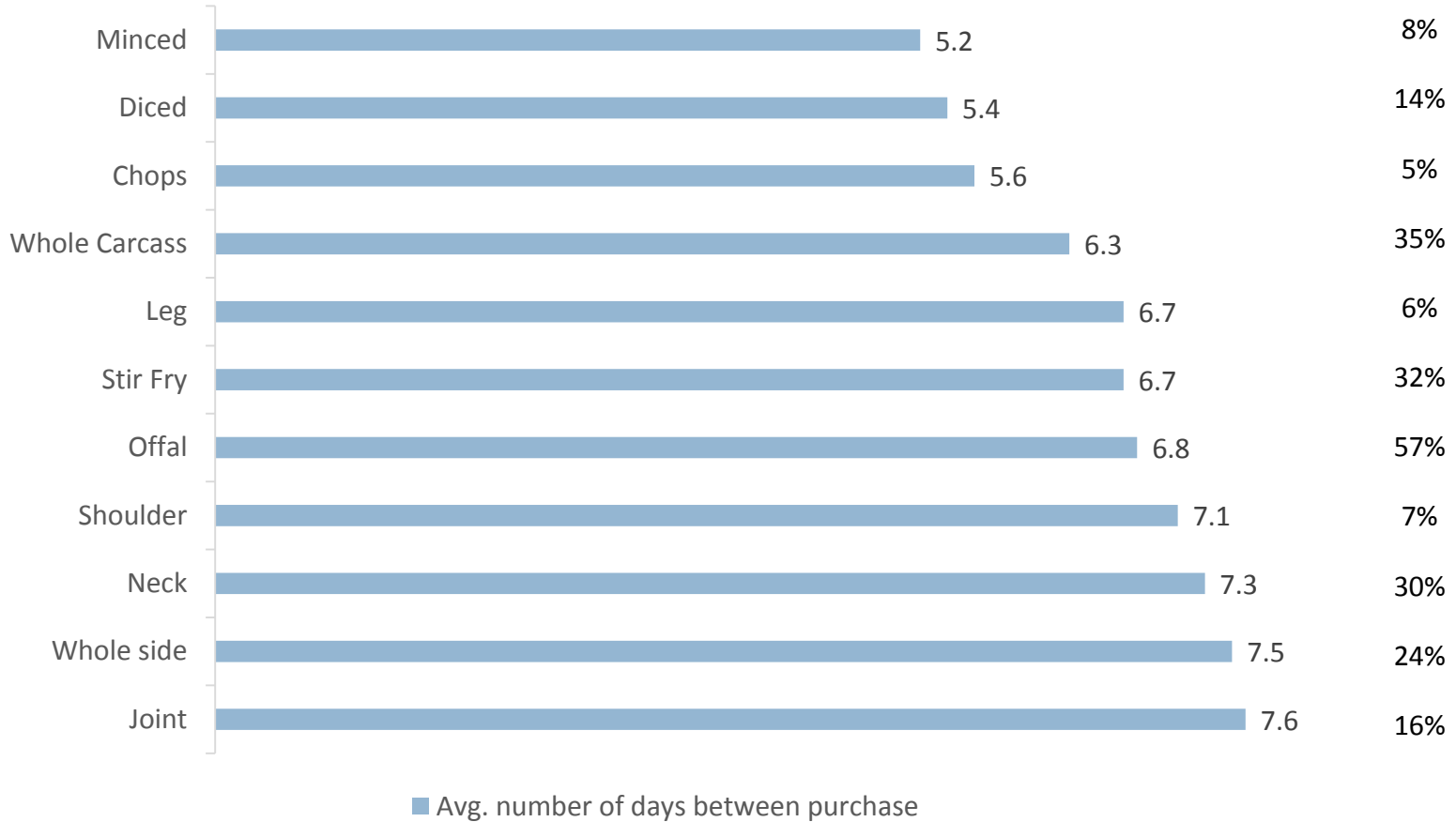
BASE – All respondents



LAMB: Average purchase frequency and popularity

Most frequent

% never buying



Least frequent

■ Avg. number of days between purchase

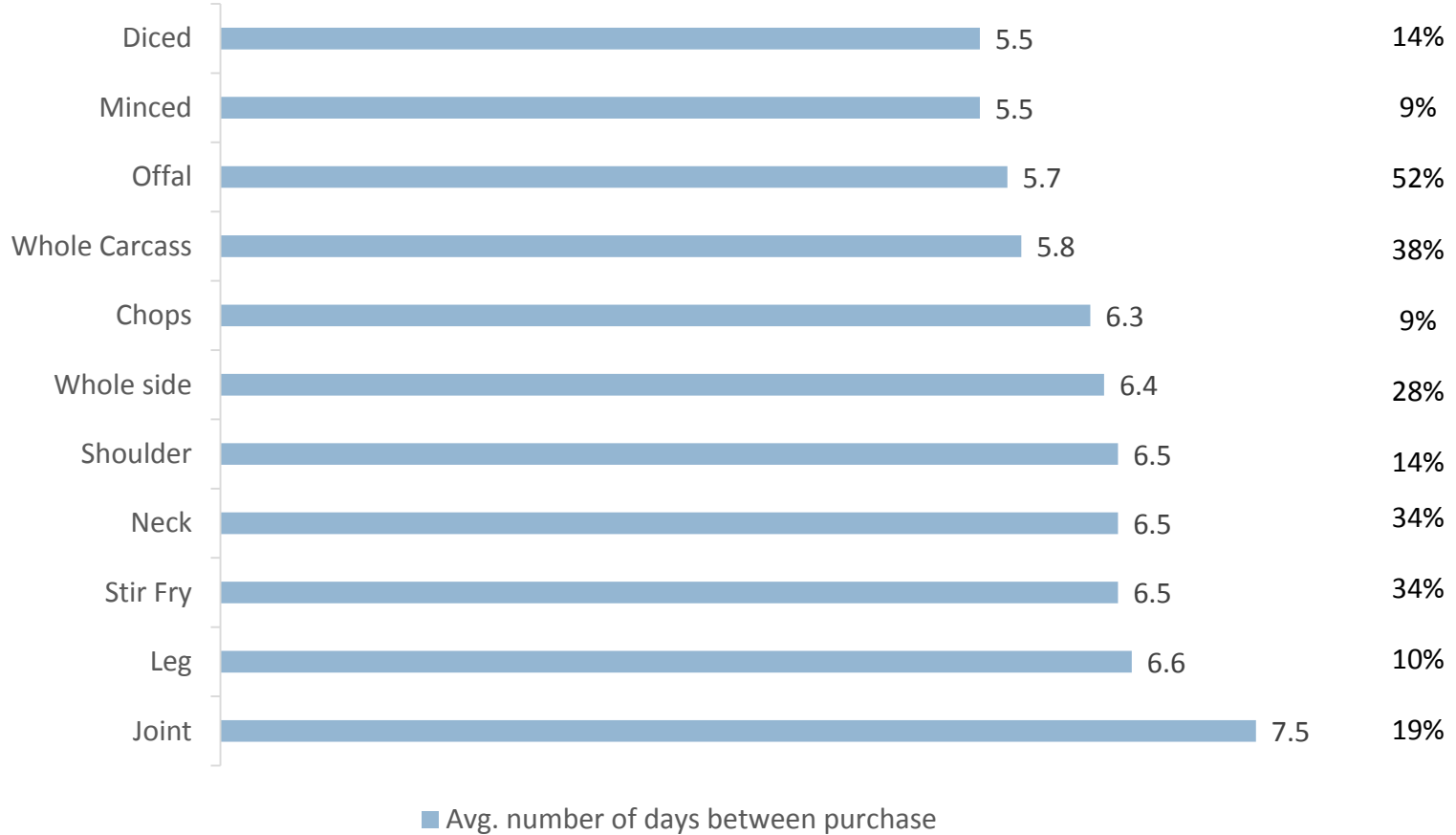
BASE – Those buying in last 3 months



MUTTON: Average purchase frequency and popularity

Most frequent

% never buying



Least frequent

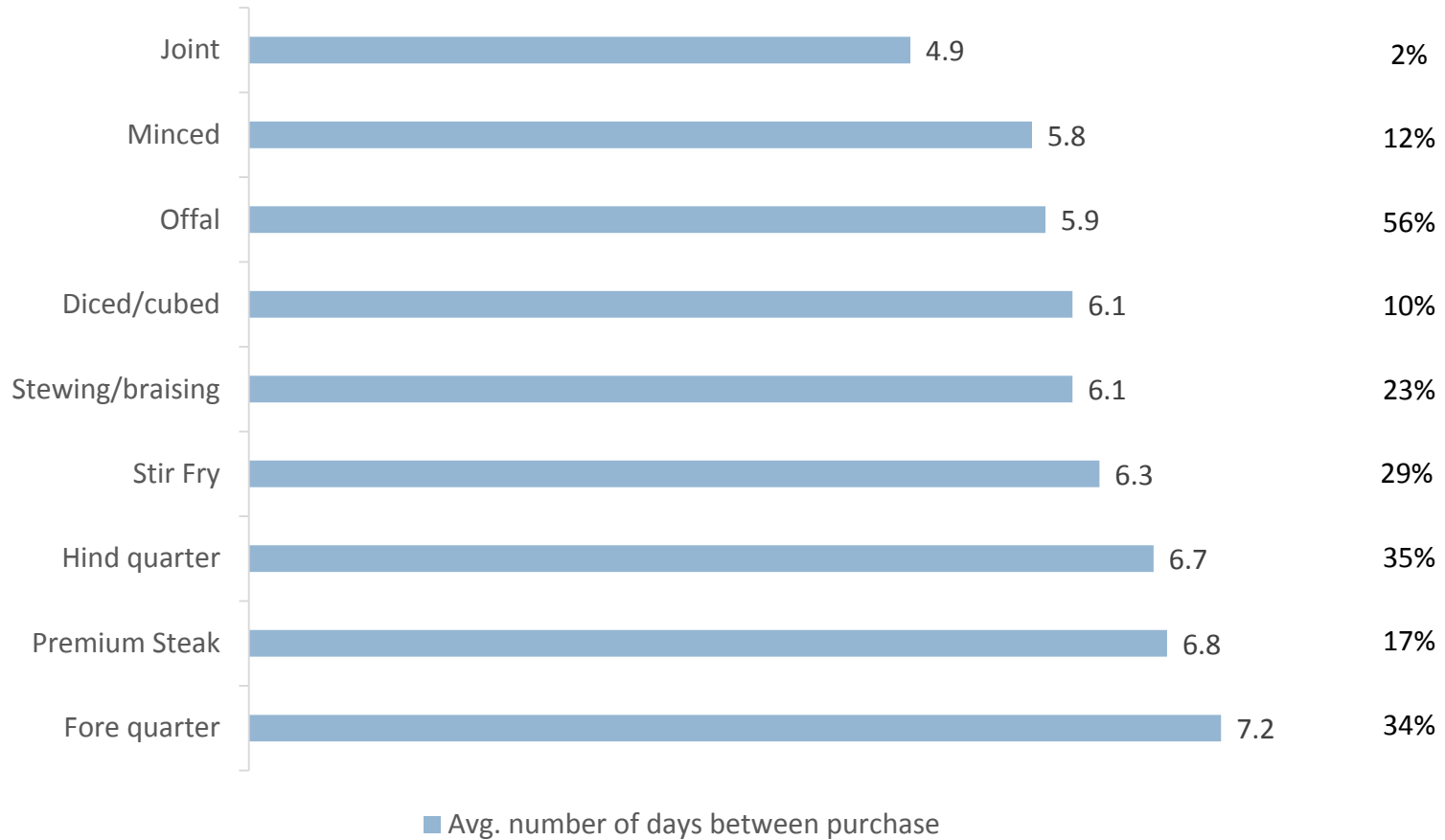
■ Avg. number of days between purchase

BASE – Those buying in last 3 months

BEEF: Average purchase frequency and popularity

Most frequent

% never buying



Least frequent

■ Avg. number of days between purchase

BASE – Those buying in last 3 months

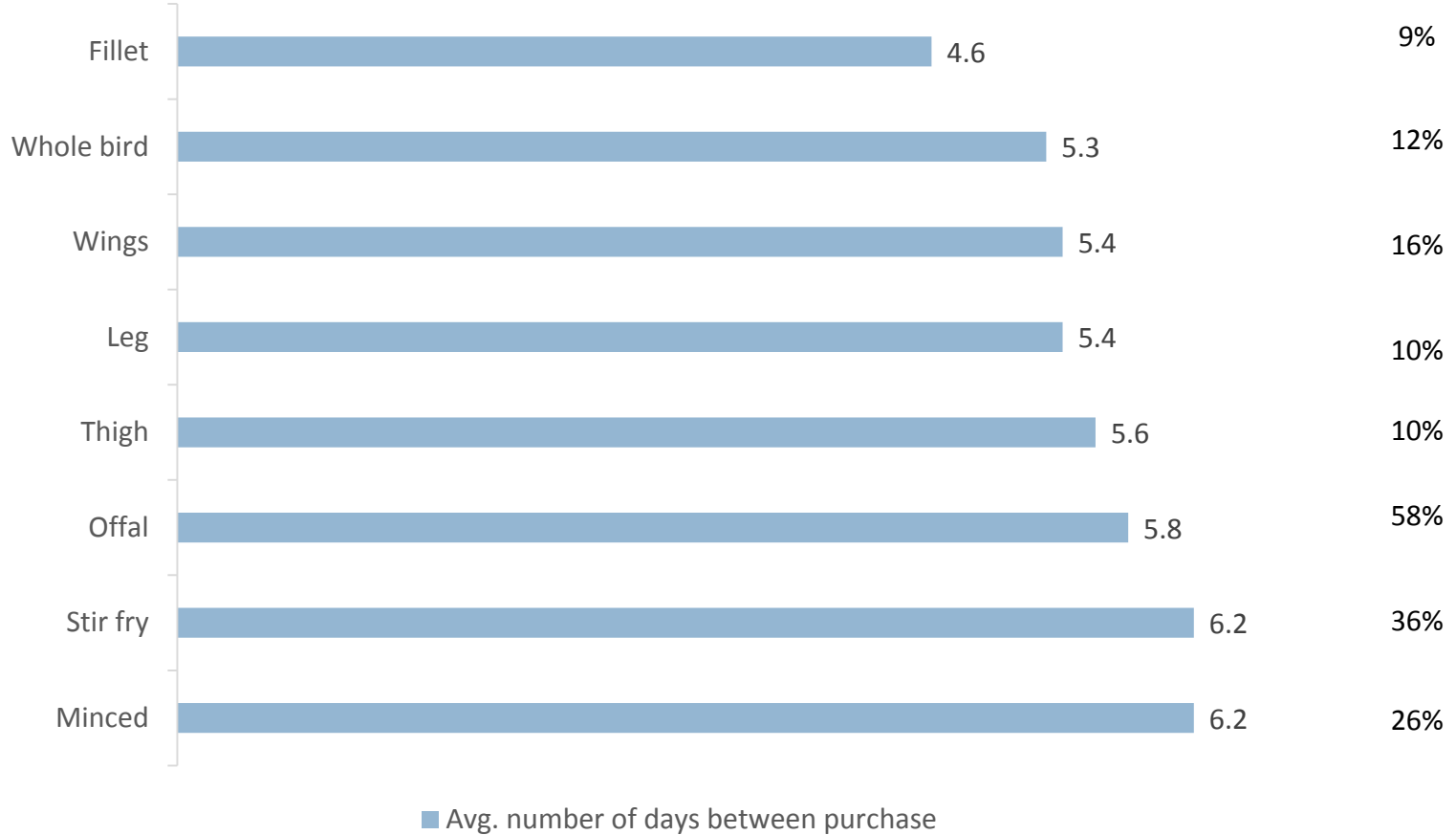


CHICKEN: Average purchase frequency and popularity

Most frequent



Least frequent



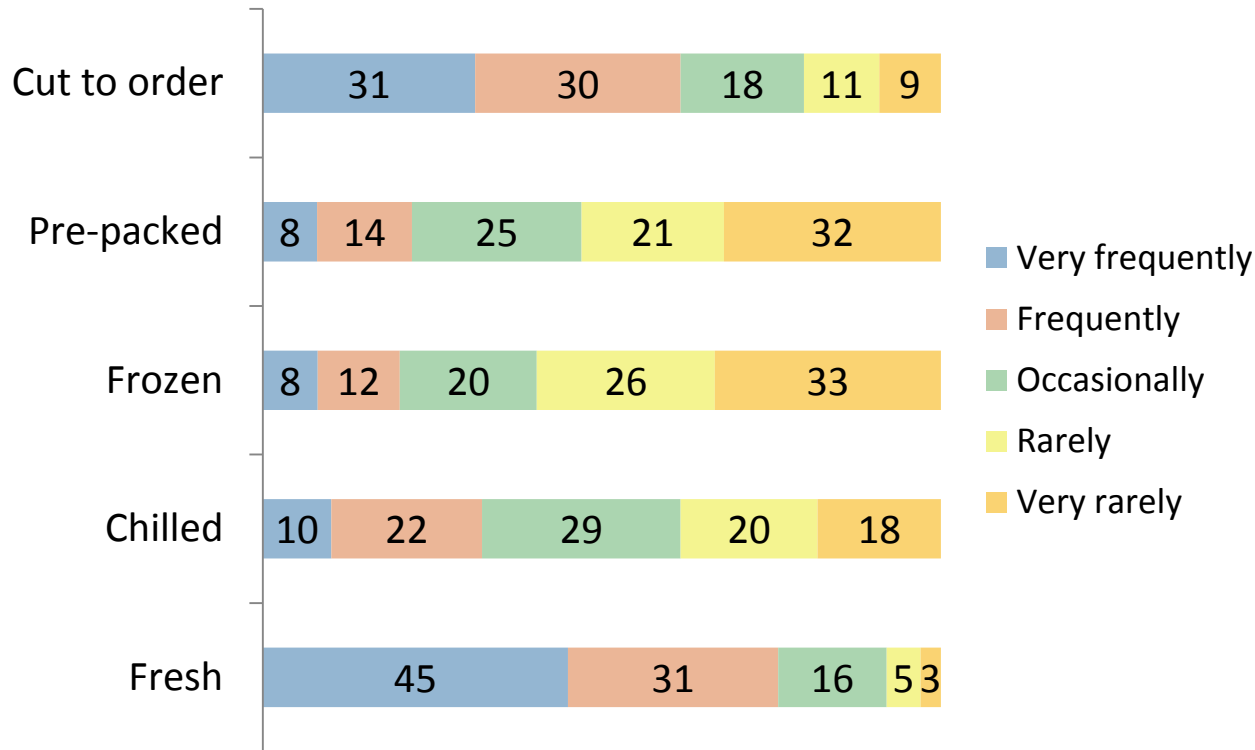
% never buying

■ Avg. number of days between purchase

BASE – Those buying in last 3 months

Format of buying meat and frequency

Q – How often do you usually buy lamb/mutton/beef?

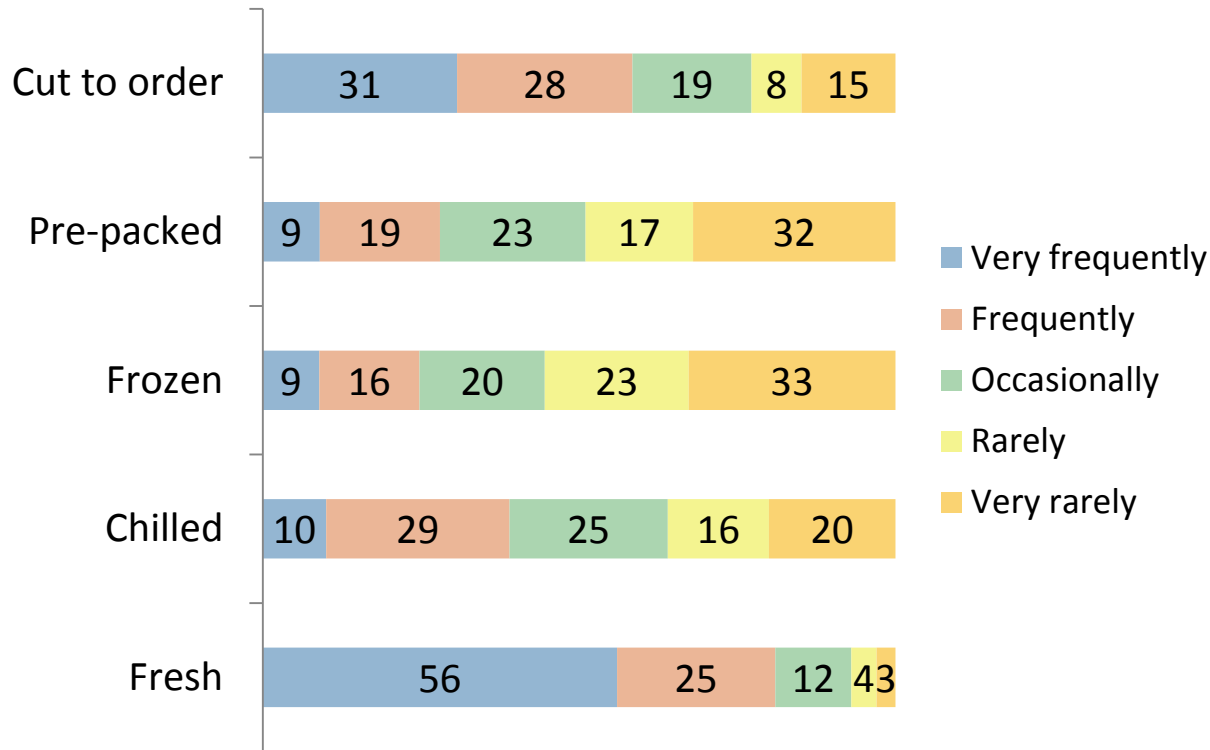


Fresh and cut to order meat are the most frequently purchased. Fresh particularly amongst the older age groups

BASE – Those buying in last 3 months

Format of buying poultry and frequency

Q – How often do you usually buy chicken/poultry?



As with meat , fresh and cut to order poultry are the most frequently purchased amongst the older age groups.

BASE – Those buying in last 3 months

Cuts they would like to see – verbatim mentions

Q – Are there any cuts of meat/poultry you would like to see more available? *unprompted*

THOSE MAINLY USING HALAL BUTCHER

Other cuts generally – 8
 Beef & chicken generally - 6
 Goat – 5
 Chicken breasts – 5
 Chops – 5
 Leg of lamb – 5
 Mince generally – 3
 Chicken wings - 3

THOSE MAINLY USING NATIONAL S'MARKET

Other cuts generally – 8
 Beef generally – 6
 Lamb generally – 5
 Chicken breasts – 3
 Chicken fillets – 2
 Veal – 2
 Venison - 2

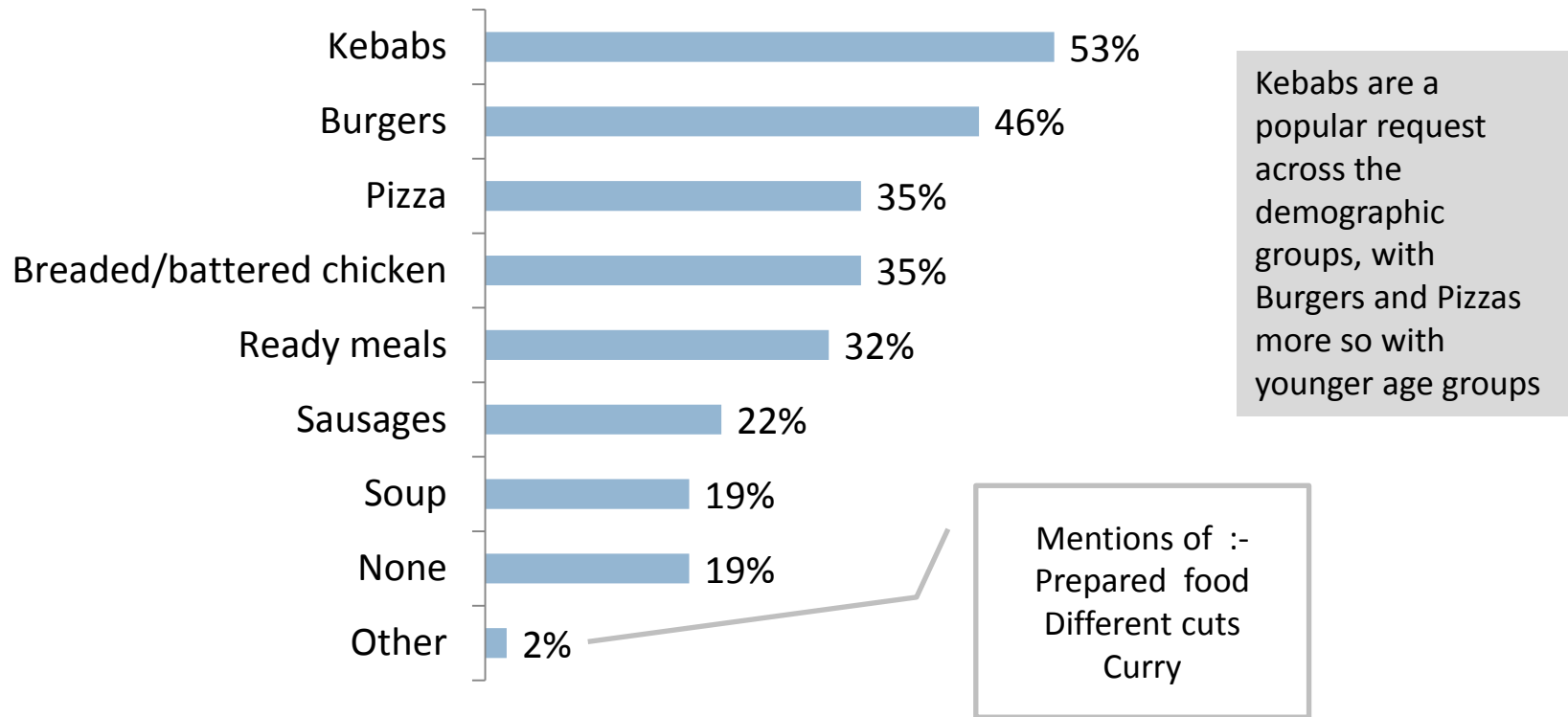
THOSE MAINLY USING C&C/ W'SALER

Lamb generally – 2
 Chicken breasts – 2
 Other cuts generally – 1
 Lamb ribs – 1
 Turkey – 1
 Chicken wings - 1

62% of respondents either
 answered don't know or
 none

Meat products they would like to see

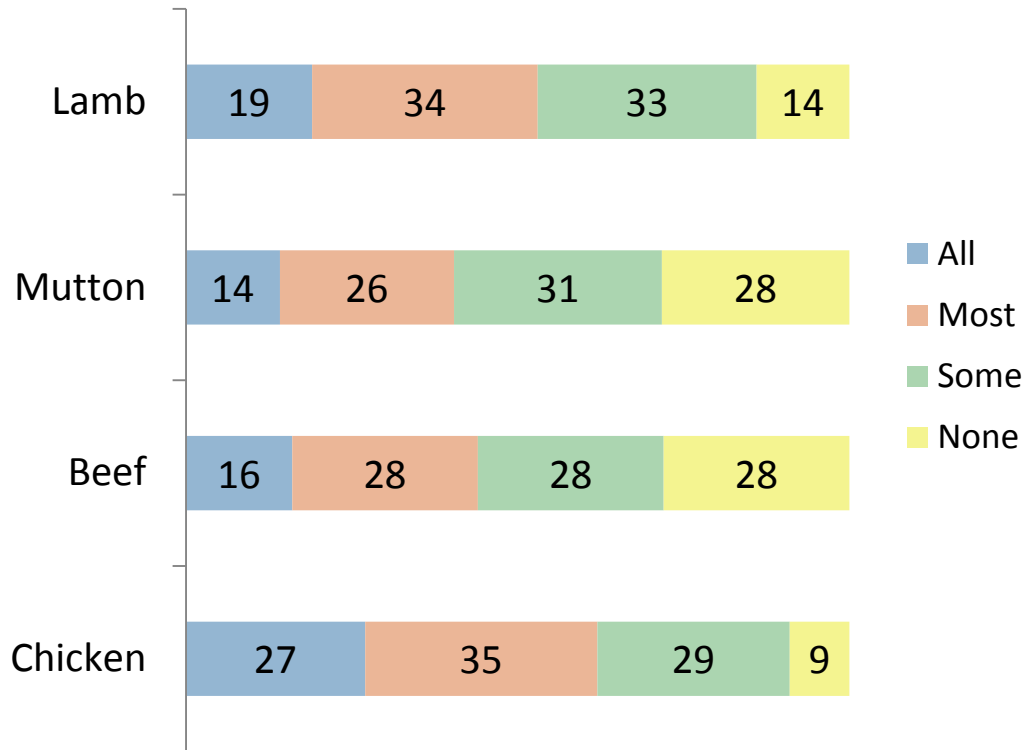
Q – Are there any meat products you would like to see more available? *prompted*



BASE – All respondents

Proportion of meat purchased to freeze

Q – What proportion of the meat you buy do you freeze?



Chicken is the most likely to be frozen with mutton and beef the least likely. Younger age groups are more likely to freeze meat.

BASE – All respondents

Top 5 factors in choosing meat/poultry

THOSE MAINLY USING HALAL BUTCHER

Religious comp. – 72%
Quality – 48%
Price – 27%
Appearance – 24%
Place of purchase – 21%

THOSE MAINLY USING NATIONAL S'MARKET

Religious comp. – 42%
Quality – 27%
Appearance – 24%
Price – 23%
Origin – 20%

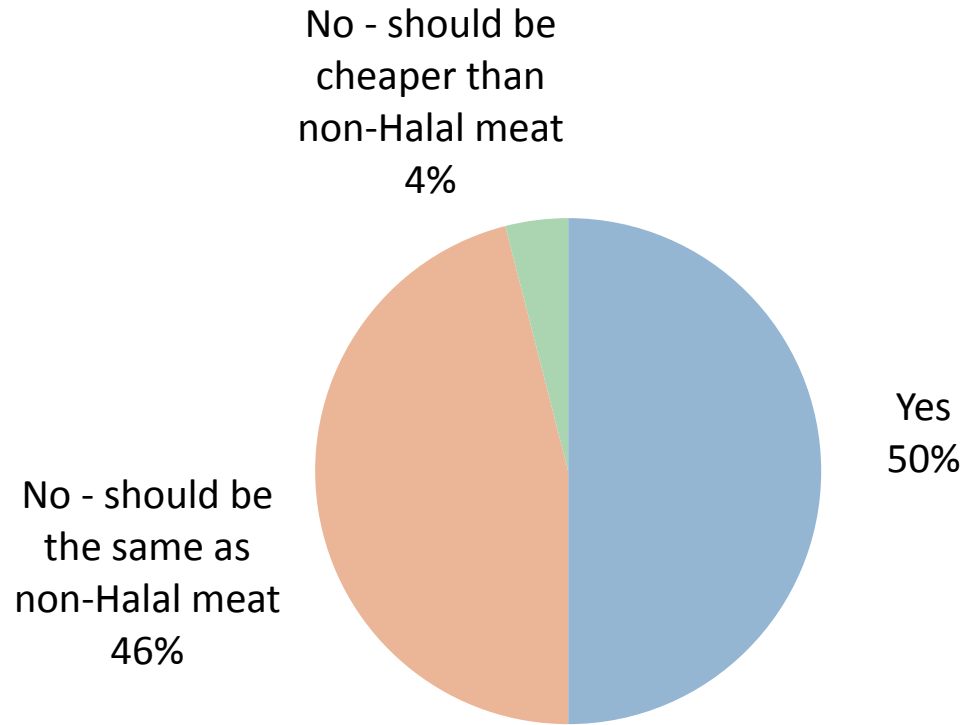
THOSE MAINLY USING C&C/ W'SALER

Religious comp. – 67%
Quality – 44%
Appearance – 35%
Price – 28%
Place of purchase – 23%

Religious compliance is the key priority across the demographic groups, but becomes less dominant with less frequent mosque goers

Would you pay more for Halal meat

Q – Would you pay more for Halal meat?



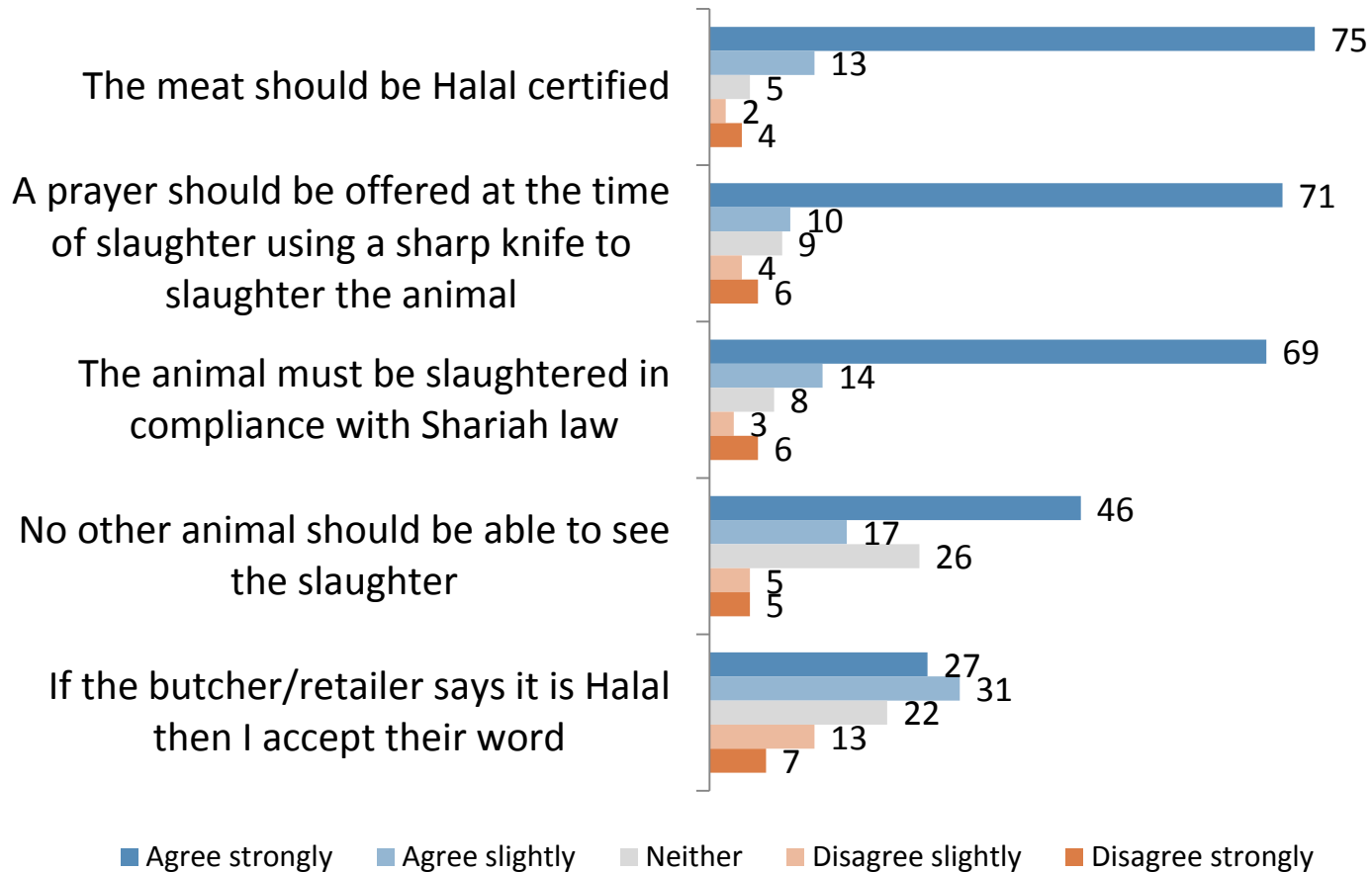
The middle age groups are willing to pay more as are the more frequent mosque goers but the youngest and oldest groups are more in favour of price parity with non-Halal meat Those with Middle Eastern, Bangladeshi and Turkish backgrounds are also more likely to want price parity

BASE – All respondents

The slaughter process and certification

Slaughter process

Q – How strongly do you agree or disagree with the following statements on Halal meat?

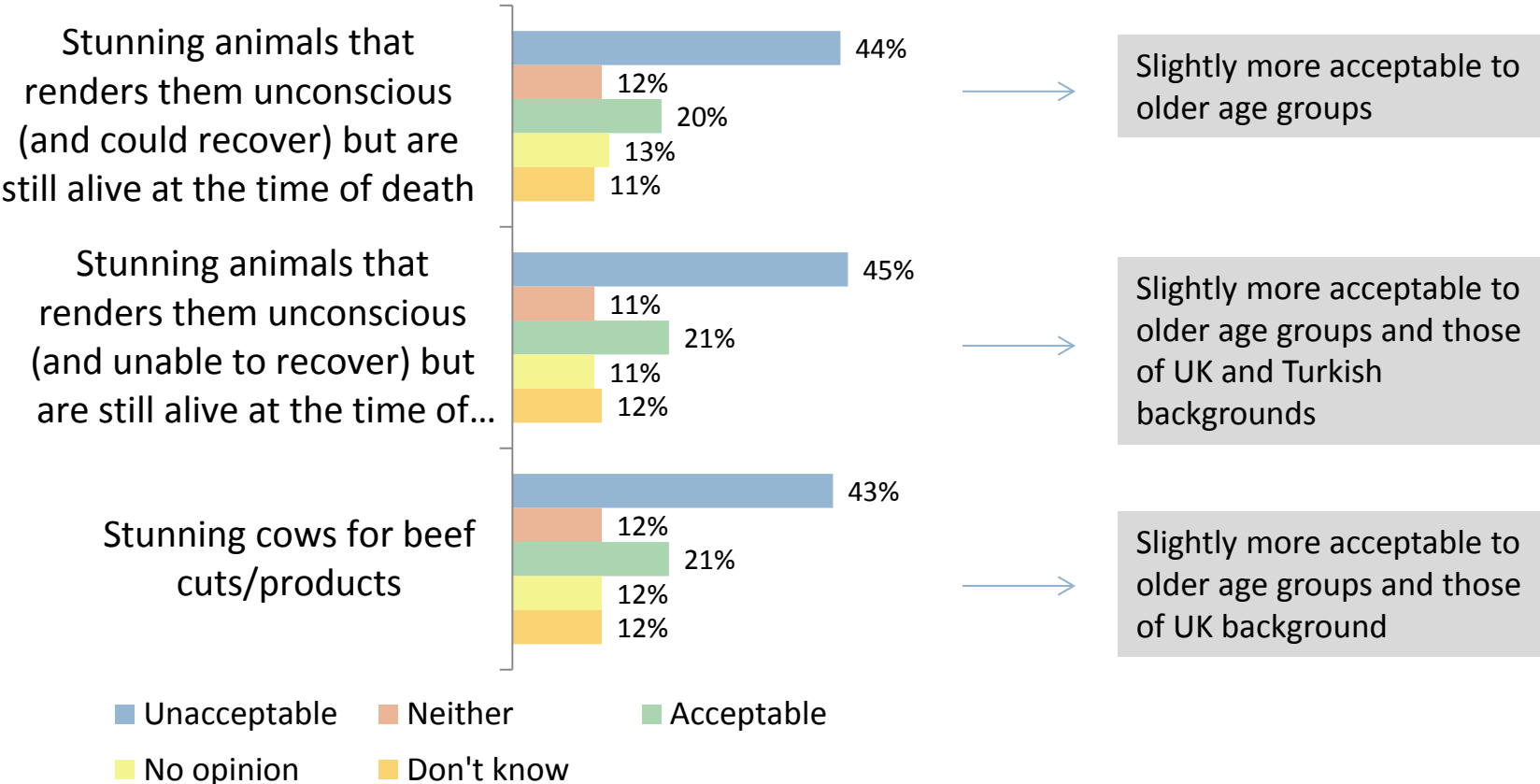


There is fairly consistent scoring for these statements across the demographic groups

BASE – All respondents

Acceptability of stunning animals during slaughter

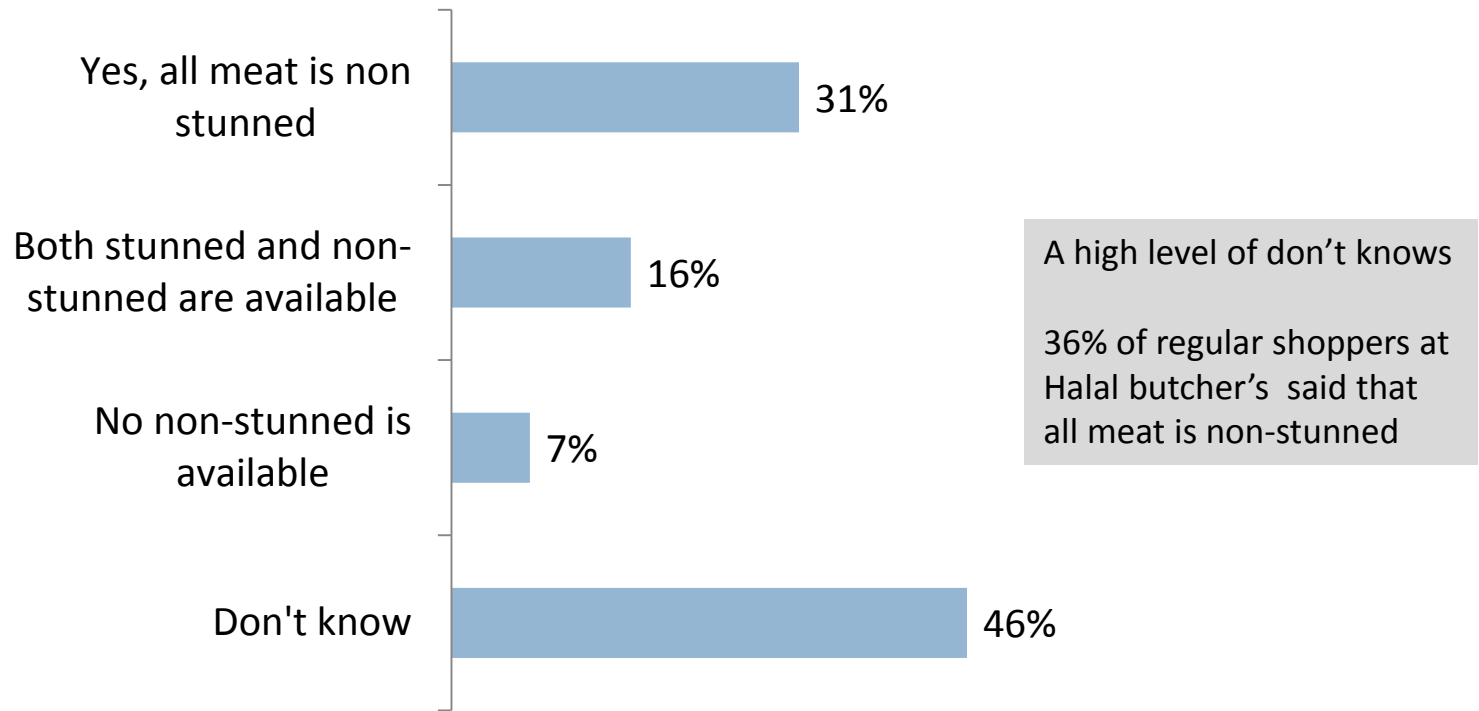
Q – How acceptable or unacceptable do you find the following statements regarding the stunning of animals during the slaughter process?



BASE – All respondents

What does your meat supplier provide

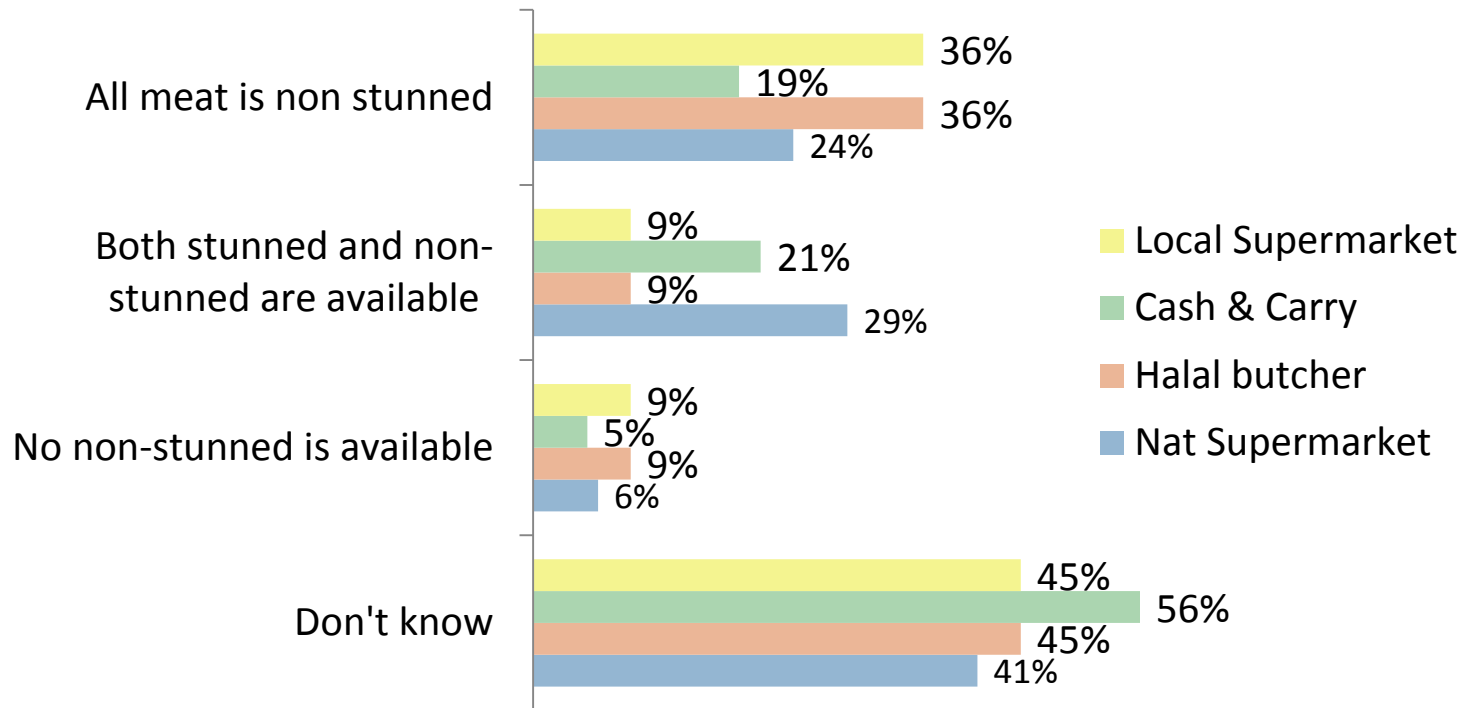
Q – Does your current butcher/supermarket/supplier provide meat that is non-stunned?



BASE – All respondents

What does your meat supplier provide

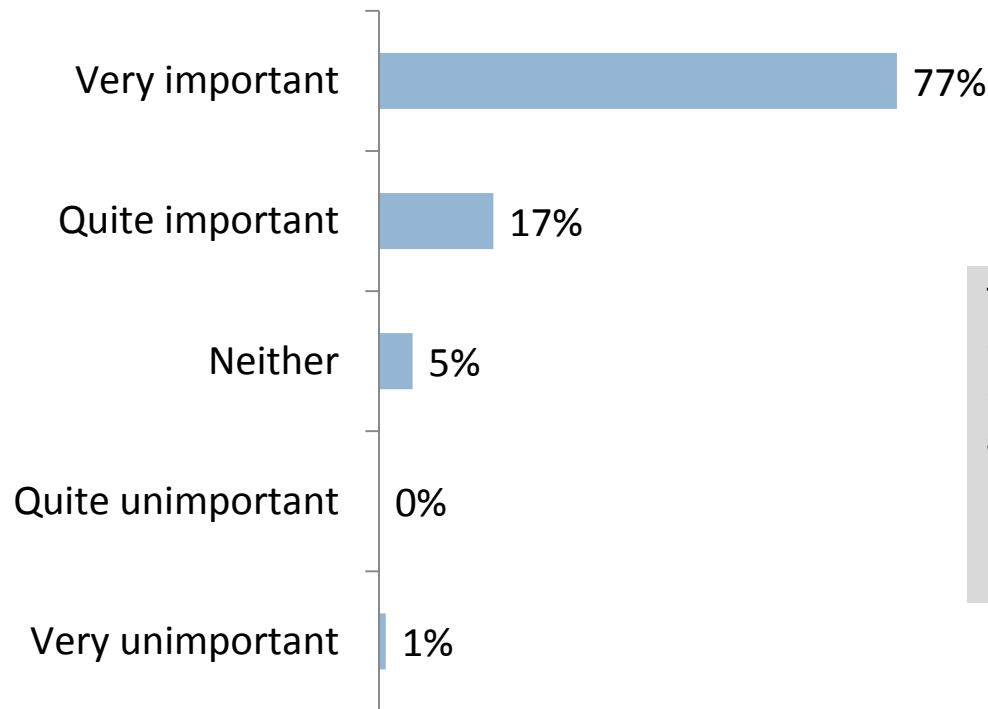
Q – Does your current butcher/supermarket/supplier provide meat that is non-stunned?
Those using as main meat outlet



BASE – Those using as main meat outlet

Importance of having Halal certification

Q – How important is it that pre-packed meat should have a Halal certification logo?

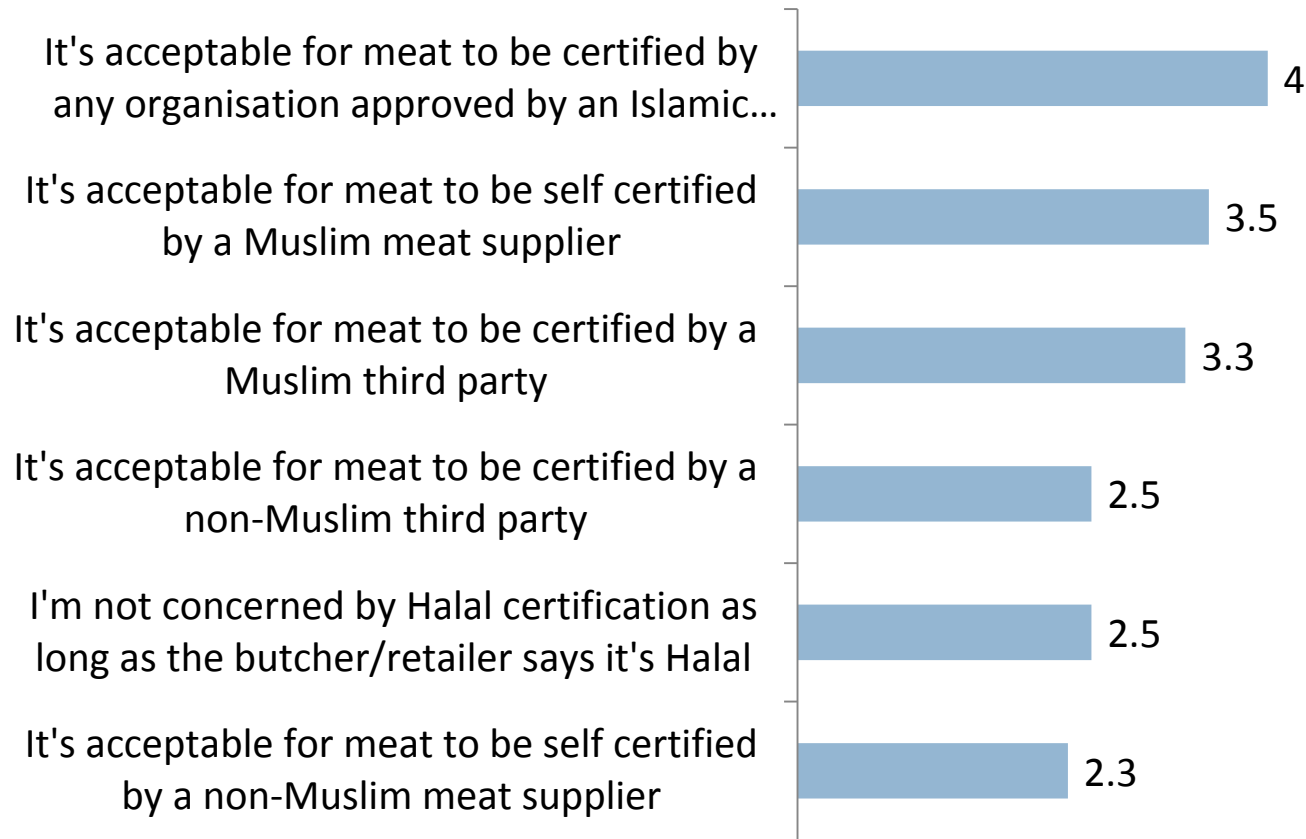


The average score of 4.7 out of five is consistent across the demographic groups, but those of Pakistani and Indian backgrounds score it even higher

Agreement with statements on Halal certification

Q – How strongly do you agree or disagree with the following statements on Halal certification?

Scores out of five where five equals strongly agree



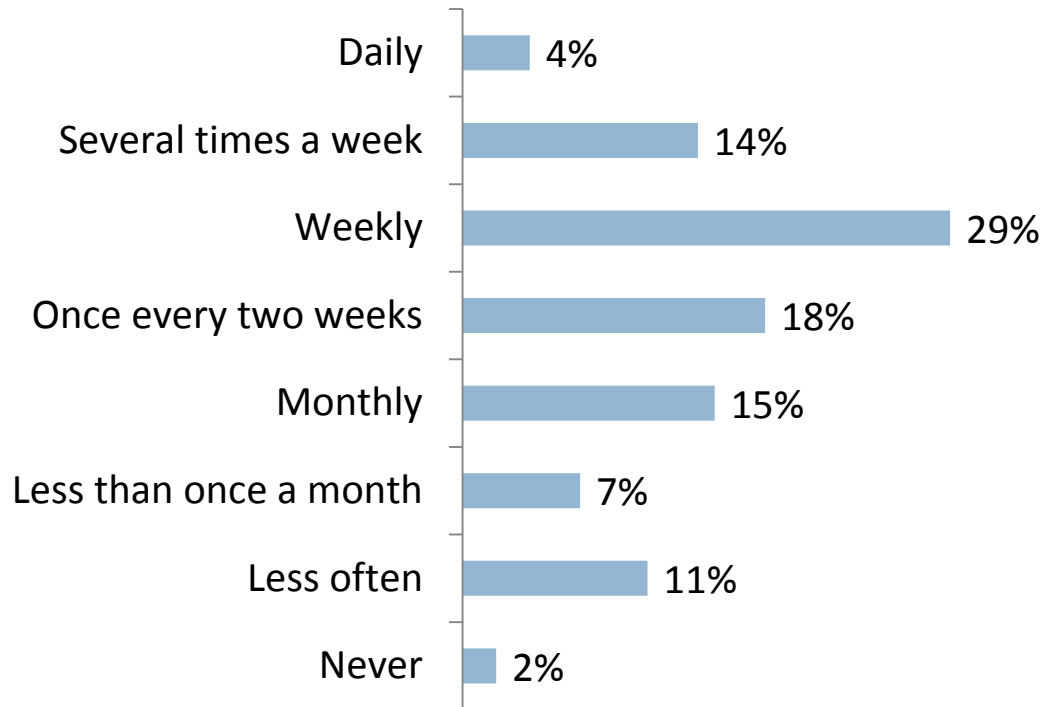
More support for Muslim meat suppliers than for non-Muslim meat suppliers

BASE – All respondents

Diet and eating out

Eating out

Q – How often do you eat out in a restaurant or buy a takeaway?

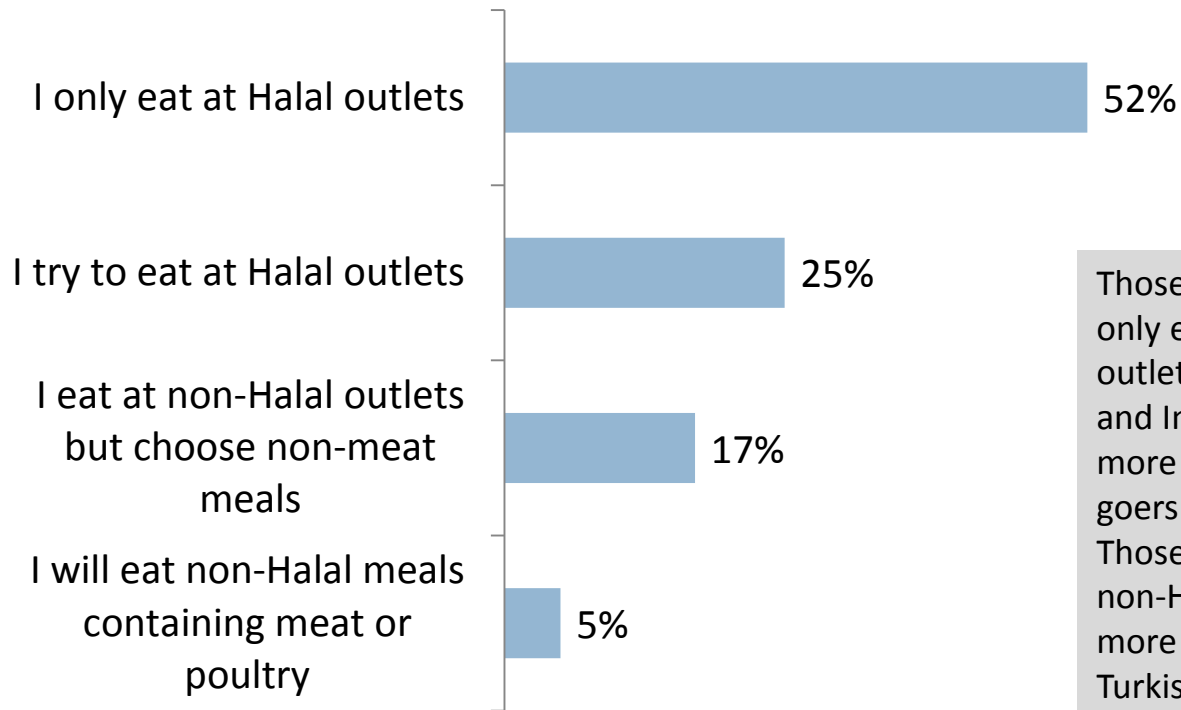


Younger age groups are more likely to eat out more frequently, as are those with a UK background and those visiting a mosque regularly

BASE – All respondents

Eating out – Halal or non-Halal

Q – Which of the following statements most reflects your own eating out or takeaway behaviour?

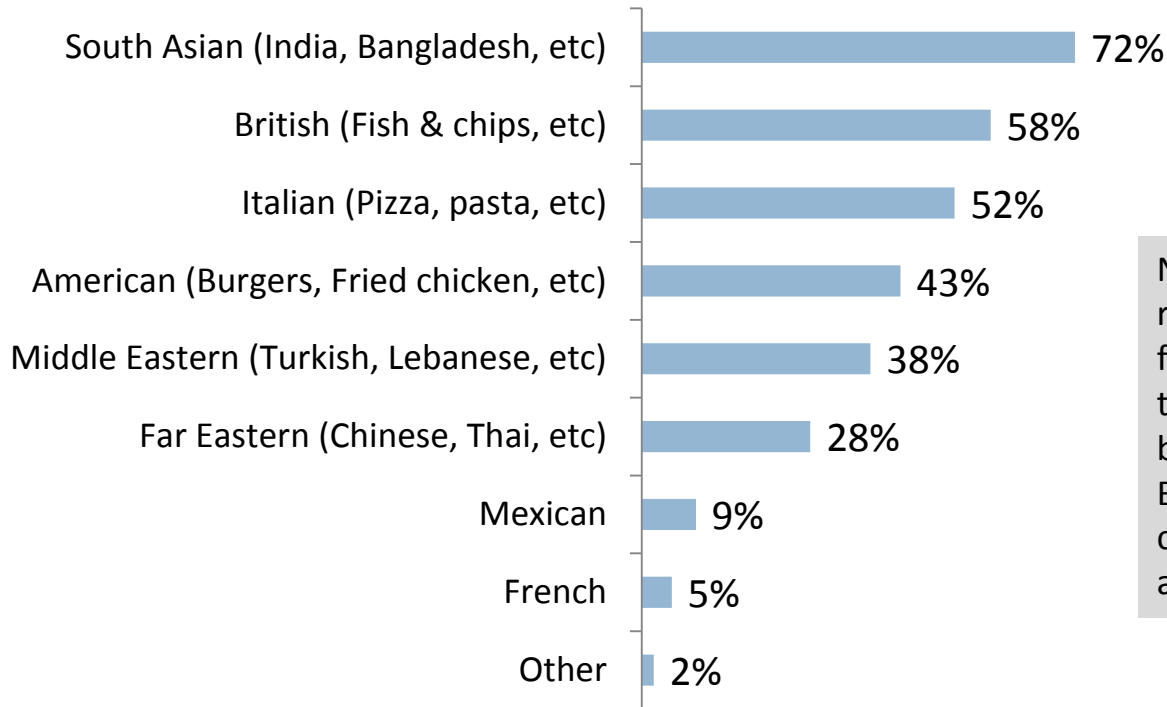


Those more likely to only eat at Halal outlets are Pakistani and Indian and the more frequent mosque goers
Those who will eat non-Halal meals are more likely to be of Turkish and Middle Eastern background

BASE – All respondents

Eating out – Type of cuisine

Q – What type of cuisine have you had in the last three months when eating out or buying a takeaway?

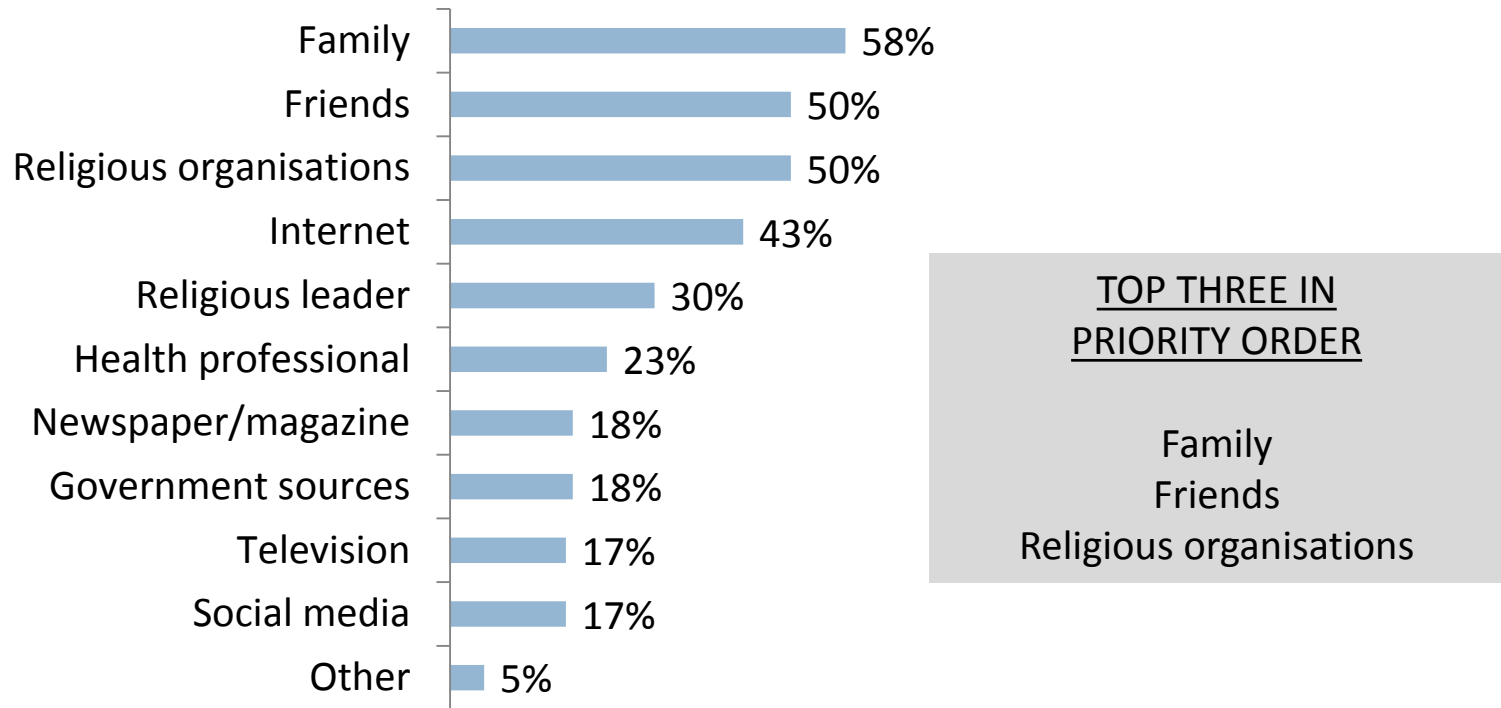


Not surprisingly respondents tend to favour the food from their own particular background. British and Italian cuisine is also popular amongst most groups

BASE – All respondents

Trusted food information

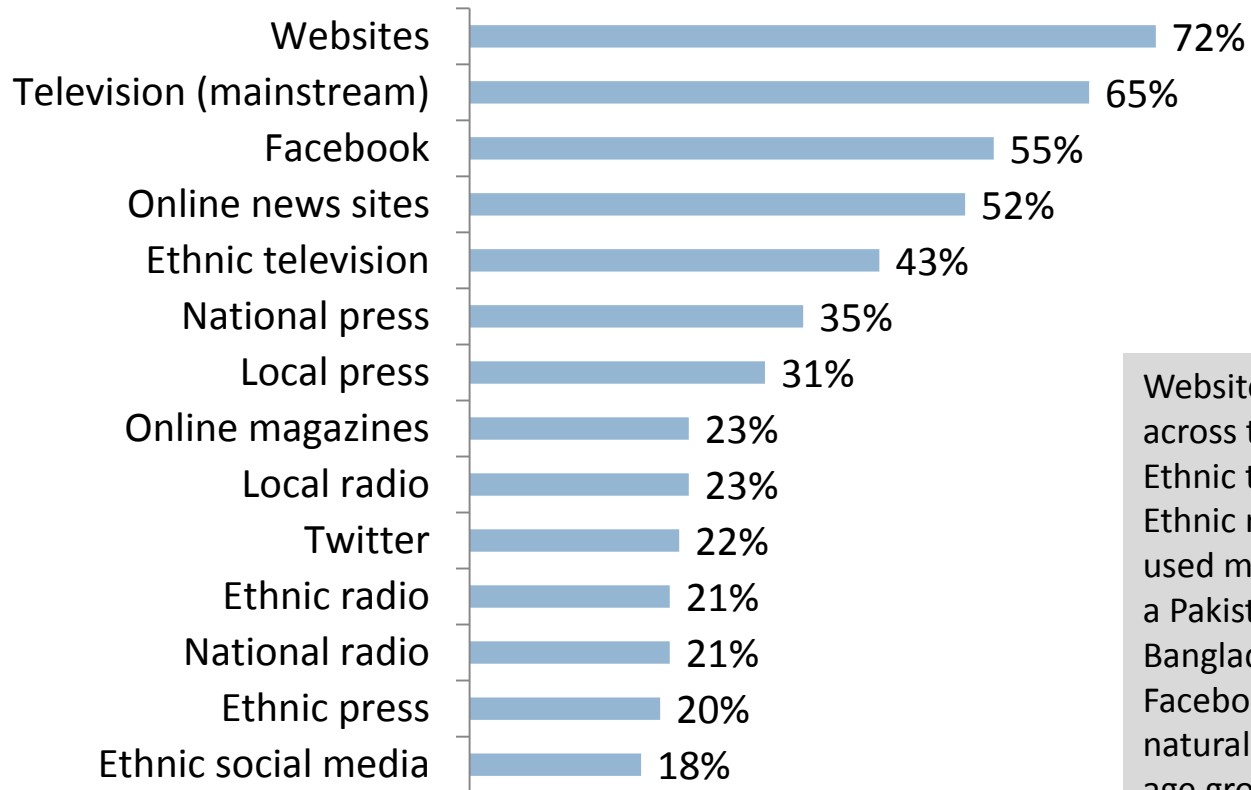
Q – In general where do you look for trusted information about the food you eat?



BASE – All respondents – multi answer

Media usage

Q – How often do you use the following?

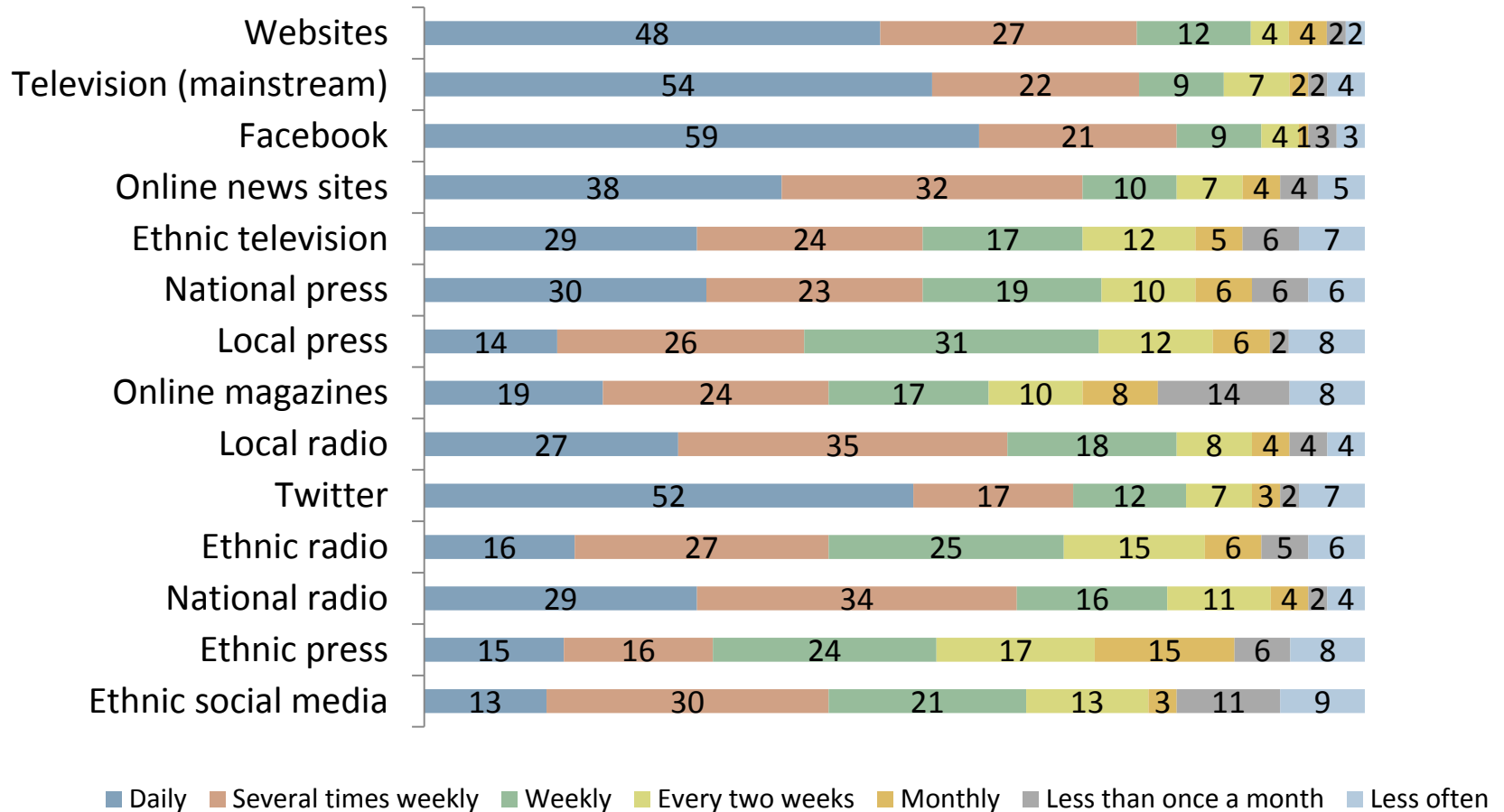


Websites are favoured across the groups
Ethnic television and Ethnic radio tends to be used more by those from a Pakistani and Bangladeshi background.
Facebook and Twitter naturally favour younger age groups

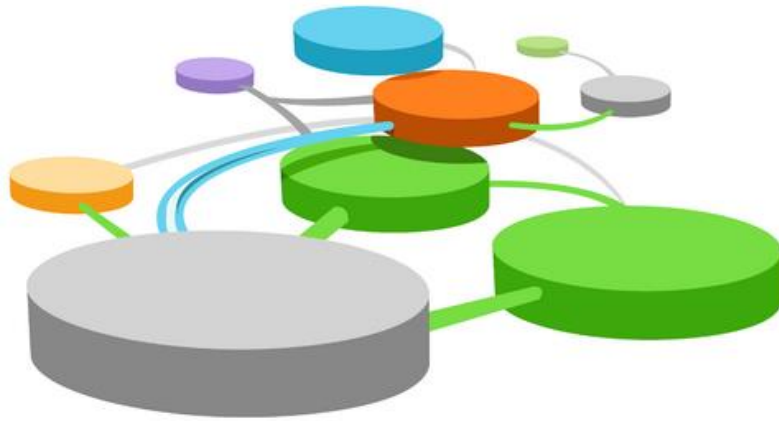
BASE – All respondents

Media usage - frequency

Q – How often do you use.....?



BASE – Those using the medium



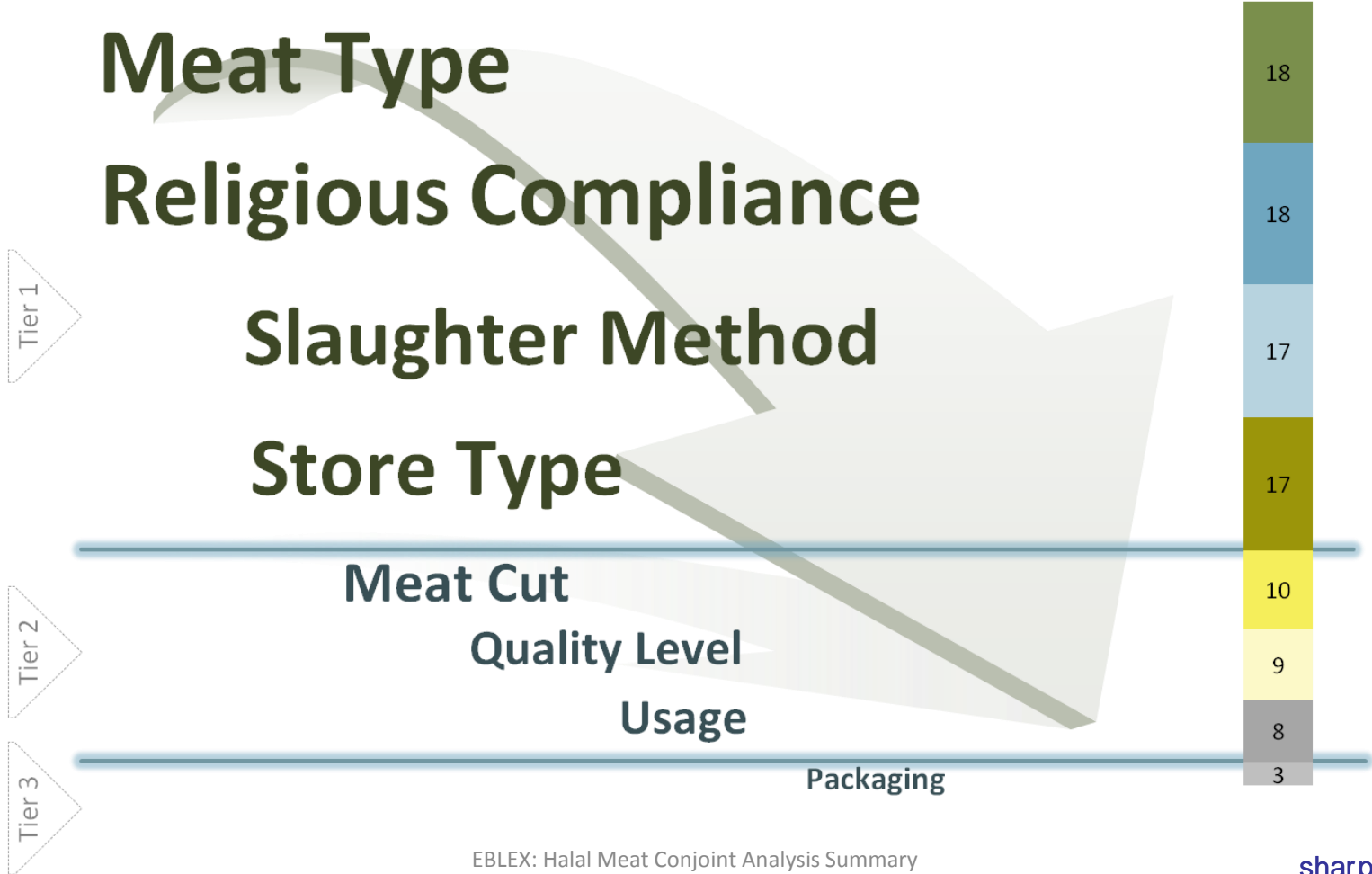
Conjoint Analysis



- Conjoint analysis defines and applies numerical values to the purchase hierarchy when there is a wide range of overlapping variables driving the decision
- For this study we considered eight variables:
Species (Meat Type) / Religious Compliance (Assurance Scheme) / Slaughter Method (stunned or not) / Meat Cut / Store Type (supermarket or independent) / Quality Level / Usage (how long stored) / Packaging
- These conjoint results show the purchase intention hierarchy whereas the online results show attitudes towards Halal Meat and the patterns of purchasing behaviour
- The results were supplemented by a Choice Simulator which has been embedded into Microsoft Excel spreadsheet to enable users to evaluate the potential shopper reach of the c10,400 species, pack, cut, quality and store combinations

The relative importance of the variables driving purchase intention – total sample

Higher level variables are Meat Type, Compliance Assurance Type, Store Type and Slaughter Method. Middle tier variables are Meat Cut, Quality Level and Usage; whilst packaging is the Lower level variable.



The Oxford Partnership Conjoint Preference Simulator

The conjoint preference simulator is contained within a separate Excel file and is used as follows:

1. Select a sub-sample – a life stage, an occasion or a demographic group
2. Select the variables you wish to evaluate – meat quality, assurance scheme, store type, etc.
3. Quantify the reach of that combination amongst the selected sub-sample

In the example 91% of the total sample would buy the combination shown on the left (the optimum); whereas only 35% would buy the one shown on the right (the worst)

Simulator of Concept Preference

③ **91%**
would buy this product

① All ▼

35%
would buy this product

Chicken/ Poultry ▼	Beef ▼
Premium ▼	Standard ▼
Bought from an independent Halal butcher ▼	Bought from a wholesaler/ cash & carry ▼
② As minced meat ▼	As stewing/diced or cubed meat ▼
Cut to order ▼	Pre-packed ▼
Muslim assurance scheme ▼	Family/ Friend assurance ▼
To use the same day ▼	To use the same day ▼
Animal not stunned ▼	Animal stunned (unconscious but alive) ▼

This presentation and
conjoint simulator can
be downloaded from

www.eblextrade.co.uk/halal