

A woman with blonde hair tied back, wearing a red and black plaid sweater, is shown from the side, looking down at a smartphone she is holding in her hands. The background is a blurred grocery store aisle with shelves and bright overhead lights.

Selling Ireland's Meat and Seafood in Online Grocery

The purpose of this study is to help Ireland's Meat and Seafood exporters sell more effectively through online grocery retailers globally.

For this project, we partnered with jump!, an innovation agency with offices in Dublin and London.

01
Understand
Tomorrow

Research,
analysis and
insight.

02
Define
Tomorrow

Brand vision,
positioning
and strategy.

03
Invent
Tomorrow

Innovation,
concepting
and
prototyping.

This project is based on a mix of research and analysis delivered across three phases.

01 Understand Tomorrow

- Primary and secondary research identifying today's landscape and exploring the future context and emerging consumer needs.
- Seven Expert Consultations
- jump! SIGNALS: emerging online retail futures

02 Define Tomorrow

- Quantitative U&A Research (N=3,034) in UK, France and Sweden.
- Online Grocery Shopper Segments

03 Invent Tomorrow

- Online Selling Action Areas

Our analysis assessed a wide range of robust data sources to define the current landscape and identify future shifts



We're telling the story of selling meat and seafood in online grocery in five parts

01 Online Landscape

An overview of where the sector is at today including the macro context which is influencing and shaping it.

Markets and players explored.

02 Quant Research: Online Grocery Shoppers Today

Key headlines from the Kaizen 3 Quantitative Study.

Full jump! report available as a separate document.

03 Online Grocery Shopper Segmentation

Overview of four Online Grocery Shopping Segments emerging from the Quantitative Study.

Full Segment Pack includes more data and descriptions on each.

04 Online Shopping Futures

Summary of nine emerging areas likely to shape tomorrow's online shopping capabilities, shopper habits and experiences.

05 Five Action Areas to Sell Meat and Seafood Better Online

We tie Sections 01-04 together to summarise:

- a. Key Needs
- b. Opportunity Focus
- c. Consumer Action Considerations
- d. Retailer Action Considerations

01 Online Landscape

- a. People Context
- b. Technology Context
- c. Market Overview
- d. Key Retailers
- e. Shopping Experience
- f. Online Trust

People Context
Population

As the population grows, it creates ever-growing demands of consumers.

9.7 billion

Global population by 2050. An increase of 2 billion from today.

68%

People living in urban areas by 2050, an increase of 13% from 2018.

Source:
UN.org

There is collective concern for the environment as experts warn of irreversible damage.



93%

People report that they are concerned about the environment, with 77% wanting to learn to live more sustainably (2019).

Source:
Forbes.com

People Context
Climate Concern

People are making
changes to their
diet in order to live
more sustainably.

1 in 4

US adults report eating
less meat in the last year
(2020).

Source:
Gallup.com

People are spending longer on the internet as they adopt more devices.

6h 42 min

Average time spent online each day globally (2019).

11

The average number of internet devices in US households (2019).

Source:
WeAreSocial.com
Deloitte

This growth is having a profound affect on e-commerce.

80%

The percentage of e-commerce transactions in China that are made through SuperApps like WeChat (2019).

30%

Consumers that would be willing to make a purchase through social media directly (2018).

Source:

McKinsey
Forbes.com

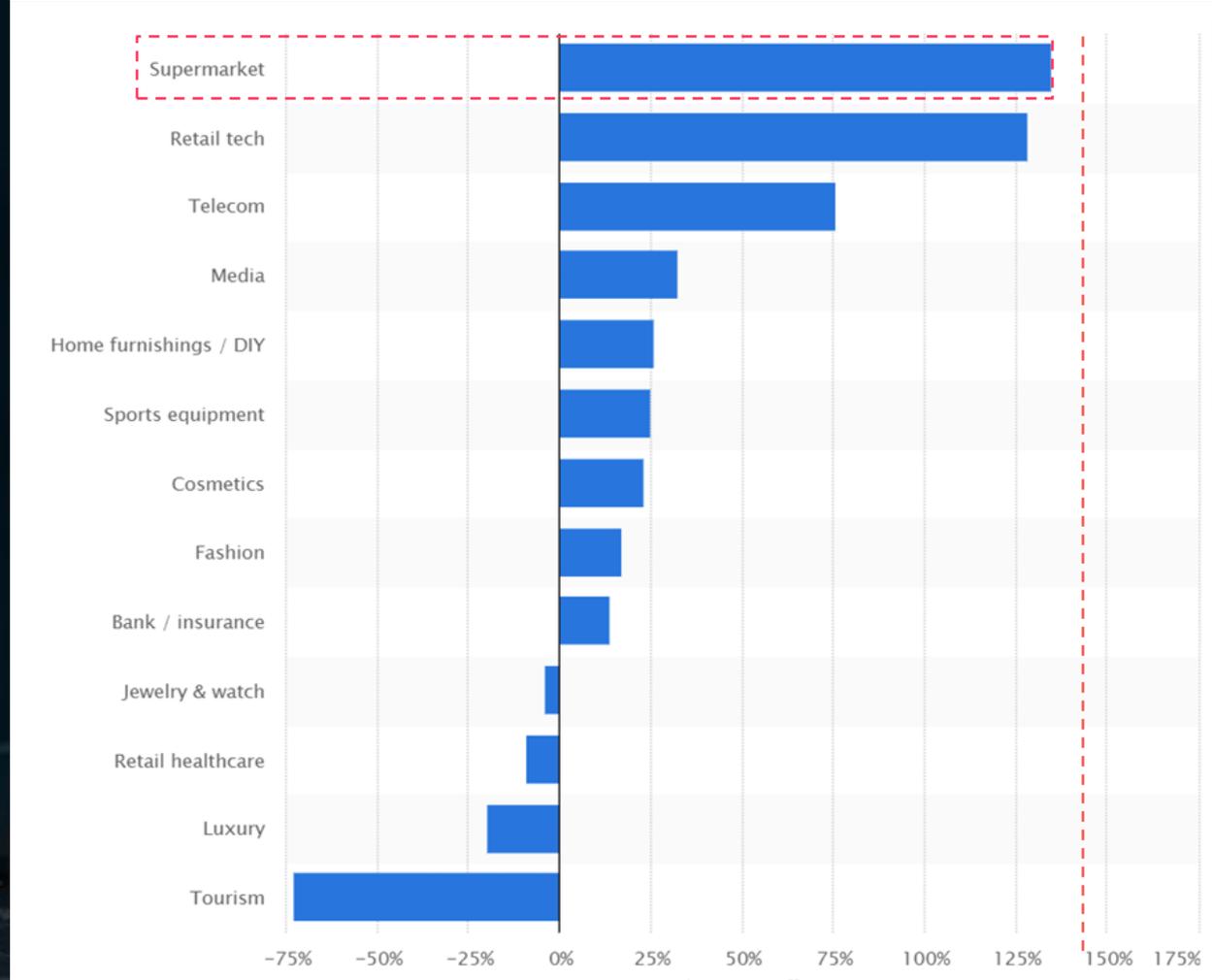
The 2003 SARS outbreak in China paved the way for eCommerce SuperApps; we believe Covid-19 will have a similar impact globally.

926.1
million

Chinese people use eCommerce market giants such as Alibaba, JD.com & Taobao (2020).

Source:
Statista Research

And today, as physical distancing continues, it will grow the adoption rate of online grocery shopping, which we believe will form new consumer habits.

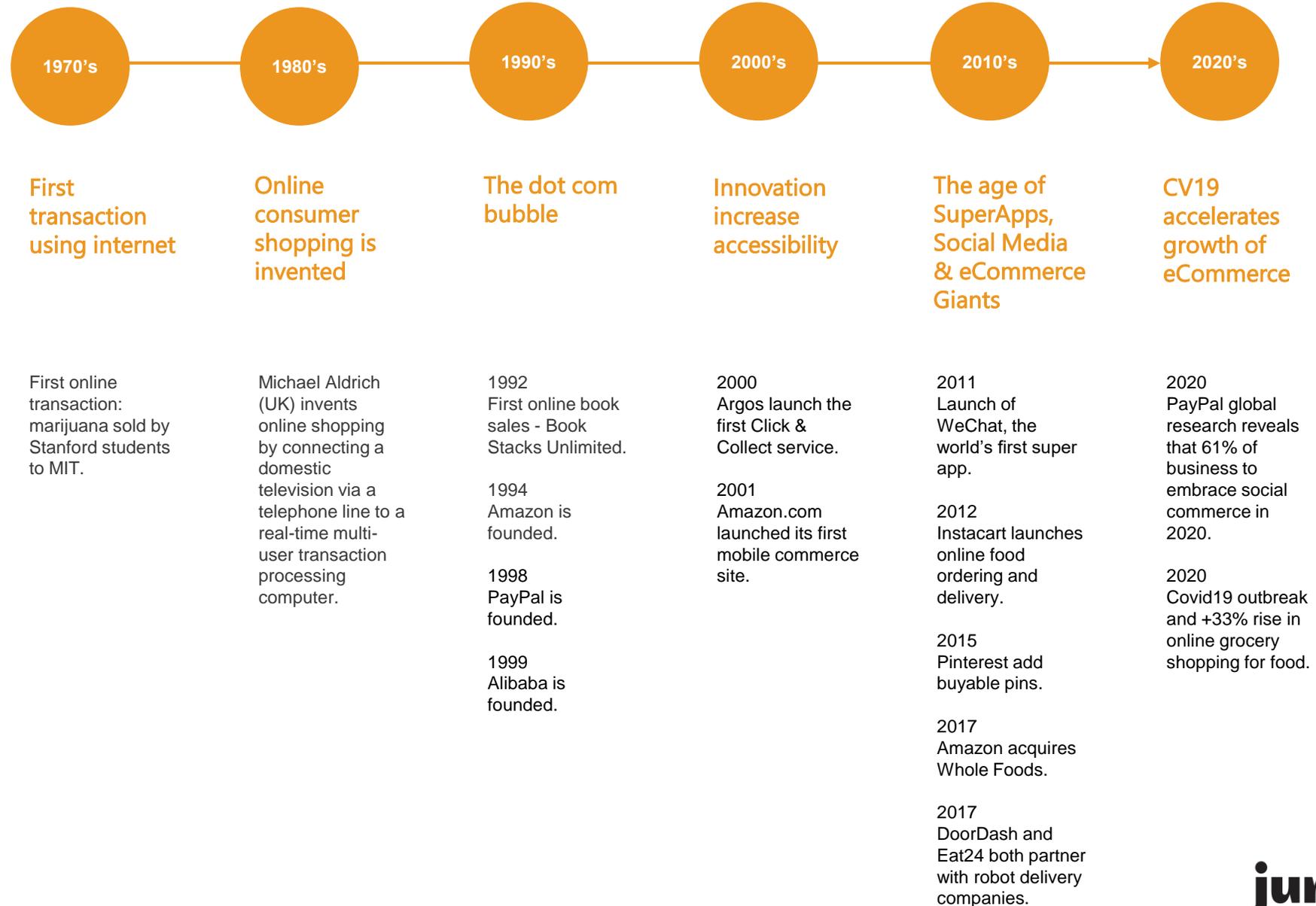


Source:
ContentSquare.com

Market Overview

E-commerce

E-commerce: the first half century!



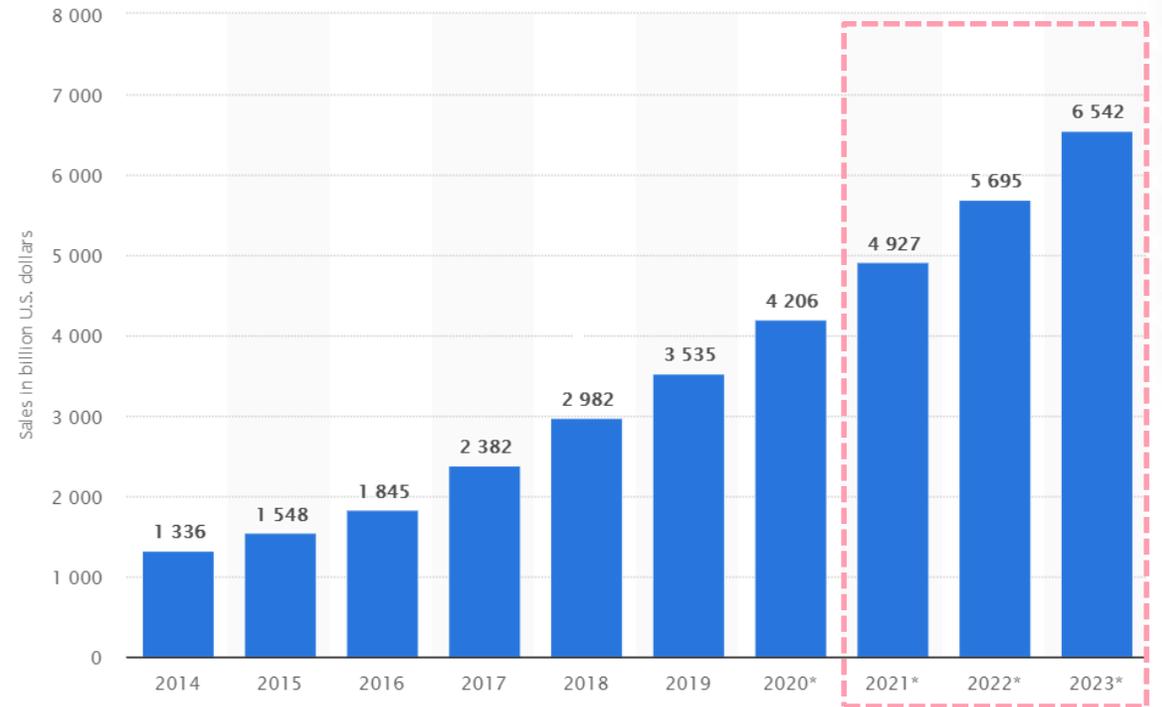
1.8 bn

Of people purchased goods online
(2020).

Online shopping is
now achieving some
global scale

In the three years since
2017, e-commerce has
grown 75% and in the
next three years to
2023 is forecast to
grow a further 55%.

Retail e-commerce sales worldwide from 2014 to 2023
(in billion U.S. dollars)

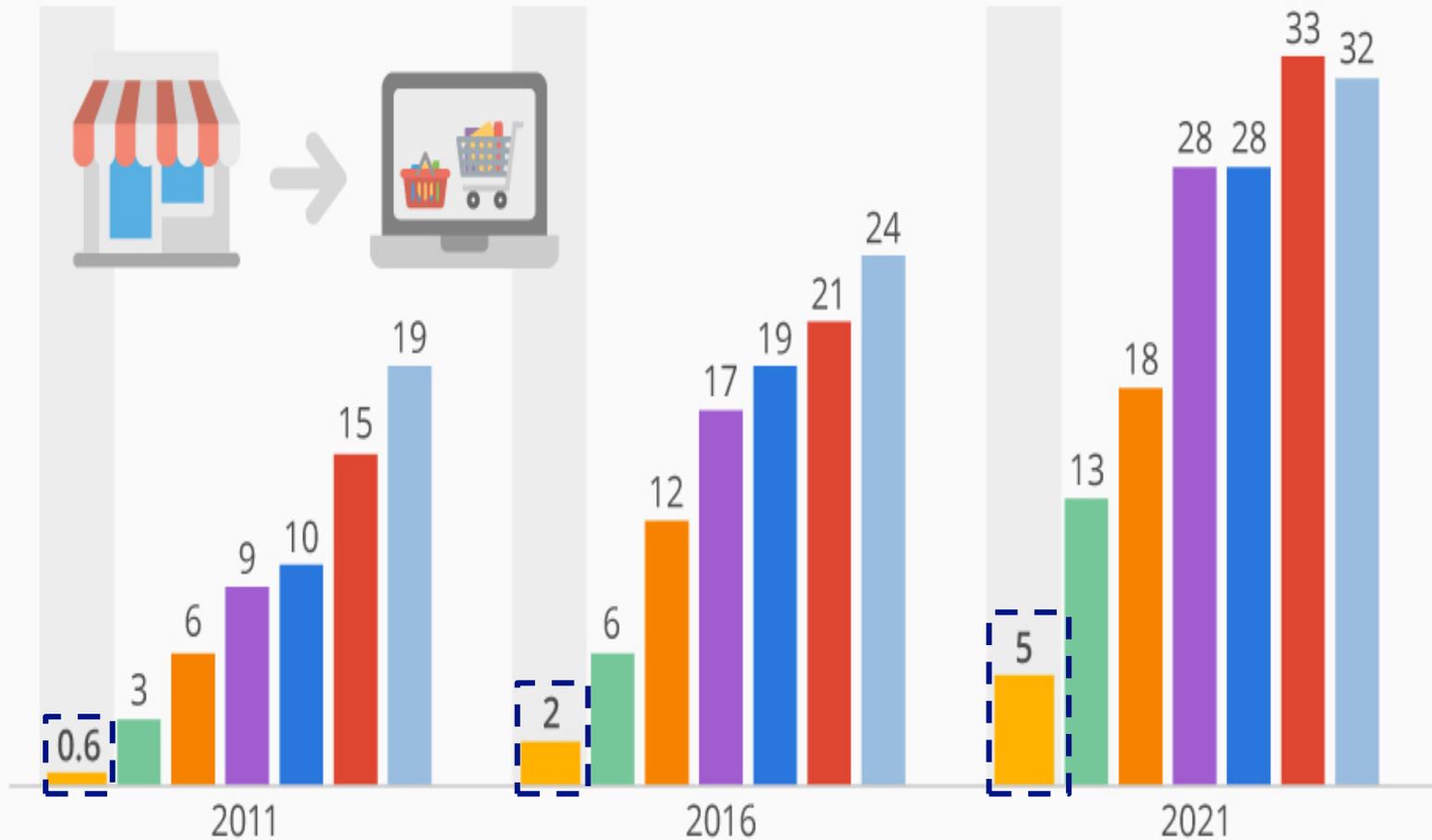


Source:
Statista.com

Whilst groceries trail other categories in transitioning to online, it is the fastest-growing category, forecasted to grow +24% between 2018 – 24.

Groceries Trail Other Categories in Transition to Online

Online share of total sales in the United States, by category (in %)



Covid-19 is having a dramatic affect on the growth of online grocery retail...

The online grocery sector is the fastest-growing sector and what's happening now (CV19) has forced growth. It's not just something that young tech-savvy millennials are doing. We now have older people that have to understand how to do it – that will stick.

Kaizen 3 Expert Panel

+33%

The forecasted growth of the UK online grocery market in 2020 alone.

+218%

Downloads of the mobile app Instacart, an online grocery retailer, in March vs. Feb 2020.

+1 million

Customers waiting to join Ocado in July 2020.

Source:
Mintel.com
TechCrunch.com
The Guardian

...It has spurred a new wave of people to adopt online grocery shopping.

34%

Of Irish consumers buying their groceries online are first-timers while

33%*

of EU Online Grocery Shoppers only started in the past 6 months.

Source:
Empathy Research

*Kaizen 3 Quantitative Study. jump! 2020;
UK, FR, SW, n=3,034

Market Overview
Top Online Grocery Markets

Online
Grocery
Market
Revenue

\$50.9 B

\$31.9 B

\$23.9 B

\$14.6 B

\$9.9 B

Top 5 global
online grocery
retail markets
(2018)



Online
Grocery
Channel
Share

3.8%

7.1%

1.6%

6%

8.3%

Vs.

Top 5 fastest
growing online
grocery markets
by forecasted
CAGR 2018 –
2023.



+31%

+23%

+21%

+20%

+15%

Online grocery sales
of Fresh Food is
growing as consumer
preference shifts
online
(US, 2018-19)

+41%

Growth in fresh produce in online grocery shopping

+36%

Growth of meat sales in online grocery shopping

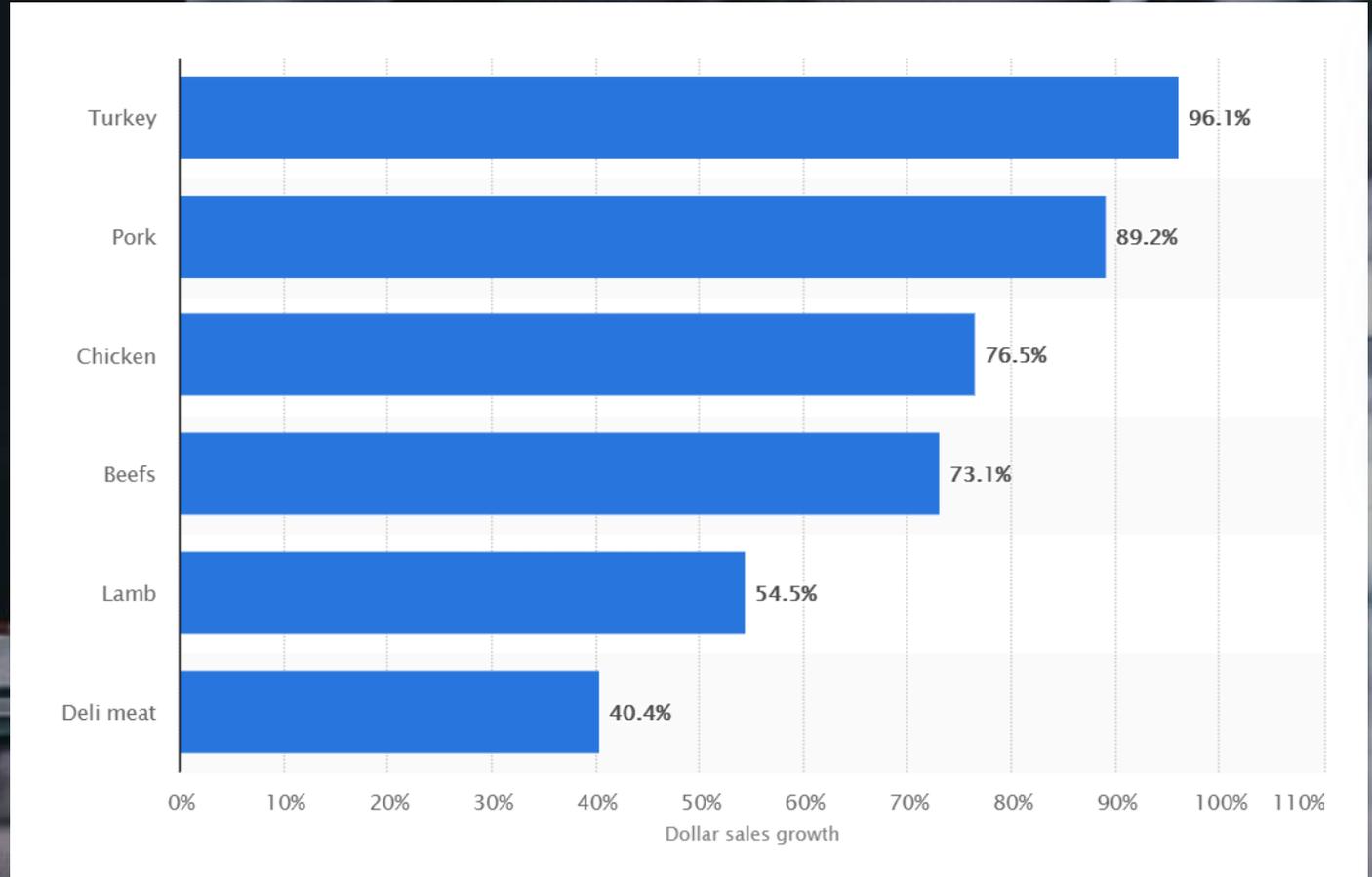
+14%

Growth of seafood sales in online grocery shopping

Overall US meat sales have driven an upturn since Covid-19.

In the EU*, Online Grocery Shoppers also report buying more meat online since Covid-19.

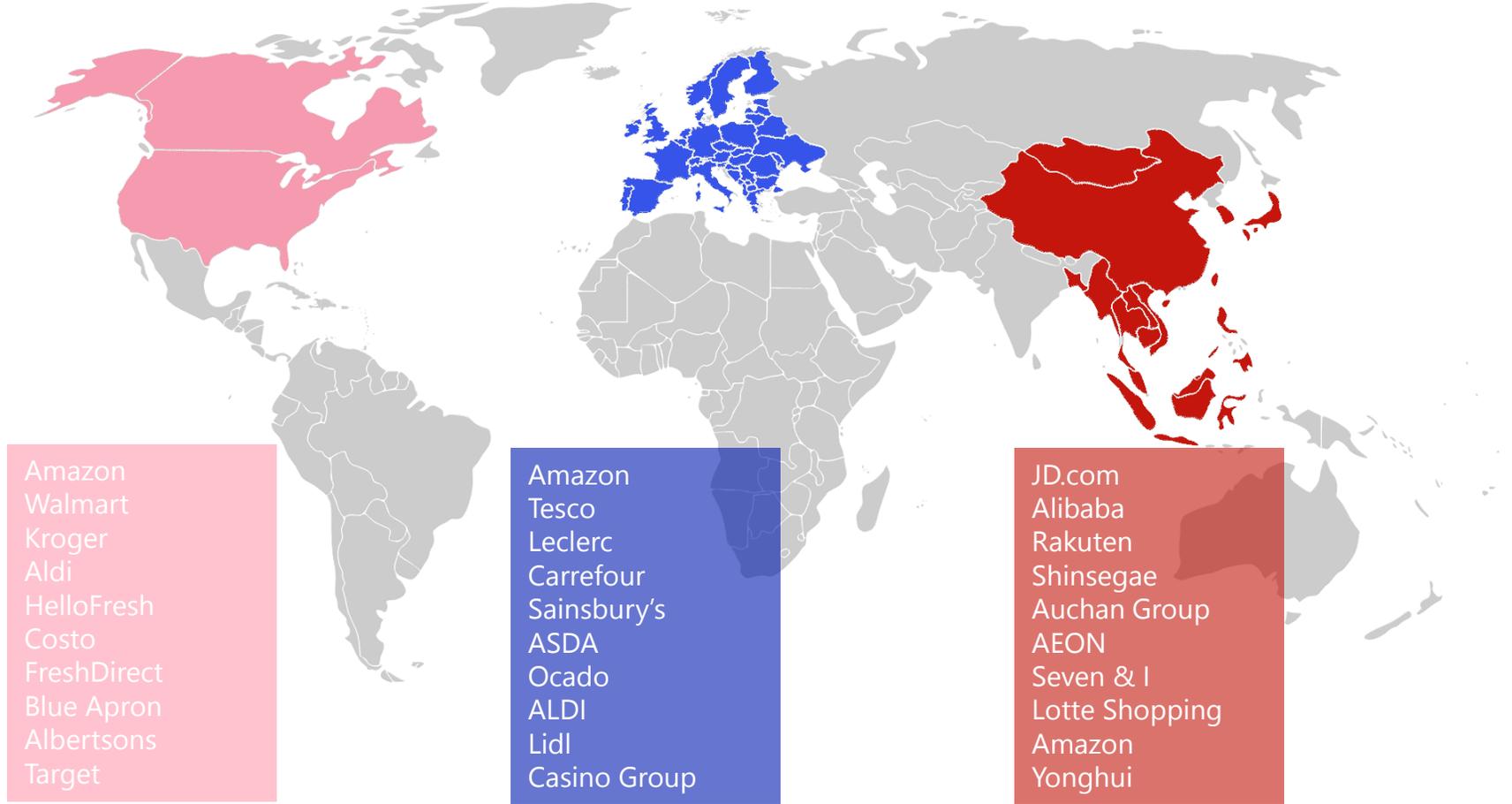
Impact of coronavirus (COVID-19) on the sales growth of meat in the United States for week ending March 15, 2020, by category*



Source:
WinsightGroceryBusiness.com
Note:

*Kaizen 3 Quantitative Study 2020 as represented by UK, France & Sweden (N = 3,034)

Top 10 ranking of online grocery retailers by region



Shopping Experience
Delivery Expectations

Consumers want
timely and speedy
delivery options
when shopping
online.

88%

Online shoppers globally
are willing to pay for
same-day or faster
delivery
(2019).

Source:
PWC Global Consumer Insights Survey 2019

Consumers no longer rely on physical stores as they increasingly shop through multiple devices.

As such, consumers are increasingly turning to social media platforms to research a product before buying.

+25%

The global growth of mobile (m)-commerce in 2020. An increase in market sale value of \$600 million.

Source:
Oberlo.com

25%

Of Irish shoppers use social media to browse for new items. 37% among Gen Z (2019).

Source:
PWC Report

Privacy is a concern for the majority of people when sharing information.

However, people believe online retailers that deliver personalised user experience are more trustworthy.

8/10

global citizens are concerned about their online privacy (2019).

Source
IPSOS Public Affairs Report

75%

Global consumers are more likely to buy from a retailers that recognizes them by name and recommends options based on past purchases (2018).

Source
Forbes.com

E-commerce business strategies

01 No-Store

Traditional e-commerce platforms providing home delivery for grocery shopping that comes from fulfilment centres (also known as dark stores).



Fresh Product Implications

High-level management of delivery channel.

Challenge is to overcome the lack of sensory experience that exists in-store and deliver trust in quality products.

02 Local Store

Buy online from an existing physical supplier such as your local store or nearby farm through home delivery or click and collect.



Fresh Product Implications

Locality and physical presence increases trust in freshness of products.

Increased likelihood that consumers will trust and therefore continue to grocery shop here.

03 Experience Store

The integration of online and offline technologies to create highly experiential physical stores. Shop and pay in-store via app, with option for delivery or take-away.



Fresh Product Implications

Provides grocery shoppers with a sensory experience while delivering superior levels of convenience.

No-store Strategy: Amazon Fresh:

amazon Amazon Fresh

Deliver to Ireland Today's Deals Customer Service Registry Gift Cards Sell Amazon's response to COVID-19

fresh Past Purchases Deals Lists Groceries Household, Health & Beauty Local Market

Meat & Seafood

Serve the latest flavors

BEEF CHICKEN PORK SEAFOOD MEAT SUBSTITUTES

Fresh Seafood

From the manufacturer

Marine Harvest Fresh Atlantic Salmon, Skin-On, Responsibly Farm-Raised, 12 oz
★★★★★ 557

Fresh Tilapia Fillets, Raised, 12 oz
★★★★★ 270

Customer reviews
★★★★★ 4.5 out of 5
557 customer ratings

5 star	76%
4 star	19%
3 star	7%
2 star	2%
1 star	5%

How does Amazon calculate star ratings?

By feature

Portion size	★★★★★ 4.2
Flavor	★★★★★ 4.2
Value for money	★★★★★ 4.2

See more

Farm Sites
Our salmon are raised in ocean waters, isolated and contained in a pure environment that is perfect for producing premium salmon.

Salmon Color
Naturally occurring carotenoid pigments in our feed give the salmon their bright orange color. Wild salmon also get their color from carotenoids by eating crustaceans.

Environmental Impact
Our farm sites are in areas where free-flowing water ensures clean water flow and minimal impact on the local environment. When the impact on the seabed is considered unsatisfactory we take corrective action and allow seabed communities to recover.

Omega-3's
Each 6 oz. portion of Marine Harvest salmon contains approximately 3.23 mg of Omega-3 fatty acids. This is comparable with levels found in wild salmon. Eating seafood twice a week is recommended by the USDA/PHS Dietary Guidelines for Americans.

How is this 'Atlantic' salmon, when it comes from Chile and is farmed in the Pacific Ocean?
Atlantic salmon, or *Salmo salar*, is the species of the fish, not the name of the body of water in which they are raised.

'Atlantic' Salmon
Farming Locations Mercury Levels Safety Concerns

by Marine Harvest
Marine Harvest Fresh Atlantic Salmon, Skin-On, Responsibly Farm-Raised, 12 oz
★★★★★ 557 ratings 128 answered questions

Price: \$7.99 (12.49/lb)

Shop fish and seafood intelligently.

- Marine Harvest Atlantic salmon is fresh and never frozen, dry packed, brined, pastured, or smoked.
- Free weights per package, each 6 oz. portion contains 35 grams of protein and 100% of the recommended daily value of Omega-3.
- Only 100 calories per serving.
- Responsibly farmed product of Chile or Canada.

Freshness Guarantee
We guarantee that you will be satisfied with the freshness and quality of this product, and that it will be delivered to your home within an applicable time to, will be, best by or expiration date.

Intro

Amazon Fresh is an online grocery retailer that delivers in the US, Asia and Europe. It is a one-stop-shop ecosystem designed to meet all grocery needs.

Focus

Fast and simple. A small selection with focus on ready to eat, processed food for simple recipes.

Shopper Experience

1. Minimal click strategy. Three clicks to add to cart on average.
2. Shoppers are nudged through star ratings, reviews, and recommendations.
3. Subscription model available to reduce delivery fees and increase delivery time.
4. Experience feels seductive to impulse purchasing across any device.

Selling Meat and Seafood

1. Multimedia Content to promote product with content on provenance and nutrition.
2. Using multi faceted photos of the product, cooked, packaged, raw.
3. Peer reviews and comments with recipes shared.

Learnings / Tips

- a. Reduce the amount of clicks to add to cart (3).
- b. Promote user reviews with photos of product.
- c. Short, sharp copy with bullet points.
- d. Push video, media, images and content to nurture visitors with information on freshness, quality.

Local Store Strategy: Walmart

The screenshot shows the Walmart.com website interface. At the top, there's a navigation bar with 'Pickup & delivery' and 'Walmart.com'. Below that is a search bar with 'Search Walmart.com' and a magnifying glass icon. A 'NextDay delivery' toggle is visible. The main navigation includes categories like 'Food', 'Trending', 'Seasonal Grocery', 'Beverages', 'Coffee', 'Snacks, Cookies & Chips', 'Baking', 'Breakfast & Cereal', 'Chocolate, Candy & Gum', 'Meal Solutions, Grains & Pasta', and 'Condiments, Sa'. A 'Shop by Category' sidebar on the left lists various food categories. The main content area features a 'Refine by' section with filters for 'Price', 'Top Brands', and 'Store Availability'. A 'Food Spotlight' section displays a collage of grocery items. Below this, there are product tiles for 'Bacon & Sausages', 'Hot Dogs', 'Beef', 'Poultry', and 'Fish & Seafood'. A 'BEST SELLER' badge is present above a product listing for 'All Natural 93% Lean/7% Fat Lean Ground Beef Tray, 1 lb'. The product details include a price of \$5.47, a rating of 3.6 stars from 16 reviews, and a 'See all reviews' button. A 'Customer Reviews' section shows a star distribution chart.

Intro

Local Stores with 3,100 curbside pick up covering 80% of the US population and Intense delivery service investment to reach 50% of American households.

Focus

Bulk and Choice. A large variety of sorting criteria and products are sold in lots.

Shopper Experience

1. Choose your store, free pick-up as well as the availability in-store is displayed as first information
2. Quick access to 'customers also viewed' or 'customers also clicked'
3. Price oriented and family specials to access quickly to discount and bulk
4. First page dedicated to season and innovation discovery

Selling Meat and Seafood

1. Presented packaged, canned or processed.
2. Majority of seafood is frozen. When not, it is mainly processed fish products, or packaged and seasoned fish.
3. Family pack with nutritional information sheet and cooked photo.

Learnings / Tips

- a. All fresh food is presented packaged.
- b. Cooked dramatized high quality photos of raw product.
- c. Peer reviews link to the product.
- d. Peers favourites for add on purchases.

Experience Store Strategy: Hema Fresh (Alibaba Group)

The screenshot displays the Hema Fresh app interface. At the top, a banner reads "FRESH FOOD" over a background of fresh produce. Below this is a "FEATURED SELLERS" section with four tiles: "GREEN GINSENG FOOD", "JUNDE STEAK" (imported beef), "XIANYOU" (imported seafood), and "TYSON" (chicken). To the left is the Hema logo (盒马). Below the featured sellers are two rows of circular icons representing product categories: "水果蔬菜" (Fruit & Vegetables), "肉禽蛋品" (Meat, Poultry & Eggs), "海鲜水产" (Seafood & Aquatic Products), "餐饮熟食" (Food & Beverages), "速食冻品" (Ready-to-eat & Frozen Foods), "云超特卖" (Cloud Super Specials), "粮油零食" (Grains, Oils & Snacks), "酒水饮料" (Alcohol & Beverages), "美护百货" (Beauty & Daily Goods), and "乳饮烘焙" (Dairy, Drinks & Baking). On the right, there are images of fresh salmon and a person using a smartphone to scan a product. At the bottom left, a "FOOD TRACKING" section shows a timeline of a product's journey from farm to store. At the bottom right, a photo shows a staff member holding two large lobsters.

Intro

Hema Fresh is an 'Experience Store' in urban China. It combines the best of real-world experience with digital convenience. It also serves as a fulfilment centre and restaurant. Everything is linked to the Hema Fresh App.

Focus

All products are brought to life, highlighting fresher produce and superior experience.

Shopper Experience

1. Shoppers are autonomous as they scan their products and choose their delivery.
2. Scan products through the HemaApp to see shopper reviews, production information, its shelf life and delivery options.
3. Pay through HemaApp or facial recognition.
4. Free delivery and in under 30 minutes locally.

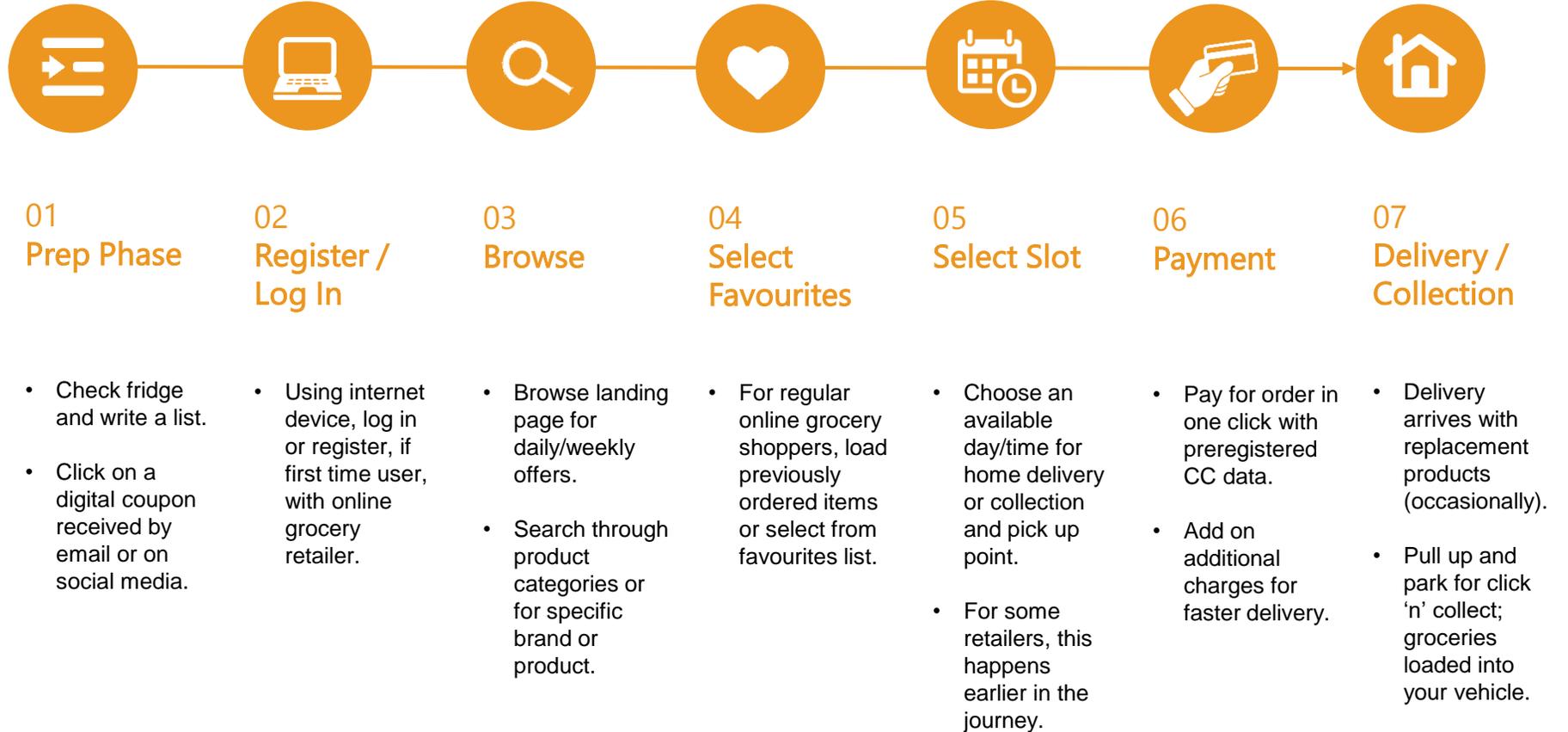
Selling Meat and Seafood

1. High-resolution images of produce online.
2. Virtually all fresh food has a feature that unpacks the entire farm to store journey.
3. Lots of peer reviews and recipe ideas.
4. Bright colours with curated placement of meat and seafood portraying a focus on health.

Learnings / Tips

- a. Mobile first creates easy to use shopping experience.
- b. Amplified sensory experiences earn trust.
- c. Easily accessible Information through App scanner, including photos, certifications, videos.
- d. Freshness with bright photos and live videos or live experience.

Typical online grocery shopping journey.



02

K3 Quant: OGS
Today

- a. Methodology
- b. Executive Summary
- c. Online Grocery Shopping
- d. Buying M/SF Online
- e. Nudges
- f. Approaches to Selling M/SF Online



Methodology

01

Who?

3,034 Online Grocery Shoppers in UK (1,003), France (1,019), and Sweden (1,012)

All mainly or jointly responsible for household grocery shopping.

All buy meat and/or seafood for their household.

N.B. Throughout this section 'OGS' is used as an abbreviation for Online Grocery Shoppers.

02

What?

Online Survey

20 Mins

Overview:

- i. Socio Demographics
- ii. Online Grocery U&A
- iii. Meat/Seafood U&A*
- iv. BE, Approaches, Buying Irish
- v. Final Socio Demographics

*Meat and seafood throughout the report refers to fresh products (excludes frozen).

Beef, lamb, fish and shellfish were the focus of this study.

03

Where?

UK

8th-15th July 2020

- CV19 restrictions implemented end of March, lifted in June

France

15th-21st July 2020

- CV19 restrictions implemented mid March, lifted in June

Sweden

15th-24th July 2020

- No CV19 restrictions implemented

Executive Summary

Online Grocery: U&A

1. Online grocery shopping habits are still being formed
2. Average online grocery spend is around €205 per month, suggesting that spending online is short of overall monthly grocery spend (based on most comparable data).
3. Online grocery retail channels show significant room for penetration growth of Fresh Meat and Fresh Seafood.

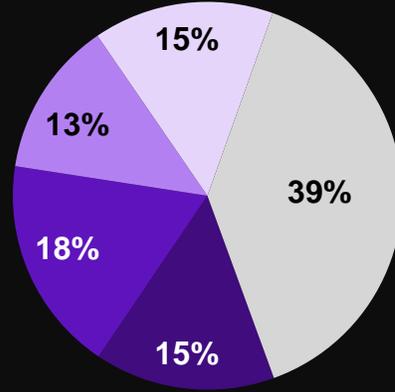
Online Meat and Seafood: U&A

1. Approx. 94% of the population eat meat/seafood (EU), while only 56% report buying meat and/or seafood online. Suggests room for growth.
2. The main reasons for not considering purchase of a type of meat or seafood is freshness and quality concerns.
3. There are clear opportunities for growth among OGS who do not currently buy m/sf online. High openness.
4. Quality and Delivery Quality are the critical factors people consider in buying online meat and seafood.
5. Nudges which emphasize herd effect show potential among OGS.
6. Point of origin is important but origin doesn't always equal 'local' and Ireland is predominantly a strong asset for meat and seafood online.
7. OGS also show an appetite for buying meat and seafood brands. Brand can be part of reassurance OGS seek online, a tool to build trust and confidence.

Online Grocery shopping habits are still being formed.

This points to opportunities for producers, brands and retailers to connect with OGS and become part of their online grocery shopping repertoire.

Total
(3,034)



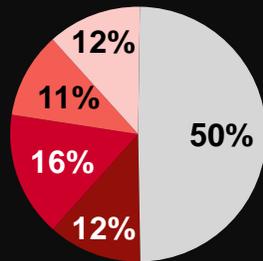
■ 3 months or less ■ 3-6 months ■ 6-12 months ■ 1-2 years ■ 2+ years

46%

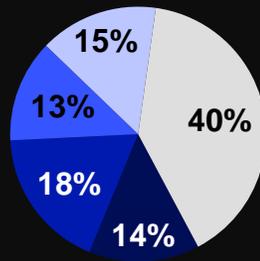
Of OGS only started shopping for groceries online within the last year.

33%

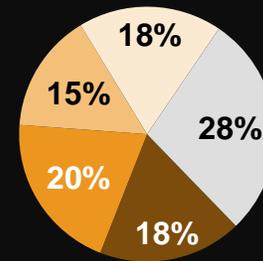
Only started in the previous six months, and CV19 was the reason 4 in 5 of them did so.



UK
(1,003)



France
(1,019)



Sweden
(1,012)

Source:
Kaizen 3 Quantitative Study (jump!, 2020)

Laptops, main shops and delivery currently define the online grocery experience.

Data also suggests that spending online falls short of overall monthly grocery spend and that frequency of online shops is far below in-store trips (based on most comparable data*).

There is an opportunity to offer a more top-up experience and therefore facilitate more frequent online shopping & increase monthly spend.

Purpose?

73% of OGS use online for main shop.

Note: French OGS are most likely to use it for top-ups (47%) and therefore more likely to 'Click & Collect' (48%) vs get Delivery (36%).

Spend?

€205 Avg. monthly online grocery spend

This is considerably lower than overall monthly grocery spend ranging from €300 (UK) to €385 (FR)*.

Service?

54% of OGS use delivery exclusively.

Note: In the UK, 75% of OGS use Delivery only, much higher than FR (36%) or SW (52%).

Frequency?

2.11 Avg. number of online grocery shops per month

While not an exact comparison, Kantar data puts all in-store grocery trips (UK) at about 16 per month*.

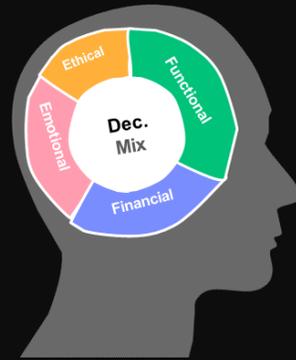
Method?

Laptops are main device used by 40% of OGS.

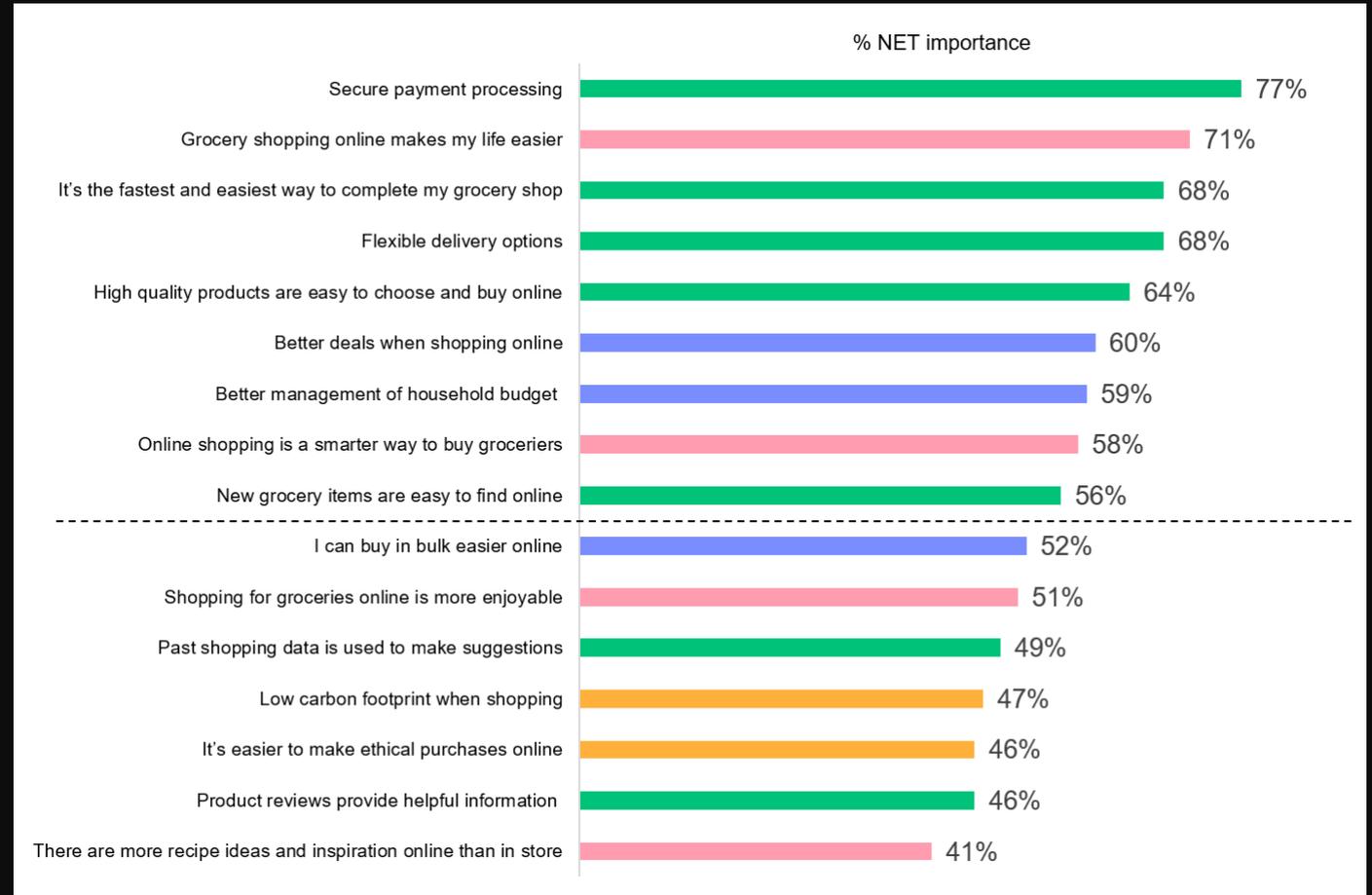
Exception: Sweden, where there is a propensity to use mobile (37%) among this newer, slightly more affluent market.

We use the jump! Decision Mix to understand how consumers assess the products and brands they encounter everyday.

For online grocery shopping, there is relative high importance across the Decision Mix values, reinforcing the need to nail a range of elements.



1. **Functional** - the practical value of a product
2. **Financial** – the monetary value of a product
3. **Emotional** – how a product makes me feel
4. **Ethical** – how it aligns with my values and beliefs

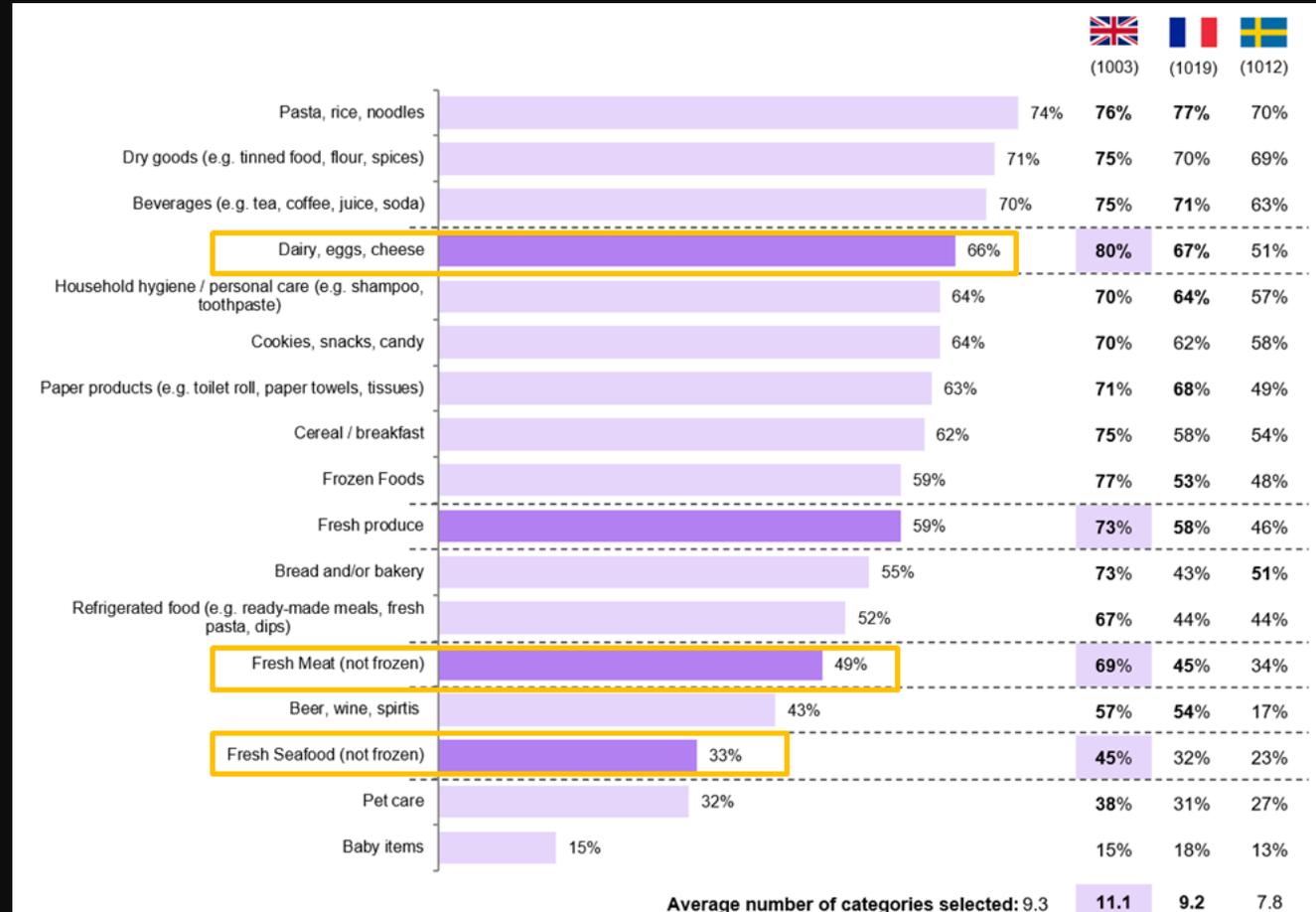


There is significant room for penetration growth.

Fresh Meat and Fresh Seafood trail Dairy, Eggs, Cheese category penetration by 17% and 33%, respectively.

If barriers can be overcome or mitigated, we believe there is potential to make inroads on these gaps.

Online Grocery Shopping Trolley



94%

Of the EU population eats meat/seafood (2020).

Source: European Vegetarian Union

There are clear opportunities for growth among OGS who don't currently buy meat and/or seafood online.

Among OGS who don't buy m or s/f online:

44%

Open to buying beef

54%

Open to buying fish

24%

Open to buying lamb/mutton

34%

Open to buying shellfish

The main reasons for not buying meat/seafood online strongly relate to sensory barriers.

Therefore, online grocery retailers need to dial up the elements which enable buyers to more easily determine freshness and quality.

#1

I like to select myself

#2

I like to see the meat/seafood I am buying

#3

Concerned with Freshness / Concerned with Quality

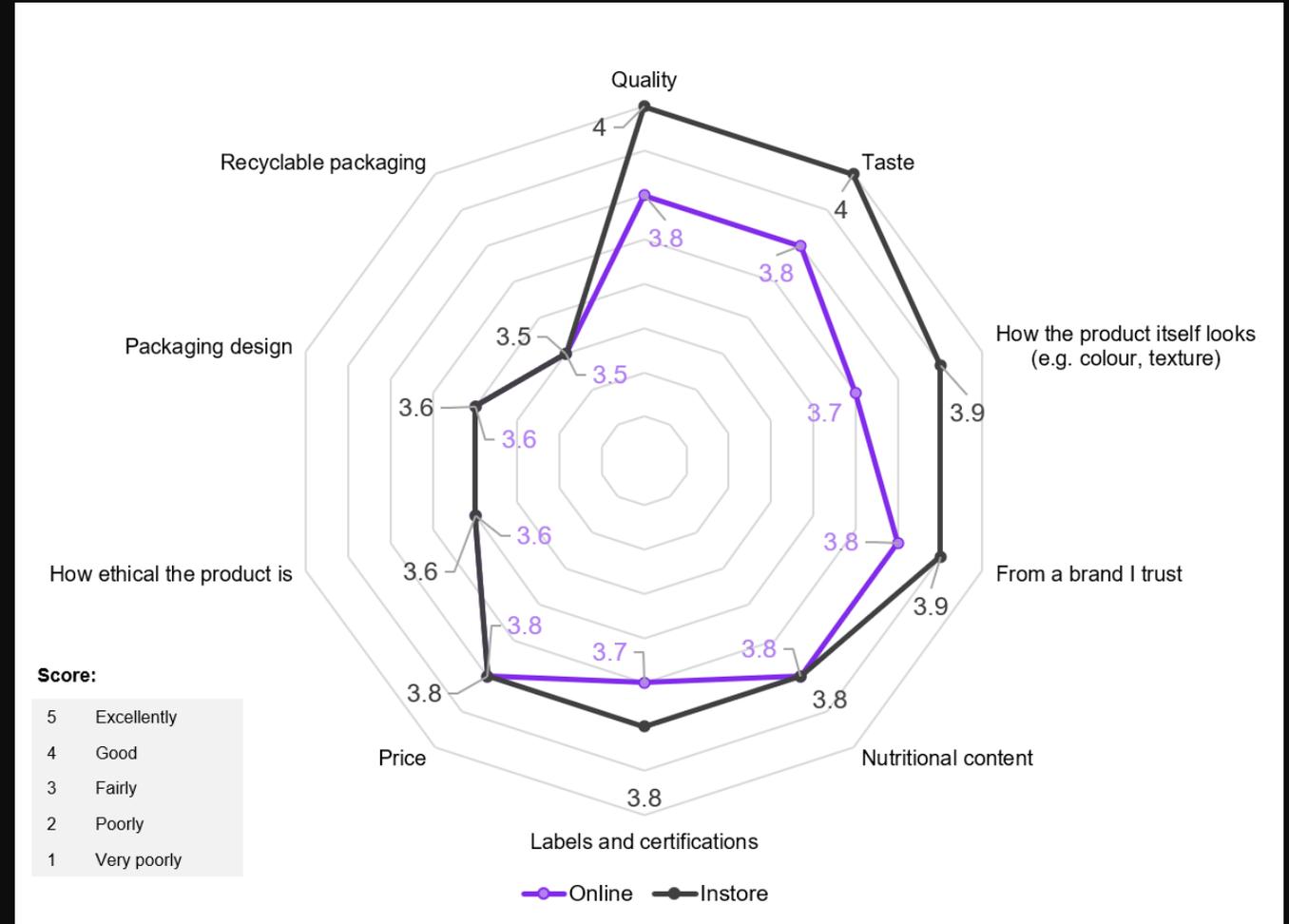
Quality, taste and visual perceptions are superior in-store vs. online when buying m/sf.

Key factors when buying m/sf: Rating the online experience vs the in-store experience.

Online m/sf purchases matches in-store along a range of other criteria but never exceeds the in-store experience for OGS.

The goal for online retailers and producers selling on their sites is to close these gaps.

Sensory cues need to be dialled up to measure up to in-store experience of meat and/or seafood selection.



Place of origin is important but doesn't always equal 'local'.

This bodes well for Ireland, which is predominantly a strong asset for meat and seafood online (see next slide).

38%

Select Country of Origin (where the m/sf comes from) ...

as the top factor for determining level of trust in m/sf bought online.

OGS also show an appetite for buying meat and seafood brands.

Brands can be part of the reassurance OGS seek when shopping online; using it as a tool to build trust and confidence.

37%

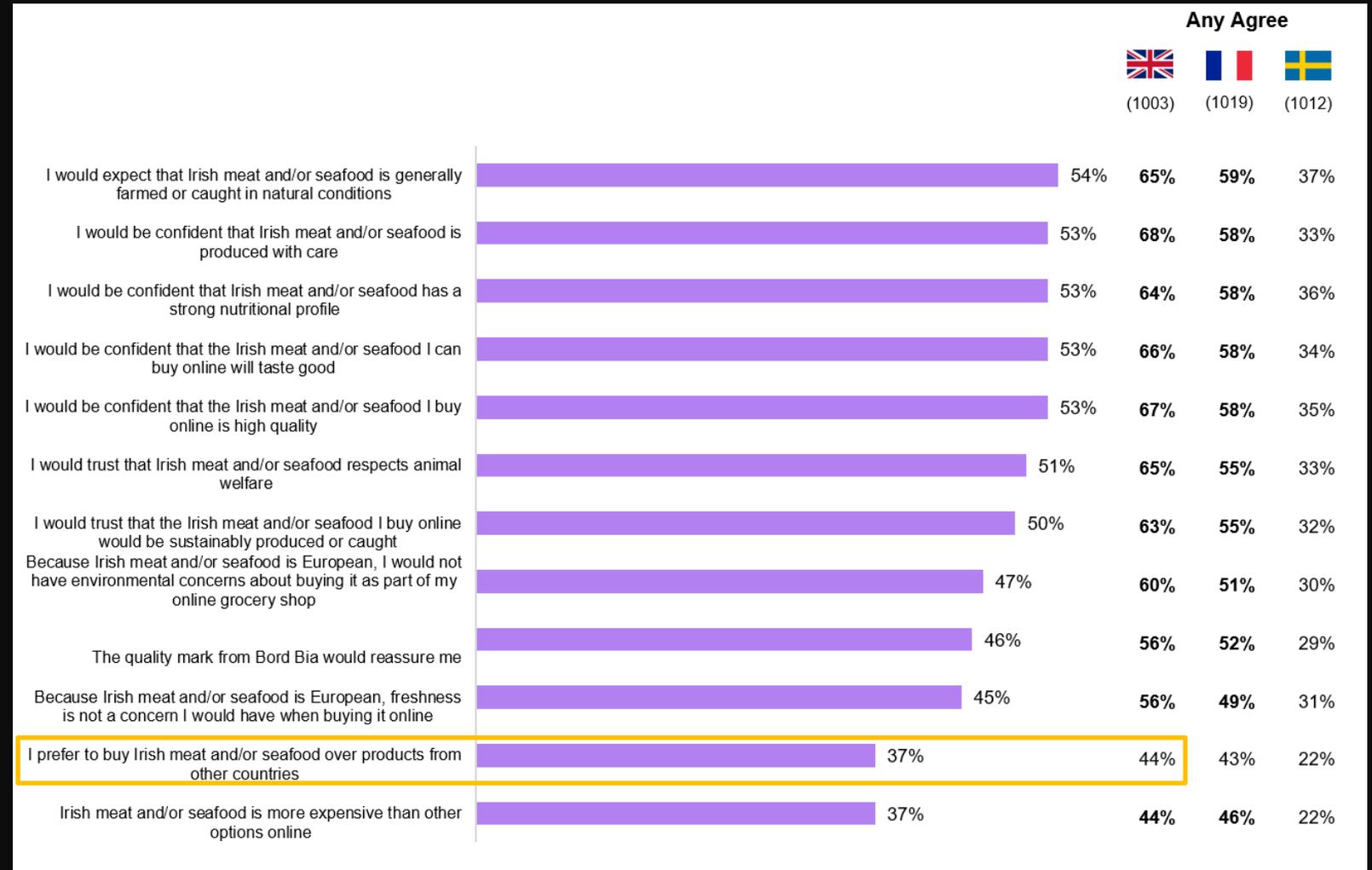
Select Choose a Trusted Brand ...

as the top factor for determining which m/sf to choose online.

Source:
Kaizen 3 Quantitative Study (jump!, 2020)

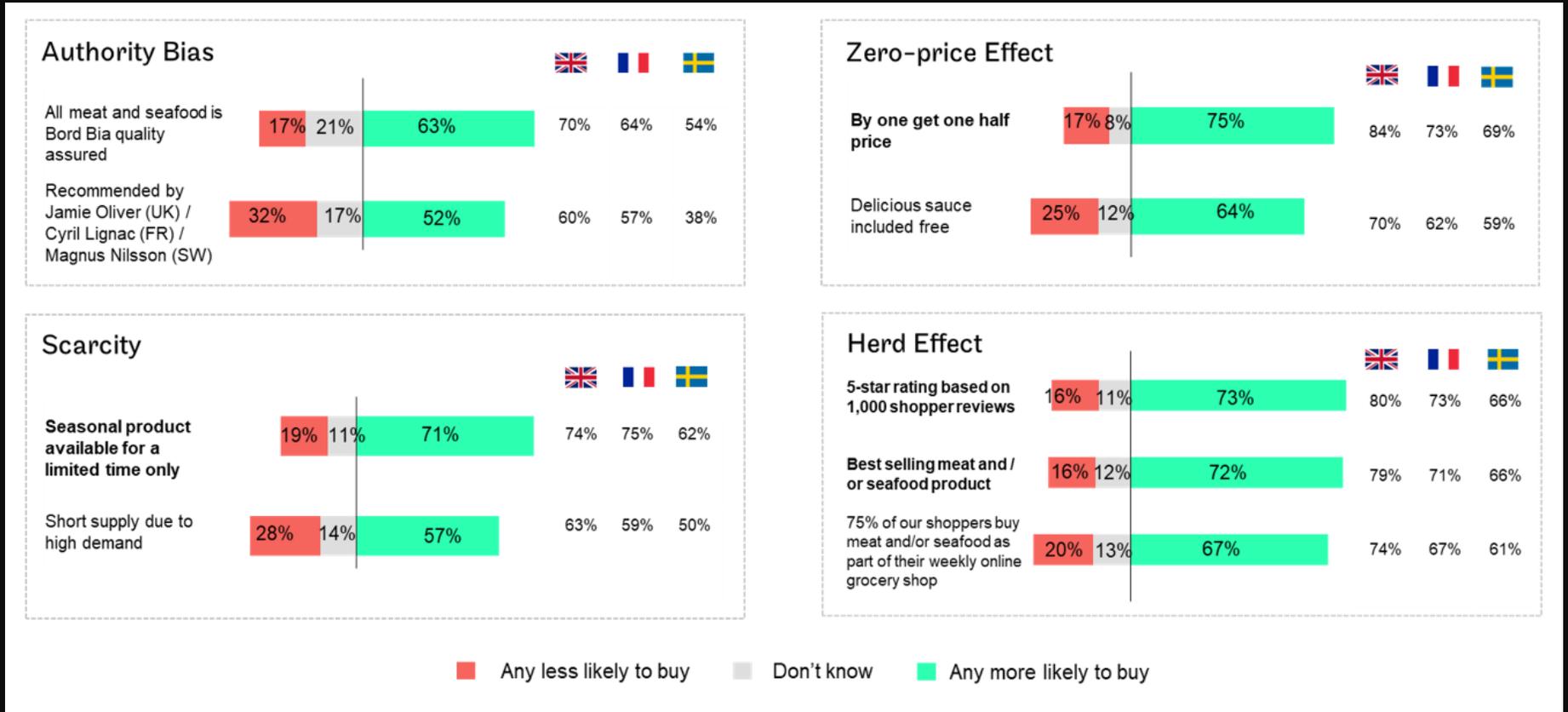
Strong capital overall for Irish producers to use both in selling online and in retailer conversations.

Over 1 in 3 prefer to buy Irish meat and/or seafood over products from other countries online; UK/FR especially strong.



As expected, pricing nudges likely to have greatest influence on 'buying more' m/sf online, but Herd Effect closely follows.

Herd Effect 'nudges' on-pack that are backed up by more proactive quality indicators show promise, as do seasonal scarcity and price reductions.



We brought to life five distinctive Online Selling Approaches for grocery retail, established & emerging features.

Each Approach was evaluated on:

- Truly different (from how m/sf is sold online)
- Reduces online concern (in relation to buying m/sf online)
- Claimed Likelihood buy more (m/sf online)

QUALITY

When selling meat and seafood online, we focus on the quality of our products.

Our products carry star ratings from other shoppers and a butcher/fish monger seal of approval. On our web page, you can clearly see certificates like Organic, Cruelty Free and others. We guarantee a full refund if you are not satisfied with a product you order from our website.

DELIVERY SERVICE

Delivering the freshest meat and seafood from our website to you on time, every time is our top priority.

All of our meat and seafood is delivered to your door in temperature-controlled bags or boxes. You can track you order from when we load it onto our delivery van to when it arrives at your door. If desired, we can offer drone delivery, guaranteeing your products are in transit for no longer than 30 minutes.

PRODUCT KNOWLEDGE

We help you make informed decisions about the meat and seafood products you buy online.

Packaging and nutritional information is always clear and easy to read on our site and we provide detailed information on the origin of all meat and seafood. Further traceability information in the form of farm or landing harbour photos and videos is also available. In addition, we offer the facility to chat directly on the website with one of our people who can immediately answer product information questions you have.

INSPIRATION

When selling meat and seafood online, we always provide mealtime inspiration.

On our website, in addition to clear photos of plated meals, there are livestream videos with real people preparing, cooking and eating our meat and seafood. We also provide descriptions of the taste of each meat and seafood product. You can even video chat with an expert butcher or fishmonger.

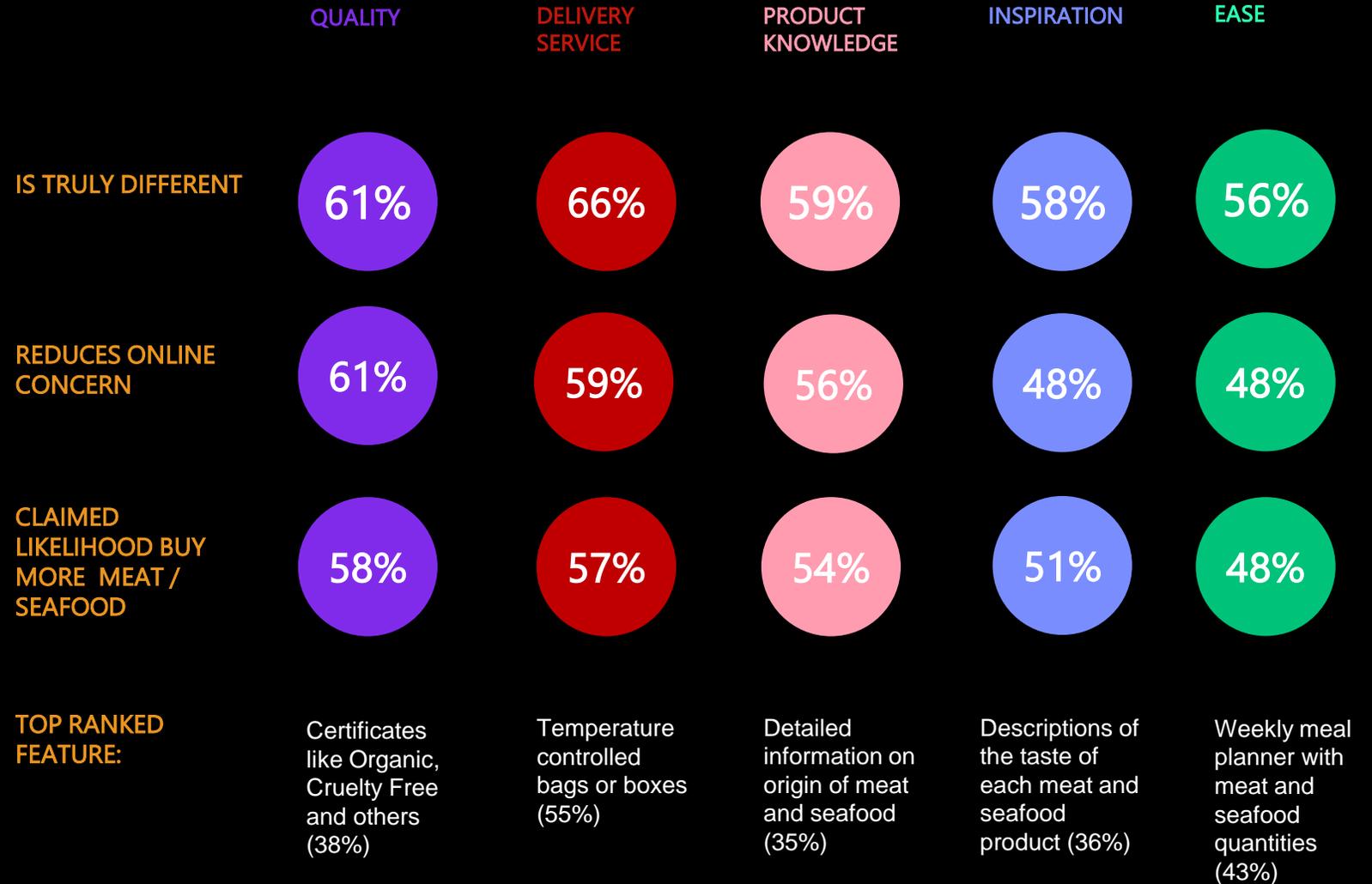
EASE

When selling meat and seafood online, we work hard to take the hassle out of mealtime planning and make buying meat and seafood easy for you.

Our website has a predictive search function which immediately shows you meat and seafood options to consider based on your needs and preferences. Our weekly meal planner populates your shopping list with the amount of meat and/or seafood required for the week. If you're interested, you can also buy meat and/or seafood as part of a subscription box which provides weekly or monthly products for your household.

These five Online Selling Approaches for meat and seafood producers and retailers are thought starters on potential focus areas and innovations to connect better with OGS.

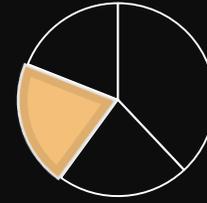
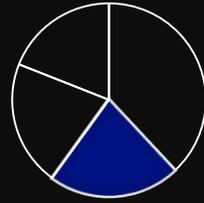
Further detail available on request.



Q. 38A This is truly different from how I've seen meat and/or seafood sold online before.
 Q. 38B This approach would help reduce or alleviate some of the concerns or issues I have with buying meat and/or seafood online.
 Q. 38C If this approach was part of an online grocery shopping experience, how likely do you think people like you would be to buy more meat and/or seafood online?
 Q. 39 Thinking about the above approach again, please indicate which is your favourite feature.

03
Online Grocery
Shopper
Segmentation

Segment summary; Size & description



Inspiration & value



38% EXPLORERS

'Explorers' because:

The ideas and inspiration they seek from online grocery shopping; which really sets them apart from other segments.

Largest segment across all markets

Convenience & dependability



22% RELIABLES

'Reliables' because:

The quality and security they desire over new ideas.

While they tend to enjoy it, they aren't interested in being inspired by online grocery shopping.

Second largest in FR

Security & Control



21% AUTO-PILOTS

'Auto Pilots' because:

Their get in/get out, light touch approach.

It's about meeting a few basic functional needs (delivery, security) rather than an inspiring shopping experience.

Second largest in SW

Ease & value



19% STREAMLINERS

'Streamliners' because:

The importance they place on smart efficiency, including bulk buying and accessing saved items, that online grocery shopping facilitates.

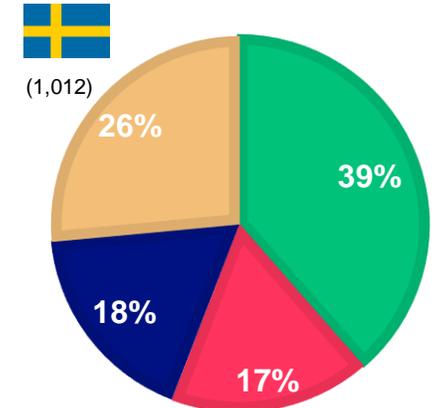
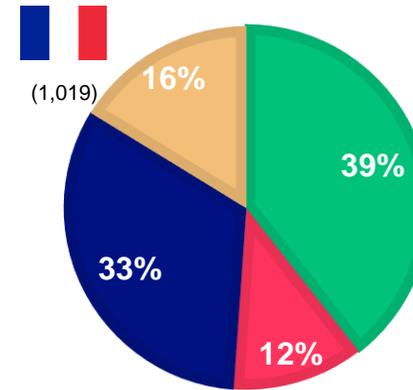
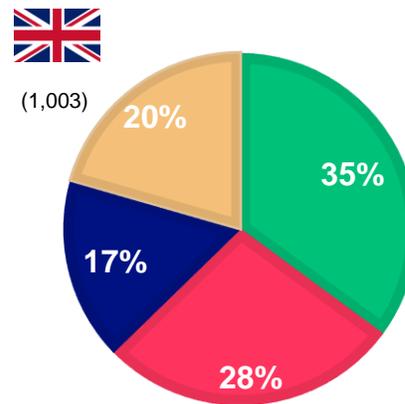
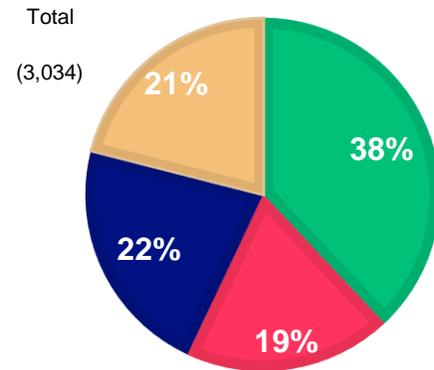
Second largest in UK

Segments: within Markets

(Base: 3,034)

Beyond Explorers, the largest segment, segment share varies across markets, reinforcing the need for tailored market strategies.

The second largest segment in each reflects differing OGS profiles, needs and behaviours.



Explorers Streamliners Reliables Auto-Pilots

Segment Packs

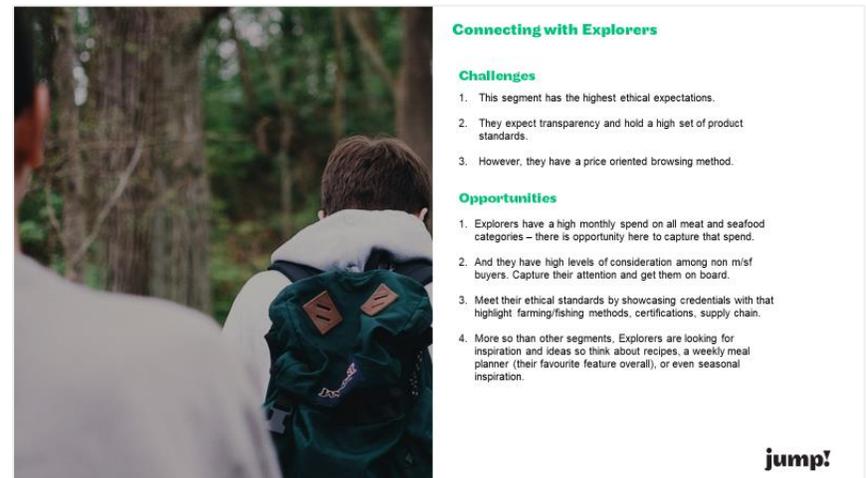
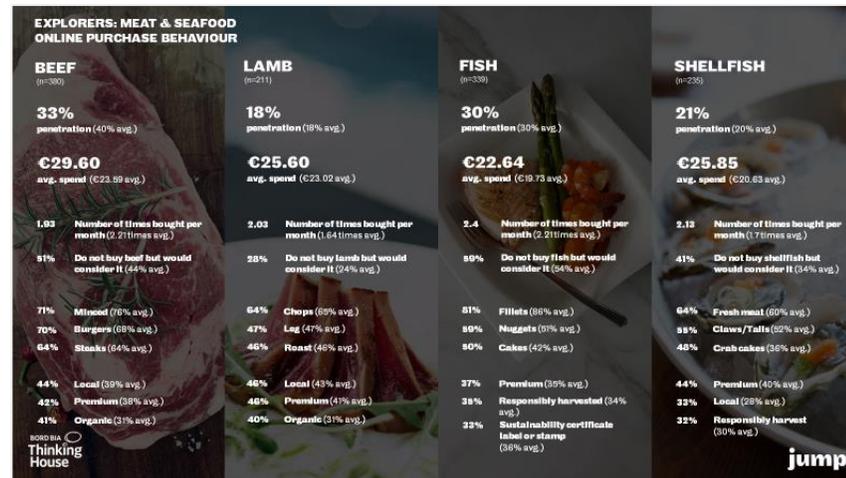
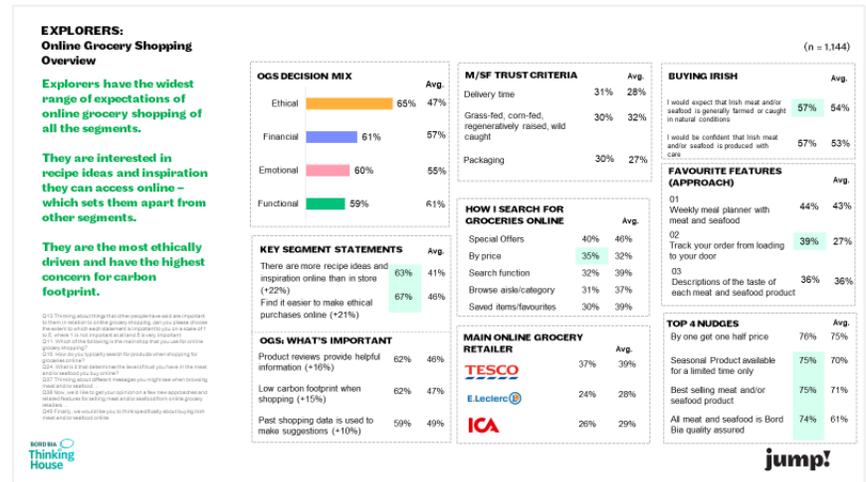
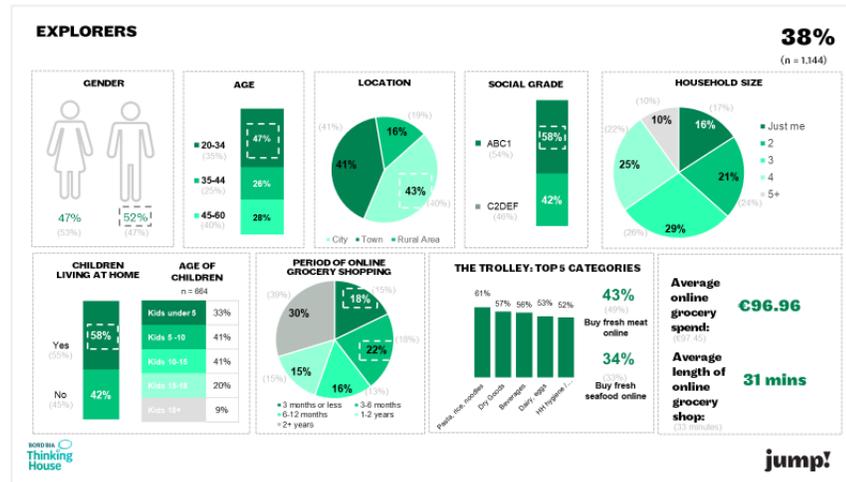
(available for each segment)

01
Socio
Demographics

02
Online Grocery
Shopping Overview

03
Online M/SF
Purchase Behaviour

04
Connecting:
Challenges &
Opportunities



Segments at a glance

Online Grocery Shopping Decision Mix (Index Scores)

	Avg.	EXPLORERS	STEAMLINERS	RELIABLES	AUTO-PILOTS
Secure payment processing	77%	-14%	+4%	+9%	+10%
Grocery shopping makes my life easier	71%	-14%	+16%	+19%	-9%
It's the fastest and easiest way to complete my grocery shop	68%	-8%	+17%	+19%	-21%
Flexible delivery options	68%	-11%	+15%	-5%	+9%
High quality products are easy to choose and buy online	64%	-5%	0%	+13%	-4%
Better deals when shopping online	60%	+2%	+3%	+1%	0%
Better management of household budget	59%	+4%	+4%	+2%	-12%
Online shopping is a smarter way to buy groceries	58%	+3%	+16%	+8%	-27%
New grocery items are easy to find online	56%	-1%	+2%	-2%	-1%
I can buy in bulk easier online	52%	+5%	+14%	-20%	-1%
Shopping for groceries online is more enjoyable	51%	+7%	+11%	+11%	-34%
Past shopping data is used to make suggestions	49%	+10%	+10%	-16%	-9%
Low carbon footprint when shopping	47%	+15%	-28%	+7%	-8%
It's easier to make ethical purchases online	46%	+21%	-24%	-3%	-15%
Product reviews provide helpful information	46%	+16%	-5%	-15%	-7%
There are more recipe ideas and inspiration online than in store	41%	+22%	-6%	-24%	-9%

Categories Purchased Online

	Avg.	EXPLORERS	STEAMLINERS	RELIABLES	AUTO-PILOTS
Avg. number of categories purchased	9.3	7.8	11.0	10.6	9.1
Fresh Meat	49%	-6%	+13%	+5%	-4%
Beef	40%	-7%	+10%	+5%	-5%
Lamb	18%	0%	+5%	-4%	-1%
Fresh Seafood	33%	+1%	+6%	0%	-6%
Fish	30%	0%	+6%	0%	-5%
Shellfish	20%	+1%	+4%	-2%	-3%

Online Grocery Frequency and Spend

	Avg.	EXPLORERS	STEAMLINERS	RELIABLES	AUTO-PILOTS
Avg. spend per online shop (€)	€97	€97	€99	€102	€92
Avg. number of online shops per month	2.1	2.2	2.2	2.2	1.8
Avg. monthly spend (€)	€205	€213	€218	€225	€165

Openness (among OGS who do not currently buy m/sf online)

	Avg.	EXPLORERS	STEAMLINERS	RELIABLES	AUTO-PILOTS
Beef	44%	+7%	-1%	-7%	-6%
Lamb	24%	+4%	-1%	-3%	-2%
Fish	54%	+5%	+4%	-2%	-6%
Shellfish	34%	+7%	+1%	-4%	-7%

04 Online Shopping Futures



Today, people live in a hyper-connected world that continues to blend with smart technology.

Tomorrow, people will expect smart technologies to be a greater and more personal part of the online shopping experience.

Retail is changing.

Technological innovations are pushing the online grocery landscape to new heights.

In this section, we highlight nine emerging innovations that are shaping tomorrow's online shopping, and more importantly changing consumer expectations.

Welcome to tomorrow's online grocery shopping.



Delivery: Uncompromised

Today

That 'last mile' is a drag on online shopping; finding a free time to wait for delivery; sticking to that arrangement etc.

The future of online grocery shopping relies on a seamless, non-invasive delivery.

'Delivery Uncompromised': my complete order, at the right time.

Tomorrow

We'll move closer to 'delivery perfection'.

As technology enables more fluid living, people will demand more seamless, accurate delivery.

Retailers are developing technologies including fleets of driverless vehicles, drones, and a variety of Smart technologies.

Grocery delivery will evolve for larger players, local 'Brick & Mortar' stores and even for farms, as people look for sustainable, carbon-free ways to shop.

First Movers

Pop It In The Fridge!

Walmart has run tests with August Home to deliver orders straight into customers' fridges – without requiring customer presence - using a system of smart locks and smart home accessories.

Gig Economy Grabs Grocery Delivery!

Uber Eats Grocery is moving from people to products/produce – delivering food from local shops and farms to homes.

With Carrefour, Uber is looking to roll out a boutique delivery service that will bring necessities to people in 30 minutes in France.

Sources:

<https://www.pymnts.com/news/delivery/20/uber-eats-moves-into-on-demand-grocery-delivery/>

Image:
<https://img.rasset.ie/00143fd8-800.jpg>

Baskets: Predicted

Today

Keeping the fridge full and the weekly shop can be a redundant and time-consuming task and is often experienced as a chore.

In the future online grocery shopping won't use up that head space.

These jobs will automatically be taken care of, behind the scenes, with predictive algorithms.

Tomorrow

Machine learning technologies will predict buyers baskets.

The shopping journey will be hyper-personalised for a fast, and tailor-made experience that requires little thought.

New products and ingredients will be added to the basket based on recent searches or views of influencers or recipes.

For retailers, leverage AI will provide real-time signals on competitive elasticity, shopper price sensitivity, product preferences and contextual data on shoppers.

First Movers

Grosh predictive shopping

An AI powered app that provides usage based suggestions.

Based on purchase history, the app provides relevant shopping suggestions across various grocers.

Amazon 'anticipatory shipping'

Amazon have acquired a patent for AI drone delivery that will start sending you things before you purchase it. Dubbed 'Anticipatory Shipping'.

Sources:
<https://groshapp.com/>

<https://techcrunch.com/2014/01/18/amazon-pre-ships/>

Shopping Social

Today

People search for meal and recipe inspiration on social media, only to look elsewhere when purchasing the ingredients, a somewhat lengthy process.

The future of online grocery shopping will enable in-social real-time shopping and check-out.

Tomorrow

Social commerce will be a one-stop-shop that creates immediate purchase opportunities, hence removing the need to search elsewhere for the ingredients.

Brands will engage with social media accounts to enable direct purchase compatibility.

Meal-time inspirations will be the fastest and most relevant way to shop for groceries.

First Movers

Amazon and Allrecipes

AmazonFresh has partnered with Allrecipes (1.5 B site visits per year) to allow users to add ingredients directly to their Amazon shopping carts while browsing Allrecipes.

Instagram Checkout

Instagram Checkout allows users to buy products, as shown in pictures from brands, without leaving the app.

Image:
<https://img.rasset.ie/00143fd8-800.jpg>

Let's Get Digital



Image:
BBC Fabio Robot

Today

Today, shoppers have two main shopping options - in store OR online.

They are distinct experiences, driven by varying needs across occasions – however, they each have their own flaws. In-store can be time consuming, while online lacks sensory experience.

In the future, these two worlds will collide to remedy these barriers.

Tomorrow

At the crossroad of in-store and online shopping, 'New Retail' is being developed and trialled in China.

Shoppers enter an experience showroom where they can browse, play, taste, interact.

Through an app they can access additional product information, inspiration and reviews.

The showroom is completely cashless – no sales will be made 'in-store'; all purchases will be completed online/via the app and delivered at home at a later day/time.

Facial recognition will be used for payment processing.

First Movers

7 Fresh JD.com

Open 24/7, these Chinese New Retail formats allow shoppers to browse while connected to an app that gives product information, meal inspirations, reviews and facial payments.

Shoppers (within 5km) can then choose to have their grocery items delivered within 30 minutes upon arriving home.

Decathlon Singapore

In their Singapore outlet, the giant sports retailer allows customers to test the equipment it sells in their 'store 'lab which simulates playing conditions.

Body Marketing

Today

Currently when shopping in-store, consumers produce raw data through physical and perceptual interaction with products. However, this data is not yet fully utilised to its potential.

Tomorrow, cameras and algorithms will analyse our reactions to provide targeted information to help us in our shopping journey.

Tomorrow

Physical retailers will use facial recognition, tracking beacons, and Point-of-Sale data to analyse shoppers emotions and preferences.

Combined with the web, mobile and social data, in-person data collection will bring retailers a 360 degree customer experience to serve them better.

Cameras will identify: high-traffic areas in the store; overlooked products; the level of product interaction, including body responses such as temperature or dilation of pupil.

This will increase real-time and post shopping advertisement opportunities.

First Movers

Amazon

Amazon Go cashless stores use computer vision to recognize faces and products.

Online, it pushes better, more personalized recommendations across its platforms.

Retail Deep

A company that replaces Loyalty cards by facial recognition thanks to AI-enabled in-store cameras.

Instant notifications and relevant recommendations are sent to staff when known customers arrive.

Sources:
<https://www.retaildeep.com/>

Live Stories

Today

Online shopping can be a barrier due to the lack of sensory experience.

This is especially true of fresh produce as people rely on the look and feel of many products in determining the quality.

Tomorrow

Retailers will Livestream products to stimulate the senses with audio and visual cues.

We are already seeing the emergence of this in China, particularly in the wake of the pandemic.

Livestreaming gives people access to fuller brand stories and can alleviate any concern related to quality.

First Movers

Taobao, Live from the farm

The online Chinese retailer trained 200,000 farmers to use their live platform, to engage shoppers and increase business in rural areas of China.

Social Chain shoppable livestreams through Facebook.

Social Chain viewers can now shop via a Live Facebook feed.

The journey has four steps: comment on a live video to activate a chatbot; confirm interest; continue to checkout; and complete purchase.

Behind The Shelves

Today

When buying food, shoppers have access to partial information.

Provenance only includes wider countries and regions, with the product journey largely unknown.

As people demand transparency, lack of such information can deter consumers.

Tomorrow, Blockchain will reassure shoppers through complete product transparency.

Tomorrow

Through Blockchain, retailers will give access to accurate product data, including journey, provider details, supply chain quality and attributes like freshness, and sustainability.

Tracing food will become the norm not just for conscious and wary buyers.

This information will help customers make informed decisions and give additional reasons to believe in brands.

First Movers

OpenSC Track Tuna

An online platform that uses blockchain to track seafood and help people to avoid illegal, environmentally-damaging or unethical products.

IBM Blockchain

Working with Walmart, Carrefour and Alibaba, IBM is developing a tracking system which will enable consumers to trace their produce from farm to fork.

Image:
<https://www.computerworld.com/article/3311464/ibm-launches-blockchain-based-global-food-tracking-network.html>

Sources:
<https://www.ibm.com/blockchain/solutions/food-trust>

<https://www.weforum.org/agenda/2020/02/blockchain-tuna-sustainability-fisheries-food-security/>

The New Shopper-tainment

Today

Today e-commerce websites are relatively transactional and focus on the convenience of online shopping.

Currently, shoppers are missing out on the fun and excitement that is fostered by physical store experiences.

Tomorrow

To engage shoppers, retailers will adopt 'shoppertainment' activities mixing social media, games, live shows and e-commerce in one eco-system.

Chatbots will offer e-shoppers a personalized and conversational experience.

Community chats, group discounts and live animation will transform websites into social places.

The gamification of e-commerce will elevate the emotional experience of online shopping.

First Movers

Pinduoduo

China's fastest-growing e-commerce app appeals to shoppers via discounts linked to group buying.

Gamification features such as hidden bargains hourly flash-sales play on consumers' fear-of-missing-out.

Live chat with peers emulates the social aspect of shopping in-store.

JD Live Club

JD.com invites musicians to livestreamed shows that promote liquor brands to those watching, purchasable in one-click.

Image:

<https://www.computerworld.com/article/3311444/ibm-launches-blockchain-based-global-food-tracking-network.html>

Sources:

<https://techwireasia.com/2020/03/shoppertainment-the-secret-to-e-commerce-success-right-now/>

Haptic Realities

Today

Online shopping is an experience lived in 2-dimensions.

Images, videos and detailed descriptions do not substitute holding a product in-hand.

The future of online grocery will allow shoppers to touch and feel products through remote virtual and haptic experiences.

Tomorrow

Numerous online retailers are starting Virtual realities commerce endeavours.

Brands will build sensorial immersions that blur the lines between offline and online realities.

For shoppers, virtual reality and haptic sets will make live interactions with products feel more real than ever.

Tomorrow's shoppers, equipped with a head set and a glove, will be immersed in virtual reality stores – enabling them to feel products in their hands.

First Movers

Walmart in the race for patents

Walmart filed two patents for virtual reality shopping: a VR headset and sensory gloves to get an in-store experience at home.

Carnegie Mellon University 'Wireality'

Researchers built a glove that recreate human touch.

Made with motion sensor it is connected to VR software.

When mass-produced the glove would cost less than \$50.

Image:
<https://www.computerworld.com/article/3311464/ibm-launches-blockchain-based-global-food-tracking-network.html>

Sources:
<http://msensory.com/walmart-vr-shopping-vr-headsets-and-sensory-gloves-would-have-the-sensation-of-walking-through-product-aisles-and-picking-out-items-for-home-delivery/>

04 Five Action Areas



Five Action Areas to Sell Meat and Seafood Better Online

Building on our market landscape analysis, expert interviews, quantitative study and emerging online shopping futures, we have identified five Action Areas for selling meat and seafood better online.

Each identifies a set of needs, opportunities and action considerations that Irish meat and seafood producers can use to leverage the strength of online, address online shopper barriers and to enhance retailer relationships.

Action Areas

- 01 Sensory Connection
- 02 Store to Door Freshness
- 03 Trust Building
- 04 Smart Value
- 05 Habit Forming

Sensory Connection

Big Need

People still seek out a sensory impression of the meat and seafood they are considering

1. Our research shows that physical stores deliver a stronger meat and seafood sensory experience.
2. This sensory deficit is a key barrier for meat and seafood particularly in online grocery retail.
3. Consumers rated descriptions of the taste of each meat and seafood product as most valued among the sources of inspiration we surveyed.

Opportunity Area

Make your online presence as multi-sensory as possible through content, communications and innovation

1. Focus on sensory experiences that reinforce product quality and taste perceptions, especially through pack and retailer innovation.
2. Content which reflects the parts of the in-store experience that customers crave is key-particularly those that drive the sensory experience.

Consumer Action Considerations

Identify opportunities to replicate elements of the physical store online

- **Bring Alive:** Integrate butcher and fish monger advice, photos or videos.
- **Get Close:** High quality images of both raw and cooked product with close-ups.
- **Mouth watering content;** in word and picture, aim for a mouth-watering impact every time. So dial up textures, juices, mouth feel and aromas.

Retailer Action Considerations

Explore opportunities to partner with retailers as a 'sensory enhancement' brand

- **Go Multi-media:** embed photos, external links and videos.
- **High-def Thumbnails:** Adopt high definition thumbnail images and adapt your images and content to display well on carousels and product pages.
- **Ad banners to Eat!:** Create them with mouth-watering images.

Sensory Connection Example

Beck & Bulow

[Click here:](#)

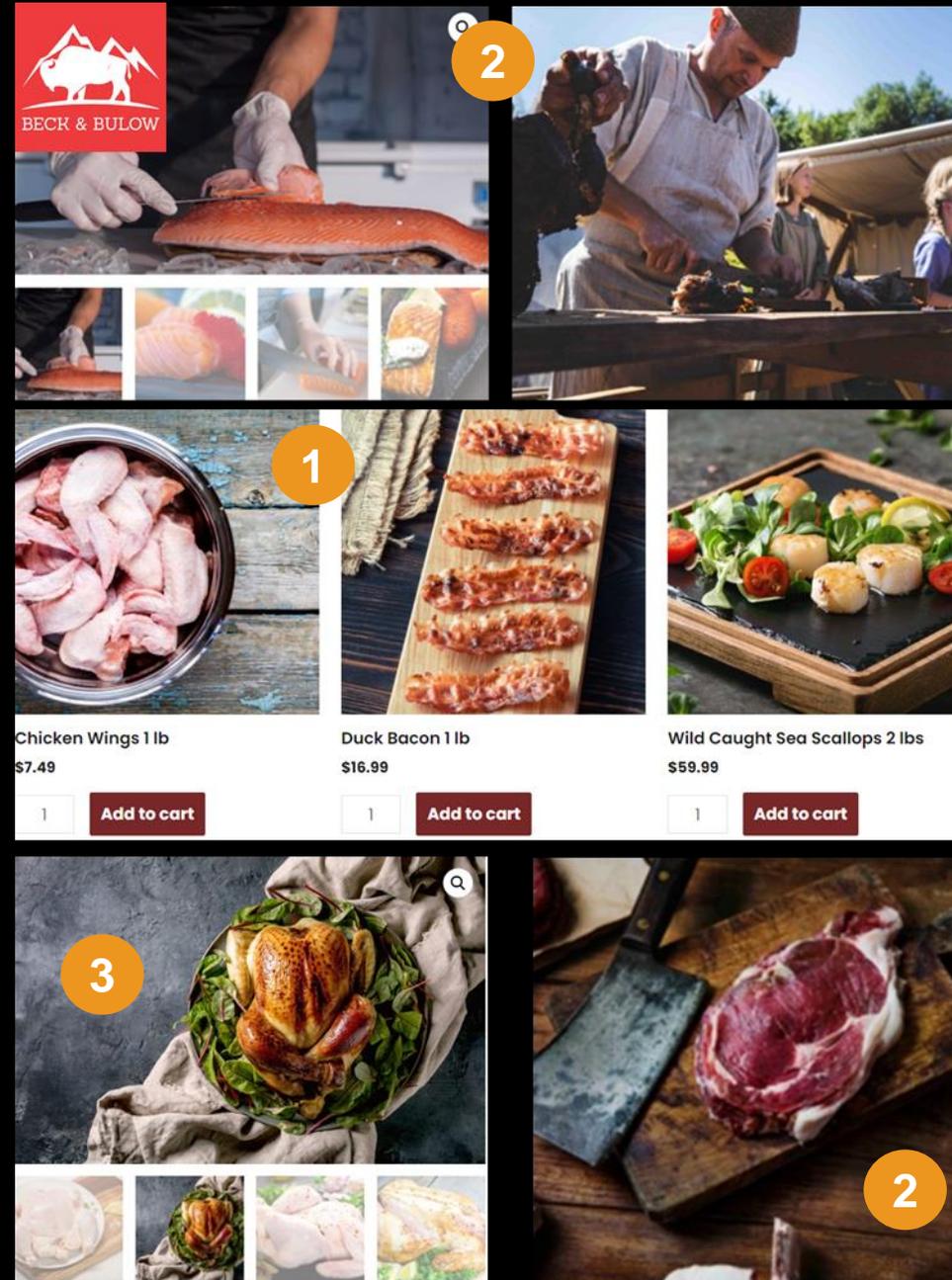
Beck & Bulow (B&B) is an online meat wholesaler in the USA. They offer 100% grass fed, beef, lamb, chicken, seafood directly from ranch to door.

Big Need

By creating a visceral and mouth-watering anticipation of their produce online, B&B give people a sensory connection that is often reduced or removed when online.

Applied Actions

1. B&B brings online shoppers up close and personal to meat and seafood with high resolution, professionally curated imagery.
2. Primal and visceral senses are stimulated through:
 - Lifelike, energised images of butchers practicing their craft
 - Rustic cutlery placed beside succulent meat – a complete picture.
 - The delicate handling of seafood by a fishmonger or chef.
3. Prompt taste and aroma by bringing to life each stage of the meat/seafood journey - raw, being cooked and plated & served.



Store to Door Freshness

Big Need

Consumers question the quality, freshness and taste of the meat and seafood delivered to them. For such 'centre plate' food, this is a critical barrier

1. In-store a consumer immediately picks up the meat and seafood they are buying. Online, they may have to wait a few days. This creates a disconnect.
2. Our research shows that the main reasons for not purchasing a meat or seafood online is the desire to see/select it and quality and freshness, therefore taste, concerns.
3. Temperature controlled boxes appeal strongly to consumers (58%)

Opportunity Area

Communicate and innovate to strengthen the promise and reality of quality delivered to consumers' doors

1. Work to elevate the product to be better 'seen and felt' on screen in order to address inherent freshness and quality concerns.
2. Call out messages and measures that will build shoppers' confidence in the delivery they receive.

Consumer Action Considerations

From the first visual impact to delivery innovation, show your strong commitment to deliver freshness

- **Call It Out:** Communicate freshness guaranteed / working with retailer to ensure only the freshest product is delivered as well as 'fresh' visual cues
- **And Spell It Out;** Highlight certifications, nutrients, benefits of a product. Don't assume OGS know this already.
- **Smartness, Delivered:** Innovate for special / sealed packs; temperature control mechanisms; cooler boxes; part of retailers' express service.

Retailer Action Considerations

Position with retailers as a freshness innovator working to overcome critical online barriers

- **'Fresh Online' Communication:** Open conversations about promising and proving freshness at every point the store's online butcher and fishmonger areas.
- **Fresh Delivery Innovation:** Offer to partner retailers with delivery innovations that highlight or enhance store to door freshness.

Store To Door Freshness Example

Carrefour

[Click here:](#)

Carrefour is a French online grocery retailer with a presence throughout Europe, Asia and areas of Africa.

Big Need

Carrefour focus on superior delivery and quality to give OGS complete confidence in the freshness of their produce.

Applied Actions

1. Sixty minutes delivery with freshness guarantee on select produce.
2. Select produce is purchased directly via Carrefour, but delivered by the producer, thus, cutting out the 'middle-man' of the supply chain.
3. Certifications are shown on product thumbnails, reinforcing product quality, with detailed information below.
4. By highlighting butcher/fishmonger selected produce, they elevate the online experience to feel closer to 'in-store', which we know is associated with fresher produce.
5. Currently adopting blockchain technology to assist in greater transparency for produce tracing. We believe this will be crucial in coming years when backing and freshness claims for producers and retailers.

1 NOW Choose **NOW** at the checkout and get it delivered **within 60 mins**

Scheduled delivery: **Tomorrow 06 October 12 pm - 2 pm**
FREE DELIVERY for orders above 50 AED

Approx 2 pieces per KG

Freshness Guaranteed

2 Sold and delivered by jemangefrançais
French Free-range Chicken - Direct Producer - by batch of ...
the 2 units of 2 kg
9.99 € / kg

FRANCE
€ 39.95

3 Salmon steaks with skin s / bones **CARREFOUR QUALITY...**
the 2 blocks of 140g
24.64 € / Kilogram

TIDE CAPTURE AREAS (MISCELLANEOUS)
€ 6.90

4 Préparé par votre Poissonnier
Préparé par votre Boucher
My fishmonger
My butcher

Trust Building

Big Need

Online consumers are removed from the physical product, so continuously building trust is critical to establish an enduring customer base

1. Our quantitative research shows that trust in shopping meat and seafood online is lower than shopping for them in store.

Opportunity Area

Identify features of your product that will drive trust and loyalty. Think brand, Irishness and proof of quality

1. Trust is built through confidence in the country of origin; certifications; brand trust; good farming methods and in the UK, the retailer reputation
2. In UK and FR Irish meat and seafood enjoys a strong reputation: natural; caught with care; strong nutrition; tastes good. In SW Irish meat and seafood are not well known.

Consumer Action Considerations

Dial up brand, Irishness and good farming and fishing credentials

- **Build Brands:** In the physical store, the product speaks for itself. Online, people want 'shortcuts' to trusted products; aka Brands.
- **Embrace Irish:** Ireland is an asset that builds trust. Call out your origin and the natural / good farming or catching credentials that follow
- **Good Farming / Fishing:** Creates an authentic point of connection and trust for people buying their food 'on screen'.

Retailer Action Considerations

Explore partnership opportunities and focus on proof credentials

- **Build Brand Partnerships:** Especially in the UK, consider leveraging the trust that consumers have in online retailer brands.
- **Prove Your Trustworthiness:** Certs carry weight with consumers online. Make the case with retailers
- **Personalise:** We know that personalisation from retailers builds trust. Are there opportunities you can explore?

Trust Building Example

Nemlig.com

[Click here:](#)

Nemlig.com is a dedicated online grocery retailer in Denmark.

Key Need

Nemlig build trust in the meat and seafood online by highlighting origin through logos, accredited certifications, distinct brand logos and personalising their offerings.

Applied Actions

1. With clear indication of the produce shelf life, Nemlig mitigate freshness concerns.
2. There's a sensory connection being formed as fresh m/sf produce is presented as raw or on the plate, never as packaging first, as would be the case in-store.
3. Confidence in quality backed by certifications and accreditations in the product thumbnail.
4. Healthier food choices are promoted through the Nordic Keyhole, a label which indicates produce that has greater nutritional claims within that product category.
5. They embrace country of origin, notably Ireland.
6. Personalised meal plans that cater for dietary requirements. Communicate on partnerships in this area.

nemlig.com
DAGLIGVARER NÅR DET PASSER DIG



1

Mine. shelf life 4 days + delivery day
Minced beef 8-12% organic.
780 - 820 g / Gris Lam & Co

5°

3

8995

115.32 kr./Kg.



Sous Vide



2



MONDAY: Quick barbecue stick with spice butter and pota...

2 personer Arbetsdag

Meal plans

6

Go to the [Recipes](#) page

[This week's meal plan](#)

[Child-friendly meal plan](#)

[Gluten-free meal plan](#)

[Quick meal plan](#)

[Low carb meal plan](#)

[The world's meal plan](#)

[Vegetarian meal plan](#)

[+ Previous meal plans](#)

4



5



Smart Value

Big Need

Online grocery shoppers want to buy smartly and manage their shopping smartly. So they seek out online deals and budgeting opportunities

1. With higher rates of main shopping and bulk buying online, it is important to help OGS make the most of the financial drivers of shopping online.

Opportunity Area

Continuously offer and test a range of value wins for consumers to identify the most effective

1. This is about giving them opportunities to get in on deals, make the most of being able to stock up and manage their spending better.
2. This is a valuable win for consumers and brands that can deliver it consistently.

Consumer Action Considerations

There are several tactics that can position your products as part of consumers' 'smart and agile shopping list'

Lever Deals: we know that 'buy one, get one half price 'delicious sauce included' offers increase openness to purchase

First Purchase: Capture attention with an offer, flash sale, or season exclusives.

Rewards: Offer rewards that gives exclusive savings/access and build habits

Budget Management: Anchor your products to the weekly shopping list to help OGS better manage their m/sf spend. Think about family packs, meal bundles, multi-purchase prices

Retailer Action Considerations

Know the workings of the retail ecosystem you're selling in, then partner

- **Price Filters:** Understand how your retailer's filters work to ensure you are at the top of price filtered searches.
- **Pair Up:** Offer value by pairing up with other products on the site e.g. complete meal for €XX.

Smart Value Example

Willys

[Click here:](#)

Willys is Sweden's leading discount grocery store with a strong presence online and offline.

Big Need

Willys provides access to everyday products at low-prices, a proposition that is in tune with peoples' desire for efficient and smarter ways of grocery shopping.

Applied Actions

1. Deals and discounts are widespread across their website. OGS here are instantly making wins.
2. Products have a purchase limit, which nudges OGS to stock up on an offer, as well as giving them a significant discount that helps them manage their budget.
3. Price relativity nudges used to show savings through comparison: 'Save SEK / kilo'.
4. Willys Plus app offers exclusive discounts for members.
5. Search management through 4 pricing filters.
6. Pre-made shopping lists available to help OGS complete orders efficiently.
7. They add a layer of emotion to low-price value, creating deeper appeal for the OGS, an opportunity for future messaging.

1 WILLY:S

2 2 FOR 25⁰⁰ WillysPlus

3 SAVE SEK 23.00 / PC 69⁹⁰ WillysPlus

4 Price (Cheapest - Most Expensive)

5 Price (Most Expensive - Cheapest)

Comparative price (Cheapest - Most expensive)

Comparative Price (Most Expensive - Cheapest)

6 Finished shopping lists

Deli for everyone!
9 ITEMS

Hot prices on tacos.
19 GOODS

Great prices!
13 GOODS

7 Long live eco-low price!

Ekologiskt kött till logiska priser!

SAVE SEK 4.00 / PC 54⁹⁰

SAVE SEK 5.00 / PC 19⁹⁰

19⁵⁰

SAVE SEK 5.00 / PC 19⁹⁰

Habit Forming

Help shoppers feel they are saving time and, therefore, have more time for themselves.

Kaizen 3 Expert Panel

Big Need

A repeated theme among online grocery shoppers is that it makes life easier. Anything that does this is valued strongly.

1. 71% say online grocery shopping makes my life easier and two thirds highlight it as the fastest, easiest way to complete my grocery shop.
2. Flexible delivery, ease of access to high quality, better deals, better budgeting are all valued factors that contribute to this.

Opportunity Area

Become part of people's habitual shopping by offering ease and speed of choice-making

1. It is said in Behavioural Economics that the easiest choice to make is 'no choice'.
2. This is about simplifying processes and offers so they can become people's default shopping.
3. Channel, retailer and product/brand wins should be based on optimizing time not only across the shopping journey but throughout the week (e.g. meal planning) as well.

Consumer Action Considerations

Make your product habitual by becoming the most automatic, most anticipated and safest 'default' choice

First Glance Decision Making:

Create easy to read stamps/badges that convey important information about your products at first glance.

Plan-friendly: Make your products an irreplaceable part of the weekly meal plan and saved items; hassle-free decision making.

Trigger Anticipation of Rewards:

Use product images in an ideal occasion or paired with others that, for example compliment it.

Herd Effect: Highlight Five Star ratings / 'best selling' nudges. Safety in numbers!

Retailer Action Considerations

Get in synch with your retailer's system and use it to your advantage

- **Better Browsing:** Optimise to fit with your retail partner's browsing journey plus work to be at the top of the search results (think about cut, type, and meal/recipe tags).
- **Smart Subscription:** Talk to your retail partner about subscription models that could be integrated into their service.
- **More Rewarding:** Look for ways to fit with your retailer's rewards system.

Habit Forming Example

Ocado

[Click here:](#)

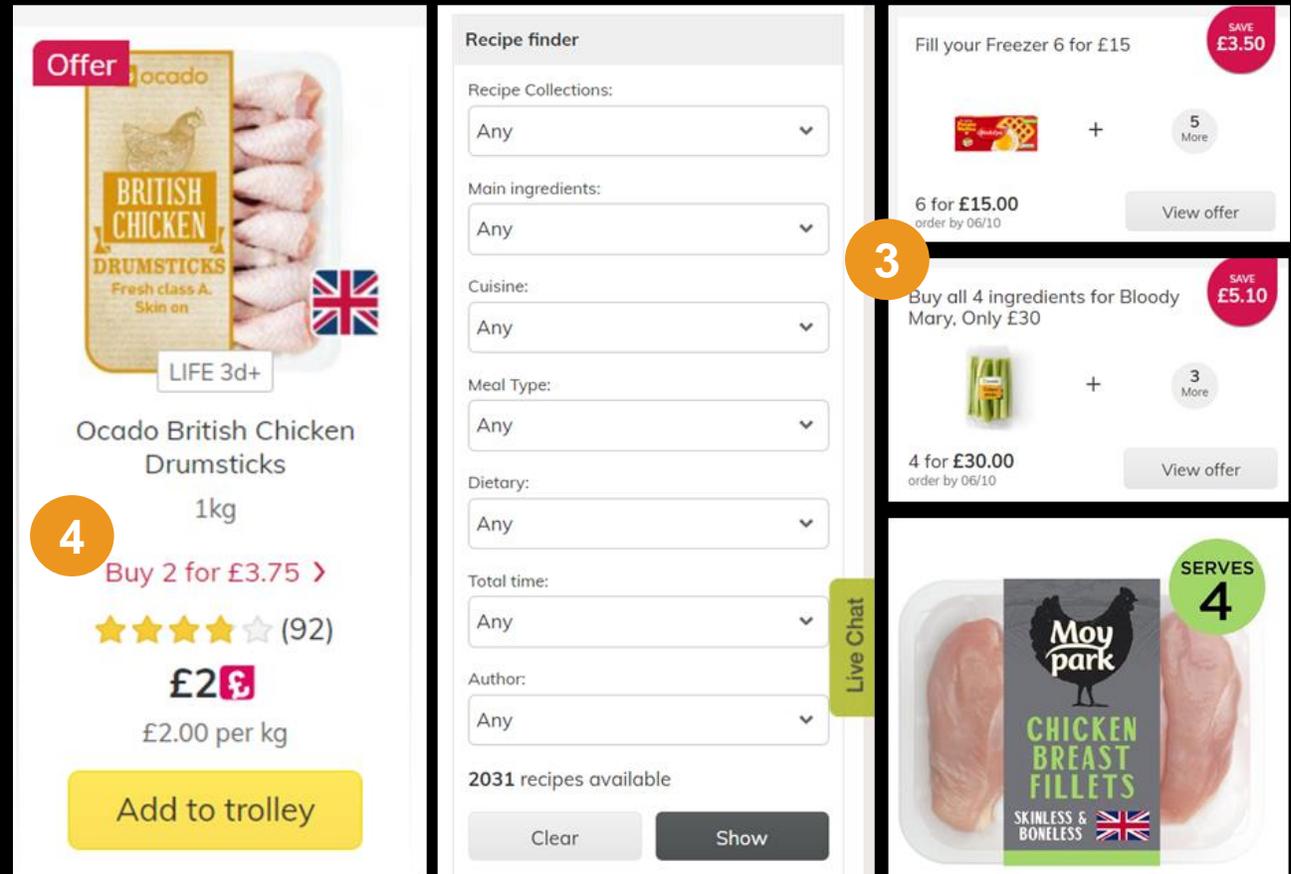
Ocado is a dedicated online grocery retailer in the UK. Demand for their service has soared throughout 2020 as they overtook Tesco in market valuation despite having less than 2% market share.

Big Need

Ocado presents OGS with a series of solutions, from delivery to inspiration, that are geared toward forming habitual behaviours.

Applied Actions.

1. Ocado highlight the simple wins of OGS: Flexibility, efficiency, ease.
2. OGS can develop further investment through The 'Ocado Smart Pass'. It gives members rewards, priority delivery times, exclusive discounts and gift samples, all of which are likely to increase their likelihood of future purchasing.
3. Enabling hassle-free choices and inspiration through custom recipe finder, bundle product deals and serving size recommendations.
4. Behavioural economics applied including five star ratings and price nudges.



Project Kaizen 3

Five Action Areas

to Sell Meat and Seafood Better Online

01 Sensory Connection

Make your online presence as multi-sensory as possible through content, communications and innovation

02 Store To Door Freshness

Communicate and innovate to strengthen the promise and reality of quality delivered to consumers' doors

03 Trust Building

Identify features of your product that will drive trust and loyalty. Think brand, Irishness and proof of quality

04 Smart Value

Continuously offer and test a range of value wins for consumers to identify the most effective

05 Habit Forming

Make your product habitual by becoming the most automatic, most anticipated and safest 'default' choice

Kaizen 3

APPENDIX

Sources

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'Kaizen 2' Future of Meat Innovation Platforms Adapted for Selling Online

In January 2020, Bord Bia published the Tomorrow's Meat jump! report.

In this report, we identified the future cultural context of meat and six consumer emerging need platforms to drive tomorrow's growth for Ireland's meat.

We are building also on additional Bord Bia and jump! analyses of seafood sustainability and seafood nutritional opportunities to create a seventh emerging need platform for Irish seafood.

In this section we will:

1. Highlight the purpose of each need platform.
2. Explain the emerging consumer expectation and the impact of COVID-19.
3. Provide current brands that are tapping into this emerging need.
4. Identify the key online selling implications for each platform.

Emerging Need Platform	Relevancy	
	Meat	Seafood
Mouth-watering Transparency	Relevant	Not Relevant
Healthy Indulgence	Relevant	Not Relevant
Eclectic Discernment	Relevant	Relevant
Conscious Enjoyment	Relevant	Relevant
Supercharged Convenience	Relevant	Relevant
Primal Satisfaction	Relevant	Relevant
Immunity Eating	Not Relevant	Relevant

Each platform is a growth opportunity for Ireland's meat and seafood producers.



People want to know everything about everything and will switch their spending to brands and businesses that feed this need. Security; Trust; Taste.



Healthy, balanced eating that doesn't compromise pleasure.



Contemporary everyday food experiences that are both elevated and experimental.



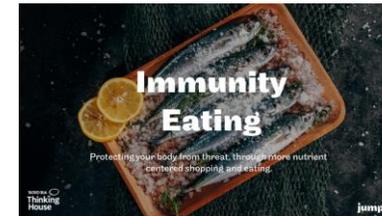
People are becoming increasingly mindful about what they eat.



Ingenious ways to eat better.



Enjoying a life that feels more visceral, more raw.



Protecting your body from threat, through more nutrient centered shopping and eating.

Mouth-watering Transparency

Emerging Expectations

Radical transparency is becoming a key consumer decision-point.

Several factors, from the appreciation of workers' and producers' rights to health concerns driven by real-world crises in Baby Milk and African Swine Flu (China), and Horse Meat and Listeria (Europe), are all contributing to greater consumer awareness.

Our view is that this desire will only increase as a result of Covid-19 as health transparency becomes an imperative in all parts of society.

Mouth-watering Transparency

Truth tastes better. **This is about enhancing the dream people have of our meat through the unabashed sharing of our processes; traditions; expertise; ambition.**

People want to experience the truth behind their choices, evident in the popularity of investigative videos on Netflix and YouTube (e.g. food & clothing); on social sites when revealing public spending or when calling out celebrities for certain behaviour.

Coopcorico



Coopcorico is an online grocery retailer that delivers throughout France.

Regarded as the 'cooperative producers', animal welfare is paramount to the brand, with easily traceable produce along with insight into living conditions.

All fresh food producers are part of the newly formed French brand, Aim & Bio. The company ensures better environmental practices and fair trade regulation.

Silver Fern Farms (NZ)



Silver Fern Farms, a New Zealand-based red meat producer, will add a QR code on its packaging as part of its traceability program, allowing consumers to track where the meat comes from and the quality of its environment.

The rollout of the full QR code traceability functionality will be completed in early 2020.

Online Considerations / Implications

Give as much information as possible while ensuring to nail the fundamentals: give name to the origin; the farmer; the diet; tell us about the animal.

Give people the opportunity to ask questions and receive answers.

Illustrate the wellbeing of the animals through pictures and videos.

Embrace and champion transparency practices with pride.

Highlight achievements and goals that you are working towards in terms of better practices.

Healthy Indulgence

Emerging Expectations

While health and wellbeing thrives, we are witnessing a rise in consumer demand for food and drink options that deliver pleasurable experiences without the sacrifice of their health.

This demand is significantly greater during Covid-19 restrictions as people are placing more importance on maintaining a healthy diet while simultaneously seeking to indulge in cooking new dishes.

Healthy Indulgence

This is about looking for **Healthy Indulgence**; healthy, balanced eating that doesn't compromise pleasure.

People will want to feel *ready* to take on what can be a fast paced world and at the same time *rewarded* when they do.

We can satisfy this need by delivering high quality meats that are both delicious and nutritious.

Muscle Food



Muscle Food are a UK based online retailer of all things health and fitness.

They provide those looking for insightful nutritional content an easy to navigate website, which includes categories of meat 'under 5% fat' and 'learn'.

Users can subscribe to receive weekly meat boxes as well as recommended products based on their physical goals.

The Meat Store



GRASS FED
Carnivore Diet Meat Pack

The Meat Store is an Australian online butchers that offer people meat in all forms.

Users can buy meat packs that are customised to suit a specific diet, from the carnivore diet to keto diet.

Online Considerations / Implications

Provide clear, easy-to-find details of ingredients and nutritional breakdown.

Call out the benefits provided by the specific meat or seafood.

Highlight the farming or fishing practices being undertaken and their benefits to the quality of produce.

Showcase all relevant certifications that increase the credibility of quality claims.

Eclectic Discernment

Emerging Expectations

As 'discernment' has gone mainstream, people's demand for quality has remained, but consumers' palates grown more sophisticated & experimental, fed by social media and streaming services.

As premium players compete, **we're going to see people gravitate towards more distinctive and potentially more daring food experiences.**

There's a growing appetite for these daring food experiences in the wake of Covid-19. People miss the experience of dining out, instead, putting a greater emphasis on in-home cooking as they experiment to create elevated meals.

Eclectic Discernment

This is about guiding people in their search for products that bring people elevated yet experimental food experiences everyday.

As new cultures and new technologies open up food enjoyment possibilities, people will want to widen their horizons through distinctive, high-quality experiences.

Meat can be part of this quest for new and better.

Lone Mountain Wagyu (US)



Lone Mountain Wagyu is a US online retailer of premium Wagyu beef.

Meat lovers can subscribe to receive quarterly or semi-annual wagyu deliveries or purchase any of their wide variety of cuts.

Luma Delikatessen



Luma Delikatessen is the online butcher of the sister brand Luma Dry Aging Company.

Thanks to a patented maturing process, they are renowned for providing the best-in-class meat to some of the finest restaurants in Europe.

They sell various beef types, poultry and pork from places of provenance.

Online Considerations / Implications

Give your product a sophisticated description that is tied to nature.

Portray exquisite imagery of your product as though it were served as a fine dining meal.

Create luxury meat boxes that are delivered with cooking tips from best in class chefs.

Allow people to build meat boxes that are personalised to their preference.

Conscious Enjoyment

Emerging Expectations

In this context of climate urgency and mass activism, people's consumption choices – of which the tension between meat-eaters and vegans is central to - will increasingly signal where they stand in society's 'Climate War'.

The stay-at-home lockdown has given people the opportunity to reflect on their values and reconsider their habits. Coupled with news headlines of wildlife flourishing and spirited support of local, this may give people the nudge that inspires improved ways of living.

Conscious Enjoyment

Conscious Enjoyment is about paving new opportunities for people to enjoy meat while also demonstrating respect for prevailing climate, biodiversity and animal welfare concerns.

People want to feel they are part of a meaningful, collective change that is setting the world on a path to sustainability.

We can satisfy this need by delivering guilt-free choices that are acceptable and desirable in a society focused on conscious enjoyment.

truLOCAL



truLOCAL is a Canadian based meat subscription service.

They focus on delivering high-quality meat & seafood boxes that allows people to connect to local farmers with focus on farmers that are using sustainable farming methods with respect to the welfare of the animal.

The website gives users the ability to hear from the farmers for themselves.

Buy a Cow



Buy a Cow is a UK based online beef seller.

By buying a share of a cow, ensuring that a zero food waste policy is upheld, you will be delivered a meat box directly from the farmer of the cow.

The webpage gives insight into the rearing of the cow, the details of the farmer, customer reviews and 100% money back guarantee for unsatisfied customers.

You can also e-mail to arrange a visit to see a cow!

Online Considerations / Implications

Provide information related to the green initiatives being undertaken by your brand.

Make visible your contribution to the climate.

Highlight the positive impact of a purchase. E.g. contributes to zero waste.

Give your customers confidence that your product is locally produced in ways that respect the eco-system.

Get to hear from farmers directly who discuss ways they're reducing carbon emissions on their farm.

Primal Satisfaction

Emerging Expectations

Aided by technology, people are living on-demand which connects them to hyper convenient food experiences that don't compromise on quality, health or sustainability.

Seamless shopping experiences are becoming everyday through premium delivery services, new product formats, ultra smart vending, and direct to consumer business models.

As mentioned earlier in this report, health related fears are forging new consumer habits as people are fearful of contracting covid-19. Those who would shop in-store normally are learning to shop online, thus giving charge to this need.

Supercharged Convenience

This is about people's desire for ingenious ways to eat faster and better.

Brands and products that can help people shortcut their way to superior food and meat experiences will win tomorrow.

Thrive Market



Thrive Market is a US online, membership-based retailer which gives people access to products at wholesale price ranges.

As a member, your account is tailored to your dietary and lifestyle preferences.

Members can mix and match meat and seafood, all of which is sourced from fully transparent producers, to create their own meat boxes.

Hungry Root



Hungry Root provides consumers with access to healthy whole-food ingredients.

Users sign-up and insert their dietary preferences, after which groceries, including meat and seafood, will be delivered with easy to follow recipe cards.

This gives people a convenient way of shopping for the meals they love, without the need to visit grocery stores and spend time browsing online for inspiration.

Online Considerations / Implications

Online caters for easy product comparison, therefore, make sure you stand out – be eye-catching; be attractive; be different.

Give multiple shipping options with clarity on price and time. Where possible, offer free shipping.

Instil trust by encouraging reviews.

Create a range of meat boxes in different sizes.

Send newsletters.

Imbed your brand with voice activated shopping.

Immunity Eating

Emerging Expectations

With society's digitally dependant lifestyles, people are seeking out ways to reconnect with nature.

There is a greater appetite for wild, raw or visceral experiences that stir ones primitive senses.

Throughout pandemic restrictions, people are finding comfort and support in nature. Post Covid-19, we can expect that people will appreciate all things natural and outdoors that bit more, further elevating our *Primal Satisfaction*.

Primal Satisfaction

This is about enjoying life full-on; embracing more raw and visceral food experiences especially through nature and wildness.

People will seek out a life that's more raw, more sensory, more connected to nature.

We can satisfy this need by focusing on meat's natural ability to deliver on big satisfaction, big taste and 'big sharing' occasions.

The Carnivore Club



'Live Vicariously Through Your Mouth'

The Carnivore Club is a subscription service featuring premium cured meat boxes that are delivered to it's members doors monthly.

Each month, they feature a new artisan to bring a different and unique box to their members, from Italian Salumi to South African Biltong.

The Hama Company



Hama is a 5th generation family run oyster farm.

In response to Covid-19 restrictions they have designed a Virtual Oyster Happy Hour.

The idea is simple: consumers order a box to their home in time for a live Zoom call where they will get to listen to experts who will talk and eat all things oysters.

Online Considerations / Implications

Give your meat a unique selling point that differentiates it from the rest; from provenance, distinctive cuts or flavours.

Talk about meat as though it is an imperative to survival.

Talk like an expert meat eater – bring alive the readers senses.

Provide cooking tips that are best suited for the meat cut/specie in question.

Immunity Eating

Emerging Expectations

There's a growing awareness and consciousness of how external factors from pollutants to stress can impact our bodies immunity and ability to fight infection and disease.

There were 17 million new cases of cancer recorded worldwide in 2018. 91% of the worlds population live in places where air quality levels exceed WHO limits.

The current coronavirus crisis has also heightened peoples want to strengthen their bodies core functions and defend themselves from disease and risk.

Immunity Eating

We see people becoming more pro active and seeking ways to naturally protect their bodies against harmful toxins, disease and environmental pollutants.

Fish in particular contains many bioactive compounds that **can reduce the risk of disease** such as heart disease, cancer, diabetes, dementia, arthritis, and other inflammatory diseases.

Fish contains many natural anti-inflammatory nutrients and properties including A and B vitamins, astaxanthin, selenium, Co Enzyme Q10 and Zinc.

We think people will increasingly begin to shop for these specific nutrients to bolster their immune systems.

John West Immunity Vit B12



This John West immunity product features a blend of wild caught tuna and of kidney beans and chick peas and capsicum, delivering 100% of your daily vitamin B12 needs for **immunity support**.

Vitamin B12 is essential for the production of red blood cells and the overall functioning of your nervous system. It's found naturally in animal products such as fish and meat.

Vitamin D



According to a recent study by TCD professors Dr Eamon Laird and Prof Rose Anne Kenny, there's evidence highlighting the association between vitamin D levels and mortality from Covid-19.

Other scientists at Northwestern University in the US found those with severe vitamin D deficiency were twice as likely to experience Covid-19 complications.

Oily fish is one of the best sources of Vitamin D without supplementing.

We can expect people to increasingly seek out certain foods for their nutrient properties.

Online Considerations / Implications

Few foods are as well positioned and naturally as rich in immunity rich nutrients as fish and seafood.

By creating and repositioning well known and loved fish such as mackerel or salmon as 'immunity boosting' or inflammation fighting, we increase their appeal.

Online technology presents us with the opportunity to target and advertise fish and seafood amongst conversations and articles on immunity and better nutrition in general.