Attitudes to Halal meat and purchasing patterns in the UK

Results from online research

April 2013

Contents

1 - Introduction

1.1 Background

The latest census data shows that the number of Muslims in England and Wales increased from 3.0% in 2001 to 4.8% in 2011. This growing segment of society has its own specific needs in relation to food and particularly meat and poultry purchases where the animals are required to be slaughtered in a way that is compliant with Shariah law.

Research was commissioned in order to further understand the needs and attitudes of Muslim consumers within the meat market.

1.2 Objectives

The overall objectives of the research were as follows.

- To explore meat purchasing behaviour in more detail to understand what is purchased, how frequently and in what format
- To understand what influences the decision of where to shop and to establish the barriers/drivers to purchasing from different types of outlet
- To establish the importance of Halal for Muslim consumers, particularly in relation to requirements such as religious compliance, quality, provenance, assurance marks and certification, price, appearance, health concerns, cut and availability
- To gain a deeper understanding of the relative importance of stunned versus non-stunned meat in the purchase decision
- To explore eating out habits and types of cuisine favoured
- To understand where consumers look for trusted information on food and their relative importance
- To explore consumers' media consumption and frequency of usage

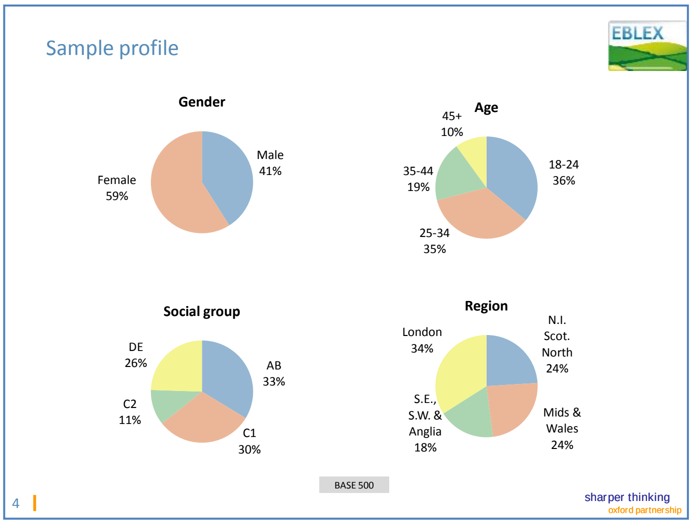
1.3 Methodology

Two online surveys were conducted; one to investigate Halal meat purchasing behaviour and attitudes to slaughter methods and certification, and one specifically for conjoint analysis looking at purchasing trade offs across a variety of variables.

The research was conducted by means of an online questionnaire through an online panel provider. Fieldwork took place in April 2013 with a sample of c.500 interviews achieved for each survey amongst UK Muslims – 500 interviews in the regular survey and 489 in the conjoint survey.

1.4 Sample profile – regular survey

Key demographics of the sample profile achieved closely mirrored the Muslim national profile for the UK shown in the latest census data.



The demographic breakdown is shown below.

- **Age:** 18 to 24 - 36%; 25 to 34 – 35%; over 35 – 29%
- **Gender:** Male – 41%; Female – 59%
- **Social group:** AB – 33%; C1 – 30%; C2 – 11%; DE – 26%
- **Region:** Scotland, Northern Ireland and the North – 24%, Midlands and Wales – 24%; South East, South West and Anglia – 18%; London – 34%
- **Family origin:** Pakistan – 37%; Bangladesh – 16%; India – 14%; UK – 9%; Middle East – 6%; Mixed – 4%; Other – 13%
- **Mosque visits:** Daily – 16%, Several times weekly – 19%, Weekly – 21%, Rarely – 26%, Never – 9%, Rather not say – 9%

2 - Key point summary

- Those respondents with a UK and Middle Eastern family background seem more tolerant in their attitudes to Halal meat and its slaughter process than Asian Muslims who generally adhere to stricter guidelines
- There is little difference in behaviour and attitudes to Halal meat between younger and older age groups, younger age groups being just as strict in the observance of their faith. If there is a difference it is that younger age groups are perhaps seeking more modern and convenient options
- There is a general consistency of response that animals should not be stunned during the slaughter process – 50% of respondents say not stunning is acceptable and only 12% disagree. Almost one quarter of respondents either don't know or have no opinion
- Religious compliance is the key purchasing priority across the demographic groups
- In terms of Halal certification there is strong support for pre-packed meat to have a Halal certification logo – 77% agreeing strongly
- There is also strong support for the certification body to be Muslim based with the strongest support is for an organisation approved by an Islamic authority.
- Whilst Halal meat is perceived to be superior, its ability to attract a premium splits opinion, with 50% saying they would pay more and 46% saying it should be on a par with non-Halal meat
- The top three overall considerations when deciding where to shop for meat/poultry are religious compliance followed by quality and shop cleanliness
- The top three reasons given overall, from the regular survey, when choosing meat/poultry, are religious compliance followed by quality and then price. The conjoint analysis however, suggests slaughter method and store type are also high priorities
- Halal butchers are the main meat retailer for 60% of respondents. National supermarkets are second at 23%. Lack of trust on religious compliance is the main reason for those not using supermarkets
- Chicken is the most popular meat purchased by respondents followed by Lamb
- Fresh and cut to order are the most frequent ways of buying meat and poultry
- Over half (52%) will only eat at Halal outlets if eating out
- Family, friends and religious organisations are the main sources of trusted information on food

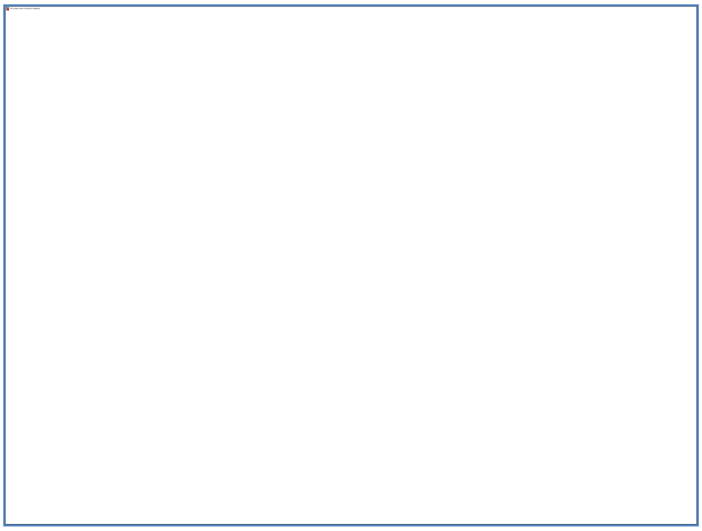
3 – Research Summary

3.1 – Grocery shopping

The vast majority of the sample (84%) buys the bulk of their general groceries from a national supermarket chain. Local shops (6%), independent supermarkets (5%) and cash and carry's (5%) are also used but to a much lesser degree. Online shopping was not specifically mentioned in respect of this question but may be included under national supermarkets.

3.2 Meat and poultry shopping

Halal butchers are used regularly by nearly three quarters (73%) of respondents, a figure that drops to 37% who buy regularly from a national supermarket, 27% who buy regularly from an independent supermarket or a cash and carry and 6% who buy regularly online. *See diagram*



Sixty per cent of the sample uses a Halal butcher as their main outlet for meat purchases. A further 23% use a national supermarket, predominantly Asda and Tesco, as their main outlet for meat, 9% a cash and carry and 5% an independent supermarket.

Asian Muslims are slightly more likely to use a Halal butcher whereas those with a UK or Middle Eastern background are slightly more likely to use a national supermarket.

The main reasons for using the outlets revolve principally around trust and religious compliance. For those using Halal butchers, religious compliance is the main driver of usage but closely followed by trust in the outlet. For national supermarket users trust is the number one driver followed by value and range with religious compliance a little further down the list.

For those not purchasing meat from a national supermarket, the key reason given for not using them is the lack of trust in the religious compliance of the product (72%).

When asked to rate the importance of various factors when considering where to shop for meat and poultry, the top three scores were for religious compliance (8.8/10), meat quality (8.6/10) and shop cleanliness (8.4/10). These were followed by price and retailer/butcher assurance (7.9/10), and the product range (7.8/10). The interplay of these variables is examined in Section 4.

3.3 Meat and poultry purchases

Overall, chicken is the most popular meat purchased across the demographic groups, 91% having purchased in the last three months. Lamb is next at 74% followed by fish at 63%, beef at 46% and mutton at 33%. Eighty per cent of the sample buys lamb and/or mutton.

3.31 Chicken

Fillets are the most frequently purchased cut, bought by 91% and every 4.6 days on average. Whole bird is the second most frequent cut purchased, bought by 88% followed by wings, legs and thighs. Chicken offal is the cut fewest people buy (42%) but those that do, purchase quite frequently.

Fresh is the format most frequently purchased with 81% buying fresh chicken frequently or very frequently. Cut to order is the second most common purchasing format with 59% buying frequently or very frequently. Frozen and pre-packed are the formats bought least often.

Chicken is more likely to be frozen once at home, 62% saying they freeze all or most of the chicken they buy.

When asked if they would like to see any other cuts of poultry made more available, while the majority gave no answer, there were a few suggestions for chicken breasts, chicken wings and turkey.

3.32 Lamb

Chops are bought by the most people (95%) followed by leg (94%), shoulder (93%) and minced (92%). The latter is purchased most frequently, every 5.2 days, followed by diced and chops.

3.33 Mutton

Mutton follows a similar pattern to that of lamb with diced and minced the most frequently purchased every 5.5 days on average. Minced and chops are bought by the most people – 91% for each.

3.34 Beef

Joints (98%), diced (90%) and minced (88%) are purchased by the most people with joints purchased most frequently on average (5 days), followed by minced (6 days) and offal (6 days), although offal is bought by the least amount of people – 44%.

Fresh and cut to order are the two most frequently purchased formats for lamb, mutton and beef cuts, fresh particularly amongst the older age groups. Purchasing frozen and pre-packed cuts is not so common with 59% and 53% rarely or very rarely buying this way.

Lamb is the most likely meat to be frozen once purchased, 53% saying they do it all or most of the time.

When asked if they would like to see any other cuts of meat more available, while there were no significant answers general suggestions included other cuts of meat generally, goat, veal, venison, chops, lamb ribs and leg of lamb.

In terms of meat products they would like to see more available, from a prompted list kebabs were the most mentioned across the demographic groups (53%), followed by burgers (46%) and then pizza (35%), breaded/battered chicken (35%) and ready meals (32%), pizza and burgers being more commonly mentioned by younger age groups.

The question of whether people would be willing to pay more for Halal meat seems to split opinion. Whereas half the sample (50%) would be willing to pay more, 46% think it should be the same as non-Halal meat. *See diagram*.

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.

3.4 Purchase priorities for meat/poultry

Religious compliance is the key priority across the demographic groups. When asked to rank their top five priorities when choosing meat and poultry, religious compliance was the first choice factor for seven out of ten (70%) respondents, quality being the next most popular first choice factor with 13%.

The most popular second choice was quality with 42% of the sample agreeing, and the top third choice factor was price with 26% agreeing.

For those whose main outlet for meat and poultry is a Halal butcher the top three choice factors are religious compliance (72%) followed by quality (48%) and price (27%). For those whose main outlet for meat and poultry is either a national supermarket or a cash and carry the top three are religious compliance followed by quality and appearance.

The hierarchy of choice is also discussed in Section 4.

3.5 The slaughter process

Agreement with the statements below show there is strong agreement for Halal meat to follow proper religious compliance during the slaughter process but less agreement about putting trust in the butcher. These figures are fairly consistent across the demographic groups.

- 'The meat should be Halal certified' – 75% agree strongly

- 'A prayer should be offered at the time of slaughter using a sharp knife to slaughter the animal' – 71% agree strongly
- 'The animal must be slaughtered in compliance with Shariah law' – 69% agree strongly
- 'No other animal should be able to see the slaughter process' – 46% agree strongly
- 'If the butcher/retailer says it is Halal then I accept their word' – 27% agree strongly

On the subject of stunning versus non-stunning animals at the point of slaughter there is greatest support for non-stunning although a significant minority have a more relaxed attitude. 'Stunning animals that renders them unconscious (and could recover) but are still alive at the time of death' – 44% unacceptable, 20% acceptable.

- 'Stunning animals that renders them unconscious (and unable to recover) but are still alive at the time of death' – 45% unacceptable, 21% acceptable
- 'Stunning cows for beef cuts/products' – 43% unacceptable, 21% acceptable
- 'Stunning sheep for lamb and mutton cuts/products' – 42% unacceptable, 23% acceptable
- 'Stunning animals for poultry cuts/products' – 43% unacceptable, 22% acceptable
- 'Animals are not stunned at all' – 12% unacceptable, 50% acceptable

When asked whether their current meat outlet/supplier provided non-stunned meat nearly half of respondents (46%) did not know, 31% said all meat was non-stunned, 16% said they supplied both stunned and non-stunned meat and 7% said that no non-stunned meat was available.

3.6 Halal certification

Seventy seven per cent of respondents thought that having a Halal certification logo on pre-packed meat was very important, an additional 17% thought it quite important. These figures were even higher for those of Pakistani and Indian backgrounds.

In terms of who should certify Halal meat, while opinions differ as shown by the results to the statements below, there is generally more support for the certification to be by Muslim suppliers as opposed to non-Muslim suppliers. Those with the strongest opinions on this are to be found amongst Asian Muslims whereas UK and Middle Eastern Muslims show less concern.

- 'It's acceptable for meat to be certified by any organisation approved by an Islamic authority' – 70% agree, 11% disagree
- 'It's acceptable for meat to be self certified by a Muslim meat supplier' – 55% agree, 26% disagree
- 'It's acceptable for meat to be certified by a Muslim third party' – 47% agree, 27% disagree
- 'It's acceptable for meat to be certified by a non-Muslim third party' – 24% agree , 50% disagree
- 'I'm not concerned by Halal certification as long as the butcher/retailer says it's Halal' – 26% agree, 53% disagree
- 'It's acceptable for meat to be self certified by a non-Muslim meat supplier' – 22% agree, 56% disagree

3.7 Diet and eating out

When asked about their diet and healthy eating, 33% were happy they have a healthy, balanced diet (more likely to be Indians) while 45% thought it quite healthy but could be improved. Only 17% admitted it was not very healthy and could be improved a lot. Nearly half (47%) thought their diet had remained about the same over the last few years while just over a third (36%) thought it was more healthy now and 15% thought it less healthy now.

In terms of eating out or buying a takeaway, 47% do so weekly or more frequently with younger age groups more likely to do so. Eighteen per cent eat out less than once a month.

Results show that respondents tend to favour the food from their own particular background although British and Italian cuisine are also popular amongst most groups.

Over half of respondents (52%) will only eat at Halal outlets with a further 25% who try to eat at Halal outlets. Seventeen per cent eat at non-Halal outlets but choose non-meat meals and 5% will eat non-Halal meals. Asian Muslims are more likely to only eat at Halal outlets, as are more frequent mosque goers, while Turkish and Middle Eastern Muslims are more likely to eat non-Halal meals.

3.8 Information sources and media consumption

The three most trusted sources for information about food are Family (58%), Friends (50%) and Religious organisations (50%). These are followed by the internet (43%), religious leaders (30%) and health professionals (23%).

When asked to rank the top five media used, websites are the most mentioned across the groups, with mainstream television second, Facebook third, online news sites fourth and Ethnic television fifth. Websites are favoured across the groups but 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.

In terms of frequency of usage, not surprisingly Facebook and Twitter are used daily by approximately half of their users, as are websites and mainstream television. Press and radio tend to be consumed slightly less frequently.

4 – Conjoint analysis results

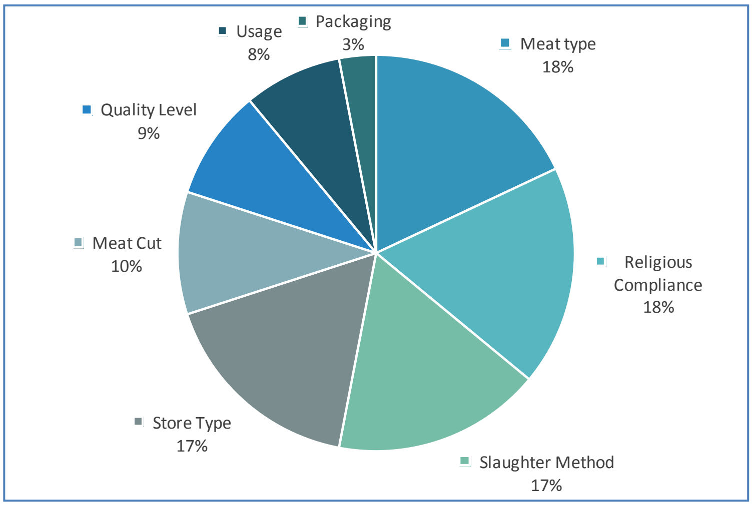
The conjoint results show the purchase intention hierarchy as opposed to the online results which show attitudes towards Halal meat and the patterns of purchasing behaviour.

The core benefit of the conjoint analysis technique is that it defines and applies numerical values to the purchasing intention hierarchy when there is a wide range of overlapping variables driving the decision. The eight variables considered in this study were:-

- Species (meat type)
- Religious compliance (Assurance scheme)
- Slaughter method (stunned or non-stunned)
- Meat cut
- Outlet type (supermarket or independent)
- Quality level
- Usage (how long stored)
- Packaging

4.1 Relative importance of purchase variables

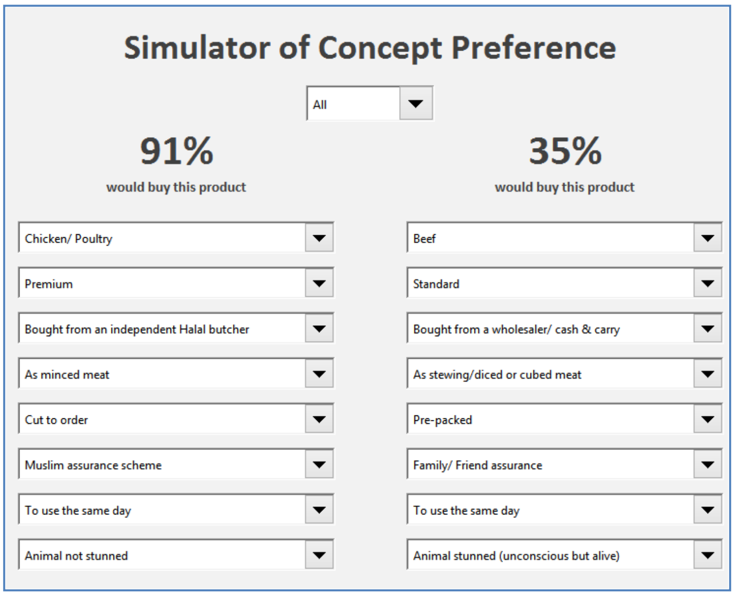
The overall results show the relative importance of the eight variables shown above. Higher level variables are Meat Type, Compliance Assurance Type, Store Type and Slaughter Method. Middle tier variables are Meat Cut, Quality Level and Usage; whilst packaging is the Lower level variable.



4.2 Choice simulator

The conjoint analysis enables the production of a choice simulator, a tool embedded in Excel that allows the quantification of the reach of various combinations of the purchase variables amongst the selected sub-sample.

In the example on the right which relates to the total sample, 91% of the total sample would buy the combination shown on the left relating to chicken/poultry, whereas 35% would buy the combination shown on the right relating to beef.



The simulator enables users to evaluate the potential shopper reach of over 10,000 combinations of purchase variables.

Further copies of this document, along with a presentation and the Conjoint analysis embedded in Excel can be downloaded from:

www.eblextrade.co.uk/halal