

National Consumer Agency

Market Research Findings Shopping and Pricing Household Budgeting and the Impact of the Recession



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January 2010
Research Conducted by


amárach
research

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- **Profile of Sample**

- **KEY FINDINGS:**

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- **SECTION 2: Grocery Shopping**
- **SECTION 3: Household Budgeting**

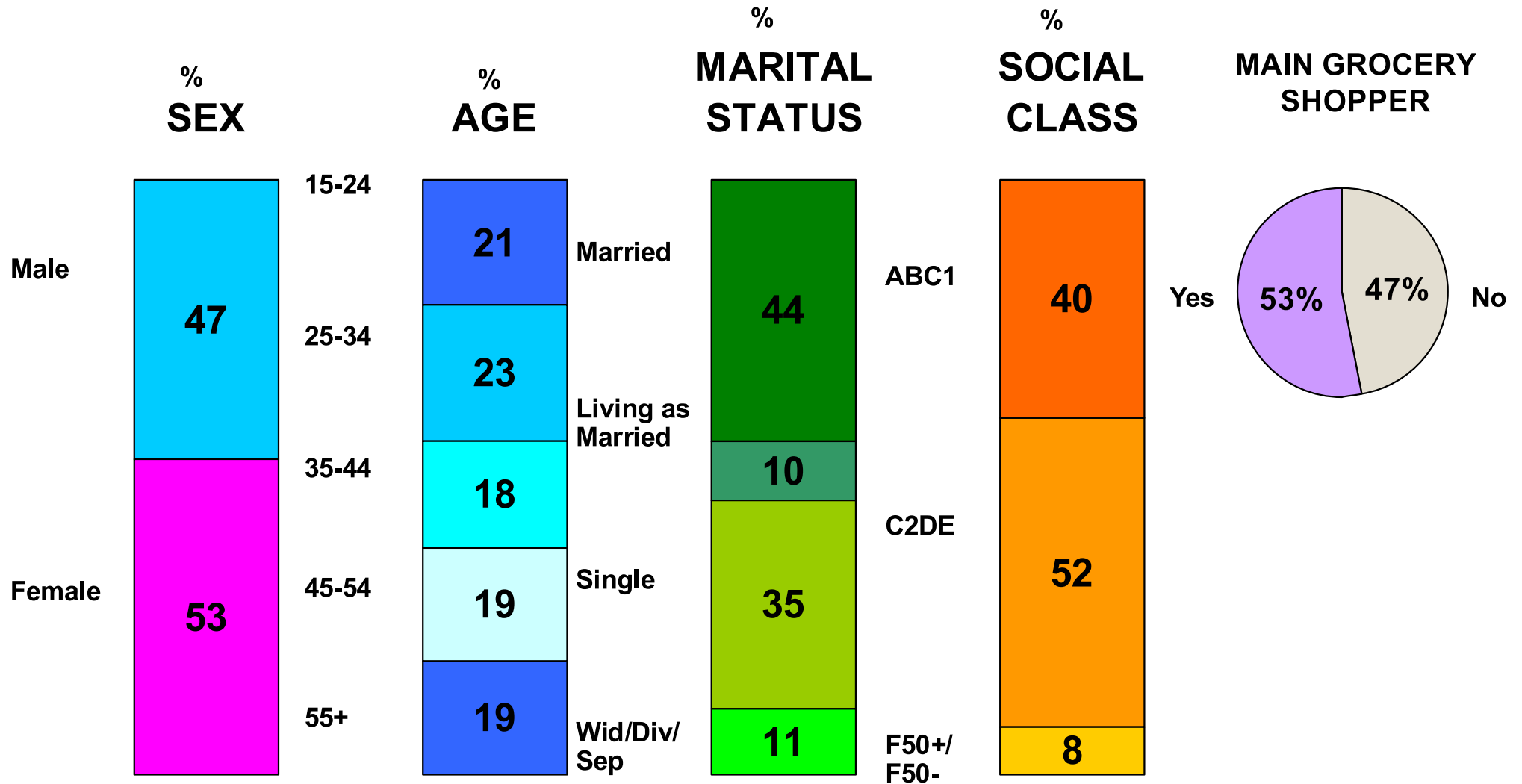
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Profile of Sample – I

(Base: All aged 15-74 – 1,000)



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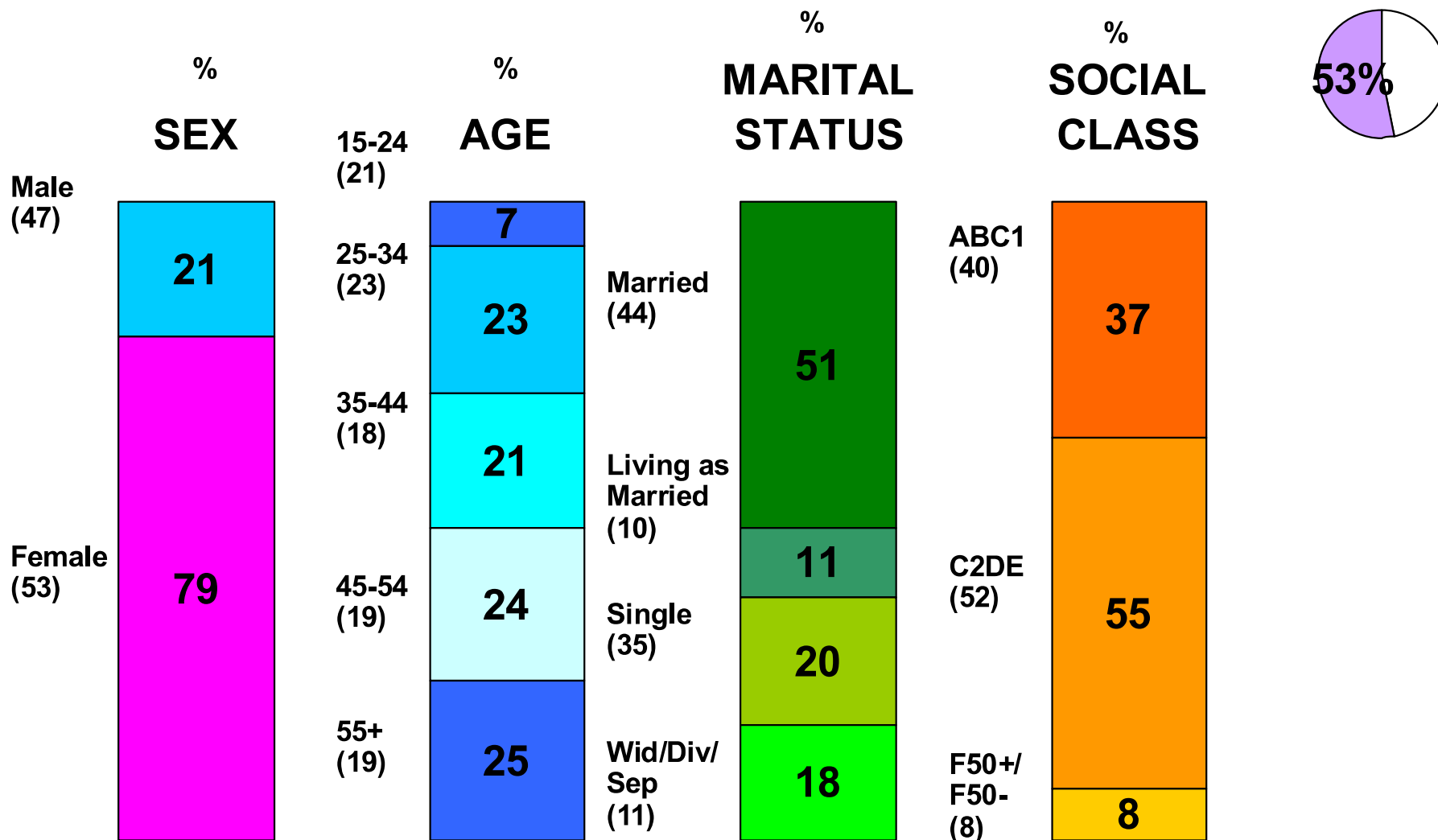
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Profile of Sample – II – Main Grocery Shoppers



(Base: All Mainly Responsible for Grocery Shopping in Home – 525)

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() = Total Sample

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Profile of Sample – III – Internet Use

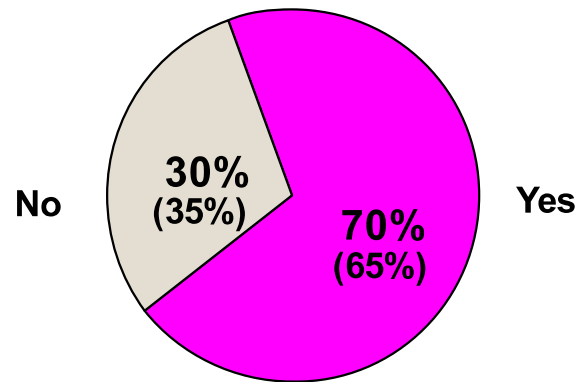


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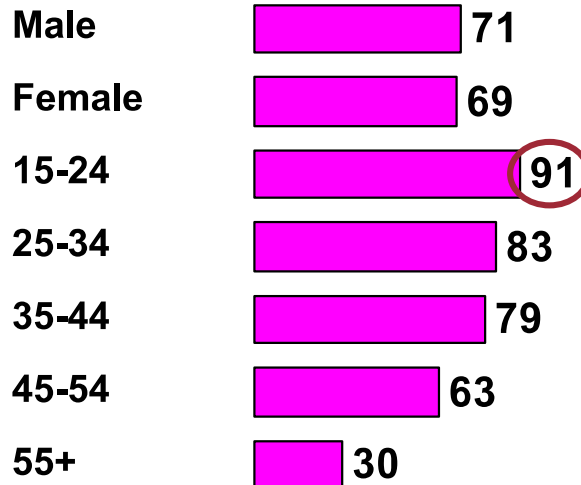
() = figures from wave 3 2009

(Base: All Respondents – 1,000)

USE INTERNET

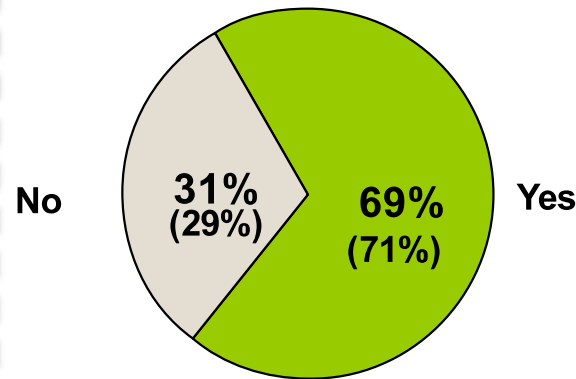


% Yes

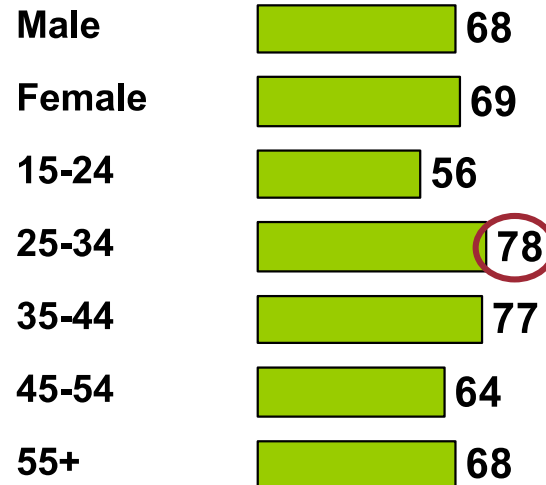


EVER PURCHASED ONLINE

(Base: All Internet Users - 702)

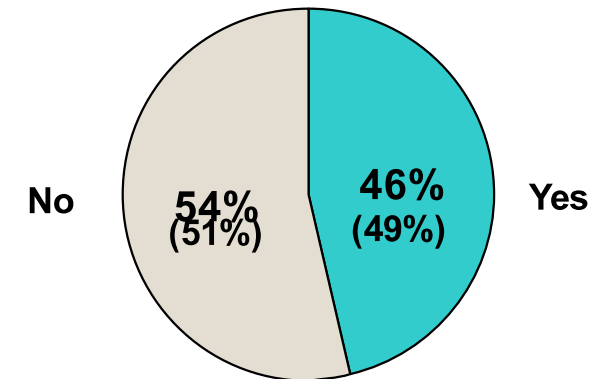


% Yes

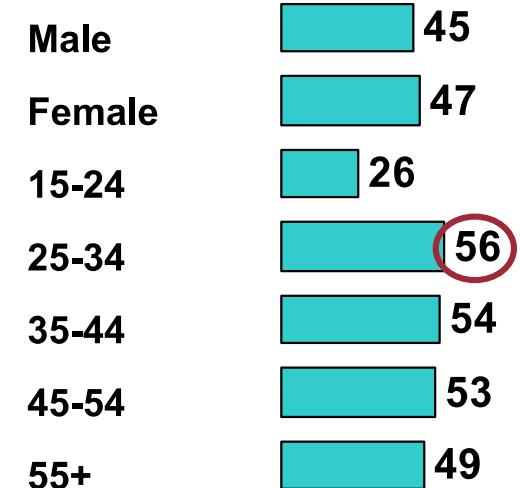


BANKING ONLINE

(Base: All Internet Users - 702)



% Yes



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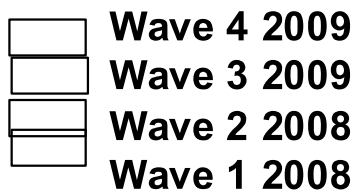


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Section 1: General Shopping and Pricing

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Goods & Services Purchased in Past 12 Months – Primary



(Base: All aged 15-74 – 1,000)

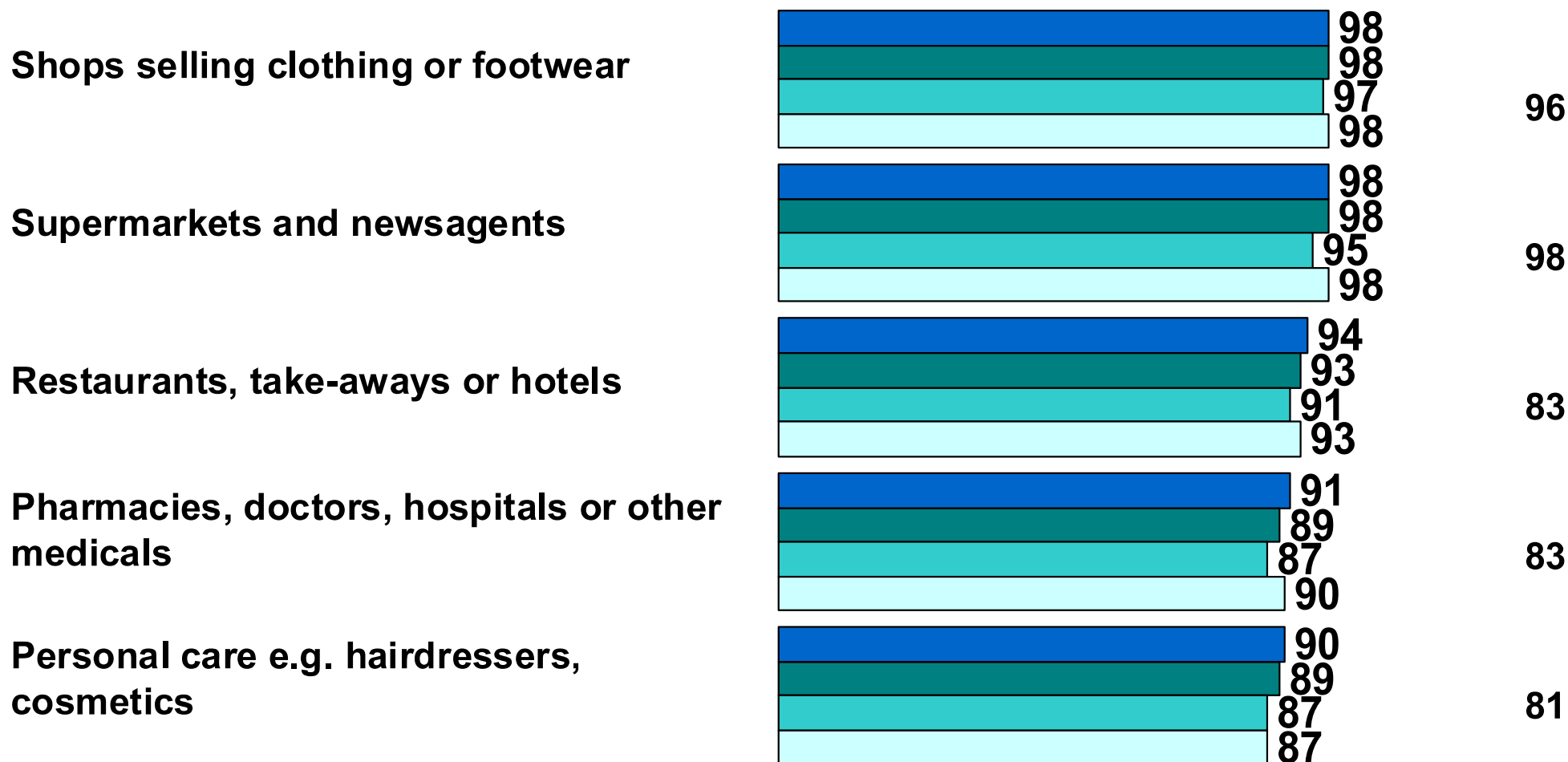


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Goods & Services Purchased:

% Ever Bought

Benchmark
2007



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Goods & Services Purchased in Past 12 Months – Secondary – I

- Wave 4 2009
- Wave 3 2009
- Wave 2 2008
- Wave 1 2008



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(Base: All aged 15-74 – 1,000)

Goods & Services Purchased:

% Ever Bought

Benchmark
2007

Pubs



80

Communications services including home phone



76

Entertainment at home e.g. DVDs, CDs, games



71

Banking products and services including a current a/c



75

Entertainment outside the home e.g. cinema



64

Petrol stations



73

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Goods & Services Purchased in Past 12 Months – Secondary 2

- Wave 4 2009
- Wave 3 2009
- Wave 2 2008 (Base: All aged 15-74 – 1,000)
- Wave 1 2008



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**Benchmark
2007**

% Ever Bought

Goods & Services Purchased:

Insurance products and services

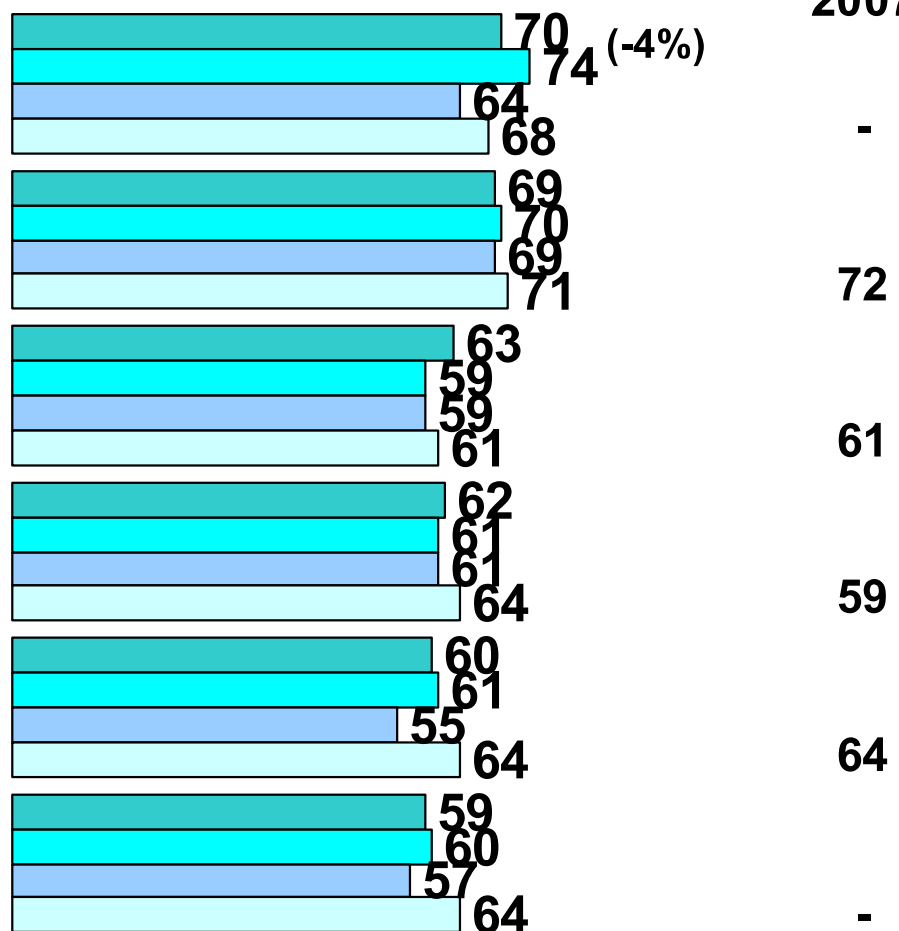
Energy suppliers e.g. ESB, Bord Gais

Local authority bin services

Public transport – buses and trains

TV Service Providers e.g. Sky, ntl

Airlines



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Goods & Services Purchased in Past 12 Months - Tertiary



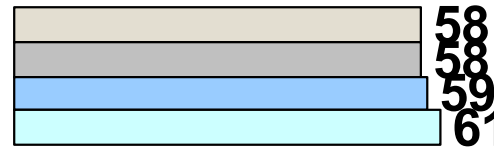
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(Base: All aged 15-74 – 1,000)

Goods & Services Purchased:

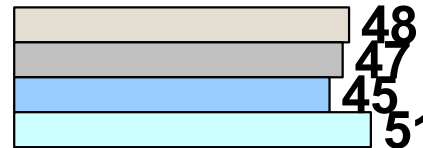
% Ever Bought

Shops selling furniture or household appliances



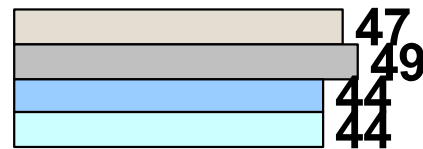
Benchmark
2007

Education providers e.g. schools and colleges



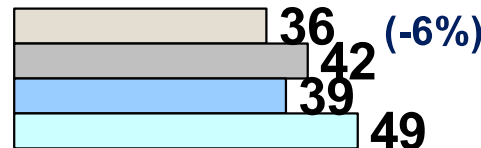
56

Building and related services e.g. plumbers



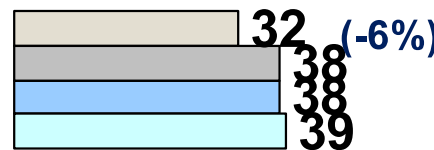
53

Travel agents



41

Car dealers



51

- Wave 4 2009
- Wave 3 2009
- Wave 2 2008
- Wave 1 2008

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Shopping Around



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(Base: All aged 15-74 – 1,000)

Comparison of prices

Wave 4 '09
%

Wave 3 '09
%

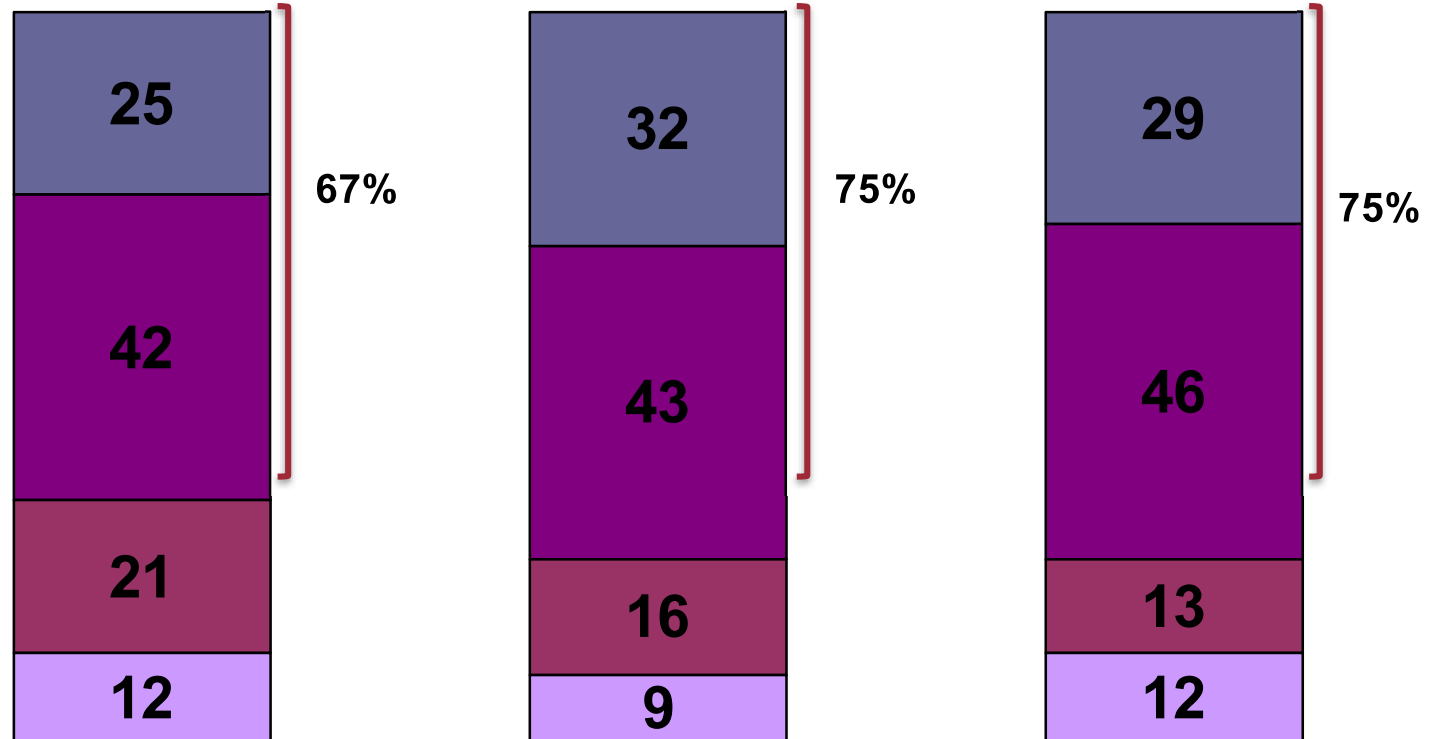
Wave 2 '08
%

I always compare/shop around for better prices

I sometimes compare/shop around for better prices

I very rarely compare/shop around for better prices

I never compare/shop around for better prices



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Most Likely to Shop Around/Compare Prices in....



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(Base: All who shop around/compare prices - 675)

Wave 4 2009

Wave 3 2009

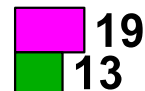
Most Likely

%

Supermarkets & Newsagents



Shops selling clothing or footwear



Shops selling furniture or household appliances



Insurance products & services



Airlines



Car dealers



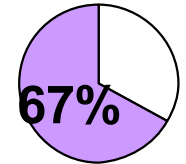
Petrol stations



All others 2% or less for most likely

Total*

%



* New question

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Key Influencing Factors in Determining Where to Shop

(Base: All Aged 15-74 – 1,000)



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Strongest Influencing Factor

Wave 4 2009

Wave 3 2009

Wave 2 2008

%

%

%

Price

65

70

64

Convenience

17

13

22

Shopped there previously

10

8

9

Service

6

5

3

Other

2

2

2

Don't know

—

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Biggest Influencing Factors Across Sectors – I



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Wave 4 2009
Wave 3 2009

(Base: All aged 15-74 – 1,000)

Supermarkets and newsagents*

Shops selling clothing or footwear

Insurance products & services

Car dealers

Airlines

Petrol stations

Shops selling furniture/
household appliances

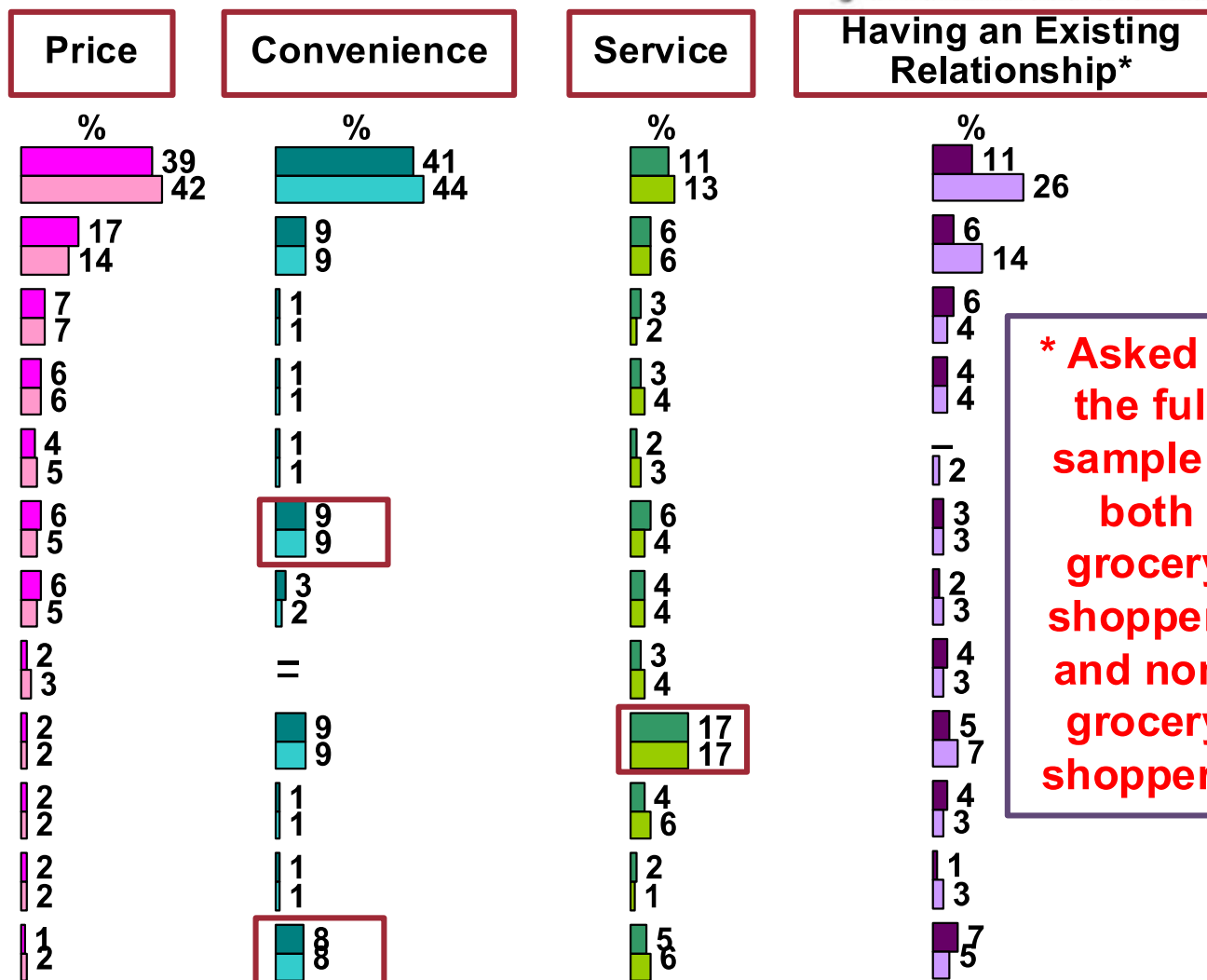
Building & related services

Restaurants or hotels

Communications services

Travel agents

Pubs



* Asked of the full sample – both grocery shoppers and non-grocery shoppers.

* Having shopped there previously was asked in Wave 3.

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Biggest Influencing Factors Across Sectors – II



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(Base: All aged 15-74 – 1,000)



* Having shopped there previously was asked in Wave 3.

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Price Comparison Sites

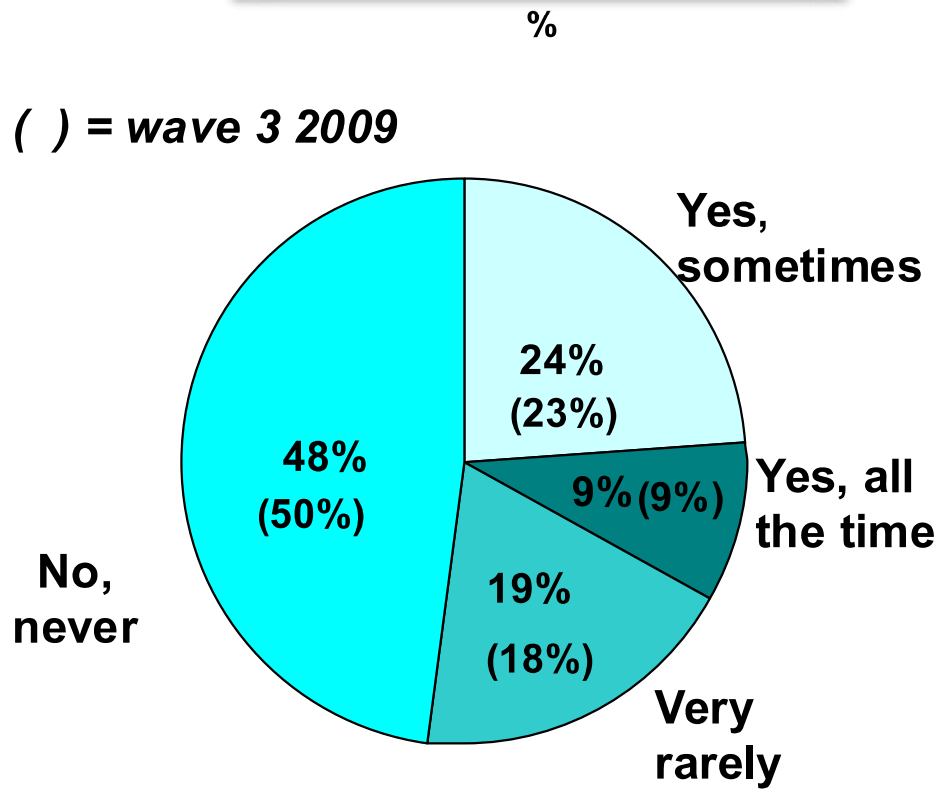


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(Base: All who sometimes/always use price comparison sites – 229)

(Base: All who use the internet – 702)

Frequency of using sites



Top 10 sectors most likely to use a product review/website to compare prices/quality#



Wave 4 2009
Wave 3 2009

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Section 2: Grocery Shopping and Pricing

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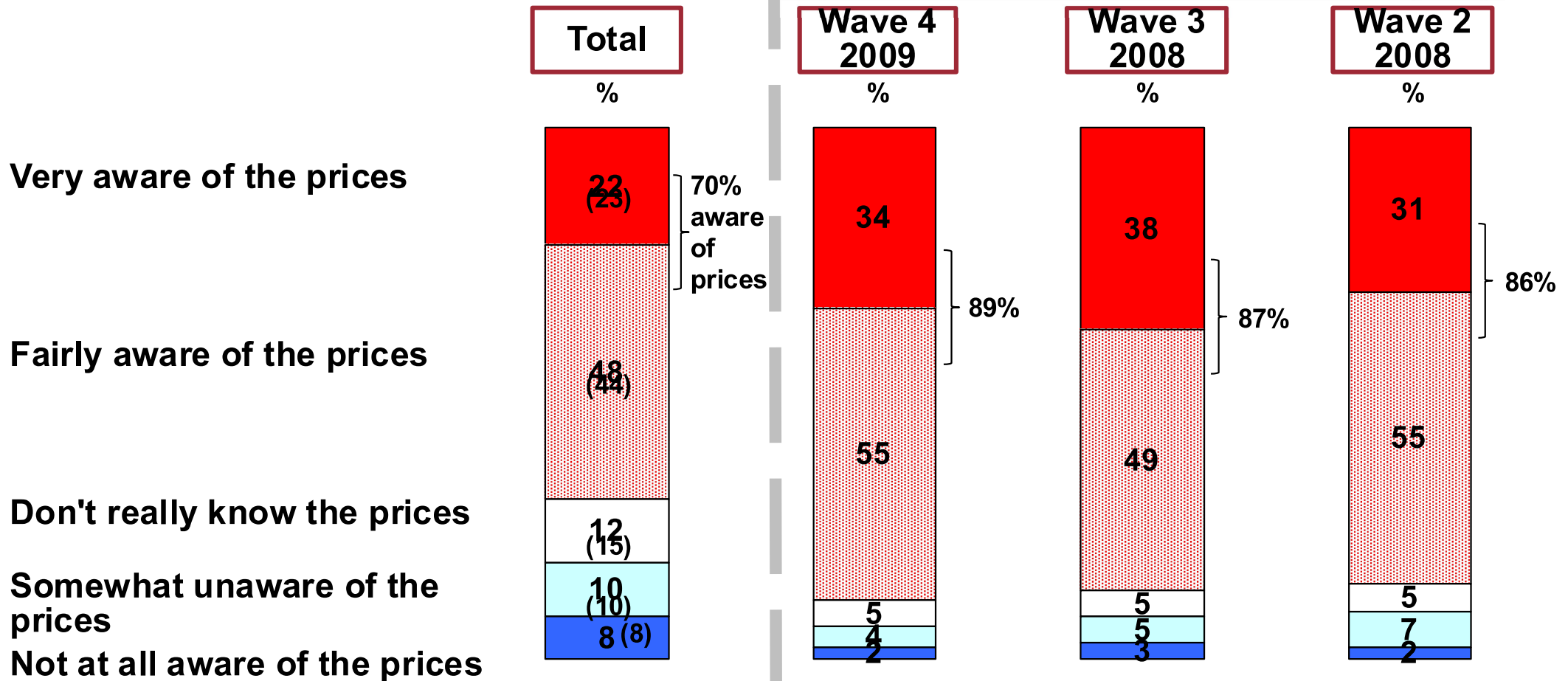
Overall Awareness of the Price of Everyday Goods



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(Base: All aged 15-74 – 1,000)

All responsible for the main grocery shop – 525
(53%)



() = Wave 3 2009

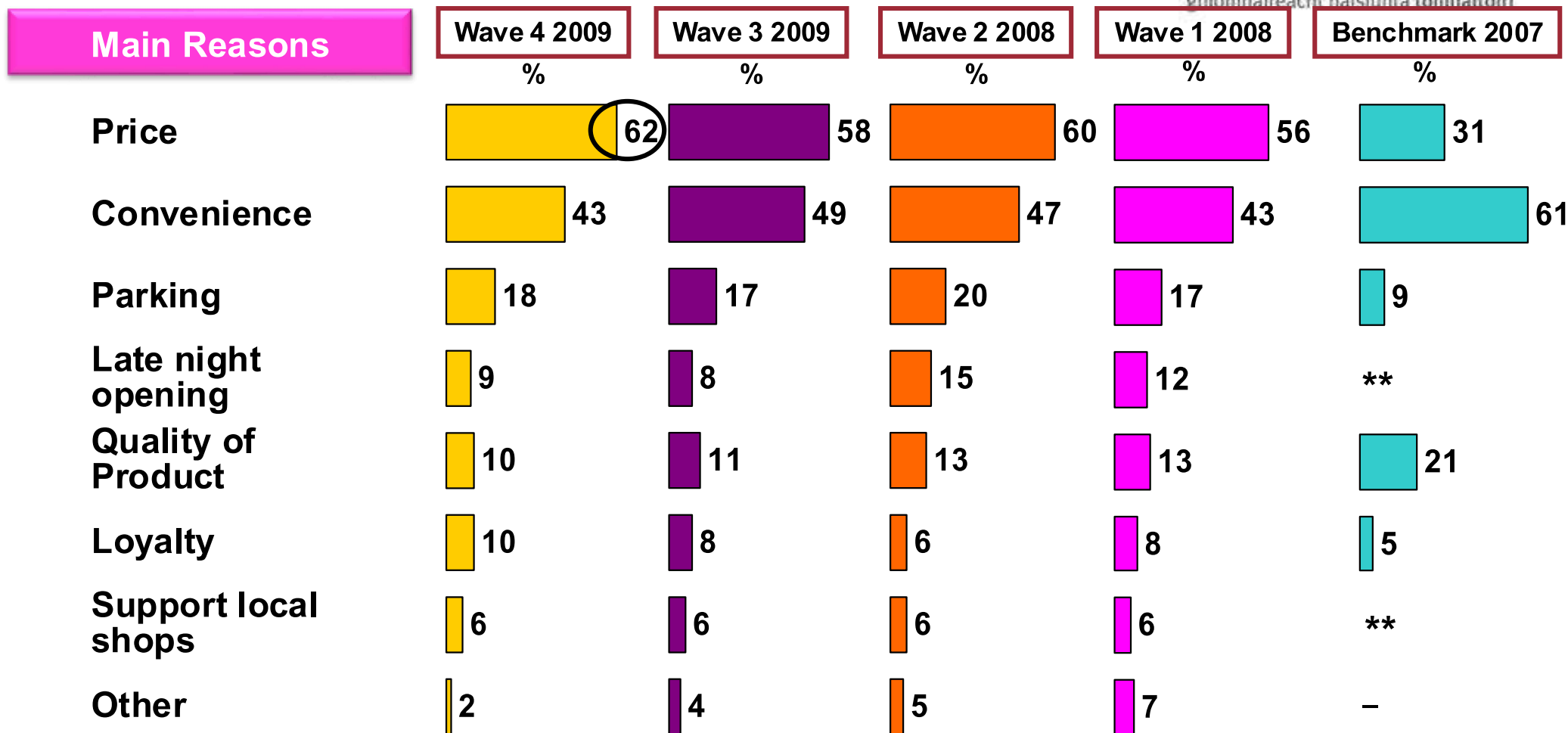
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Main Reasons for Choice of Main Grocery Shop



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(Base: All main grocery shoppers – 525)



** Not asked in Benchmark

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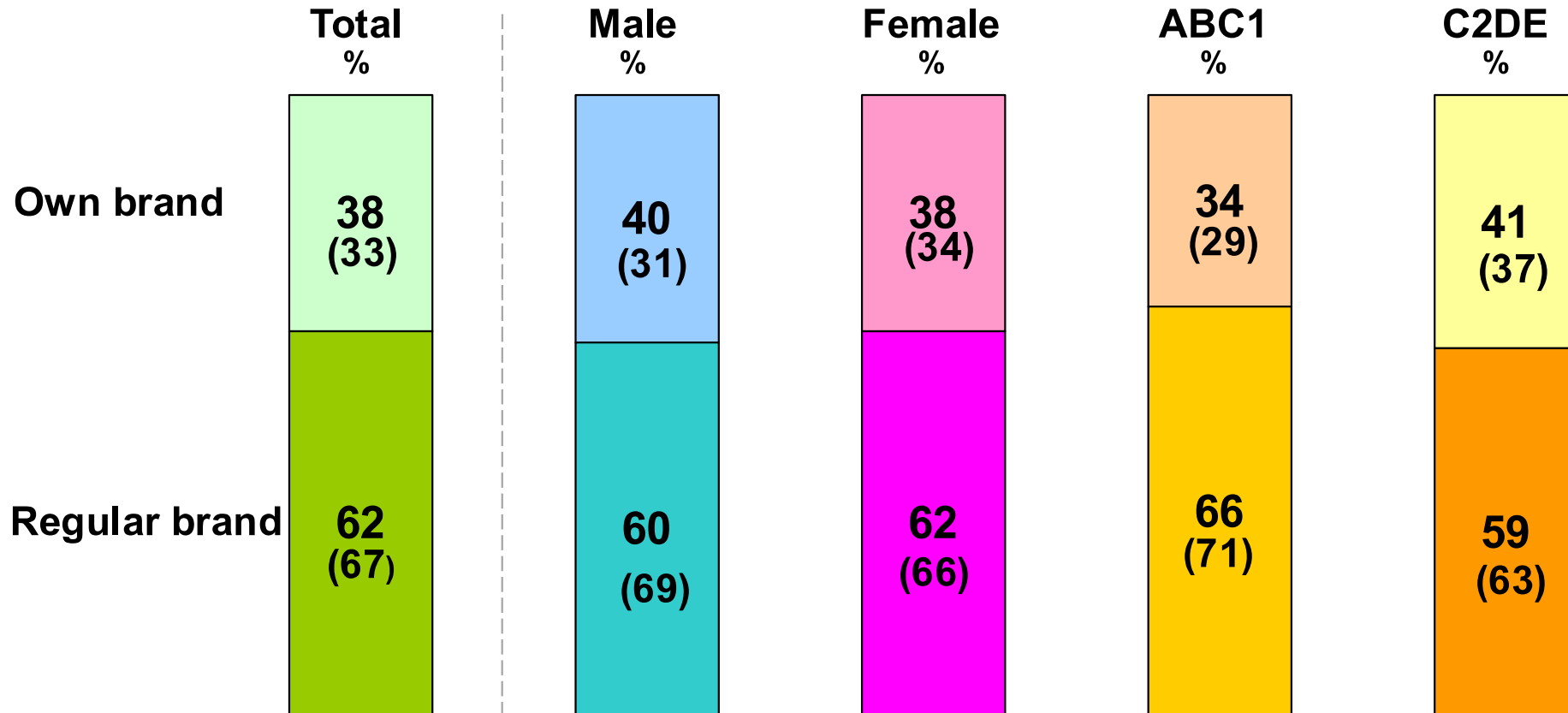
Own Brands versus Regular Brands



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(Base: All main grocery shoppers – 525)

Wave 4 2009



() = wave 2 2008

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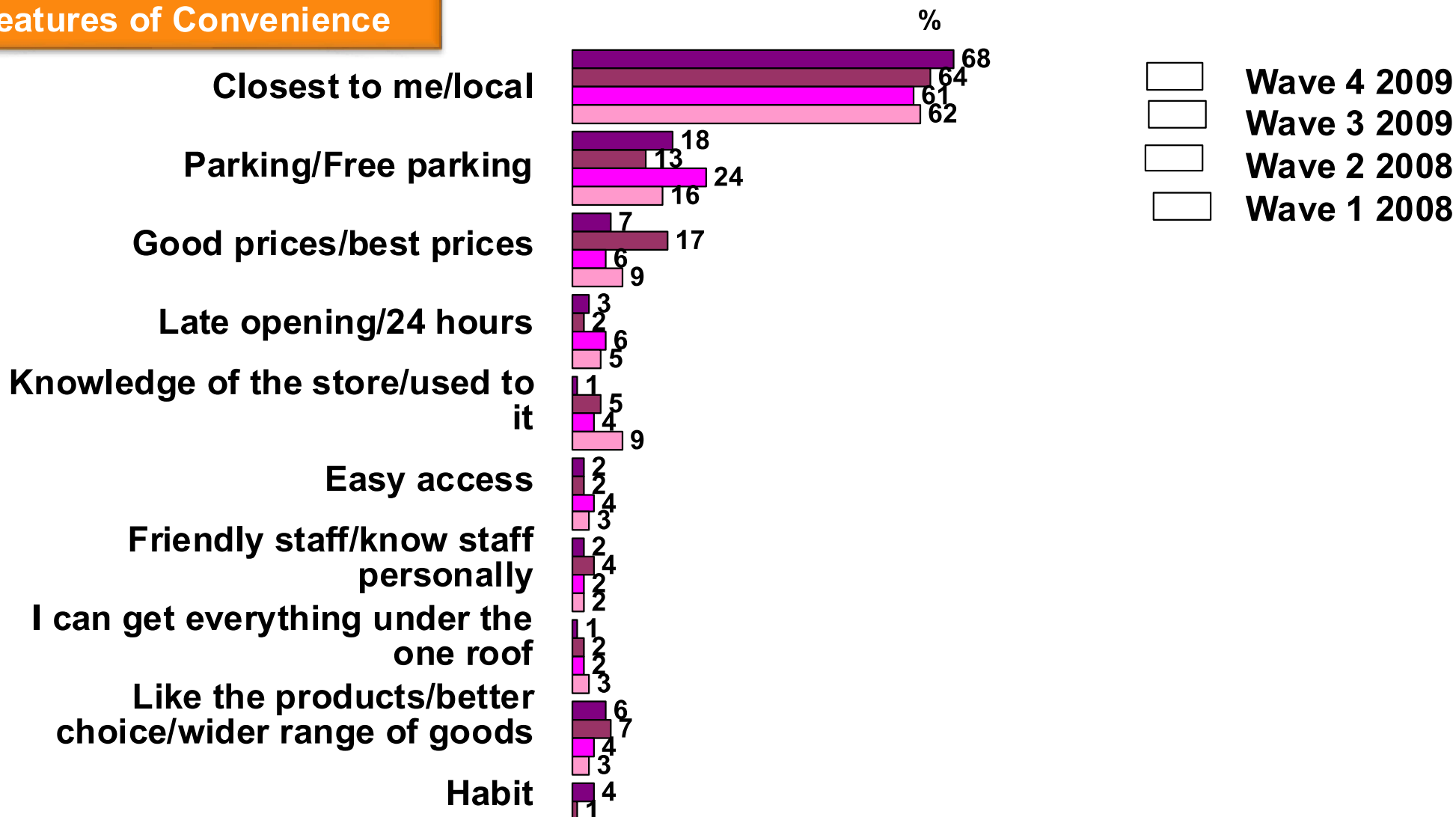
Features of Convenience which Determine Choice of Grocery Shop

(Base: All choosing their main grocery shop for convenience – 225)



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Features of Convenience



All others 1% or less

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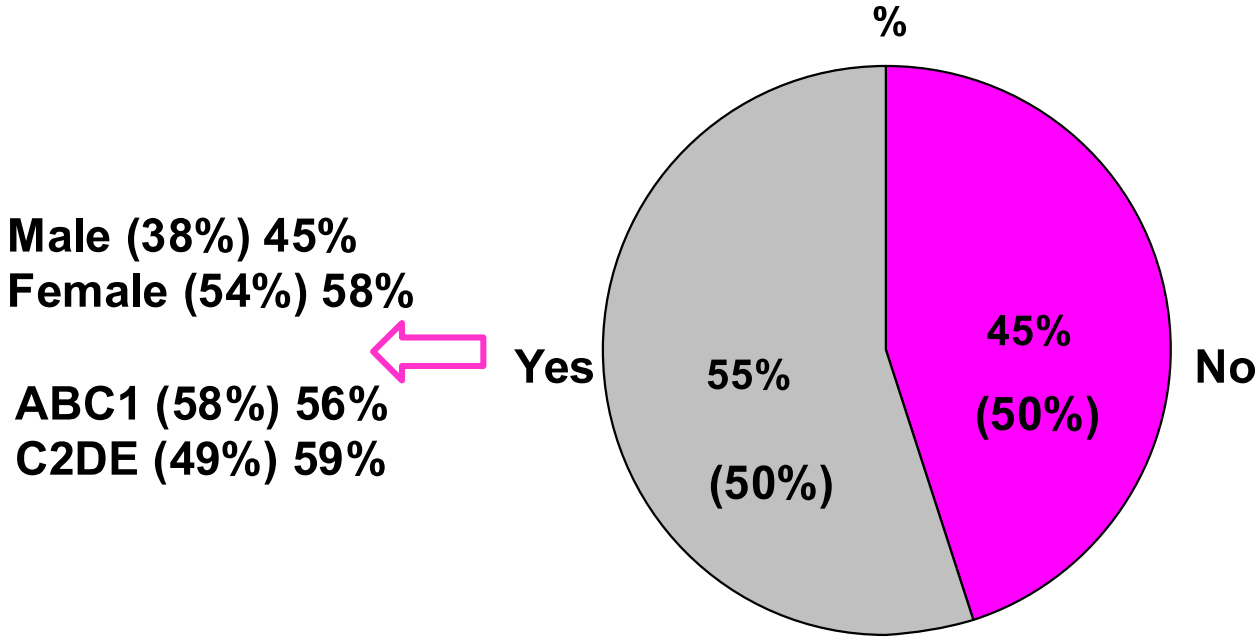
Change in Grocery Shopping Since the Start of the Year



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(Base: All main grocery shoppers – 525)

Change in Grocery Shopping



() = Wave 3 2009

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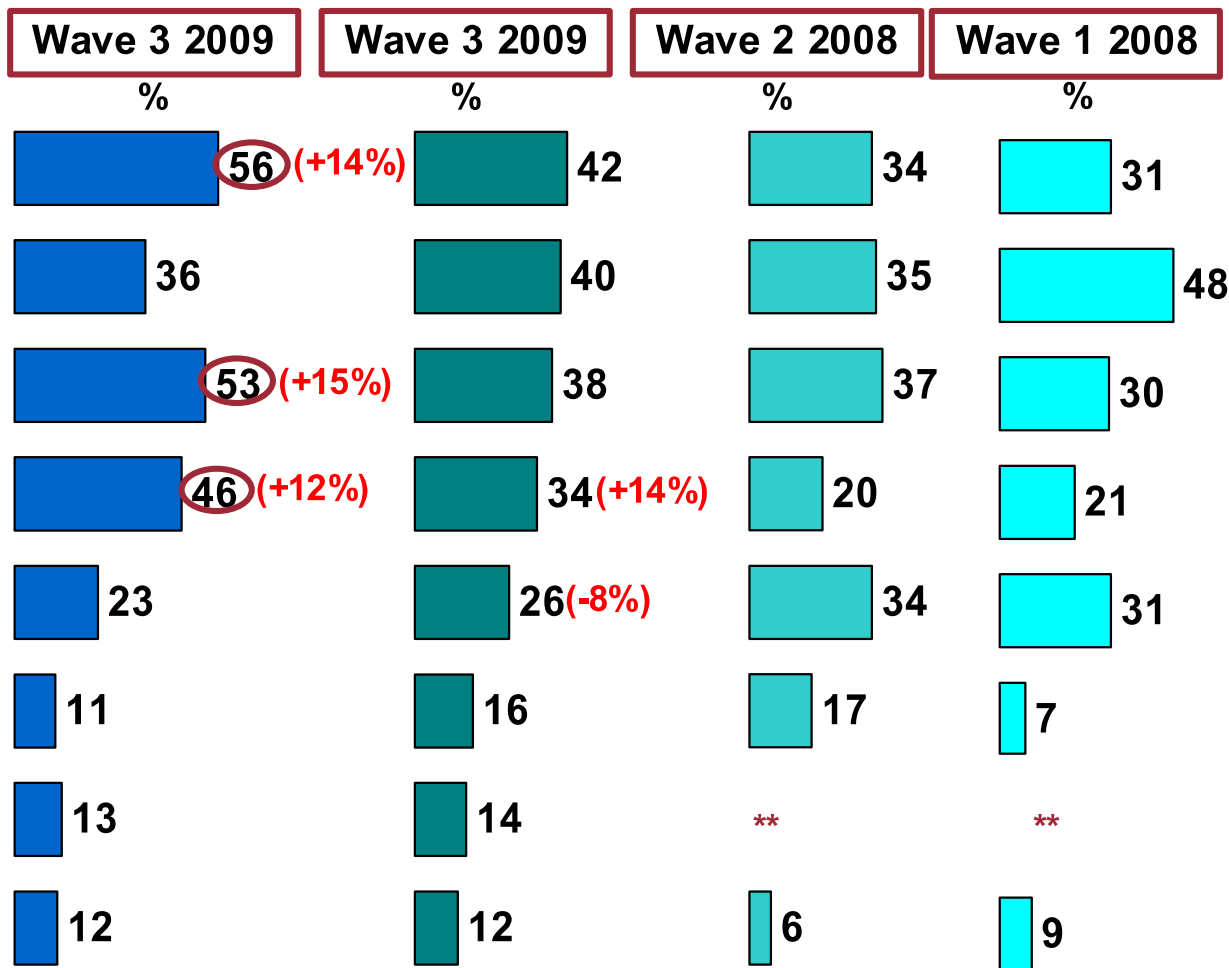
Changes Made to the Grocery Shopping Since the Start of the Year



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(Base: All who changed their shopping behaviour since the start of the year – 291)

Changes to Grocery Shopping



** Not asked in previous waves

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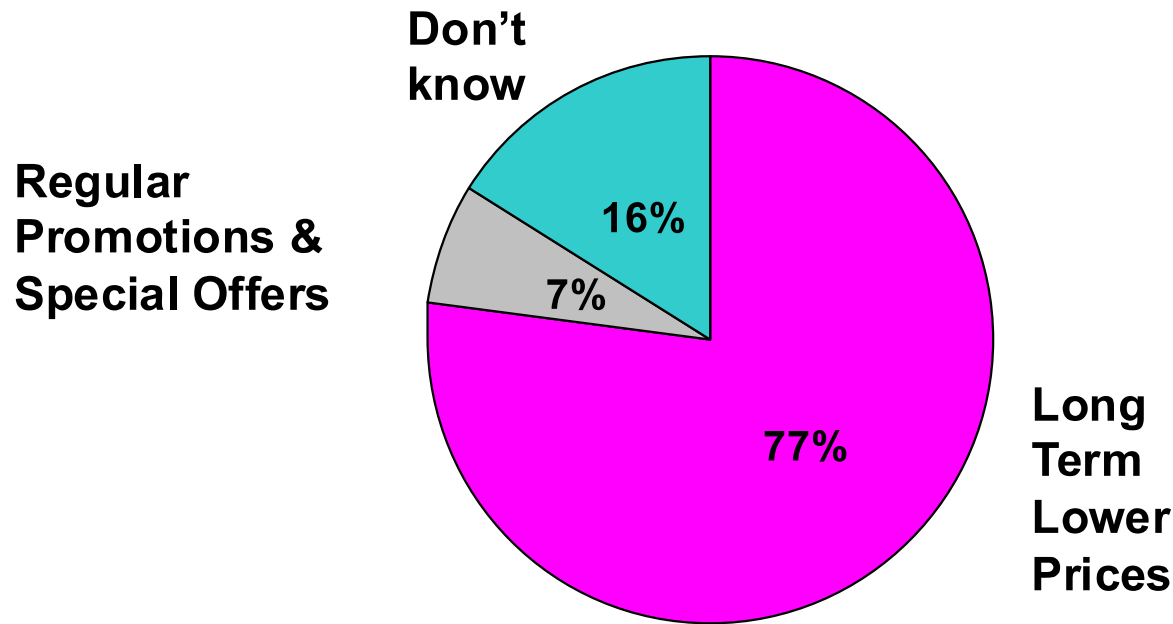
Price Cuts & Special Offers

(Base: All responsible for the main grocery shop - 525)



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What would you prefer to see more of within supermarkets?



** New Question*

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Funding of Promotions & Special Offers

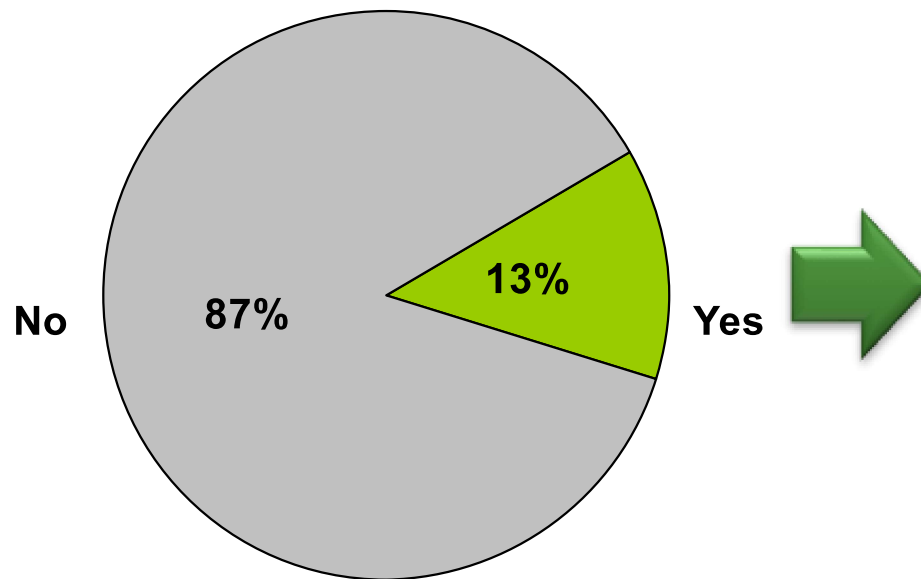


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(Base: All responsible for the main grocery shop - 525)

Do you know how promotions and special offers are funded by Supermarkets?

How are they funded?



all others 1% or less

* *New Question*

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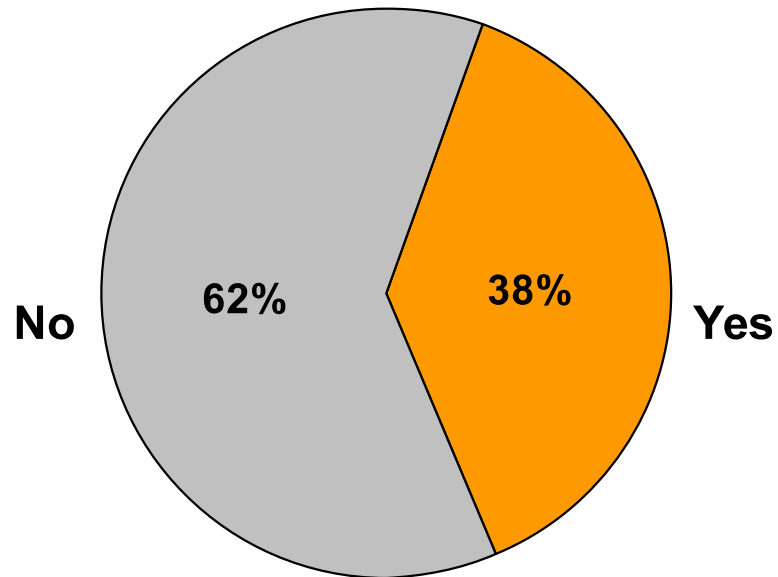
Special Offers & Promotions



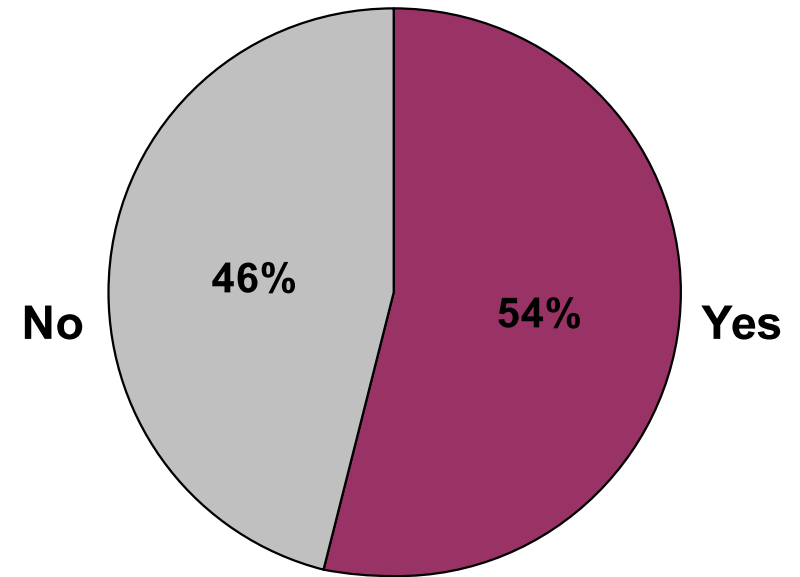
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(Base: All responsible for the main grocery shop - 525)

Are you aware that retailers sometimes sell items at a loss in order to entice customers into the stores?



Do you actively seek out special offers & promotions in various supermarkets?



*** New Question**

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Section 3: Household Budgeting and the Impact of the Recession

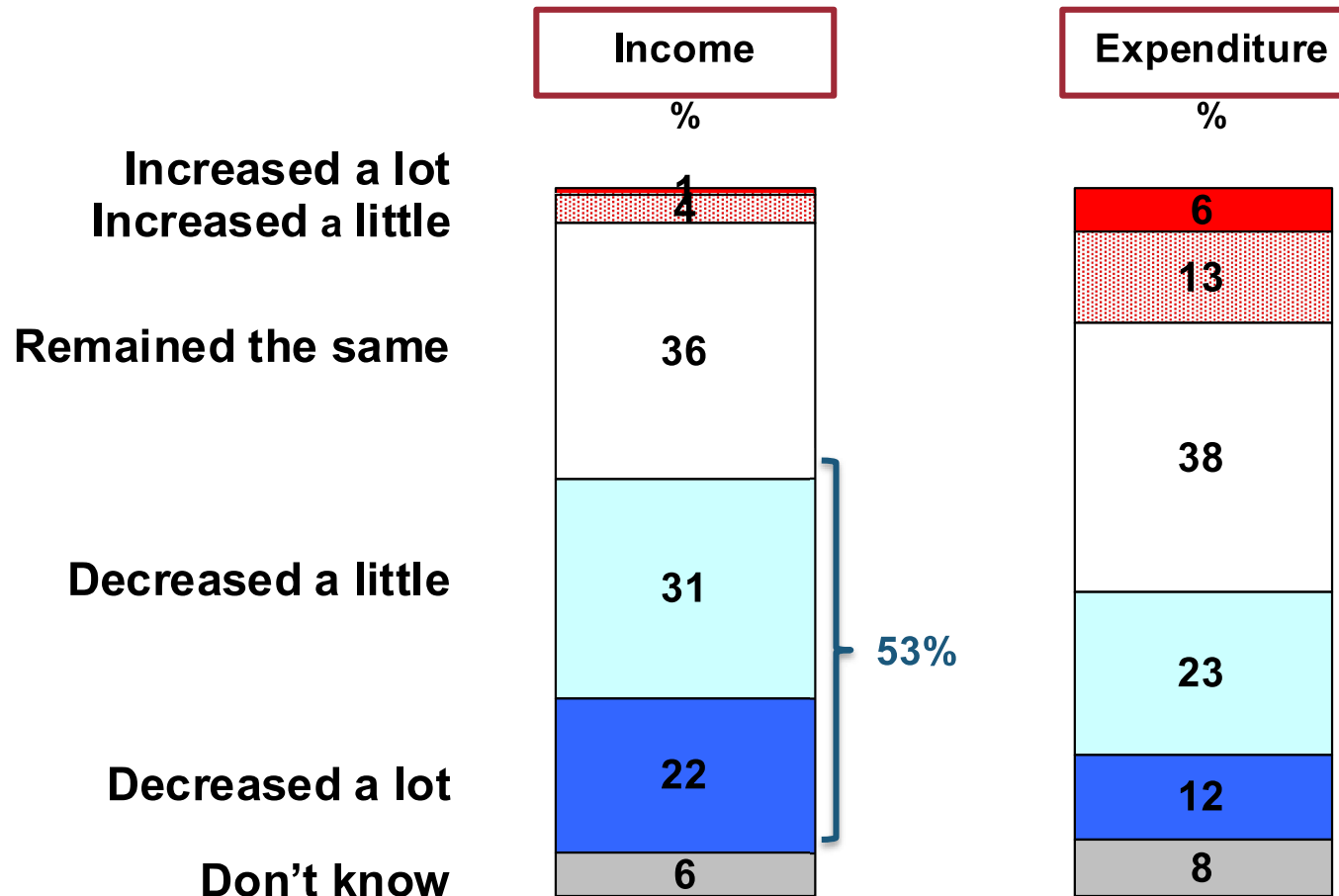
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Household Income & Expenditure



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(Base: All aged 15-74– 1,000)



** New Question*

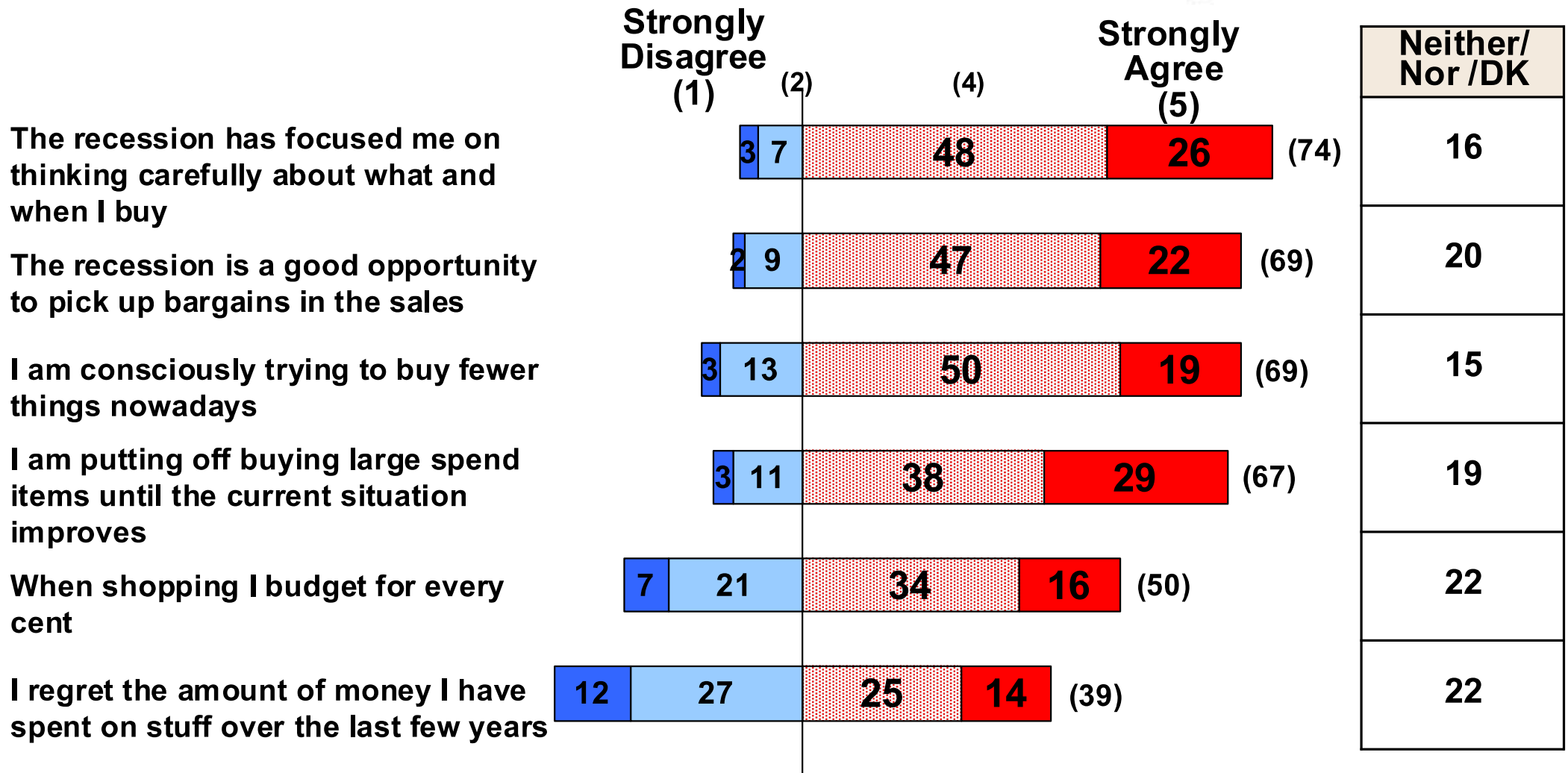
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Spending / Thrift



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(Base: All aged 15-74– 1,000)



* *New Question*

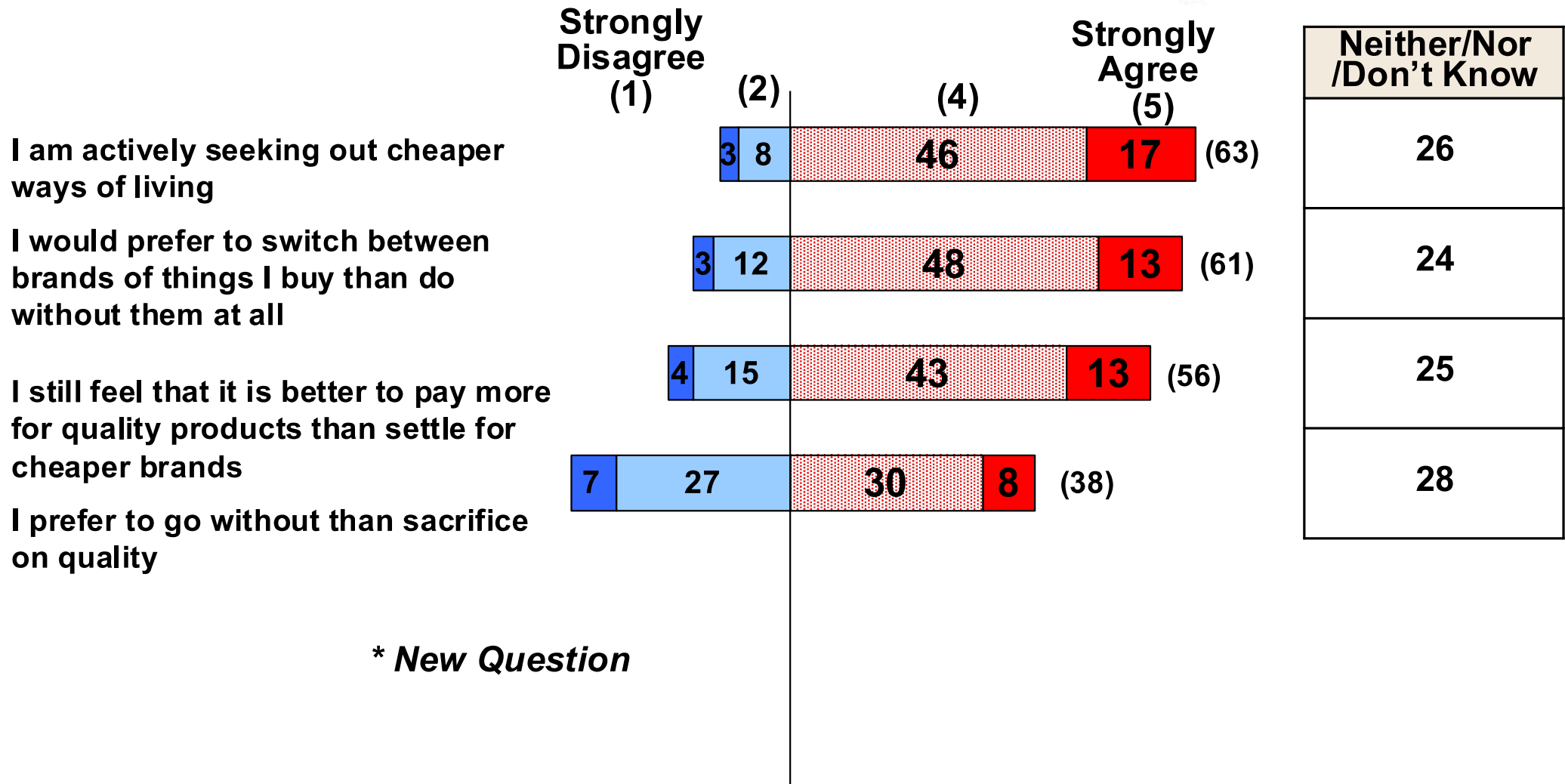
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Coping Behaviour



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(Base: All aged 15-74– 1,000)



** New Question*

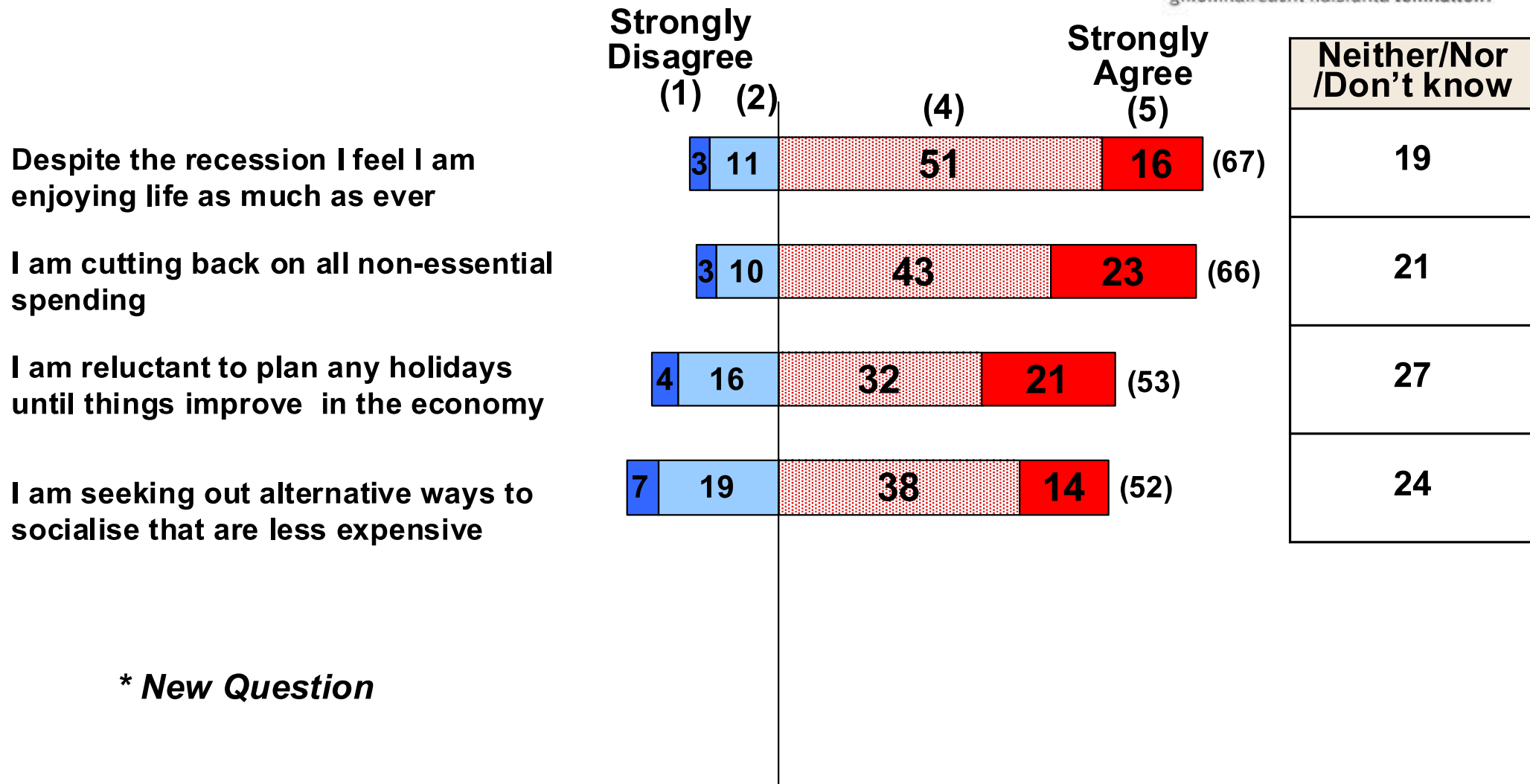
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Lifestyle



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(Base: All aged 15-74– 1,000)



** New Question*

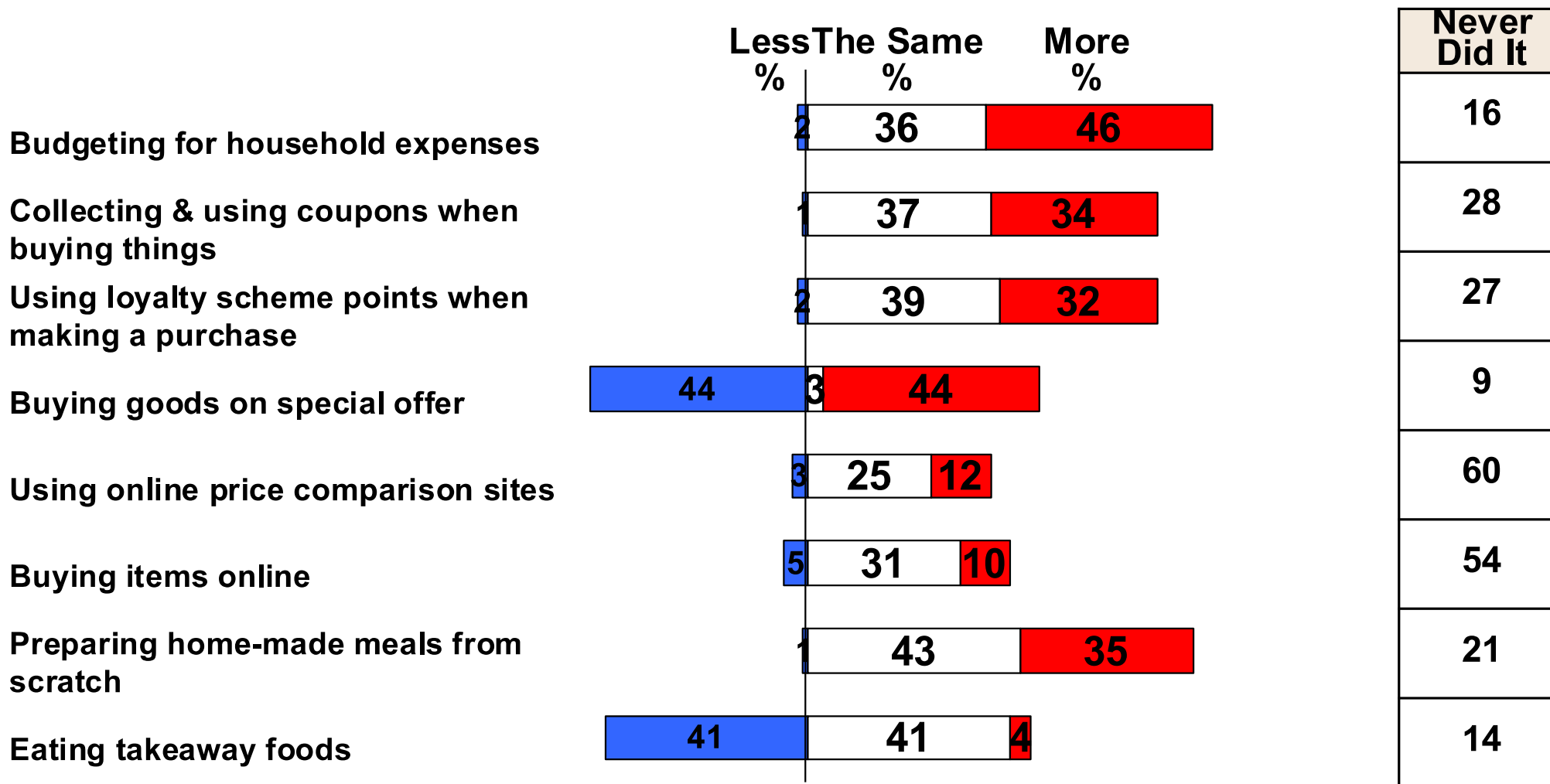
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Change in Behaviour as A Result of Recession – I



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(Base: All aged 15-74– 1,000)



** New Question*

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Change in Behaviour as A Result of Recession – II



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(Base: All aged 15-74– 1,000)



** New Question*

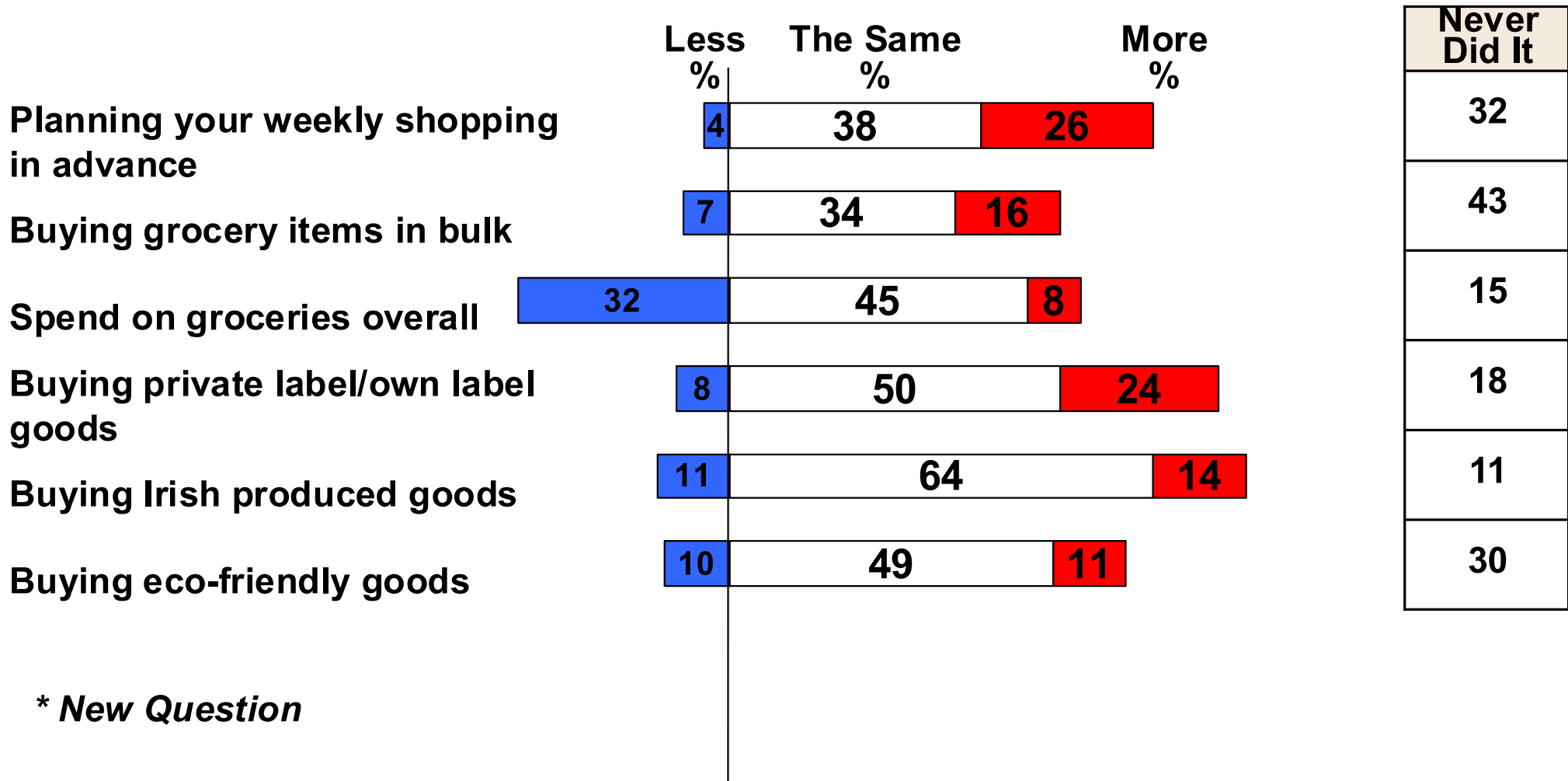
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Change in Behaviour as A Result of Recession – III



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(Base: All aged 15-74– 1,000)



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