National Consumer Agency

Market Research Findings:
Shopping and Pricing

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March 2012
Research Conducted by

amárach research

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Key Findings

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Key Findings - I

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Shopping and Pricing

- **Over 4 in 5** (85%) compare/shop around for better prices.
- **Price** remains the **leading influencing factor** in determining where to shop at 56% (↑3%) with convenience second at 21% (↓2%).
- Consumers citing an **awareness** of the price of everyday goods has increased from 71% to **78%.**
- For those **responsible for the main grocery shop, 93%** state that they are **aware** of the prices of everyday goods, an all-time high.

Key Findings – II

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Grocery Shopping

- **Price is number one determining factor** in deciding where to carry out the **main grocery shop**, rising by 10% points to 73%, with convenience considered the second most important factor, at 54%.

- Over 3 in 10 (31% up 3%) now visit a particular store based on special offers advertised, whereas almost 2 in 3 (65%) consumers visit their usual store and pick up special offers while there.

- The overall average grocery basket consists of 65% branded and **35% own brand goods.**

- In recent years, **1 in 5** (22%) think the **quality of own brand products has improved** or is better than they thought, and a further 17% now think that own brand products are just as good as branded products.

Section 1: General Shopping and Pricing

Shopping Around

(Base: All aged 15-74 – 1,000)

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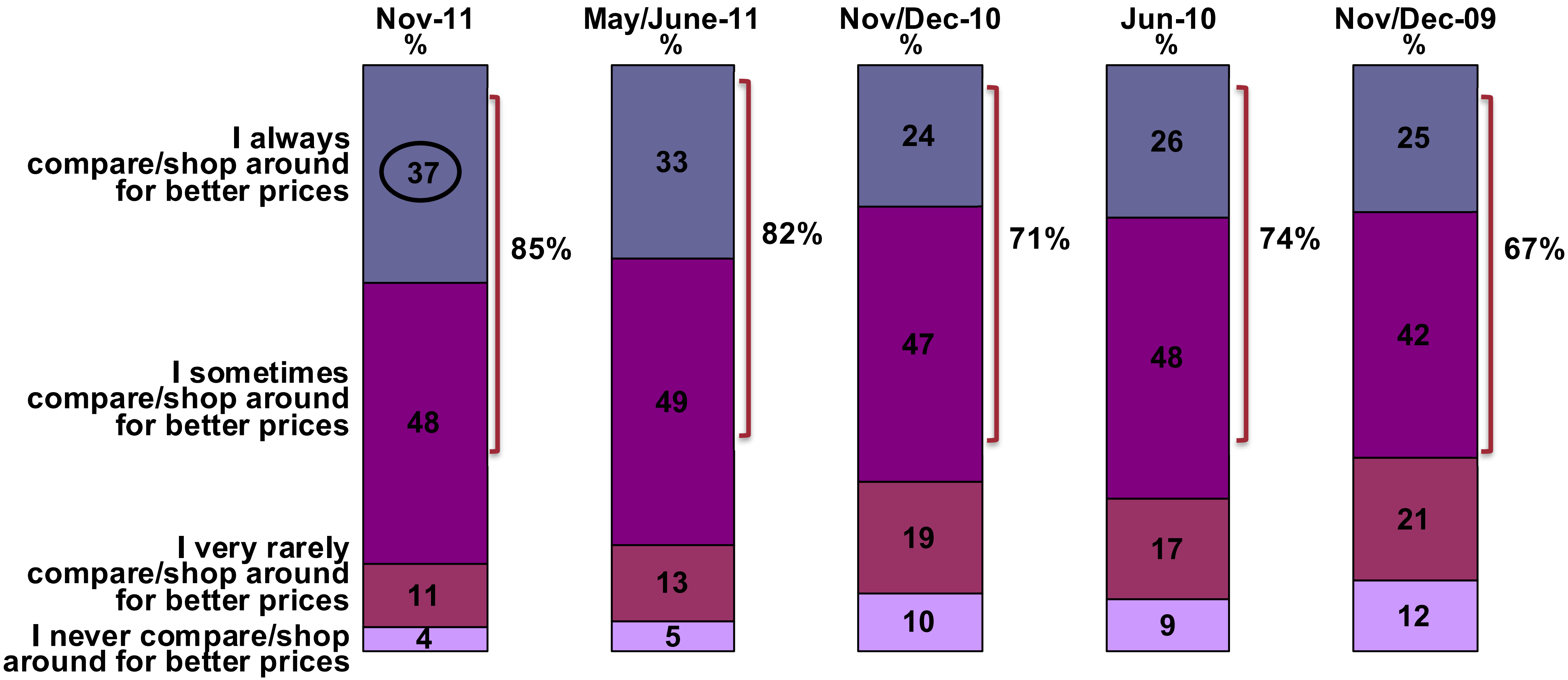
Comparison of prices



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Key Influencing Factors in Determining Where to Shop

(Base: All Aged 15-74 – 1,000)

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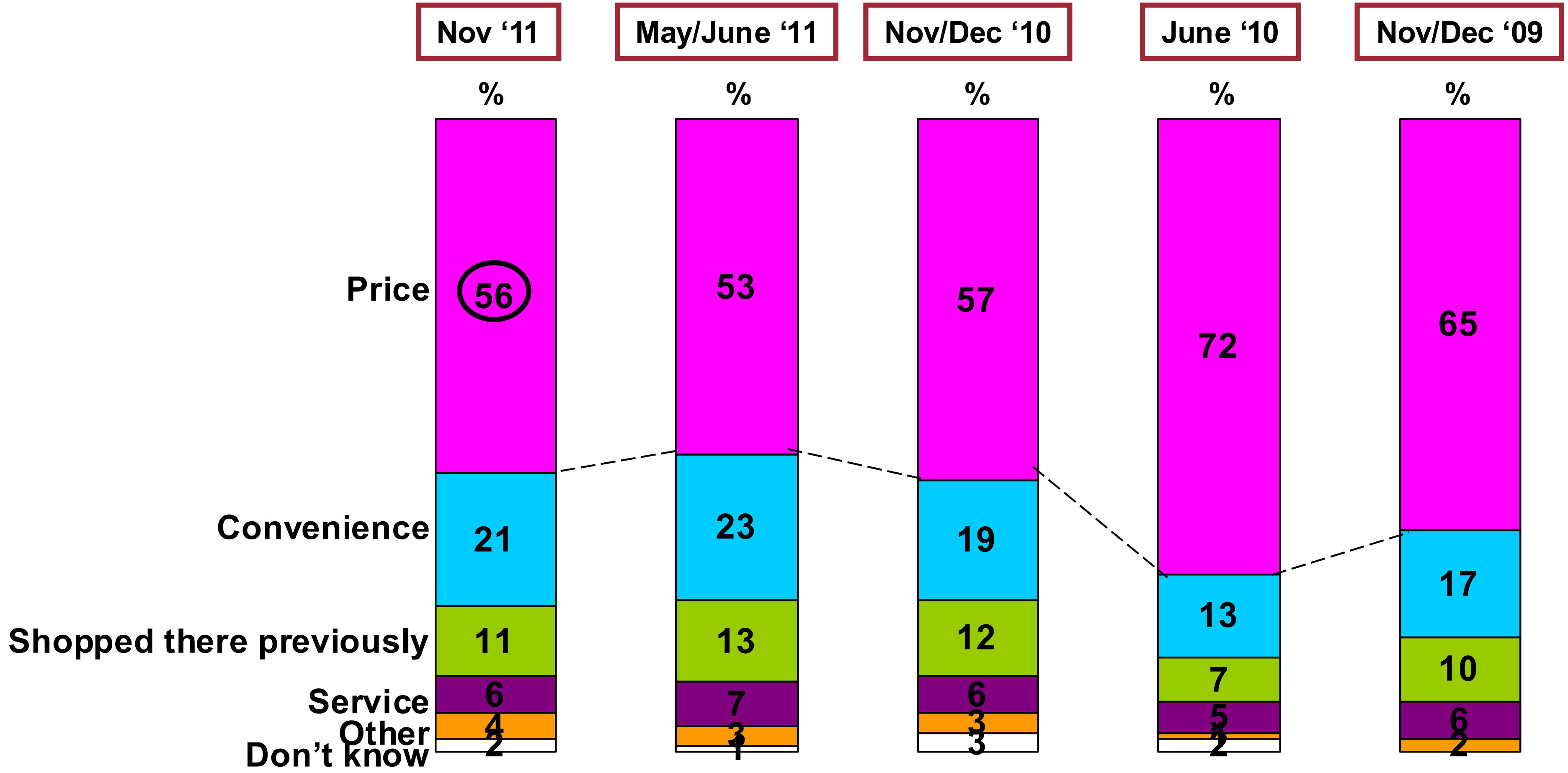
Strongest Influencing Factor



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Overall Awareness of the Price of Everyday Goods

(Base: All aged 15-74 – 1,000)

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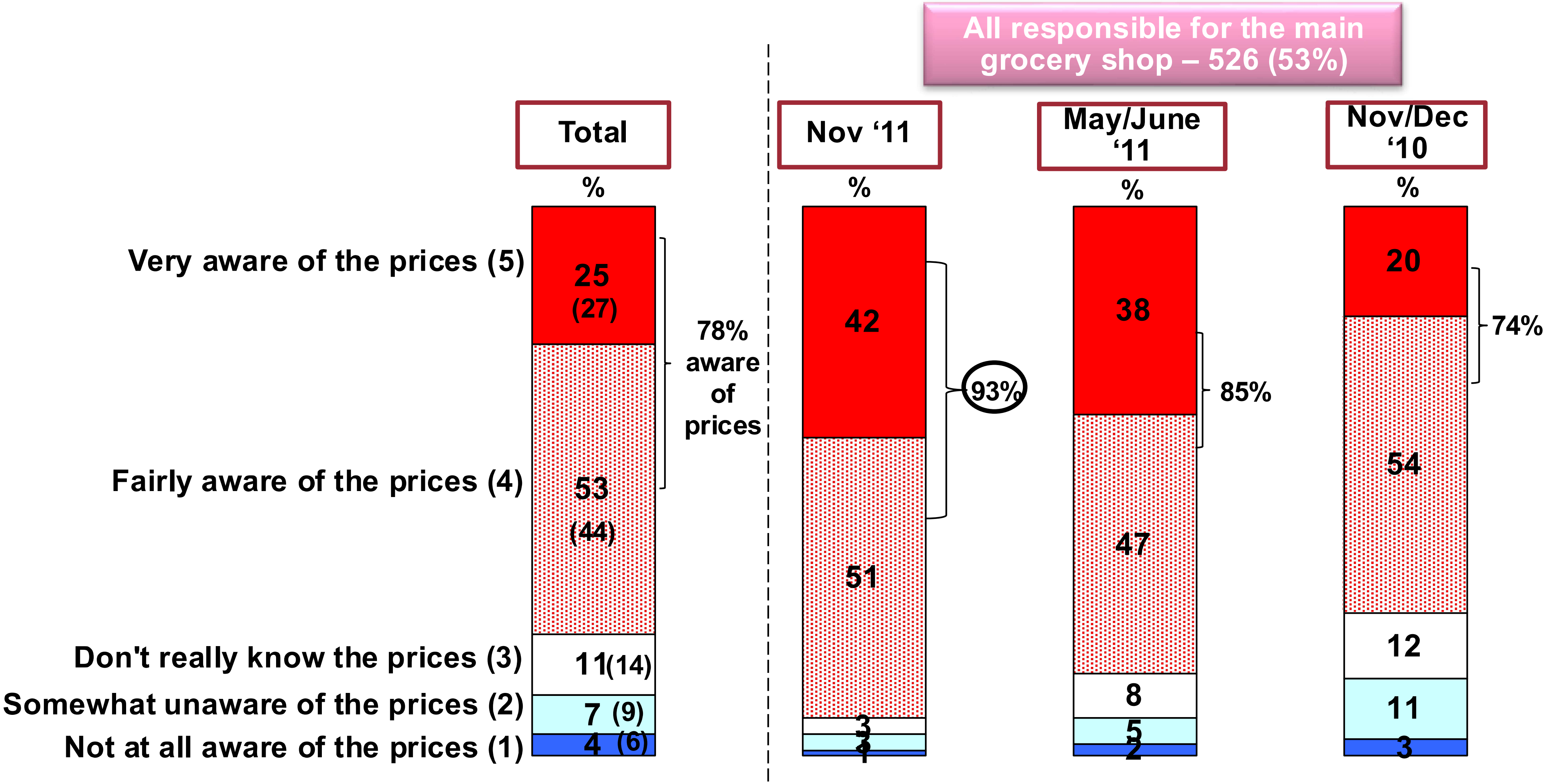

( ) = May/June 2011

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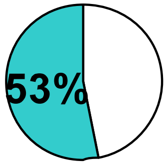
Section 2: Grocery Shopping

Main Reasons for Choice of Supermarket for Main Grocery Shop



(Base: All responsible for main grocery shop - 526)

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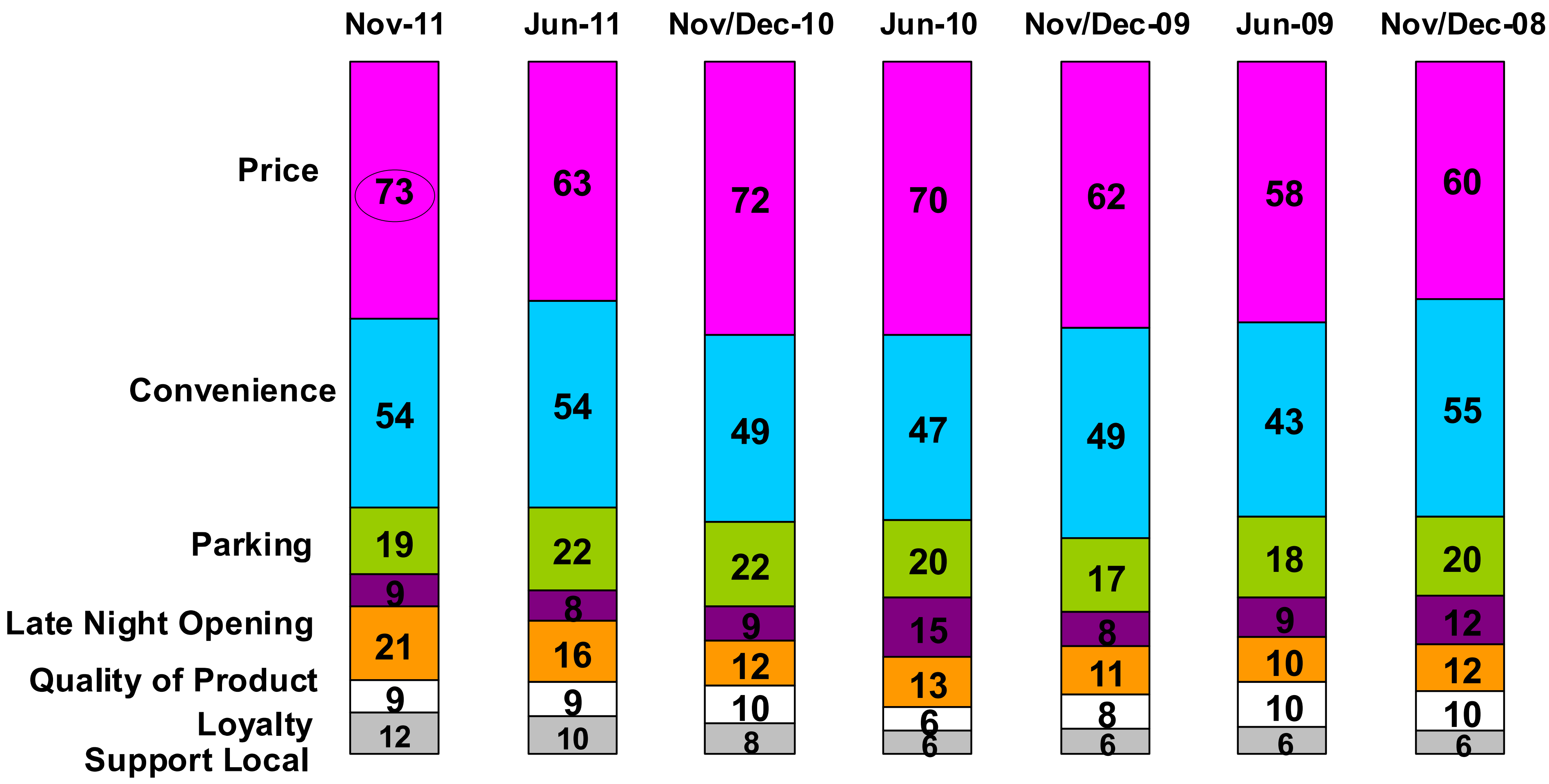

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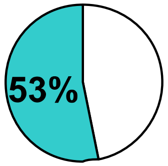
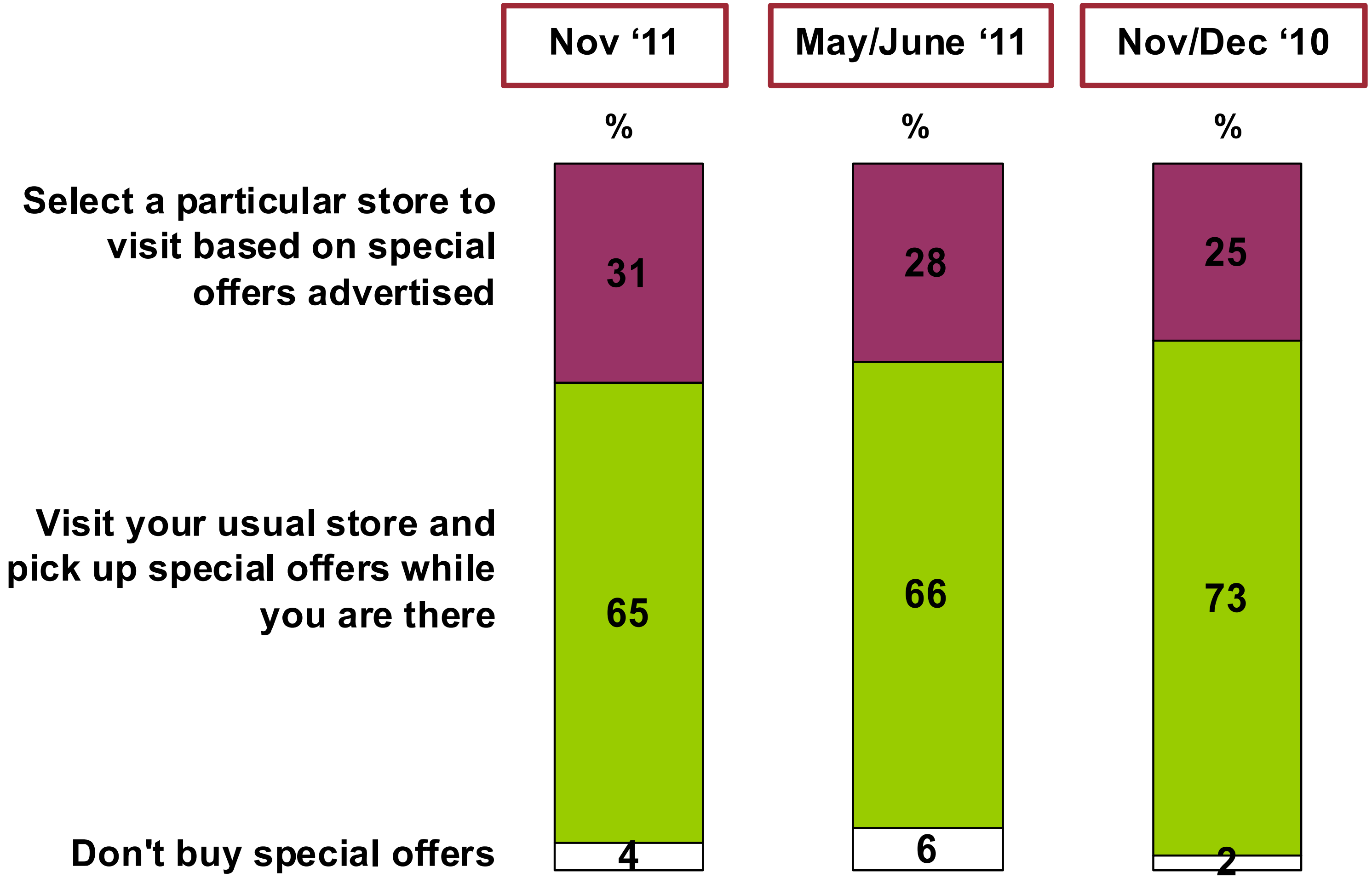
Special Offer Seekers?

(Base: All responsible for the main grocery shop – 526)





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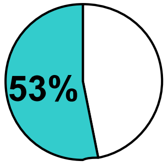
Own Brand Versus Regular Brand



(Base: All main grocery shoppers – 526)

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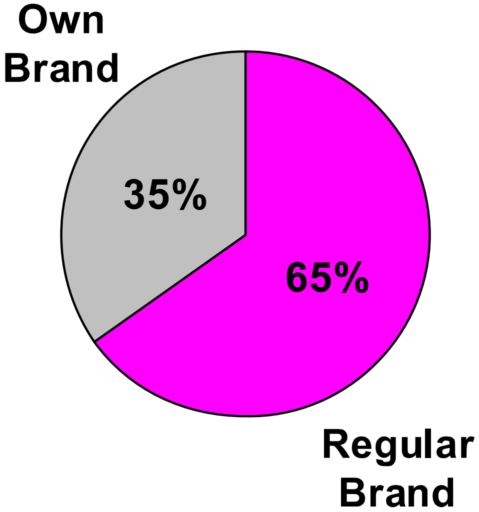
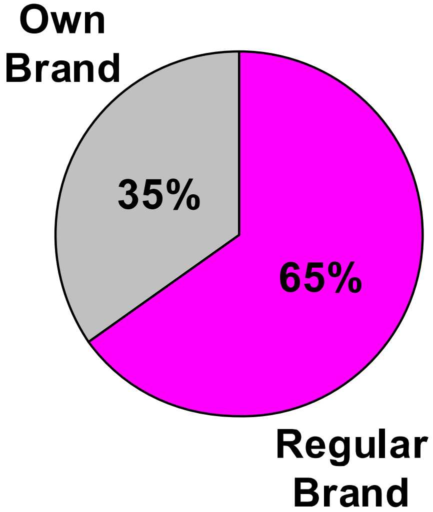
November 2011

%



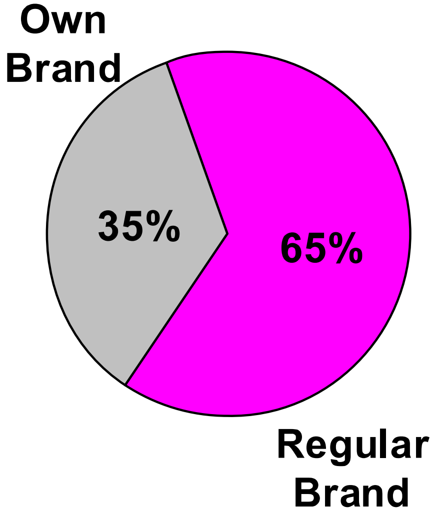
May/June 2011

%



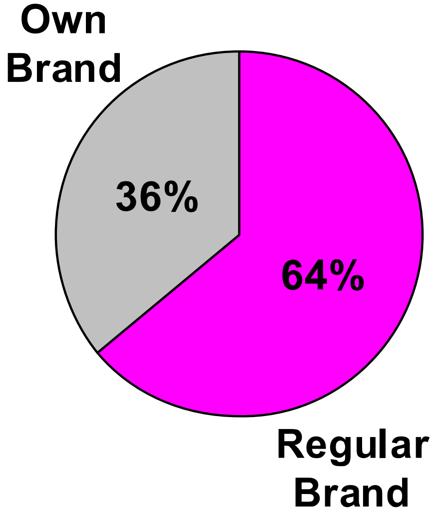
Nov/Dec 2010

%



June 2010

%



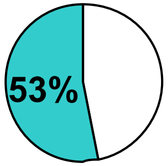
November 2011 – Higher amongst
- Those who are not aware of the prices of everyday goods (74%).
- Males (69%).
- Working full-time (68%).

May/June 2011 – Higher amongst
- Those who are not aware of the prices of everyday goods (74%).
- 55+ (71%).
- ABC/F50+(70%).

Nov/Dec 2010 – Higher amongst
- Those who are not aware of the prices of everyday goods (69%).
- Males (70%).
- 55+ (69%).

Own Brand Versus Regular Brand Preference – I

(Base: All responsible for grocery shop who purchase each of the products)



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	Beer	Tea/Coffee	Baby Products	Breakfast Cereal	Chocolate/ Sweets
Regular brand	89	84	82	76	72
Own brand	11	16	18	24	28





	Yoghurts	Bread	Fresh Meat	Frozen Meat	Soft Drinks
Regular brand	66	71	74	75	73 (+11%)
Own brand	34	29 (+5%)	26	25	27

( ) = +/-% vs May/June 2011

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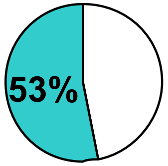
Own Brand Versus Regular Brand Preference – II

(Base: All responsible for grocery shop who purchase each of the products)



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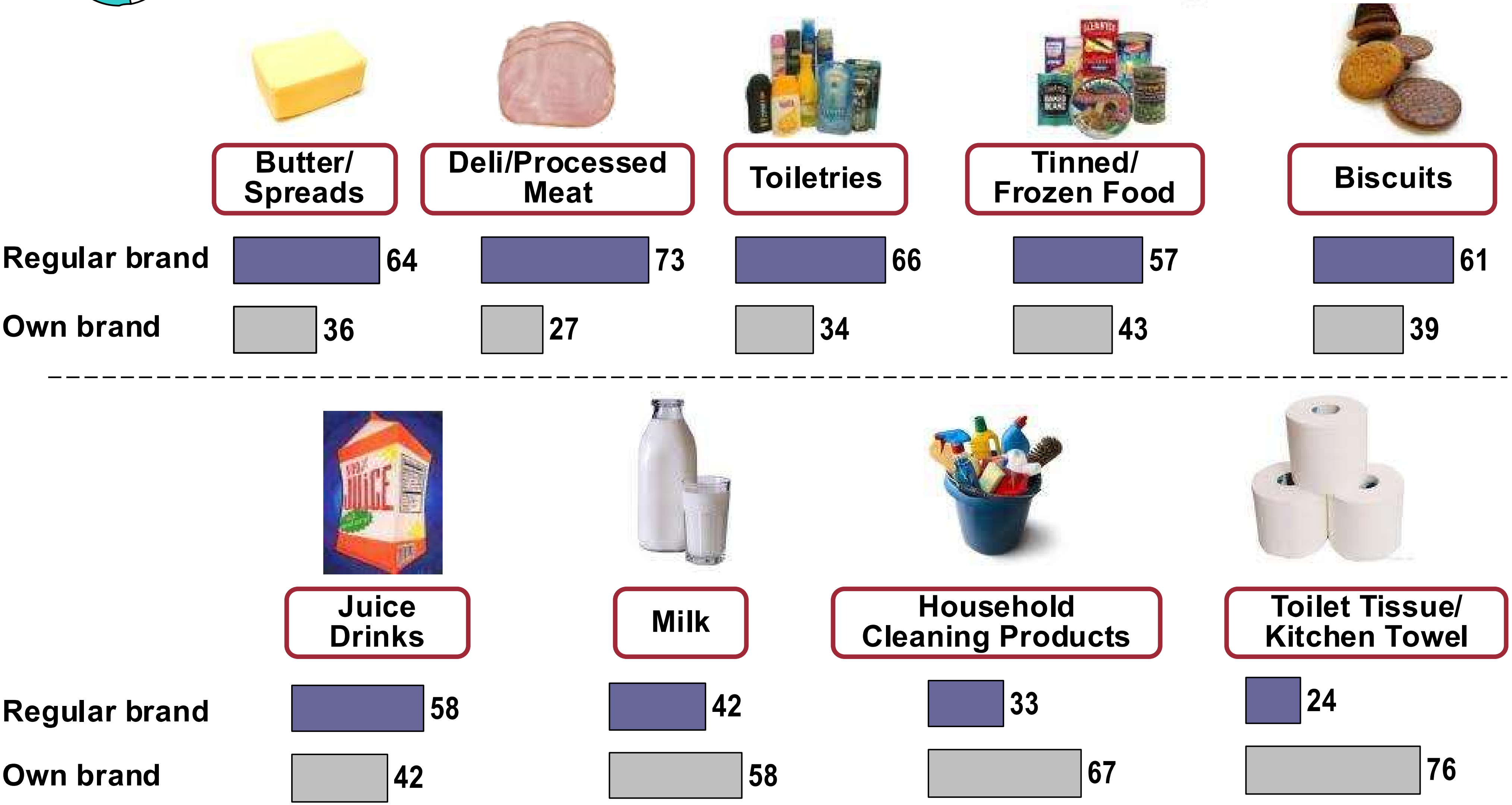

( ) = +/-% vs May/June 2011

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Switched to Own Branded Products within the Past 12 Months

(Base: All who purchase own branded products)

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** Caution small base size*

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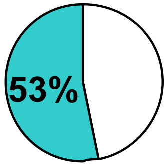
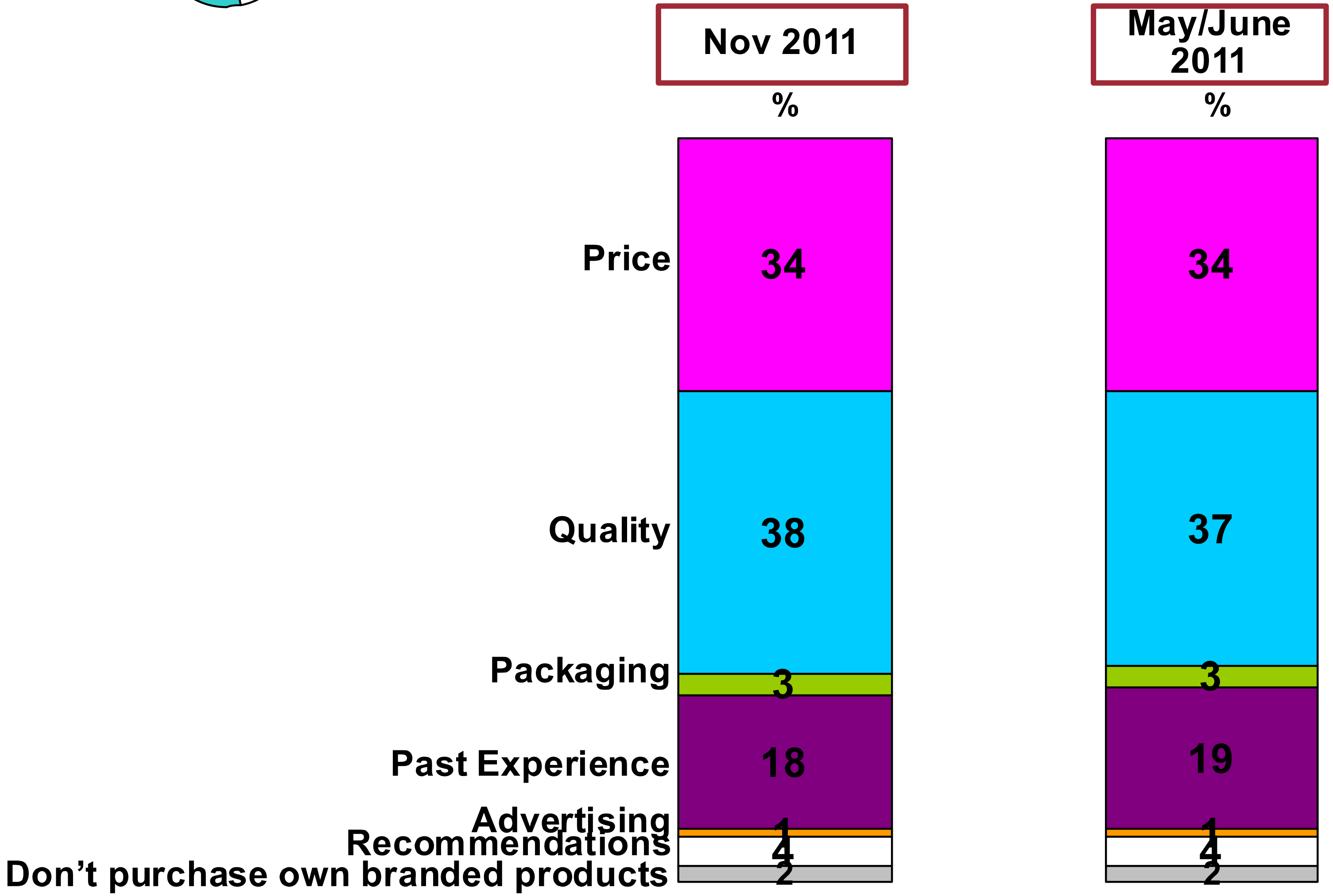
Factors Which Influence Choice for Own Brand Products – Volumetric Analysis*

(Base: All main grocery shoppers – 526)





*Volumetric Analysis is where the most influencing factors are ranked, and a score is applied according to the ranking, the level of importance is then determined by these scores. It is a standard research approach applied to ranking importance of factors.

Where Own Branded Products are Bought

(Base: All that purchase own brand products - 203)

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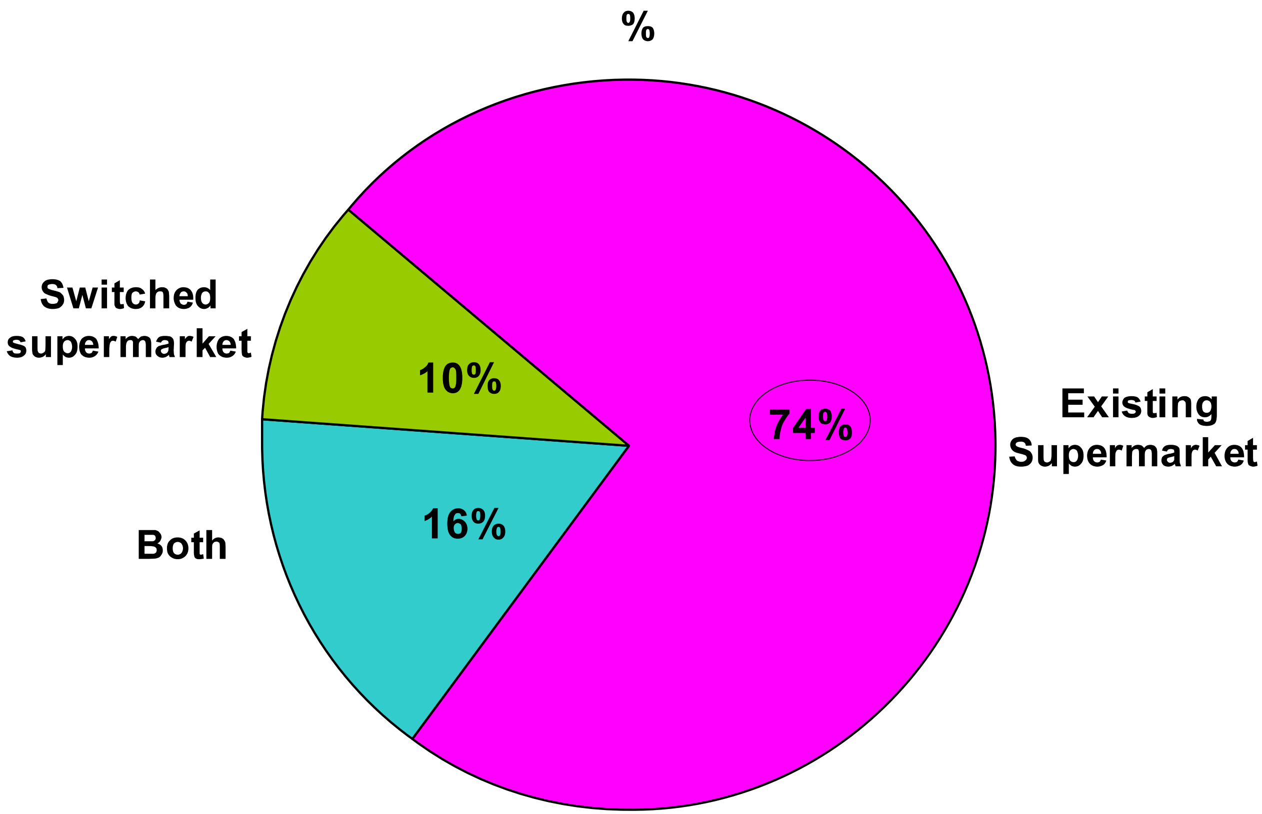

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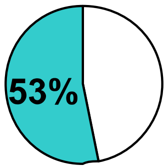
Change in Perceptions Towards Own Branded Products in Recent Years



(Base: Responsible for the main grocery shop - 526)

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* *All other mentions 1% or less*

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Research Background and Methodology

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Research Background and Methodology

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Nov/Dec 2007 → Aug 2008 → Nov/Dec 2008 → May/June 2009

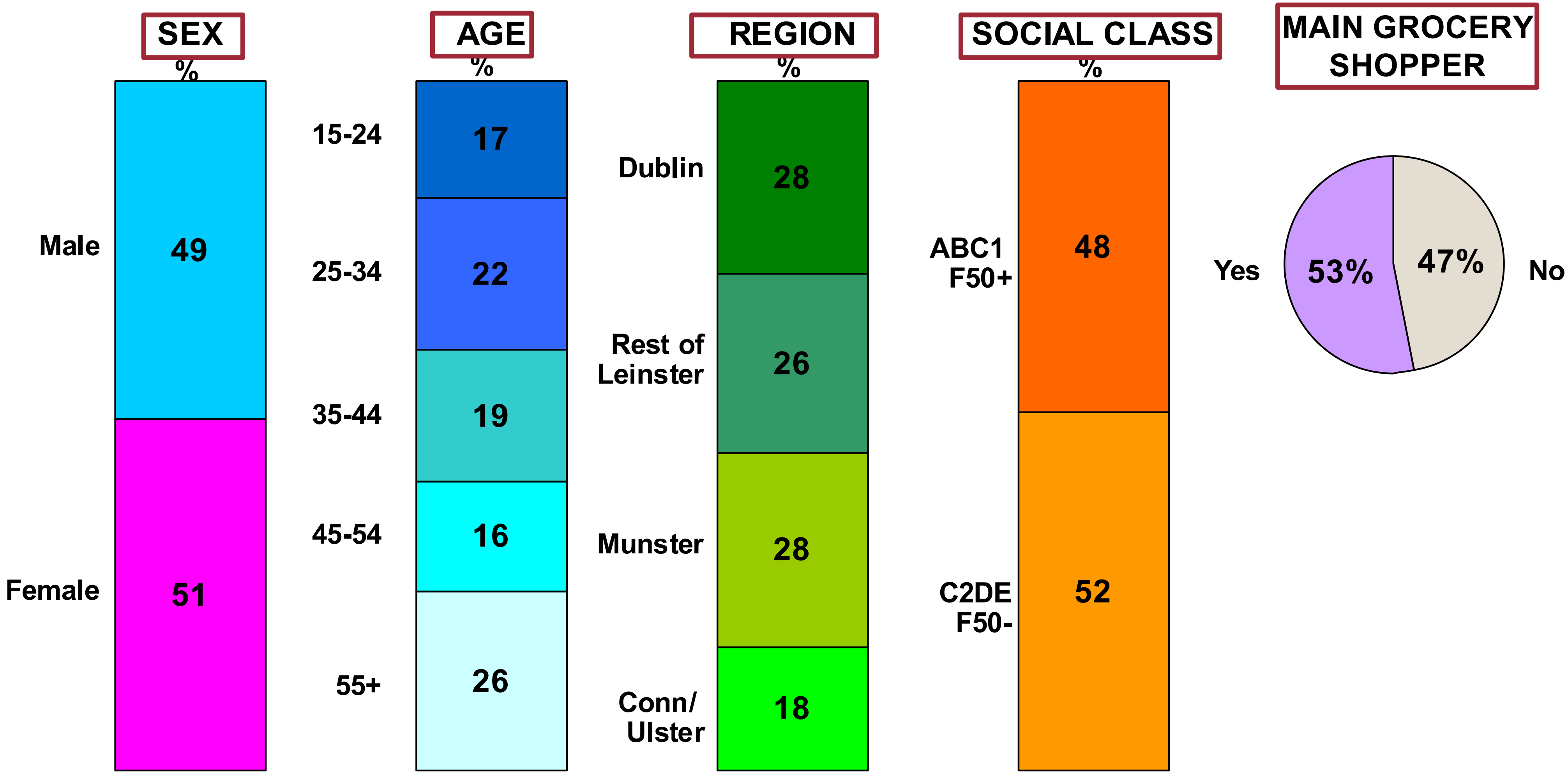
→ Nov/Dec 2009 → June 2010 → Nov/December 2010 → May/June 2011

→ **Nov 2011**
Current Wave

- **The research was conducted by means of face-to-face interviewing with 1,000 people between the ages of 15-74.**
- **To ensure that the data is nationally representative, quotas were applied on the basis of age, gender and social class.**
- **Interviewing was conducted over a four week period in November 2011.**

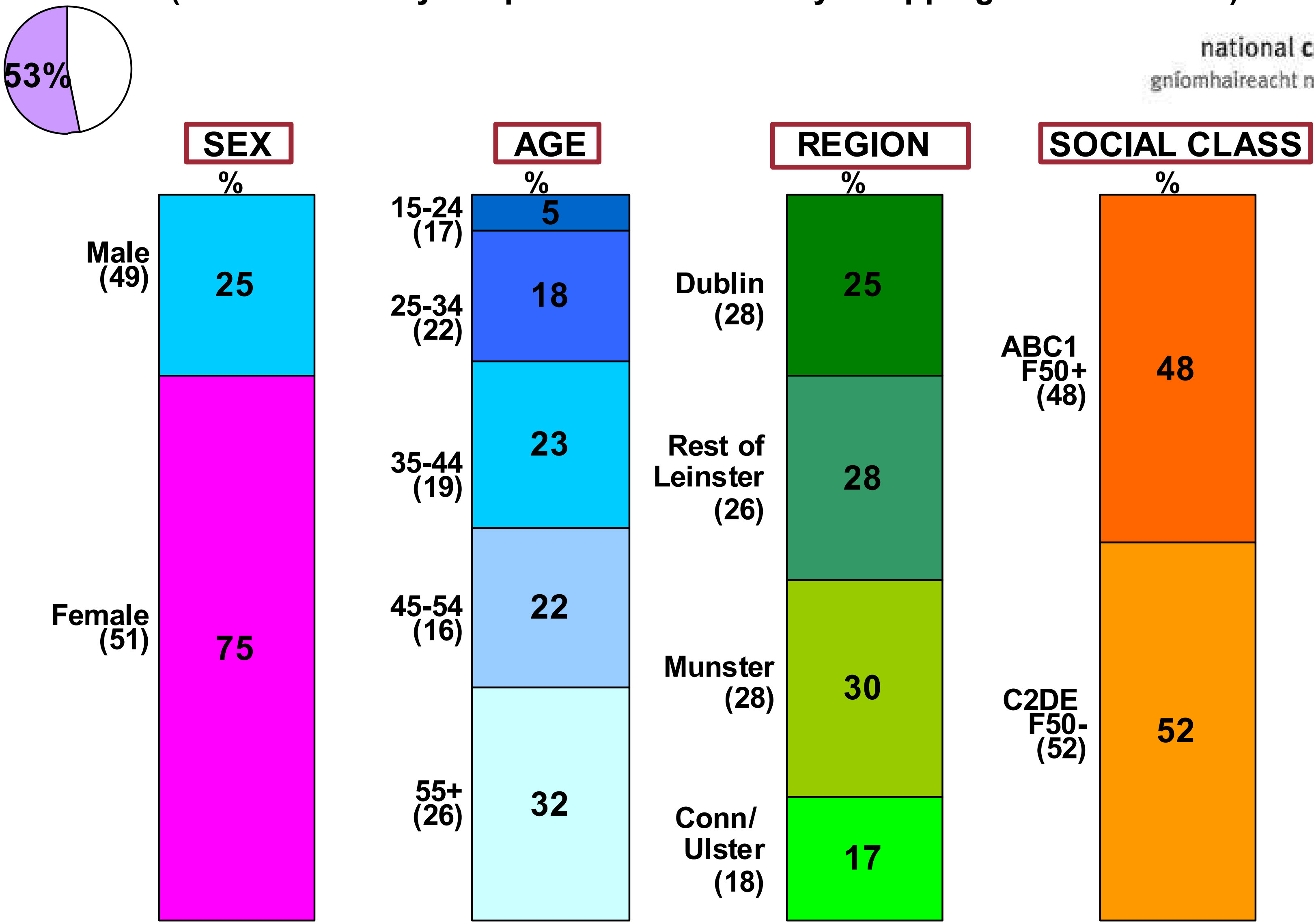
Profile of Sample - I

(Base: All aged 15-74 – 1,000)



Profile of Sample – II – Main Grocery Shoppers

(Base: All Mainly Responsible for Grocery Shopping in Home – 526)



( ) = Total Sample

Profile of Sample – III – Internet Use

(Base: All aged 15-74 – 1,000)

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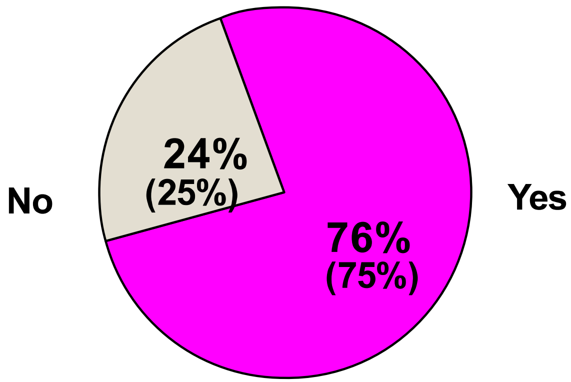
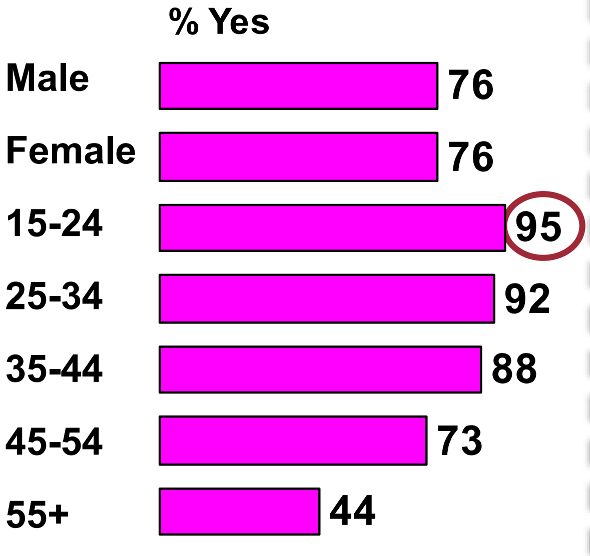
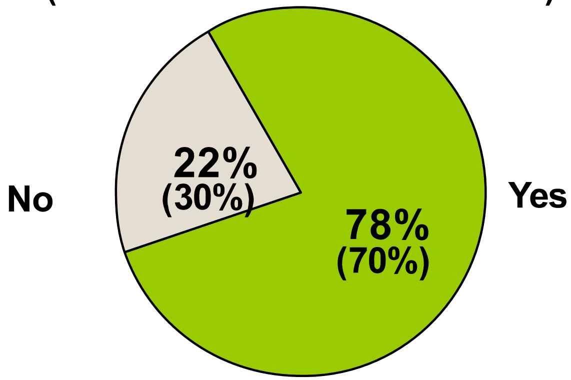
USE INTERNET

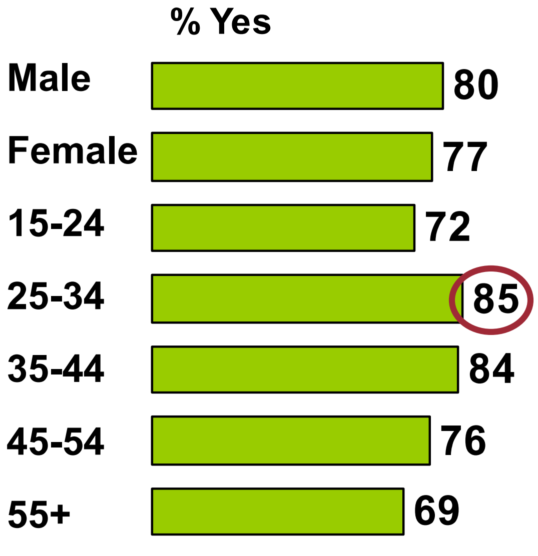




EVER PURCHASED ONLINE

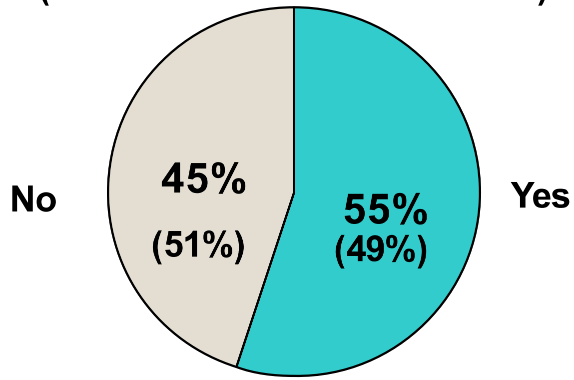
(Base: All Internet Users - 762)

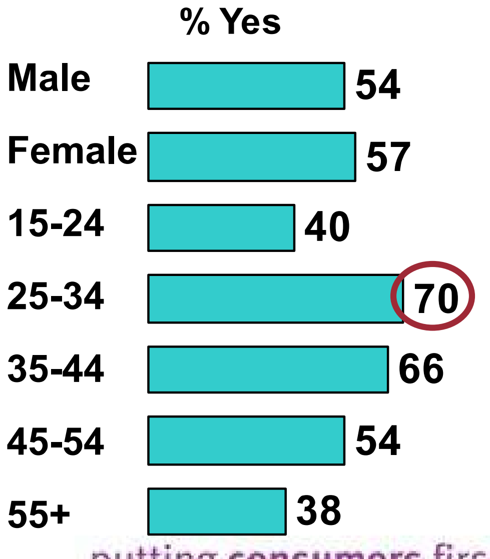




BANKING ONLINE

(Base: All Internet Users - 762)





() = May/June 2011

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Profile of Sample – IV – Social Media

(Base: All aged 15-74 – 1,000)

Nov 2011
May/June 2011

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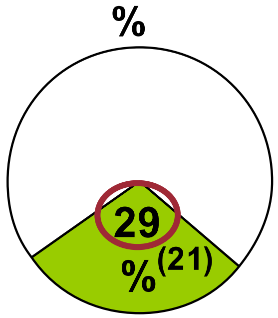
Regular users of ....

%	Nov 2011	May/June 2011	Higher Amongst
facebook	50	47	15-24 86% ABC1F50 59% Dublin 55%
twitter	10	10	15-24 21%
bebo	6	6	
LinkedIn	2	1	
None of These	48	51	55+ 86% C2DEF50- 56% Munster 53%

Type of phone



Have a 'Smart phone'

Higher amongst:

	%
15-24's	45
25-34's	46
ABC1/F50+	39
Working full time	44
Students	42
Dublin	44

() = May/June 2011

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