# National Consumer Agency

## Market Research Findings: Consumer Shopping Behaviour

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August 2013
Research Conducted by

B&A

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# Key Findings

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# Key Findings

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- **Over 7 in 10 (72%) women are mainly responsible** for the food and grocery shopping in households compared to 1 in 5 (20%) men.

- **Focus still on price** - two thirds (66%) of main grocery shoppers have chosen specific grocery store based on prices or offers.

- Shoppers are most definitely **wise and thrifty** and spread their shopping about. But they do not appear to be inclined to sacrifice quality (81% saying they are not buying products of lower quality).

- Majority believe the **quality of own-brand** products has **improved** in recent years (71%) and that much of the competition in the grocery sector happens in the own brand segment (57%).

- Across all product categories a shift towards own-brand is evident. With the most significant shifts evident in soft drinks, juices, biscuits, and baby products.

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# Consumer Shopping Behaviour

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# Women continue to be mainly responsible for Food & Grocery Shopping

Base: All Adults 16+ - 1,012

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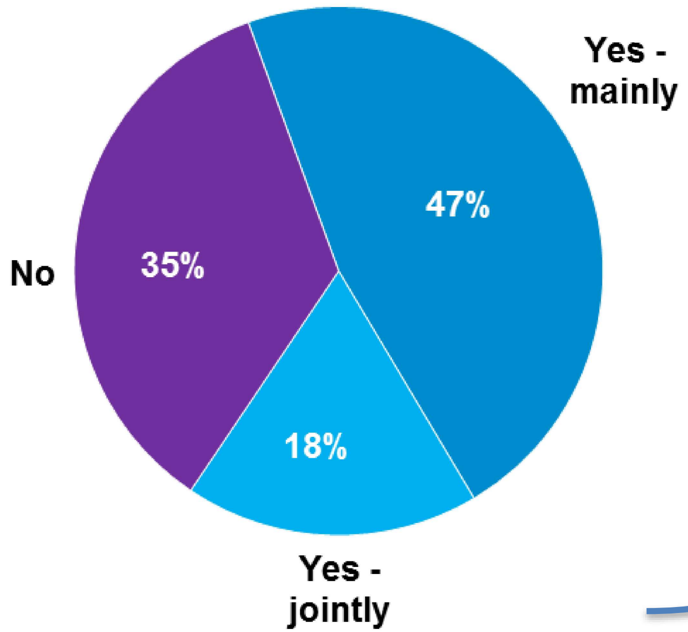


65% have some responsibility for grocery shopping

| | Total | Male | Female | U-24 | 25-34 | 35-49 | 50-64 | 65+ | ABC1 | C2DE | F | Dublin | Leins-ter | Muns-ter | Conn/ Uls |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ***Base:*** | ***1,012*** | ***485*** | ***527*** | ***153*** | ***187*** | ***288*** | ***230*** | ***154*** | ***436*** | ***501*** | ***75*** | ***291*** | ***248*** | ***288*** | ***185*** |
| Yes – mainly | 47 | 20 | 72 | 10 | 45 | 54 | 55 | 59 | 48 | 45 | 47 | 45 | 44 | 47 | 53 |
| Yes – jointly | 18 | 23 | 13 | 12 | 24 | 20 | 18 | 11 | 19 | 18 | 11 | 17 | 19 | 16 | 20 |
| No | 35 | 57 | 15 | 78 | 31 | 26 | 27 | 29 | 32 | 37 | 43 | 38 | 37 | 37 | 27 |

Women continue to be the main grocery shoppers – 72% of females compared to 20% of males. Those not involved at all tend to be under 25.

# Two thirds of grocery shoppers have made a specific store choice because of Prices or Offers

Base: All Main Grocery Shoppers - 475


* Caution low base size

2 in 3 (66%) have made a specific grocery store selection in order to avail of better prices or specific special offers. This is particularly the case in the 35-49 age group with 77% choosing a specific store for this reason.

# Shoppers are wise and thrifty, spread their shopping about but are not inclined to give up on quality

Base: All Grocery Shoppers - 646

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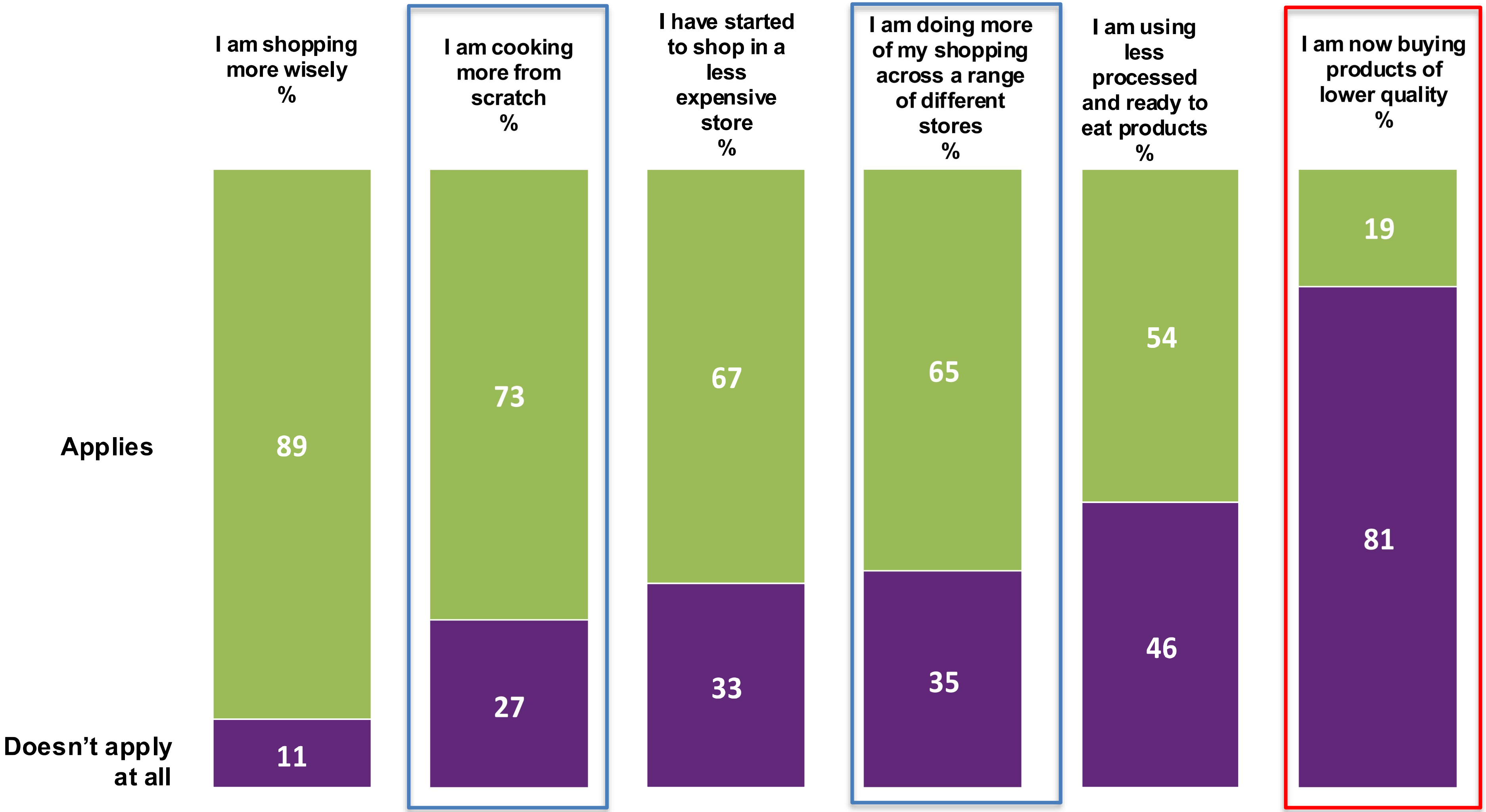


Shoppers are very clear about how they shop - they describe themselves as wise, they shop in 'less expensive' shops and spread their shopping about but seem less prepared to give up on quality.

# Perceptions of Own-Brand and Branded Shopping

**Base: All Main Grocery Shoppers - 475**

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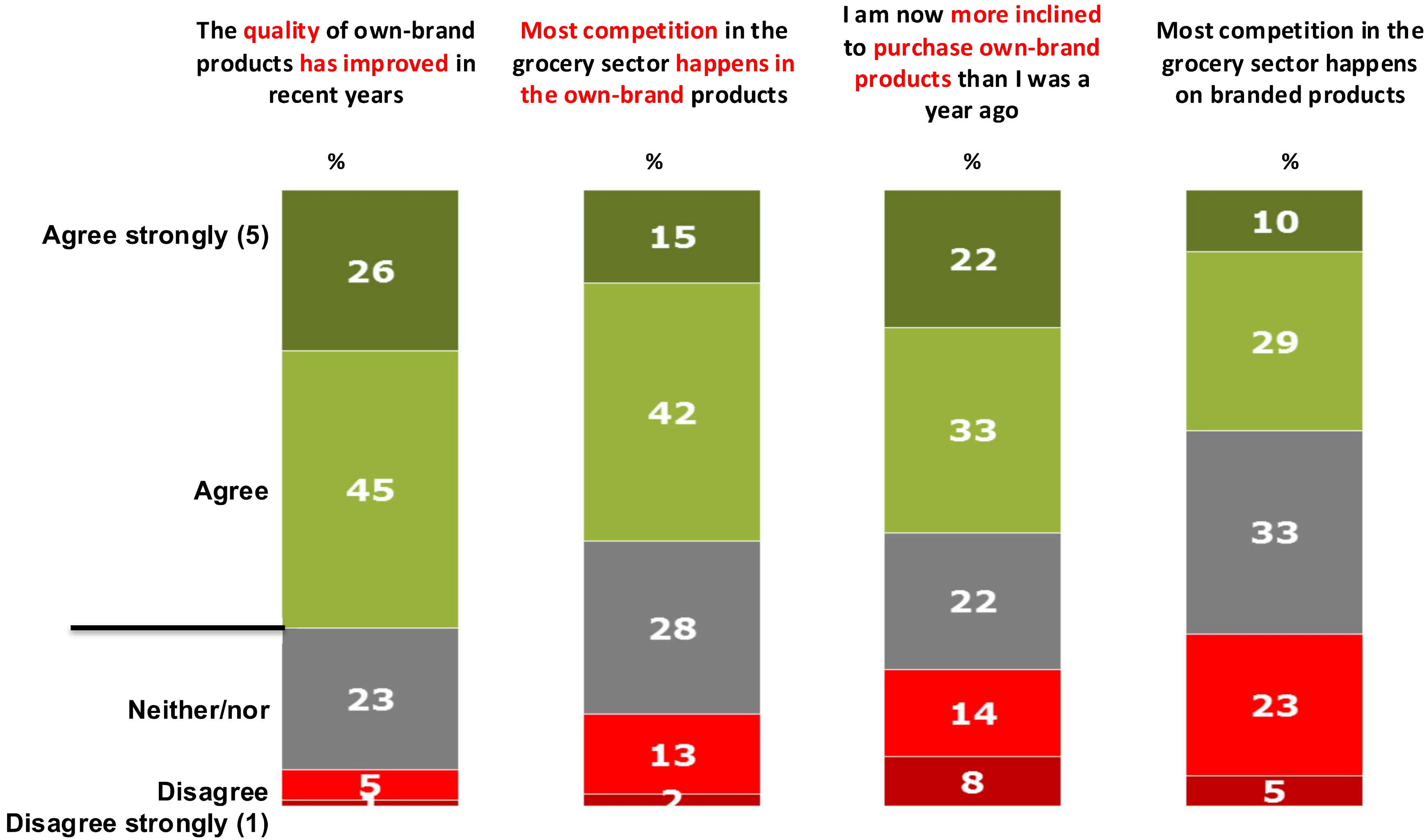


| | | | | |
|---|---|---|---|---|
| Pos vs Neg | +65 | +42 | +33 | +11 |

Majority (71%) believe the quality of own-brand products has improved in recent years.
55% are more inclined to purchase own-brand products than they were a year ago.

# U35s Most Likely to be conscious of and believe in the quality of Own-Brand

Base: All Main Grocery Shoppers - 475

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| | Total | Gender | | Age | | | | Social Class | | | Region | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Male | Female | Under 35 | 35-49 | 50-64 | 65+ | ABC1 | C2DE | F | Dublin | Lein-ster | Mun-ster | Conn/Ul s |
| | | | | | | | | | | | | | | |
| The quality of own-brand products has improved in recent years | 70 | 53 | 75 | 87 | 80 | 67 | 55 | 71 | 71 | 59 | 73 | 67 | 68 | 74 |
| Most competition in the grocery sector happens on branded products | 57 | 42 | 61 | 69 | 47 | 62 | 55 | 58 | 56 | 56 | 60 | 56 | 52 | 63 |
| I am now more inclined to purchase own-brand products than I was a year ago | 56 | 43 | 59 | 75 | 60 | 51 | 30 | 52 | 62 | 34 | 54 | 56 | 56 | 57 |
| Most competition in the grocery sector happens in the own-brand products | 39 | 38 | 40 | 46 | 33 | 43 | 38 | 38 | 43 | 26 | 43 | 35 | 41 | 38 |

# Product Categories where Own-Brand is Strongest

Base: Buyers of each category

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| | | Toilet Tissue / Kitchen Roll (420) % | Household Cleaning Products (420) % | Milk (415) % | Juice Drinks % |
|---|---|---|---|---|---|
| Regular brand | Nov-11 | 24 | 33 | 42 | 58 |
| | Jun-13 | 24 | 31 | 38 | 37 |
| Own-brand | Nov-11 | 76 | 67 | 58 | 42 |
| | Jun-13 | 76 | 69 | 62 | 61 |

Toilet paper, household cleaning products, milk and juice drinks are the product categories where own-brand is strongest.

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# Product Categories where Position is More Evenly Balanced

Base: Buyers of each category

| | | Biscuits (395) % | Soft Drinks (321) % |
|---|---|---|---|
| Regular brand | Nov-11 | 61 | 73 |
| | Jun-13 | 43 | 51 |
| Own-brand | Nov-11 | 39 | 27 |
| | Jun-13 | 57 | 49 |

Significant growth for own-brand biscuits and soft drinks.

| | | Toiletries (420) % | Butter / Spreads (417) % | Yoghurts (371) % |
|---|---|---|---|---|
| Regular brand | Nov-11 | 64 | 66 | 66 |
| | Jun-13 | 59 | 58 | 59 |
| Own-brand | Nov-11 | 34 | 34 | 34 |
| | Jun-13 | 41 | 42 | 41 |

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# Categories where brands are still Strong - 1

Base: Buyers of each category

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| | | Bread (412) % | Chocolate / Sweets (357) % | Deli/ Processed Meat (352) % | Breakfast Cereal (403) % |
|---|---|---|---|---|---|
| **Regular brand** | Nov-11 | 71 | 72 | 73 | 76 |
| | Jun-13 | 63 | 69 | 64 | 64 |
| **Own-brand** | Nov-11 | 29 | 28 | 27 | 24 |
| | Jun-13 | 37 | 37 | 36 | 36 |

A significant movement towards own-brand evident on breakfast cereal.

# Categories where brands are still Strong – 2

Base: Buyers of each category

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| | | Fresh Meat (369) % | Frozen Meat (249) % | Baby Products (95) % | Tea / Coffee (415) % | Beer (216) % |
|---|---|---|---|---|---|---|
| Regular brand | Nov-11 | 74 | 75 | 82 | 84 | 89 |
| | Jun-13 | 67 | 67 | 67 | 73 | 81 |
| Own-brand | Nov-11 | 26 | 25 | 18 | 16 | 11 |
| | Jun-13 | 33 | 33 | 33 | 27 | 19 |

Significant movement towards own-brand is also evident in baby products and tea/coffee.

# Highlights of the most significant changes in favour of Own-Brand

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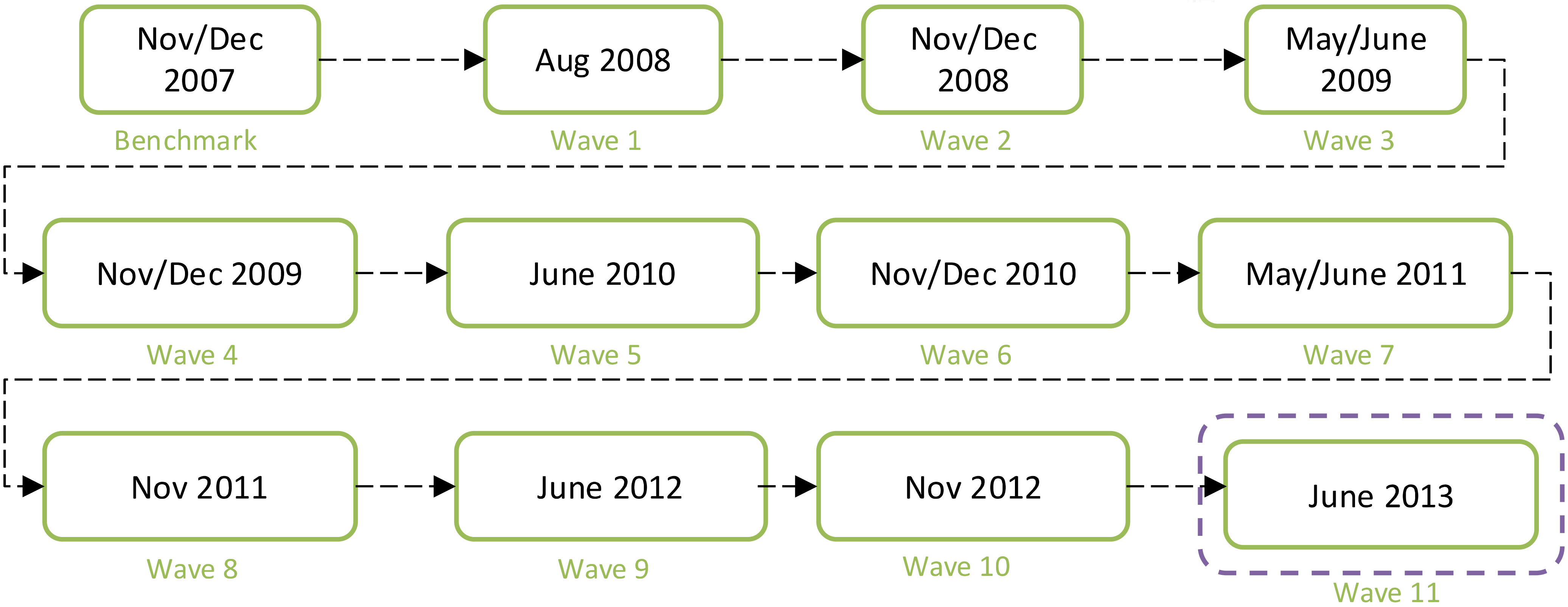
# Research Background and Methodology

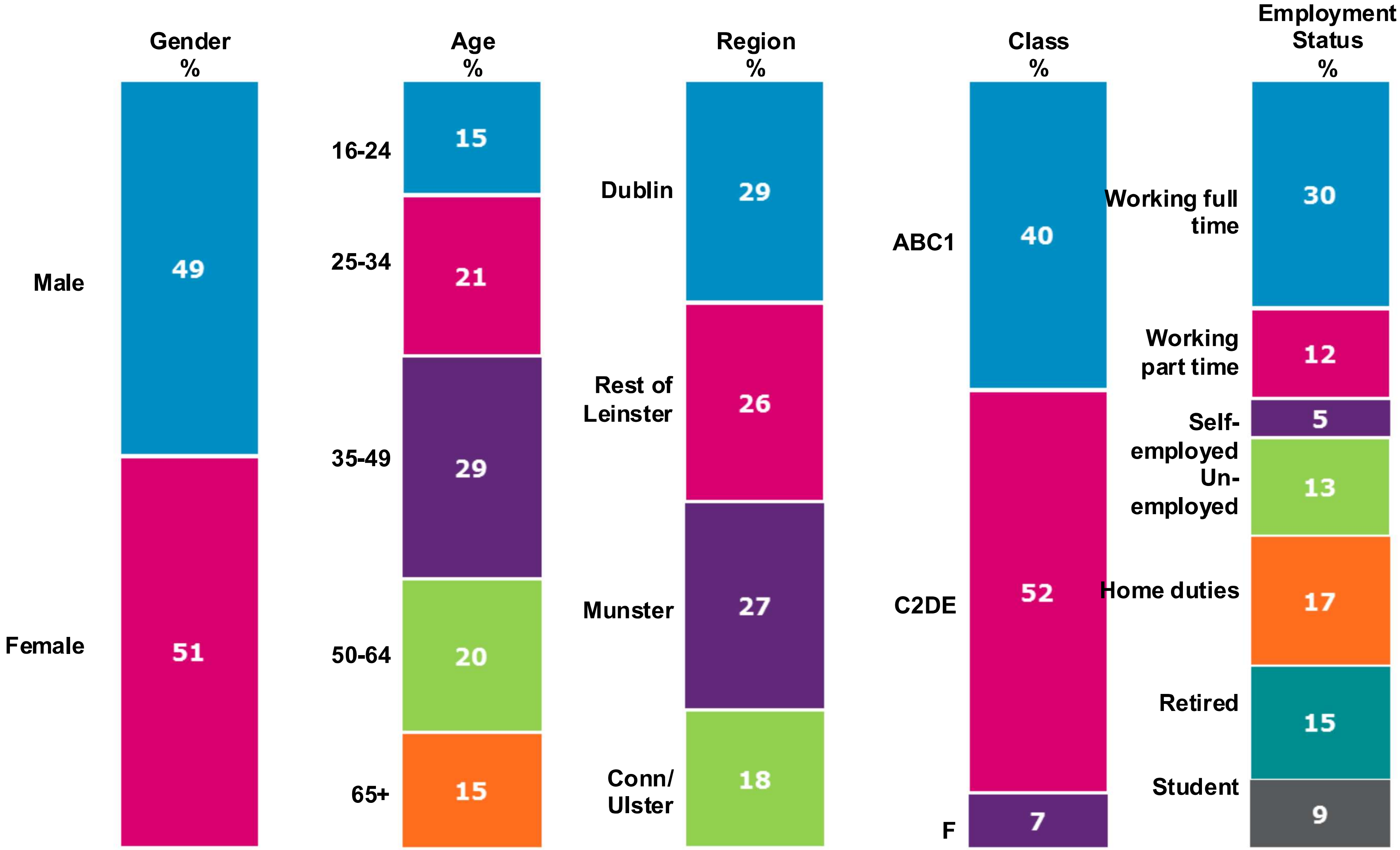
# A. Research Background and Methodology




- The research was conducted face-to-face using CAPI interviewing with 1,012 adults 16+.
- To ensure that the data is nationally representative, quotas were applied on the basis of age, gender and social class.
- Interviewing was conducted from 6th – 19th June 2013.

# Profile of Sample

Base: All Adults 16+ 1,012



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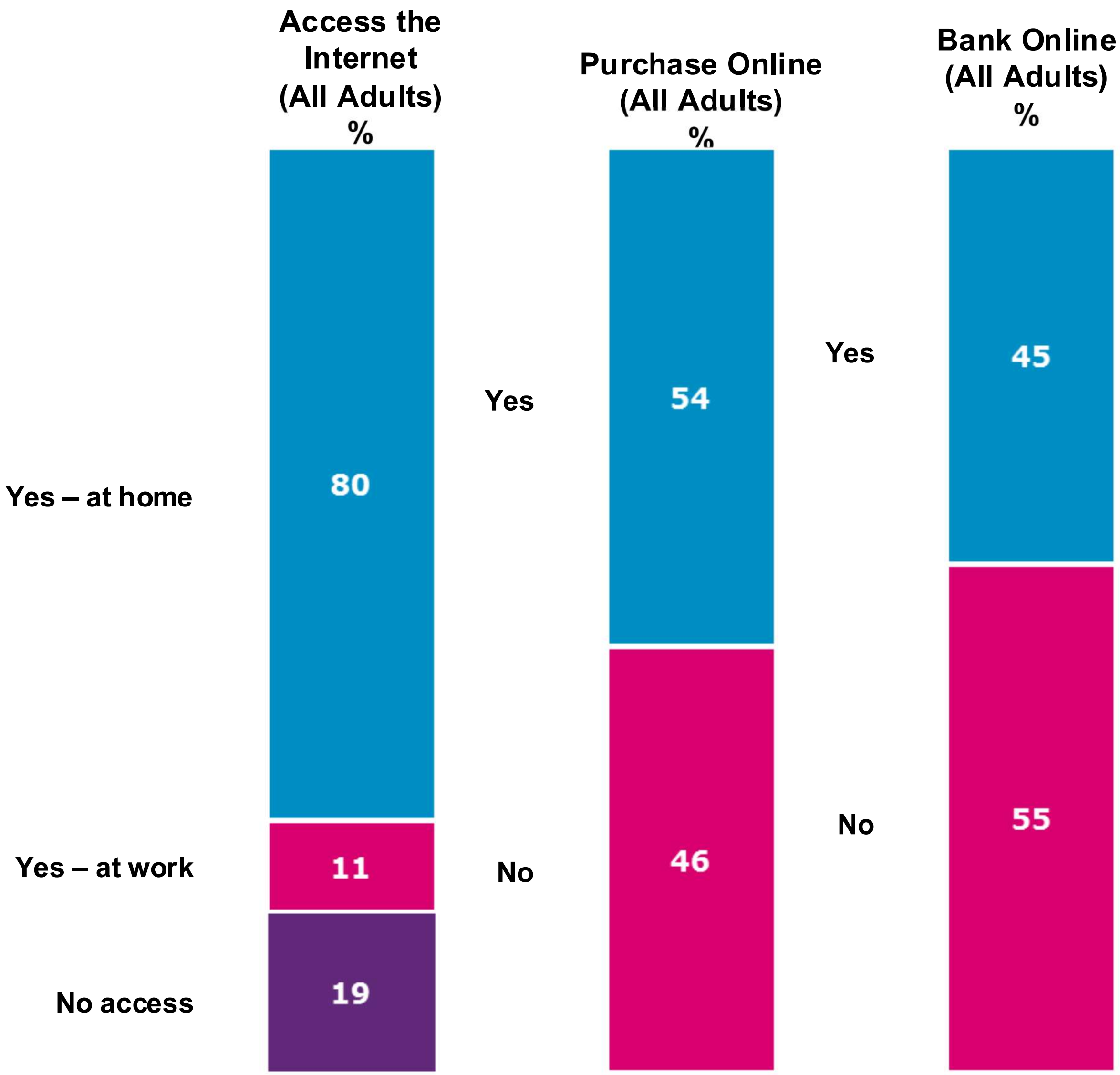


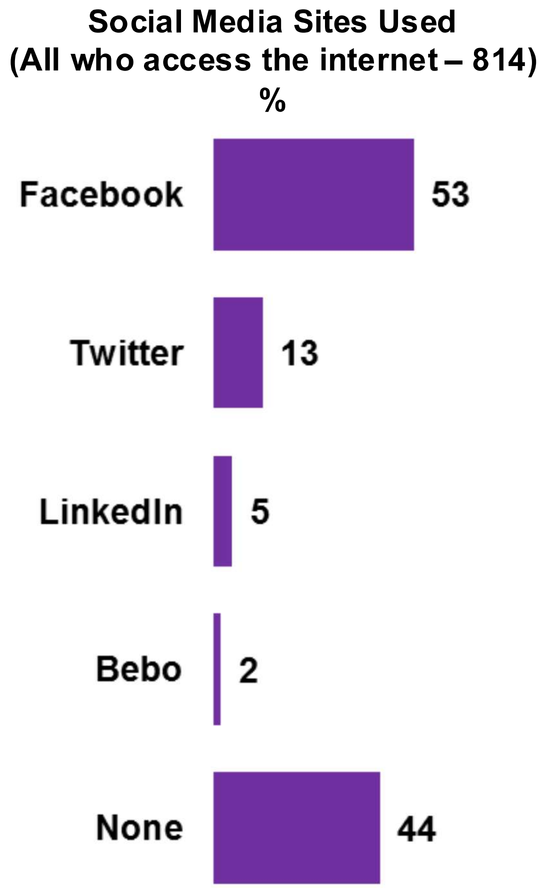


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