

Measuring and Understanding Public Opinion: Food and grocery main shop habits March 2016

Summary

As part of NEMS ongoing development programme, a study into the use of multiple stores for household's main food and grocery shopping trips was undertaken. This was specifically to quantify the prevalence of supplementation and substitution.

The expansion of consumer choice has led to over half of households using more than one store for the household's main food and grocery shopping. The main store is both substituted and supplemented with others, though the main store still accounts for an estimated 79% of all visits. Likelihood to use other stores for main grocery shop varies between retailer.

Those younger (under 35 years old) and in larger households (3 or more adults) are less likely to restrict their main shopping to just one store. Substitution of main food and grocery store is more likely among younger age groups (under 35 years old) and among those in full-time employment. Conversely, supplementing their main store with others is less likely among these two groups.

Methods of using primary research to record food and grocery expenditure are reviewed in light of this new research.

Using this Research

This public opinion data has been collected and analysed by NEMS from a representative sample of 791 UK household main shoppers.

You are free to use the data, providing you acknowledge/reference the source as "NEMS Market Research, March 2016".

If you would like to know more about this or anything else research related, please get in touch; we would be happy to help.



Background

While the growth has recently showed a marked decline, the last two decades has seen a major increase in the number and size of grocery stores across the UK. While once households frequently only had one major supermarket (if any) within a reasonable travel time at home, the major development programmes of the four main retailers has seen this change dramatically, with households now often having a choice of several stores. The recent and continued expansion of the discount retailers, in particular Aldi and Lidl has further added to the options available to the typical household.

But what, in any, impact has this had on the shopping patterns of households when they undertake their main food and grocery shopping (typically) for the week? As part of NEMS ongoing development programme, a study into the use of multiple stores for household's main food and grocery shopping trips was undertaken. This was specifically to quantify the prevalence of supplementation and substitution.

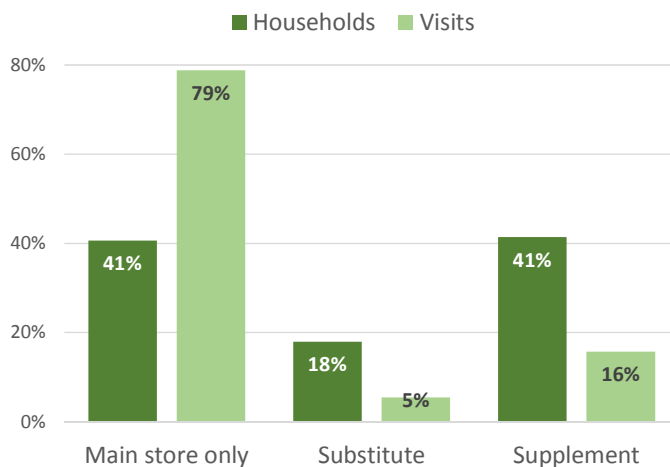
Multiple Store Usage

Over half (59%) of households use more than one store to complete their household's main food and grocery shopping.

Multiple store usage can take one of two forms; substitution of the main store with another, or supplementing the main shop with an additional visit to another store. For those who use more than one store, 33% substitute, 77% supplement (while 9% do both).

For those who do supplement or substitute their main store, the frequency of doing so is similar, with an average of around a third of shopping trips being evident for both forms of usage. By applying these frequencies to trips then it is estimated that around 79% of all trips are to the main store, with 5% being substitution and 16% being supplemented (see Chart 2).

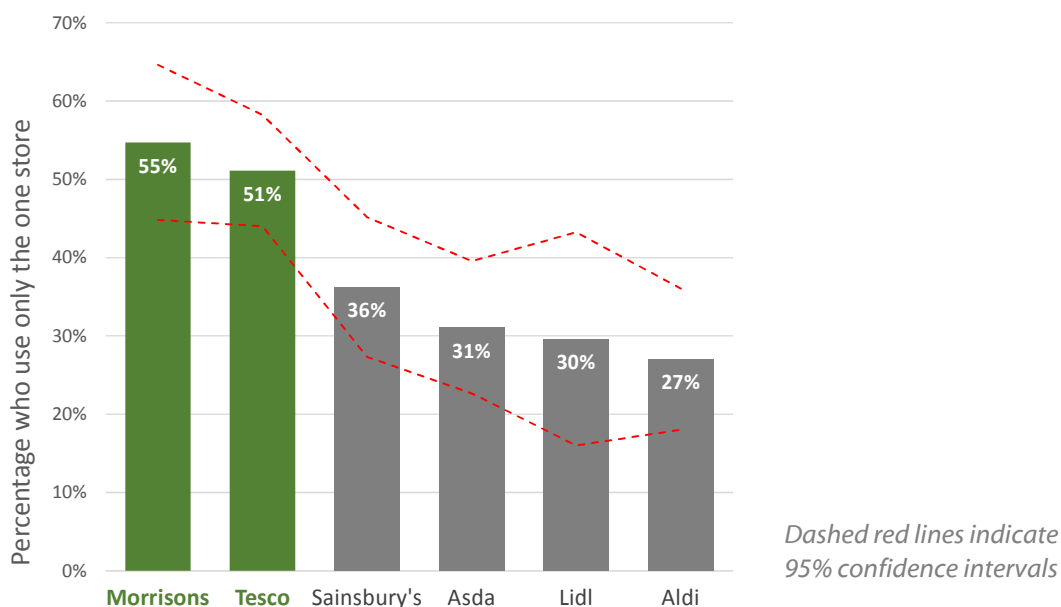
Chart 2: proportion of households and main food and grocery shopping visits



Share of visits derived from prevalence and average proportions of all visits

Likelihood to consistently use only one store shows variation between retailers. Over half of both Morrisons and Tesco shoppers only use the one store for their main shop, while this proportion falls to around a third for Sainsburys and Asda. Of the top six food retailers, Lidl and Aldi customers are least likely to use just the one store for all their main grocery shopping (see Chart 1 for details).

Chart 1: proportion of shoppers who use just one store for household's main food and grocery shopping

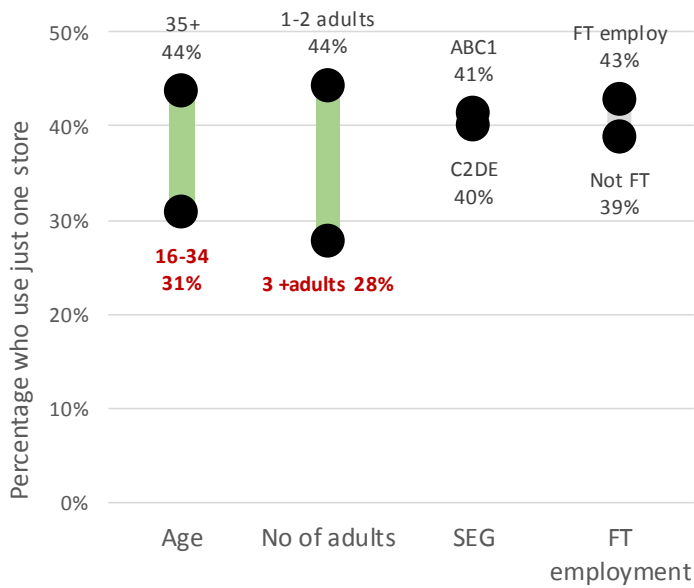


Determinants of Multiple Store Usage

While overall, 41% of households use just one store for their main food and grocery shopping, there are some clear differences in multiple store usage between different demographic groups.

While little difference in behaviour is exhibited between different socioeconomic groups and employment status, significant differences are evident on age and household composition, with younger (under 35 years old) and larger households (3 or more adults) being less likely to restrict their main shopping to just one store (see Chart 3 for details).

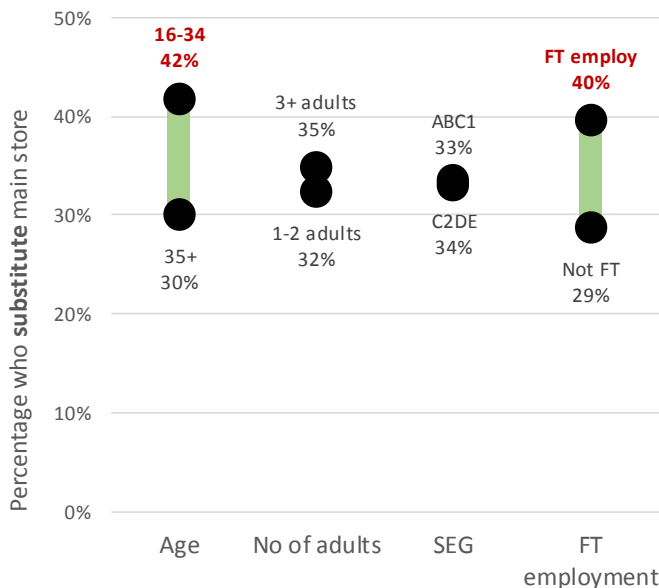
Chart 3: proportion who use just one store for household's main food and grocery shopping



Overall, 41% use just one store for their household's main food and grocery shopping

Substitution of main food and grocery store is more likely among younger age groups (under 35 years old) and among those in full-time employment (see Chart 4 for details). Conversely, supplementing their main store with others is less likely among these two groups.

Chart 4: proportion of those who use more than one store by substituting with one or more others



Overall, 33% of those who use more than one store, do so to substitute their main destination

Measuring Food and Grocery Expenditure Patterns

Convenience expenditure is usually measured using primary research, by capturing household's main and top-up shopping patterns and spend. Two approaches are widely adopted for measuring main food and grocery expenditure; capturing data for destination visited most often, and capturing data about last shopping trip.

With around one in five main food and grocery shops being either substitutions or supplements to the main store used, then this introduces a notable bias into data that only captures store 'mostly' or 'normally' used, under-representing stores that are more prevalent as substitute or supplementary.

This bias is somewhat negated by NEMS recommended methodology of capturing data for 'last trip'. This method will accurately capture main store, substitution and supplementary where this is a separate trip. Supplementary shop visits that are made on the same trip as the visit to the main store, will be under-represented, but these can be expected to account for only a small proportion (estimated <5%¹) of main food and grocery expenditure. While this specific component could be directly measured by extending the depth of the questioning, unless this level of detail were specifically required, the additional demands on the respondent (and potential impact on quality of data elsewhere in an extended interview) would be disproportionate to potential gains in the final convenience expenditure patterns.

¹ Supplementary store visits account for around 16% of all visits. However, a proportion of these will be on separate trips, and by definition the spend on the visit will be notably less than that in the main store.

Weighted:

March 2016

	Total	Use multiple stores (Q03)	Use just one store (Q03)	Substitute main retailer (Q04)	Supplement main retailer (Q06)	Both substitute and supplement (Q04/Q06)						
FOOD Are you the person responsible for most of the food shopping in the household ? [PR]												
Yes - main shopper	76.5%	553	76.1%	327	77.0%	227	65.5%	94	78.6%	258	64.9%	41
Yes - joint main shopper	23.5%	170	23.9%	103	23.0%	67	34.5%	49	21.4%	70	35.1%	22
No	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		724		430		294		143		329		63
Sample:		791		452		339		146		341		58

Mean score (annual food shopping trips)

Q01 How often do you do your main food shopping?

Those responsible for main food shopping

7 times a week	3.4%	24	4.1%	18	2.3%	7	1.5%	2	4.7%	15	0.8%	1
6 times a week	0.2%	1	0.1%	0	0.3%	1	0.0%	0	0.1%	0	0.0%	0
5 times a week	0.7%	5	0.6%	3	0.9%	3	1.2%	2	0.3%	1	0.0%	0
4 times a week	0.9%	6	1.0%	4	0.8%	2	0.6%	1	0.7%	2	0.0%	0
3 times a week	3.9%	28	3.9%	17	3.8%	11	2.9%	4	4.5%	15	3.7%	2
Twice a week	8.9%	65	11.0%	47	5.9%	17	7.2%	10	11.7%	39	9.2%	6
Once a week	58.4%	423	54.9%	236	63.6%	187	61.1%	87	55.0%	181	64.4%	41
Once a fortnight	11.3%	81	13.1%	56	8.6%	25	13.0%	19	12.3%	40	13.1%	8
Once a month	8.5%	62	8.5%	36	8.6%	25	10.7%	15	7.7%	25	7.8%	5
Once every 2 months	0.2%	2	0.0%	0	0.6%	2	0.0%	0	0.0%	0	0.0%	0
Once every 3 months	0.1%	1	0.2%	1	0.0%	0	0.0%	0	0.2%	1	0.0%	0
Once every 6 months	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less often	0.5%	4	0.0%	0	1.3%	4	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	3.0%	22	2.7%	12	3.5%	10	1.8%	3	2.8%	9	0.9%	1
Mean:		68.32		71.27		63.97		59.55		73.59		56.74
Weighted base:		724		430		294		143		329		63
Sample:		791		452		339		146		341		58

Q02 Which store do you mainly use?

Those responsible for main food shopping

Aldi	12.4%	90	15.2%	65	8.2%	24	11.2%	16	16.4%	54	13.6%	9
Asda	16.6%	120	19.3%	83	12.7%	37	17.6%	25	19.4%	64	19.7%	12
Booths	0.1%	1	0.2%	1	0.1%	0	0.0%	0	0.2%	1	0.0%	0
Co-Op	2.2%	16	2.3%	10	2.0%	6	1.9%	3	2.4%	8	1.2%	1
Lidl	6.8%	49	8.1%	35	5.0%	15	8.4%	12	6.7%	22	2.3%	1
Marks and Spencer	1.3%	10	1.8%	8	0.6%	2	2.7%	4	2.2%	7	6.2%	4
Morrisons	13.3%	96	10.1%	43	17.9%	53	9.4%	13	10.1%	33	8.8%	6
Sainsbury's	15.5%	112	16.6%	72	13.8%	41	23.8%	34	17.1%	56	35.0%	22
Tesco	23.3%	168	19.1%	82	29.3%	86	18.4%	26	18.3%	60	8.3%	5
Waitrose	3.7%	27	3.3%	14	4.3%	13	2.5%	4	3.2%	10	1.8%	1
Other	2.9%	21	1.9%	8	4.3%	13	3.2%	5	1.6%	5	3.2%	2
Iceland	2.0%	14	2.0%	9	1.9%	6	0.8%	1	2.3%	8	0.0%	0
Any Big 4 Retailers [calculated codepoint]	68.6%	497	65.2%	280	73.7%	217	69.3%	99	64.9%	214	71.8%	45
Any Discount Retailers [calculated codepoint]	19.2%	139	23.3%	100	13.2%	39	19.6%	28	23.1%	76	15.9%	10
Weighted base:		724		430		294		143		329		63
Sample:		791		452		339		146		341		58

Q03 Still thinking only about your main food shopping, do you just use (ANSWER GIVEN AT Q02) or do you use any other stores?

Those responsible for main food shopping

Use just one store for main food shopping	40.6%	294	0.0%	0	100.0%	294	0.0%	0	0.0%	0	0.0%	0
Use more than one store to fulfil main food shopping needs	59.4%	430	100.0%	430	0.0%	0	100.0%	143	100.0%	329	100.0%	63
Weighted base:		724		430		294		143		329		63
Sample:		791		452		339		146		341		58

Weighted:

March 2016

	Total	Use multiple stores (Q03)	Use just one store (Q03)	Substitute main retailer (Q04)	Supplement main retailer (Q06)	Both substitute and supplement (Q04/Q06)
--	-------	---------------------------	--------------------------	--------------------------------	--------------------------------	--

Q04 When you use more than one store for your main food shopping, is this instead of the store you use the most, i.e. as a substitution?
Those responsible for main food shopping and use more than one store

Yes	33.3%	143	33.3%	143	0.0%	0	100.0%	143	19.2%	63	100.0%	63
No	66.7%	287	66.7%	287	0.0%	0	0.0%	0	80.8%	266	0.0%	0
Weighted base:		430		430		0		143		329		63
Sample:		452		452		0		146		341		58

Mean score (%)
Q05 How often do you use the substitute food store/s? [PR]
Those responsible for main food shopping and use more than one store as a substitute

Less than a quarter of the time	16.4%	23	16.4%	23	0.0%	0	16.4%	23	13.6%	9	13.6%	9
About a quarter of the time	22.4%	32	22.4%	32	0.0%	0	22.4%	32	23.4%	15	23.4%	15
About half the time	44.5%	64	44.5%	64	0.0%	0	44.5%	64	39.2%	25	39.2%	25
(Don't know / no pattern)	16.6%	24	16.6%	24	0.0%	0	16.6%	24	23.9%	15	23.9%	15
Mean:		35.90		35.90		0.00		35.90		35.64		35.64
Weighted base:		143		143		0		143		63		63
Sample:		146		146		0		146		58		58

Q06 When you use more than one store for your main food shopping, is this as well as the store you use the most, i.e. as a supplement?
Those responsible for main food shopping and use more than one store

Yes	76.5%	329	76.5%	329	0.0%	0	44.2%	63	100.0%	329	100.0%	63
No	23.5%	101	23.5%	101	0.0%	0	55.8%	80	0.0%	0	0.0%	0
Weighted base:		430		430		0		143		329		63
Sample:		452		452		0		146		341		58

Mean score (%)
Q07 How often do you use the supplementary food store/s? [PR]
Those responsible for main food shopping and use more than one store as a supplement

Less than a quarter of the time	12.1%	40	12.1%	40	0.0%	0	10.8%	7	12.1%	40	10.8%	7
About a quarter of the time	31.1%	102	31.1%	102	0.0%	0	24.9%	16	31.1%	102	24.9%	16
About half the time	45.8%	151	45.8%	151	0.0%	0	43.1%	27	45.8%	151	43.1%	27
(Don't know / no pattern)	11.0%	36	11.0%	36	0.0%	0	21.2%	13	11.0%	36	21.2%	13
Mean:		36.17		36.17		0.00		36.97		36.17		36.97
Weighted base:		329		329		0		63		329		63
Sample:		341		341		0		58		341		58

Q08 Which store/s do you also use as a substitution for (ANSWER GIVEN AT Q02)? [MR]
Those responsible for main food shopping and use more than one store as a substitute

Aldi	15.1%	22	15.1%	22	0.0%	0	15.1%	22	14.2%	9	14.2%	9
Asda	12.6%	18	12.6%	18	0.0%	0	12.6%	18	10.5%	7	10.5%	7
Booths	0.6%	1	0.6%	1	0.0%	0	0.6%	1	1.3%	1	1.3%	1
Co-Op	9.2%	13	9.2%	13	0.0%	0	9.2%	13	11.4%	7	11.4%	7
Lidl	15.5%	22	15.5%	22	0.0%	0	15.5%	22	13.3%	8	13.3%	8
Marks and Spencer	4.9%	7	4.9%	7	0.0%	0	4.9%	7	7.5%	5	7.5%	5
Morrisons	13.4%	19	13.4%	19	0.0%	0	13.4%	19	10.9%	7	10.9%	7
Sainsbury's	19.7%	28	19.7%	28	0.0%	0	19.7%	28	18.8%	12	18.8%	12
Tesco	36.6%	52	36.6%	52	0.0%	0	36.6%	52	39.5%	25	39.5%	25
Waitrose	4.2%	6	4.2%	6	0.0%	0	4.2%	6	8.0%	5	8.0%	5
Other	2.4%	3	2.4%	3	0.0%	0	2.4%	3	3.0%	2	3.0%	2
Iceland	7.4%	11	7.4%	11	0.0%	0	7.4%	11	10.2%	6	10.2%	6
Any Big 4 Retailers [calculated codepoint]	65.5%	94	65.5%	94	0.0%	0	65.5%	94	61.6%	39	61.6%	39
Any Discount Retailers [calculated codepoint]	25.8%	37	25.8%	37	0.0%	0	25.8%	37	25.4%	16	25.4%	16
(Don't know / varies)	3.7%	5	3.7%	5	0.0%	0	3.7%	5	1.5%	1	1.5%	1
Weighted base:		143		143		0		143		63		63
Sample:		146		146		0		146		58		58

Weighted:

March 2016

	Total	Use multiple stores (Q03)	Use just one store (Q03)	Substitute main retailer (Q04)	Supplement main retailer (Q06)	Both substitute and supplement (Q04/Q06)
--	-------	---------------------------	--------------------------	--------------------------------	--------------------------------	--

Q09 Which store/s do you also use as a supplement to (ANSWER GIVEN AT Q02)? [MR]*Those responsible for main food shopping and use more than one store as a supplement*

Aldi	11.7%	39	11.7%	39	0.0%	0	14.0%	9	11.7%	39	14.0%	9
Asda	17.1%	56	17.1%	56	0.0%	0	6.7%	4	17.1%	56	6.7%	4
Booths	0.5%	2	0.5%	2	0.0%	0	1.3%	1	0.5%	2	1.3%	1
Co-Op	8.1%	26	8.1%	26	0.0%	0	11.9%	8	8.1%	26	11.9%	8
Lidl	13.4%	44	13.4%	44	0.0%	0	8.6%	5	13.4%	44	8.6%	5
Marks and Spencer	11.9%	39	11.9%	39	0.0%	0	7.6%	5	11.9%	39	7.6%	5
Morrisons	10.9%	36	10.9%	36	0.0%	0	8.0%	5	10.9%	36	8.0%	5
Sainsbury's	19.6%	65	19.6%	65	0.0%	0	16.3%	10	19.6%	65	16.3%	10
Tesco	20.2%	66	20.2%	66	0.0%	0	17.8%	11	20.2%	66	17.8%	11
Waitrose	5.2%	17	5.2%	17	0.0%	0	4.2%	3	5.2%	17	4.2%	3
Other	12.4%	41	12.4%	41	0.0%	0	7.1%	5	12.4%	41	7.1%	5
Iceland	5.2%	17	5.2%	17	0.0%	0	10.3%	7	5.2%	17	10.3%	7
Any Big 4 Retailers [calculated codepoint]	54.2%	178	54.2%	178	0.0%	0	38.8%	25	54.2%	178	38.8%	25
Any Discount Retailers [calculated codepoint]	22.6%	74	22.6%	74	0.0%	0	18.6%	12	22.6%	74	18.6%	12
(Don't know / varies)	5.9%	19	5.9%	19	0.0%	0	21.7%	14	5.9%	19	21.7%	14
Weighted base:		329		329		0		63		329		63
Sample:		341		341		0		58		341		58

SEX Sex of respondent

Male	43.6%	316	42.6%	183	45.2%	133	43.0%	61	42.1%	138	45.3%	29
Female	56.4%	408	57.4%	247	54.8%	161	57.0%	82	57.9%	190	54.7%	35
Weighted base:		724		430		294		143		329		63
Sample:		791		452		339		146		341		58

AGE To ensure we get a representative sample, could I ask how old you are ?

16 to 24	6.4%	46	8.9%	38	2.8%	8	15.6%	22	10.8%	35	31.1%	20
25 to 34	17.3%	125	18.8%	81	15.2%	45	19.1%	27	17.2%	57	12.4%	8
35 to 44	20.8%	150	18.7%	80	23.8%	70	21.8%	31	18.4%	61	21.7%	14
45 to 54	18.0%	130	16.9%	73	19.5%	57	16.8%	24	16.9%	55	16.3%	10
55 to 64	14.3%	104	15.0%	65	13.3%	39	12.4%	18	15.6%	51	12.5%	8
65 +	23.2%	168	21.7%	93	25.4%	75	14.3%	20	21.2%	70	6.0%	4
Weighted base:		724		430		294		143		329		63
Sample:		791		452		339		146		341		58

SEG Socio-economic group

A	3.1%	22	3.1%	13	3.1%	9	6.2%	9	3.1%	10	9.1%	6
B	17.6%	127	16.8%	72	18.7%	55	16.4%	23	18.8%	62	24.5%	16
C1	29.5%	214	29.7%	128	29.2%	86	26.7%	38	31.0%	102	31.6%	20
C2	31.7%	230	33.6%	144	29.0%	85	37.5%	54	30.3%	100	25.7%	16
D	6.2%	45	5.5%	24	7.2%	21	5.3%	8	5.5%	18	3.0%	2
E	11.9%	86	11.3%	48	12.8%	38	8.0%	11	11.2%	37	6.1%	4
(Refused)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		724		430		294		143		329		63
Sample:		791		452		339		146		341		58

EMP Which of the following best describes your current employment status ? [PR]

Working full-time (30+ hours a week)	43.8%	317	42.2%	181	46.1%	135	50.2%	72	40.5%	133	51.3%	32
Part-time	16.8%	122	16.8%	72	16.8%	49	13.2%	19	18.5%	61	14.9%	9
Not working - e.g. full-time student, not looking for work, unemployed (excluding retired / invalid)	11.9%	86	14.4%	62	8.3%	24	17.2%	25	15.0%	49	20.7%	13
Not working (retired / invalid)	27.2%	197	26.2%	112	28.7%	84	18.9%	27	25.4%	84	11.9%	8
(Refused)	0.3%	2	0.4%	2	0.1%	0	0.6%	1	0.6%	2	1.2%	1
Weighted base:		724		430		294		143		329		63
Sample:		791		452		339		146		341		58

Weighted:

March 2016

	Total	Use multiple stores (Q03)	Use just one store (Q03)	Substitute main retailer (Q04)	Supplement main retailer (Q06)	Both substitute and supplement (Q04/Q06)
--	-------	---------------------------	--------------------------	--------------------------------	--------------------------------	--

ADU How many adults aged 16 years or older, including yourself, live in your household ?

One	31.3%	226	30.9%	133	31.8%	94	32.0%	46	28.5%	94	27.0%	17
Two	47.1%	341	42.6%	183	53.7%	158	39.3%	56	43.5%	143	32.8%	21
Three	10.9%	79	12.5%	54	8.5%	25	6.2%	9	14.2%	47	7.6%	5
Four	7.5%	54	10.8%	47	2.6%	8	17.5%	25	10.9%	36	26.6%	17
Five	2.5%	18	2.3%	10	3.0%	9	3.0%	4	2.7%	9	6.1%	4
Six or more	0.2%	2	0.1%	0	0.4%	1	0.3%	0	0.0%	0	0.0%	0
(Refused)	0.5%	4	0.8%	4	0.0%	0	1.7%	2	0.3%	1	0.0%	0
Weighted base:		724		430		294		143		329		63
Sample:		791		452		339		146		341		58

CHI How many children live in your household, aged 15 years and under ?

None	68.1%	493	67.8%	291	68.6%	202	68.1%	97	67.0%	220	72.9%	46
One	13.2%	95	13.4%	58	12.8%	38	15.9%	23	14.4%	47	19.7%	12
Two	14.8%	107	14.5%	62	15.2%	45	12.1%	17	14.7%	48	7.4%	5
Three	2.5%	18	2.8%	12	2.1%	6	1.8%	3	2.9%	9	0.0%	0
Four	0.4%	3	0.3%	1	0.6%	2	0.4%	1	0.2%	1	0.0%	0
Five	0.1%	1	0.1%	1	0.0%	0	0.0%	0	0.2%	1	0.0%	0
Six or more	0.2%	1	0.3%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0
(Refused)	0.8%	6	0.8%	4	0.7%	2	1.7%	2	0.3%	1	0.0%	0
Weighted base:		724		430		294		143		329		63
Sample:		791		452		339		146		341		58

IS2 ISBA region

Ulster	2.8%	21	2.7%	12	3.1%	9	2.8%	4	2.6%	8	1.9%	1
Scotland	8.2%	59	7.3%	31	9.5%	28	8.1%	12	6.6%	22	7.1%	4
North / Borders	7.1%	52	7.7%	33	6.2%	18	13.5%	19	6.2%	20	12.7%	8
Lancashire	12.8%	93	14.7%	63	10.0%	30	11.2%	16	17.1%	56	17.9%	11
Yorkshire	7.8%	56	7.0%	30	9.0%	26	4.3%	6	6.7%	22	2.9%	2
Wales & South West	10.3%	75	11.4%	49	8.7%	25	10.8%	15	10.4%	34	4.4%	3
Midlands	16.4%	119	14.8%	64	18.6%	55	10.7%	15	14.9%	49	8.4%	5
East England	7.2%	52	6.3%	27	8.6%	25	8.3%	12	6.2%	20	9.7%	6
London	19.0%	137	19.0%	82	18.9%	56	21.6%	31	21.0%	69	33.2%	21
Southern	8.4%	61	9.0%	39	7.4%	22	8.5%	12	8.5%	28	1.9%	1
Weighted base:		724		430		294		143		329		63
Sample:		791		452		339		146		341		58

TV2 TV region [MR]

Grampian / Scottish	8.2%	59	7.3%	31	9.5%	28	8.1%	12	6.6%	22	7.1%	4
Tyne Tees / Border	8.7%	63	8.9%	38	8.4%	25	14.9%	21	7.1%	23	12.7%	8
Granada	13.7%	99	16.2%	69	10.1%	30	12.9%	18	18.2%	60	16.7%	11
Yorkshire	11.9%	86	12.2%	52	11.5%	34	8.1%	12	10.5%	35	5.9%	4
HTV / West Country	10.5%	76	11.3%	48	9.4%	28	10.2%	15	10.9%	36	6.4%	4
Central	19.6%	142	18.5%	80	21.1%	62	15.1%	22	18.5%	61	11.8%	7
Anglia	10.4%	76	10.1%	43	11.0%	32	9.4%	13	11.0%	36	12.1%	8
LWT / Carlton	21.9%	159	21.0%	90	23.2%	68	20.8%	30	23.3%	77	30.8%	19
Meridian	12.9%	93	13.5%	58	11.9%	35	13.3%	19	12.1%	40	3.4%	2
Weighted base:		724		430		294		143		329		63
Sample:		791		452		339		146		341		58