

Grocery Eye

Adapting shopping missions to the cost of living crisis



Background

The Grocery Eye has been running **since 2014**, surveying around **2,000 people UK Nat Rep Shoppers** each quarter, and covering grocery shopping behaviour with a focus on 4 key topics: healthy eating (Q1), plant based/meat reduction (Q2), sustainability (Q3), **shopping missions and occasions (Q4)**



Key trends



1 in 5 feel **anxious** when shopping for grocery

This is already impacting where people shop: increase in **in-store** and **discounter shopping** and **more shopping around** ...

39%

are likely to change their shopping habits next year

And how people shop: more **list writing**, **fewer treats** and a much **stronger focus on price and promotions** leaving little room for exploration and treats

Key Takeouts



 **Promotions as a key driver**

Ranging, pricing and promotion strategy more important than ever but not the only drivers...

 **Beware of stock issues**

It is a growing concern, especially when trying to stick to a list and a budget

 **Enable easy navigation**

Not being able to find what you are looking for adds an unnecessary layer of stress

 **Show relevance at point of sale**

Whether your category is at risk or not, opportunities to convert at fixture remain

Consumer Grocery Habits





Negative feelings towards grocery shopping have increased this year...

1 in **6** feel **frustrated** when they shop...

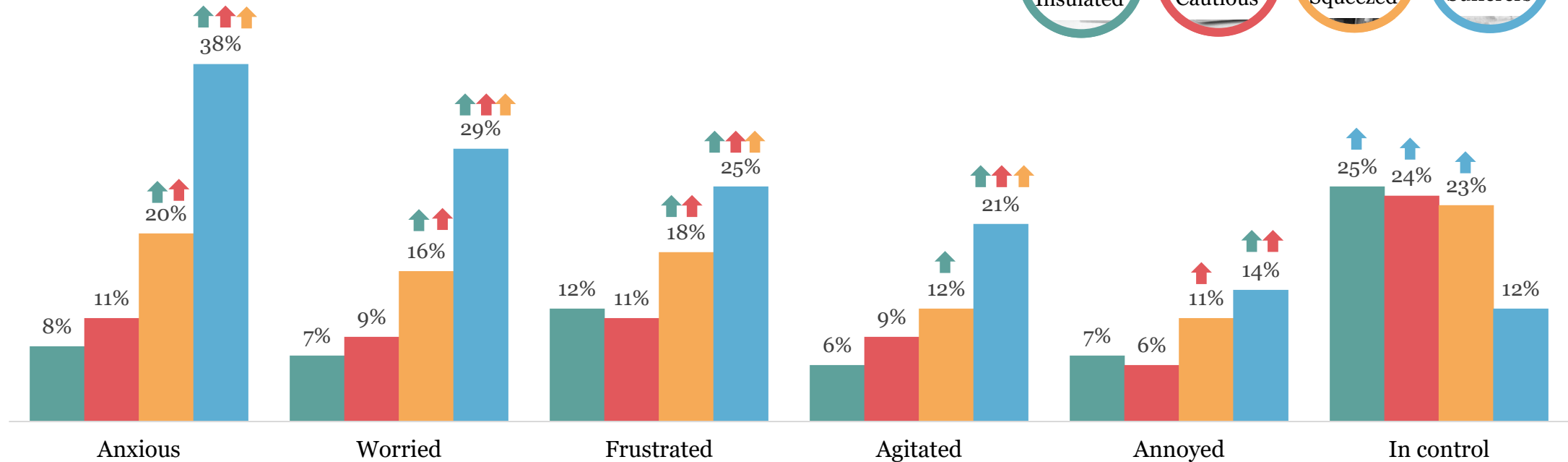
...and **1** in **5** feel **anxious**

The amount of people feeling **excited, curious and motivated** has **significantly decreased** since 2021

Overall **positive** feelings towards shopping have **dropped significantly**, from **70%** to **56%** this year,

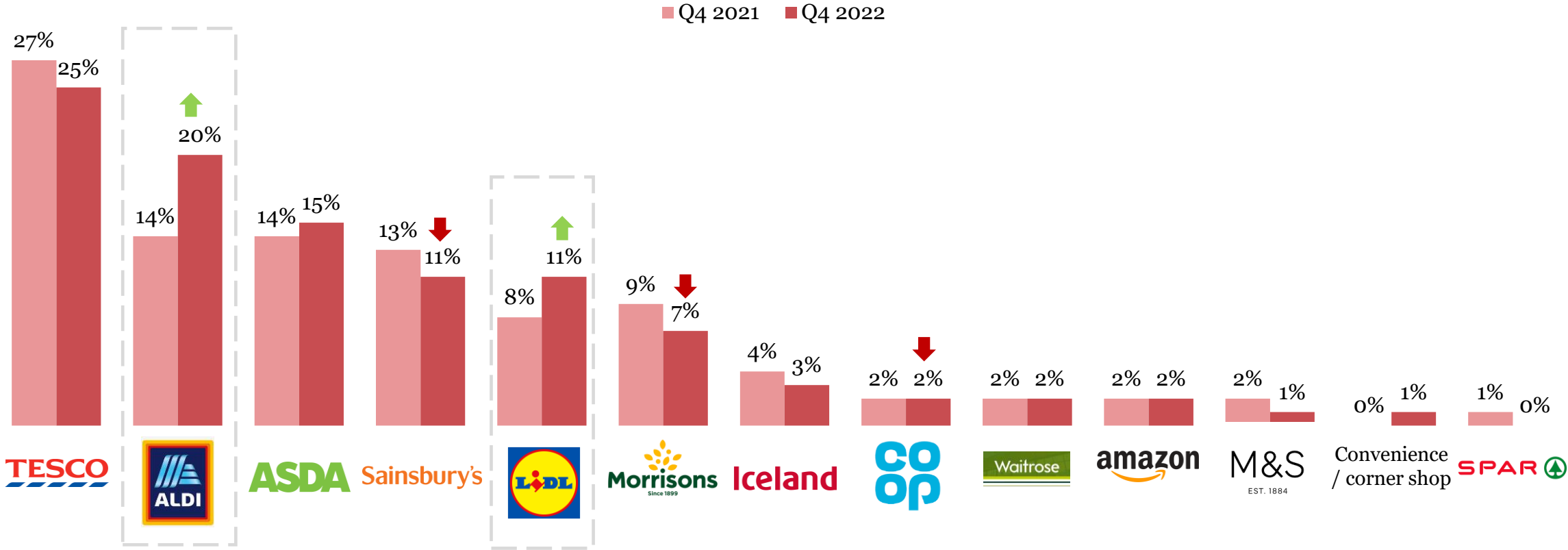
...and by resilience group, the rise in the cost of living continues to strengthen feelings of worry and anxiety for Sufferers

How does grocery shopping make you feel? (by resilience group)



↑↑↑↑ Significantly different to another resilience group at 95% confidence level

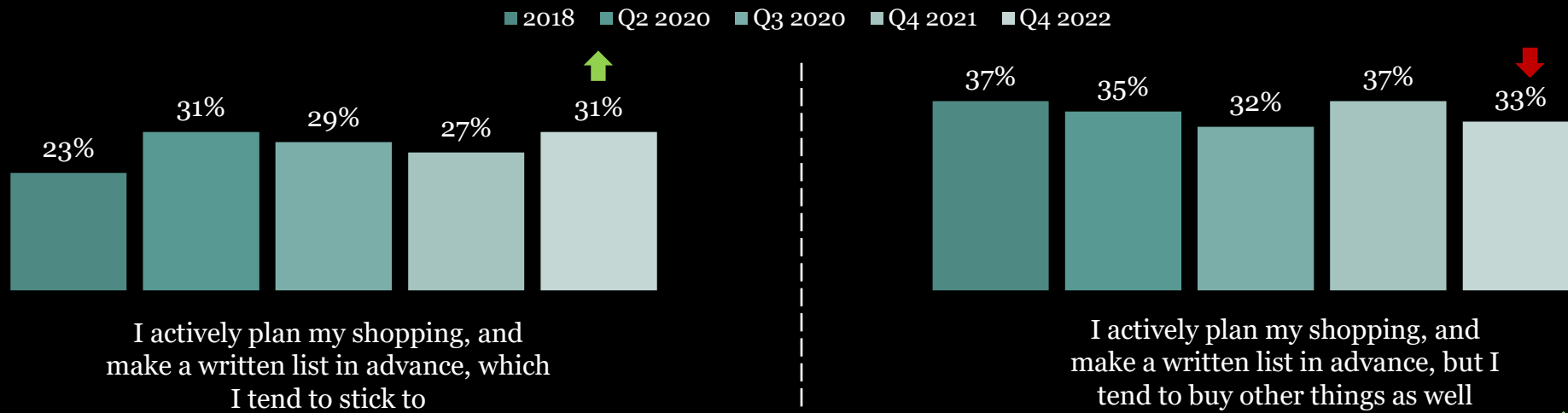
The rise in the cost of living has seen a significant footfall increase for Aldi and Lidl as shoppers' most frequented retailer



Significantly different at 95% confidence level



And there has been a significant increase in the number of shoppers trying to stick to shopping lists since 2021



Significantly different at 95% confidence level

Q4_9. Which, if any, if the following help you make decisions on what to buy when you shop for food and other essential products online? Base: Total (2,000)

Shopping behaviours & the Cost-of-Living Crisis

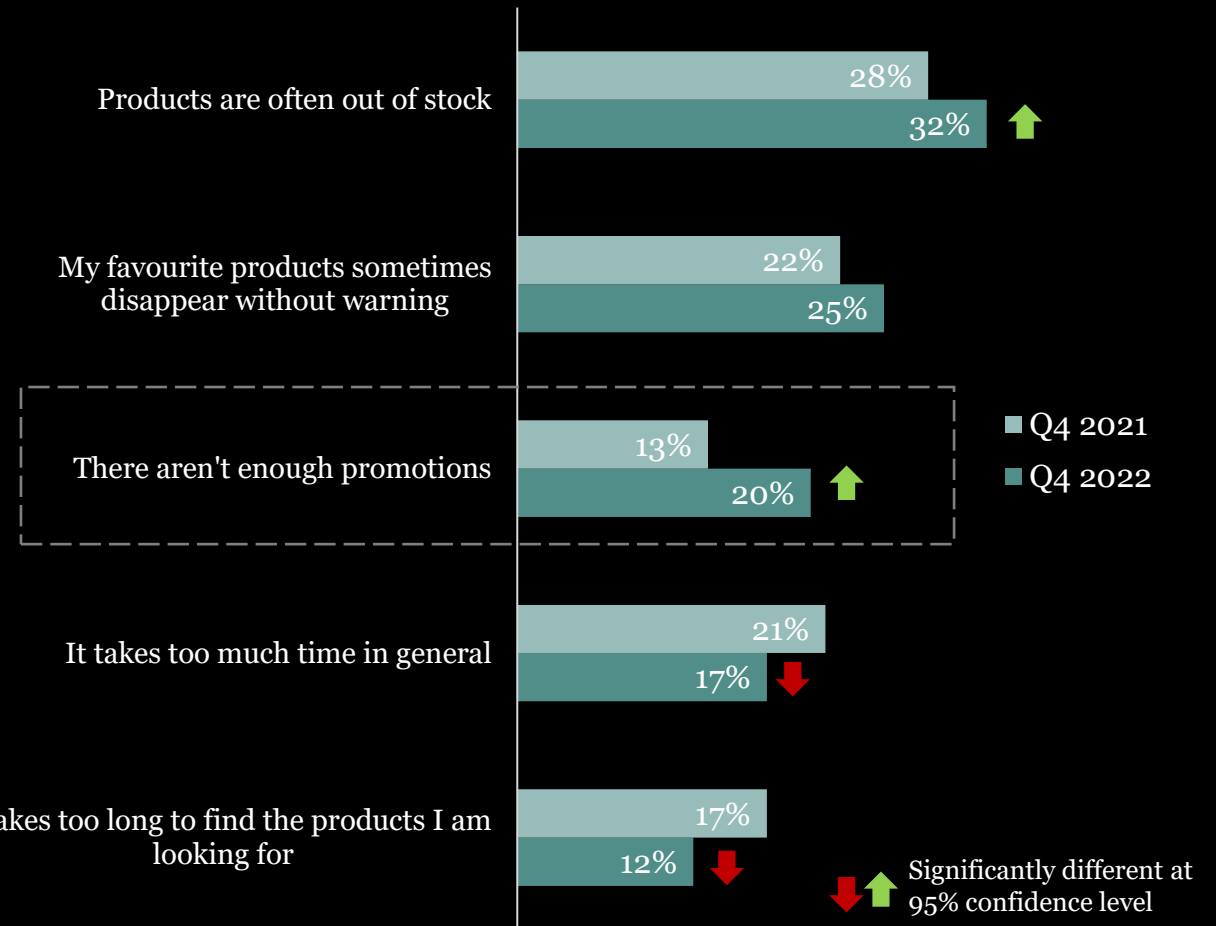


As covid becomes a thing of the past, and the cost-of-living crisis takes its place, price and stock-related issues have become bigger frustrations

40%  vs. Q4 2021 (21%)

of shoppers say their main frustration when grocery shopping is that **it gets more and more expensive every month**

What are your biggest frustrations when grocery shopping? (Promotion, stock & time-related answers)





As a result, the focus has shifted from product discovery to promotion hunting

80% 

vs 70% Q4 2021

I always look for promotions

66% 

vs 54% Q4 2021

I am price driven and always look for the cheaper option

49% 

vs 54% Q4 2021

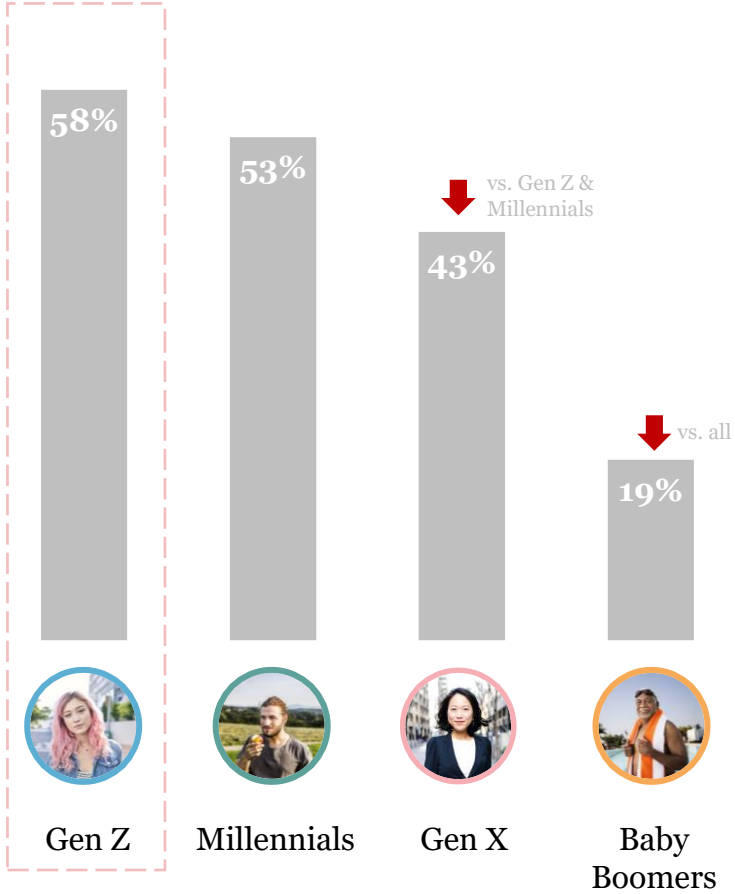
I like discovering and trying new products

**Moving
forward...**

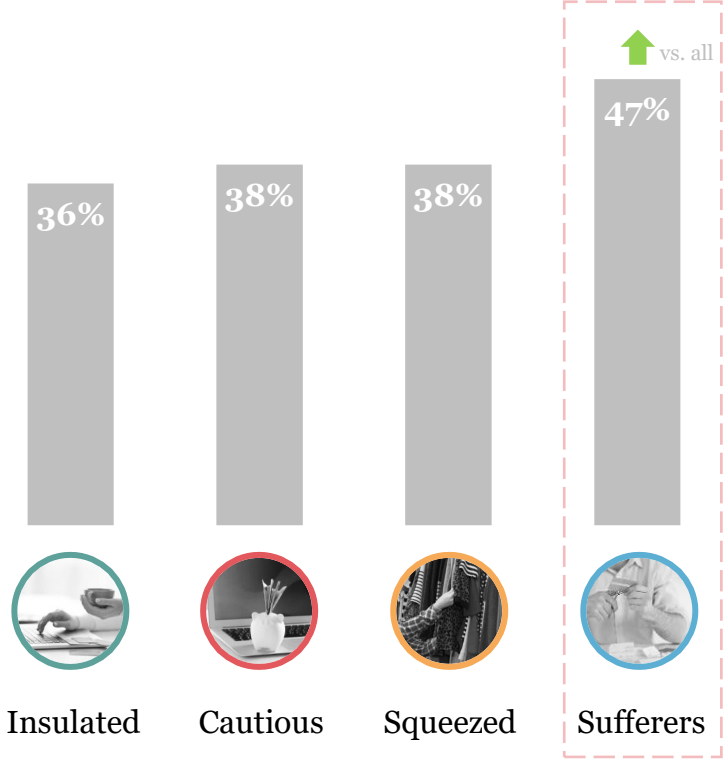
More than a third expect to change their shopping habits in 2023, with younger and less financially stable shoppers leading the way



Generations



Resilience group



Significantly different at 95% confidence level

So in 2023, we can expect to see brand loyalty diminish as consumers switch brands and cut back on non-essentials



42%

Shop around for the lowest prices



32%

Stop buying or buy fewer non-essentials



26%

Write a shopping list



25%

Switch to supermarket brands

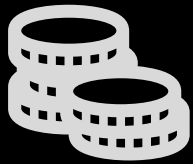


24%

Buy products from the reduced section

And although the focus is strongly on price, navigation and availability will also remain key

Top frustrations



51%
 ↑ vs. Q4 2021
 (34%)

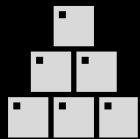
'It gets more and more expensive each month'

Top expectations



28%
 ↑ vs. Q4 2021
 (22%)

'More promotions'



32%
 ↑ vs. Q4 2021
 (28%)

'Products are often out of stock'



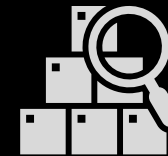
29%

'Better availability'



13%
 ↑ vs. Q4 2021
 (9%)

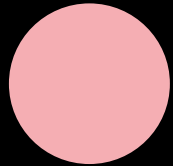
'It's difficult to find where things are'



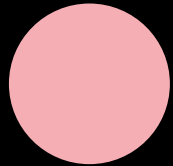
21%

'Easier to find products I am looking for'

↑↓ Significantly different at 95% confidence level



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