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Consumer Food Shopping Experiences research

**A report prepared for the Consumer
Council**



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Executive Summary

Executive Summary

Introduction

The Consumer Council for Northern Ireland (CCNI) commissioned Ipsos to undertake this piece of research to understand the lived experiences of consumers in Northern Ireland, and to ascertain how easy or difficult it is for consumers in Northern Ireland to access a healthy and affordable diet. The research focused on households who earn up to and including the Northern Ireland gross median annual income.

Methodology

In order to meet the objectives of this project, Ipsos designed a qualitative research study, comprising of depth interviews and app-based customer journeys, using Ipsos' in-house research app, AppLife. Each participant took part in an initial depth interview, completed a number of scheduled diary tasks using AppLife, and took part in a follow-up depth interview.

Key findings

The key findings from this research are outlined below.

General shopping behaviours

Some participants plan for their food shop in advance by making shopping lists or meal plans. For those who don't do this, it is generally due to lack of time or because they are buying regular products every week and know what they need. Some consumers who are trying to stick to a budget look online for supermarket deals before heading to the shops. Consumers mainly do either a larger weekly or fortnightly shop, but some shop more often – several times a week up to every day – while fewer shop less frequently, stocking up on groceries once a month. Participants shop at a range of supermarkets across NI including and most do 'top-up' shops in between.

There are multiple factors influencing buying behaviours, including price, quality and freshness, and the preferences and needs of the wider family and children in the home. Some participants are loyal to one supermarket, while others shop around to try to look for the best prices on certain products. Quality is key to consumers who are looking for a combination of value for money, while being able to access affordable, quality food produce.

Consumers pay special attention to the freshness of meat, fresh fruit and vegetables, and avoid short use-by dates. Oftentimes the person who does the shopping considers how to accommodate the whole family in terms of preferences and needs. This is particularly challenging for those with children who were fussy eaters and for those with children who have additional needs. Those with very young children or babies in the household must also factor in essential items such as nappies, baby food or formula to their regular grocery shop.

Affordability

Everyone who took part in the research indicated they had experienced rising food bills in the last year. Price increases have been recognised across all the larger supermarket retailers and across a range of staple products such as orange juice, pasta, canned food, meat and fruit and vegetables. Consumers are concerned about the rising cost of food, which is expected to increase further over the coming

months. Many had not realised the extent of their overall food spend until they took part in the research and studied receipts more closely.

In response to the increase in food costs, consumers are shopping around to find better value. Most participants look for deals and promotions where they can and those who shop in Tesco and Sainsbury's find their loyalty schemes offer good value. To reduce the overall cost of food, some households buy supermarket own-brand products, and some have reduced the amount of 'treats' they buy as part of their food shopping or look for cheaper alternatives. Some who have tighter budgets also mentioned 'going without' to make sure their children had enough to eat.

Participants were very clear about which supermarkets they felt offered best value, and many discussed shopping in discounter stores to get better deals on household items such as cleaning products, toiletries, and non-perishable foods, which they found more expensive in the larger retail supermarkets.

Participants also discussed the impact of rising costs of other bills, such as electricity, gas and fuel prices which are perceived to be increasing rapidly over a short space of time. Some families reported having to prioritise certain bills on certain weeks, in line with when they are paid.

Consumers have mixed views on whether they feel they get value for money from their current shop. Those who live in rural areas need to travel further to shop at larger retailers which are perceived to be the best value (while local convenience stores are believed to be significantly more expensive). Participants who are under greater financial strain also feel it is becoming more difficult to get value for money from their typical grocery shop.

Accessibility

The majority of participants feel they can access a good range of supermarkets and smaller independent retailers in their immediate area. This varies somewhat by region as those living in more rural areas have limited access to a wider range of larger supermarkets. Some feel that the smaller 'convenience' stores belonging to supermarket chains can have lower availability and often be more expensive. Most consumers travel to the supermarket by car, even if they live very close to a supermarket as this is the most convenient way of travel, especially when carrying heavy bags. Some are more likely to walk to smaller local stores for top-up shops while a few travel by bus or taxi.

Some participants use home delivery services for their grocery shopping, and many tried this for the first time during the Covid-19 pandemic and have continued to shop in this way after lockdown restrictions eased. For some, placing an order for home delivery is convenient around their family lives, or to assist with larger orders, for example, one that may include heavy or bulky items such as cleaning products. For others, ordering groceries online saves time and in their view money as they are able to track what they are spending on their online basket. Most feel that delivery charges are reasonable.

When asked to think about what 'healthy' means to them, most participants indicated that fresh ingredients, those typical of a traditional Northern Ireland diet (including fresh meat, vegetables and potatoes) and homemade meals were considered to be healthy. Conversely, most believe that frozen or processed meals are unhealthy. At the same time, consumers do buy some processed or frozen meals for convenience, with some families relying more on these kinds of foods than others.

Participants discussed using techniques such as batch cooking, freezing portions and leftovers, following recipes or online tutorials for support with meal planning. Most participants order a takeaway as a weekly treat – typically once a week for convenience and as a break from cooking for the night. While this is a

habit that most consumers stick to, many feel that takeaways, like groceries, are becoming more expensive and some are looking for alternatives such as buying supermarket fast food.

Availability

Most of the participants have experienced changes with the availability of goods to some degree. Consumers will generally choose an alternative if something is not available, but others may need to travel to another store or pay a higher price elsewhere for a product, if it is not available in their regular supermarket, which can be frustrating. With the rising cost of fuel, this can also prove more costly.

Items that were frequently reported to be affected by lower availability included meat, fresh fruit and vegetables, juices, cooking oils, baby formula and baby food. These products are considered by most to be staple household items and in some cases essentials, which leaves consumers feeling confused and frustrated when they try to understand why these products are not on the supermarket shelves. It is worth noting that when the fieldwork was conducted, repercussions from the Russian invasion of Ukraine had begun to filter through, which may have been a factor affecting some of availability issues experienced, but this was not something participants made reference to.

In addition to changes in availability, many commented that they were finding shorter use-by and best before dates, or fresh produce that was visibly poorer in quality and linked to short dates, which is unappealing and unsatisfactory for consumers who feel freshness is key.

Consumers had noticed changes in availability over a period of time, but most noticeably in the last six months. They have attributed the changes to the impacts of both the Covid-19 pandemic and circumstances around EU Exit and the Northern Ireland Protocol. Some feel that Northern Ireland is “bearing the brunt” of supply chain issues related to the Protocol, while others feel that the issues around availability will inevitably lead to higher shopping bills, as they believe supermarket chains will pass on any increases to the consumer.

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Introduction

Introduction

The Consumer Council Northern Ireland (CCNI) appointed Ipsos to undertake qualitative research to capture the lived experiences of consumers in Northern Ireland and to ascertain how easy or difficult consumers find it to access a healthy and affordable diet. The research focused on households who earn up to and including the Northern Ireland gross median annual income, which is £29,000¹.

Background and context

Consumers in Northern Ireland are facing ongoing and mounting challenges when it comes to their household bills. In March 2022, a cost-of-living crisis was declared, and at the time of writing UK inflation, which sits at 10.1%, is at the highest level since March 1982².

Households in Northern Ireland are seeing steep increases in their outgoings across fuel, energy and food bills. All of the main electricity suppliers in Northern Ireland have increased prices by 25% to 30% in recent months. The cost of gas and domestic oil has also risen sharply³. According to the Utility Regulator Northern Ireland, the price of gas traded internationally is currently over double the price compared to the same period last year, which has a significant impact on end market prices which reach the consumer⁴.

In recent weeks, Communities Minister Deirdre Hargey confirmed that thousands of families, individuals, low-income workers and pensioners are to receive direct cost-of-living payments of up to £650. The payments are targeted at those in greatest need, including individuals in Northern Ireland who are on income-related and disability benefits, as well as pensioners, during the escalating cost-of-living crisis⁵.

With inflation at its highest level in 40 years, household budgets across Northern Ireland and the rest of the UK are under increasing strain. Findings from Ipsos' Global Advisor survey show that the rate of inflation is the number one concern among citizens in Great Britain at this moment in time⁶. Another recent poll conducted by Ipsos in May 2022 found that over three quarters (79%) of Britons are very or fairly concerned about the economy going into recession, while 45% of those surveyed are finding it much or a little harder to stay positive about the future⁷.

While consumers throughout the UK are feeling the pinch, this may be even more prominent for households across Northern Ireland, as NI has the lowest gross weekly income compared to the UK average (£235 compared to £260 UK average). Discretionary income (the money left over after essentials are paid for) for the lowest-earning households has fallen by 21.5% over the last six months of 2021⁸.

Previous qualitative research conducted in 2022 for CCNI into choices and pressures facing consumers specifically in low-income household in Northern Ireland, found that around one third of participants interviewed stated that their income has decreased since the Covid-19 pandemic, while almost all interviewees said their outgoings have increased (most stating that their outgoings have increased 'a

¹ Northern Ireland Statistics and Research Agency. [Annual Survey of Hours and Earnings](#). Result published October 2021.

² BBC News article: [Cost of living: People cut back on food shopping as price rises bite](#). [Accessed 24/06/22].

³ BBC News article: [Energy Prices: Why are power bills going up?](#) [Accessed 24/06/22].

⁴ Utility Regulator. May 2022 Newsletter. [High wholesale energy costs leads to more increases in bills](#). [Accessed 24/06/22].

⁵ Northern Ireland Executive. [Hargey confirms cost-of-living payments](#). Published 15th June 2022. [Accessed 24/06/22].

⁶ Ipsos Global Advisor. Online representative survey of 19,505 adults aged 16-74 in 27 participating countries. April 22nd 2022 – May 6th 2022.

⁷ Ipsos UK: [Many Britons finding it hard to stay positive about the future with 8 in 10 concerned about a possible recession](#), [Accessed 20/06/22].

⁸ Northern Ireland Household Expenditure Tracker Q1 2022 [Q1 2022 Northern Ireland Household Expenditure Tracker | Consumer Council](#)

lot')⁹. Nine out of ten participants stated they were worried about their ability to pay energy bills, while eight out of ten said the same about transport, housing costs and food bills. Higher outgoings were mainly attributed to increases in heating and electricity bills, while spending on food, soft drinks and transport have also significantly increased.

According to recent Office for National Statistics (ONS) data on inflation and price indices, the largest contribution to the change in the Consumer Price Index inflation rate came from food and non-alcoholic beverages, with the largest contributions from bread, cereals and meat¹⁰. Price increases across some of the most staple food items is indeed concerning for consumers. Unprecedented increases in energy and fuel prices, the ongoing financial repercussions of the COVID-19 pandemic, the impacts of EU Exit and wider geo-political instability, mean food price increases are set to continue.

Further data published this year by the Office for National Statistics (ONS), reports that food store sales fell by 1.6% in May, 2.4% below their pre-coronavirus February 2020 levels. This change may be attributed to affordability, as recent data shows that the spending power of the average UK household fell by £40.71 per week in Q2 2022, compared to the same period in 2021. Furthermore, in Quarter 2 of this year (April – June 2022), households in Northern Ireland saw discretionary income fall below £100 for the first time since the same period in 2017¹¹. At the time of writing, households in Northern Ireland have the lowest discretionary income of any region in the UK, which is likely to contribute to lower grocery spend¹².

These findings align with the results of a BBC commissioned survey, where more than half of participants (56%) stated they had purchased fewer groceries in a bid to save money¹³. The same proportion reported having skipped meals. Those surveyed indicated that they had taken several other actions related to food behaviours to save money, including eating out less (64%), not buying takeaways (58%) and shopping at a different supermarket than usual (42%).

Both Asda and Tesco have reported that customers are changing their behaviour by reducing spending. Tesco have stated that their shoppers are buying less food and visiting their stores more frequently. Meanwhile, Asda chairman Lord Rose told the BBC that the supermarket chain was seeing 'a massive change in behaviour', with shoppers switching to budget ranges, buying less food and sticking to strict budgets in an attempt to cut costs¹⁴.

It is against this backdrop that this research was commissioned. Below the research objectives are outlined.

Research objectives

The overall objective of this research was to undertake up-to-date consumer voice research to capture the lived experience of food shopping among households earning up to and including the median gross annual income in Northern Ireland.

Key secondary objectives included:

⁹ The Consumer Council. [Consumer Vulnerability Research: Low Income Households](#). 24th May 2022. [Accessed 24/06/22].

¹⁰ Office for National Statistics. [Consumer price inflation, UK: May 2022](#). [Accessed 24/06/22].

¹¹ CEBR. Asda Income Tracker. June 2022. [Accessed 05/08/22].

¹² Ibid

¹³ Savanta survey for the BBC. 10th June. <https://www.bbc.co.uk/news/business-61813857>

¹⁴ BBC News article: [Asda says some shoppers asking cashiers to stop at £30](#). [Accessed 24/06/22]

- To understand participants' food eating and shopping behaviours (e.g., is meal-planning involved, do they cook from scratch or shop for convenience etc);
- To discover to what extent these behaviours are influenced by factors such as affordability, living location, access to transport etc;
- To understand if consumers experience any barriers in their food shopping. (i.e., cost, availability, accessibility etc); and
- To understand how consumers feel about their ability to meet theirs and/or their family's food need.

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Methodology

Methodology

In order to meet the objectives outlined on page 11, Ipsos designed a qualitative research study, comprising of depth interviews and app-based customer journeys, using Ipsos' in-house research app, AppLife. Each participant took part in an initial depth interview, completed a number of scheduled diary tasks using AppLife, and took part in a follow-up depth interview.

In-depth customer journeys

Twenty-two in-depth customer journeys were conducted across Northern Ireland, using Ipsos' in-house research app, AppLife, alongside depth interviews. This approach allowed for a greater generation of meaningful insights and provided a one-to-one space for participants to discuss matters relating to their food purchasing decisions, including any financial considerations, which can be sensitive and personal in nature. Fieldwork took place between Q1 and Q2 2022.

Depth interviews

Participants took part in an initial interview prior to completing the AppLife diary tasks. The purpose of the initial interview was to give the participants an overview of the research, to gather some initial insights into food shopping behaviours and to explain the purpose of the app-based tasks and what participants would be expected to complete using the AppLife app. The initial interviews lasted up to 30 minutes and took place either via Microsoft Teams or via telephone call.

Once participants had completed their AppLife diary tasks, they took part in a follow-up interview which lasted up to 45 minutes. This took place via Microsoft Teams or by telephone. The follow-up interview covered any areas that may have not been fully explored throughout the AppLife responses and included more in-depth questions on consumers' food shopping and eating behaviours, and perceptions on accessibility, availability, and affordability of food.

AppLife Diary tasks

Participants were asked to download the free Ipsos AppLife app from the app Appstore (iPhone) or Play store (Android) and to complete four research tasks which were scripted into the app:

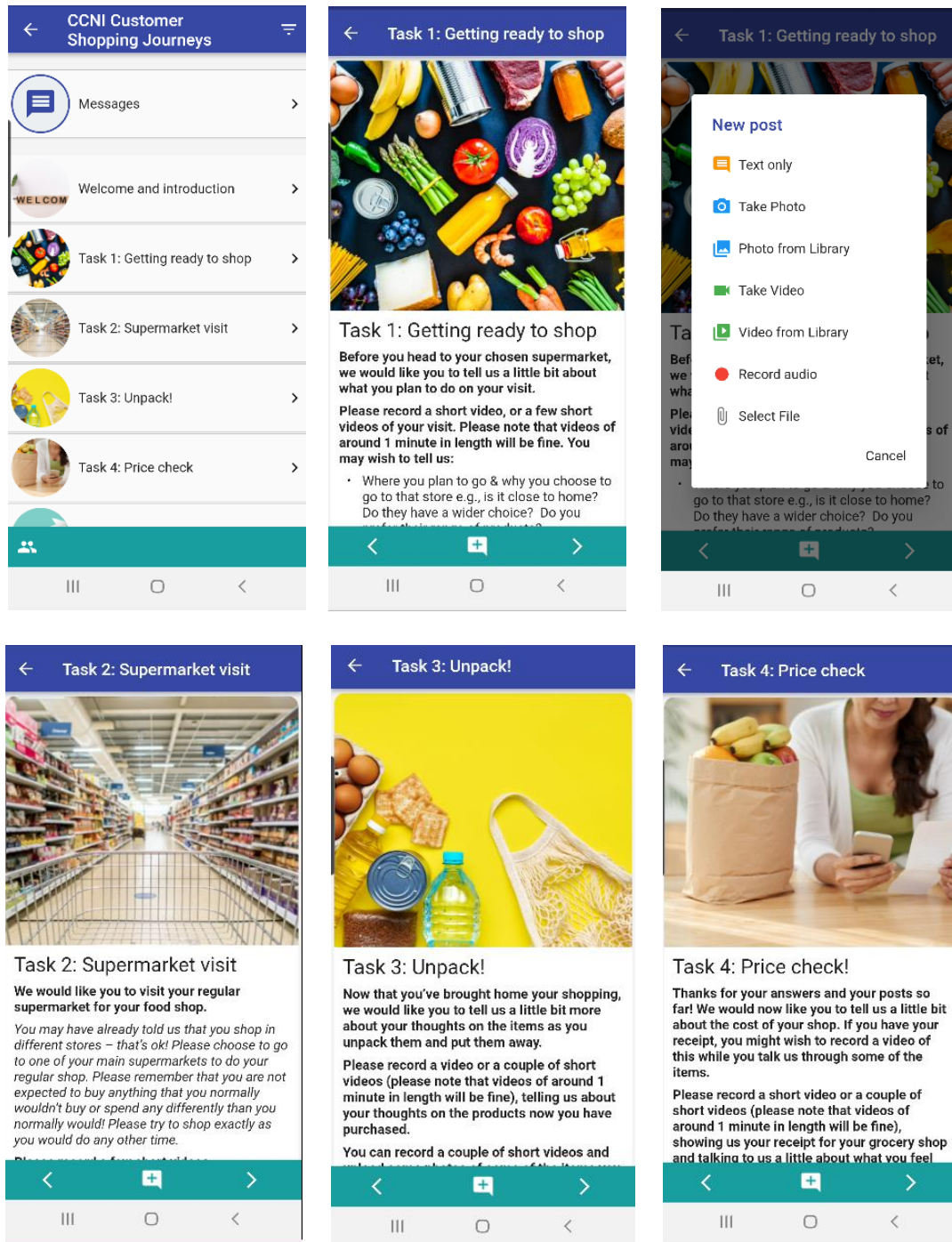
- Task 1: Getting ready to shop
- Task 2: Supermarket visit
- Task 3: Unpack!
- Task 4: Price check

Each task required participants to answer questions on a specific aspect of their food shopping journey, from the planning stage before participants went to the shops (Task 1), to an account of their experience in-store (Task 2), providing more information on the foods that had been purchased once they were brought home (Task 3) and discussing views on price and value for money (Task 4). Most tasks could be completed in the participants' home, as they either prepared to visit the supermarket, or once they had returned home with their shopping. In order to better understand consumers' shopping behaviours, one of the tasks (Task 2) involved recording some video footage while participants completed their regular grocery shop, in their usual supermarket(s). Participants were asked to shop exactly as they normally would and were assured that they were not expected to spend any more than usual.

Participants were advised that in accordance with GDPR, they were to ensure that no other shoppers, employees or persons accompanying them on the store visits were to be recorded, as Ipsos only gained consent from the participants themselves for their footage to be used. Participants were instructed to focus their footage solely on themselves, the store displays and food items being purchased.

Tasks were scripted into the app, with care taken to include visual stimuli such as images and clear titles and instructions formatted in larger, emboldened text (see Figures 1-6 overleaf). A screen recording video was shared with participants as an AppLife brief tutorial, should they require any additional support.

Figures 1-6: Examples of AppLife platform and scripted tasks



Participants were able to share video footage, photos, audio recordings and text comments within the app when answering the questions associated with each task. Participants were also able to contact the moderator privately within the app, if they had any questions. Moderators were able to schedule reminder messages to be sent to all participants, or contact a participant directly within the app.

The app was set-up to ensure that only the research team had access to all participant data, and that individual participants only had access to their own data, to ensure confidentiality and anonymity.

Sampling

For this research project participants were selected on the basis that they meet certain criteria in order to support the research objective. We aimed to recruit a spread of participants across the following criteria:

- **Representation from different settlement types:**
 - Large Town population greater than 18000 people
 - Small Town population between 5000 and 9999 people
 - Intermediate Settlements population between 2500 and 4999 people
 - Village population between 1000 and 2499 people
 - Open Countryside and small villages with population less than 1000 people
- **A spread of geographical areas across Northern Ireland:**
- **A spread of different household types e.g.,**
 - dual parent families;
 - single parent families;
 - families with pre-school/ nursery age children or younger;
 - families with primary and secondary school children;
 - single occupancy households;
 - lone pensioners; and
 - young people aged 18-24 living independently.
- **A spread of households earning up to and including the NI median gross annual income (£29,000)¹⁵.**

The participants ranged from 20 to 80 years old. The majority of the sample fell into the C2DE socio-economic grouping, however, a small number of ABC1 participants were included. Participants who fell into the ABC1 socio-economic grouping, belonged to this grouping based on occupation, however, they were either single parents or living alone and indicated a degree of financial vulnerability or financial

¹⁵ Northern Ireland Statistics and Research Agency. [Annual Survey of Hours and Earnings](#). Result published October 2021.

burden. Socio-economic grouping, while often correlated with household income, cannot explain financial circumstances, and those living alone or with dependents can experience financial hardship. Additionally, households earning close to the median gross annual income can experience challenges due to higher potential outgoings, less financial support available from government, and individual circumstances. In essence, these are people who could be referred to as the 'squeezed middle'..

To understand if any consumers were facing financial difficulties, a number of questions on financial vulnerability were included in the recruitment screener questionnaire. These questions were used to understand how consumers currently feel about their household expenditure in the context of the cost-of-living crisis. Questions on the extent of financial burden of household bills, falling behind on payments in the last six months and views on the impact of further increases to bills were included.

A sample profile is included in the table below.

Table 1.1: Breakdown of LGD, Settlement & Household Type achieved

Participant ID*	LGD	Settlement	Household Type	No. in household	Total no. aged 16 and under in household
CJ1	Derry & Strabane	Open countryside & small villages	Single occupancy household under 65	1	0
CJ2	Derry & Strabane	Small town	Family with older primary & secondary school children	4-5	2-3
CJ3	Causeway Coast & Glens	Small town	Single parent family	4-5	4-5
CJ4	Fermanagh & Omagh	Village population	Single parent family	4-5	2-3
CJ5	Fermanagh & Omagh	Intermediate settlement	Lone pensioner	1	0
CJ6	Derry & Strabane	Large Town	Dual parent family – two parents and child/children)	2-3	1
CJ7	Derry & Strabane	Village population	Lone pensioner	1	0

CJ8	Derry & Strabane	Large Town	Single occupancy household under 65	1	0
CJ9	Mid & East Antrim	Small town	Single parent family	2-3	2-3
CJ10	Newry, Mourne & Down	Village population	Young person aged 18-24 living independently	1	0
CJ11	Newry, Mourne & Down	Large town	Family with pre-school and younger children	5+	4-5
CJ12	Mid Ulster	Open countryside & small villages	Family with pre-school and younger children	4-5	2-3
CJ13	Armagh, Banbridge & Craigavon	Open countryside & small villages	Lone pensioner	1	0
CJ14	Mid Ulster	Village population	Family with pre-school and younger children	4-5	2-3
CJ15	Mid & East Antrim	Large town	Dual parent family – two parents and child/children)	4-5	2-3
CJ16	Armagh, Banbridge & Craigavon	Intermediate settlement	Single parent family	4-5	2-3
CJ17	Belfast	Large Town	Dual parent family – two parents and child/children)	4-5	2-3

CJ18	Antrim & Newtownabbey	Small town	Single parent family	2-3	2-3
CJ19	Belfast	Large town	Single parent family	4-5	2-3
CJ20	Antrim & Newtownabbey	Village population	Single parent family	2-3	2-3
CJ21	Lisburn & Castlereagh	Large town	Single parent family	4-5	2-3
CJ22	Belfast	Large town	Single parent family	2-3	2-3

*CJ = Customer Journey

Discussion Guides

Discussion guides for both the initial depth interview and the follow-up interview were developed in conjunction with CCNI to include all key lines of enquiry and to answer the research objectives. As outlined in the Project Initiation Document, the discussion guides and the AppLife diary tasks were designed to understand consumer experiences around three main themes: Affordability; Accessibility; and Availability. The main sections of each discussion guide are outlined below, and the full guides are appended to this report (see Appendices 1 and 2).

Initial interview Discussion Guide

The initial discussion guide covered:

- General shopping habits; and
- An overview of the AppLife tasks.

Follow-up interview Discussion Guide

The follow-up interview discussion guide covered:

- A recap of the store visit;
- A recap on the AppLife tasks;
- Accessibility (range of shops, travel, access to healthy foods and perceptions on 'healthy' foods);
- Availability (of certain food items in local supermarkets and how, if at all, this has changed over time); and
- Affordability (views on cost of the food shop, appeal of offers and promotions, views on any change over time and perceptions of value for money).

Analysis

Two stages of analysis have been conducted for this project:

- Analysis of the initial and follow-up interview data using a grounded theory approach.
- Visual data analysis of the AppLife diaries.

Grounded theory

Grounded theory refers to an analysis model in which theory is 'grounded' in data that has been systematically collected and analysed. This approach ensures that theory is developed from data, rather than the other way around.

The interview data has been systematically coded, using the interview notes for each interview.

The coding involved three distinct stages, which are detailed below.

Open coding

Open coding is the process of breaking down, examining, comparing and categorising data and it consists of assigning a label or 'code' to each distinct phenomenon within the data. Detailed field notes were produced for each research interview, using audio recordings. These notes were then subject to the open coding process.

Axial coding

This is the second stage of the process and involves linking concepts into conceptual families by making connections between the categories identified at the open coding stage. It involves linking relevant categories together and identifying the conditions that give rise to it as well as the context in which it is embedded. Based on the open coding completed for the interview data, the research team used axial coding based on the research questions. This stage of the coding process involves more analytic codes and descriptions as a more explanatory narrative begins to develop.

Selective coding

The final stage of the analysis process involved the selection of the core category for each research question upon which the final analysis is based. At this point, the story line is explicated further, and an analytic description of the core category is developed. This involves the research team reviewing all analytic content to ensure the core categories directly answer the research questions.

Visual data analysis

A visual data analysis was performed on the AppLife video, photo, audio and text posts. This method is based on content analysis and allowed themes to emerge from the words and images that participants shared as part of their diary tasks.

03

General shopping behaviours

General shopping behaviours

This chapter aims to provide an overview of consumers' general shopping behaviours. Before participants completed their app-based diary tasks, they took part in an initial interview where they answered questions on their shopping behaviours. This chapter will outline how participants usually do their grocery shopping, where they choose to buy their groceries, as well as recurring themes relating to factors which influence purchasing behaviours.

Planning before a food shop

We asked participants if they typically planned for their food shopping by making shopping lists or meal plans or checking what food items and other household products they currently had at home. Some participants discussed making shopping lists before each visit to the supermarket, but others talked about buying similar items each time they visited a supermarket and therefore they would have an idea of what they were going to buy without bringing a shopping list. For some, they do not feel they have the time to regularly make a shopping list, although mention that they feel it is helpful. A small number of participants who said they were on maternity leave, felt that they had more time to plan their food shopping and to make meals from scratch.

“Mostly try to do a meal plan... other weeks I don't stick to it and if I don't get a chance may just go in and get what I think I would usually get.”

Dual parent family, Large Town, Belfast

While some participants make shopping lists, fewer participants make meal plans before they visit the shops. Others indicated that without a shopping list, they may come home with more items than they had planned to buy, or without items that they had intended to buy. A small number of participants talked about using recipe books to plan family dinners.

“Use the Pinch of Nom books so they are like Slimming World books and that's where we would do 90% of our meals from”

Family with pre-school and younger children, Large Town, Newry, Mourne & Down

With the rising cost of the food basket, some consumers are starting to think about how they might change their behaviour to help to reduce costs. Not all consumers have started to implement changes to their food shopping but would consider planning their shop more carefully in the future.

“I normally don't meal plan. But just with the price of stuff going up, I have give it a thought to start doing it, if my shopping gets really, really expensive. I've noticed an increase, but not a big enough increase to start my meal planning yet.”

Single parent family, Large Town, Belfast

Some participants visit supermarket websites to look for offers and deals, which may influence their decision to go to a particular shop based on the prices during a particular week on certain items. Others use online apps to look for deals on groceries. The main apps that were discussed are the LIDL app, and an app called Gander, which shows consumers where there are reduced items in local Spar stores.

Frequency of food shopping

Frequency of food shopping largely depends on individual preferences and family circumstances. Most participants do a larger shop on a weekly basis, some participants shop fortnightly, and fewer told us that they would shop for groceries once a month, or daily. Consumers tend to visit their supermarket of choice more frequently, as well as independent retailers such as butchers, but also visit specialist stores or discount retailers (such as Home Bargains and B&M) occasionally to stock up on certain household items and non-perishable goods. One participant visited Lynas Food Outlet around once a month to stock up on larger packs of food, to be portioned and frozen at home.

Some participants shop at certain times of day, as this is most suitable based on their schedules and family life, for example, after bringing children to school. Others shop after work during the week or on the weekend. Many participants mentioned that it could be challenging to shop when they are bringing children along, as shopping can take more time and the children can influence what parents decide to buy.

Some participants also consider doing their grocery shopping around pay day, whether that is on a monthly or weekly basis.

The main supermarkets of choice

Participants shop at a range of different supermarkets in Northern Ireland. Some participants are loyal to one supermarket and tend to buy their weekly, fortnightly, or monthly shop in the same store, while others are happy to 'shop around' in different supermarkets, either due to perceived value across different stores, or because some prefer certain products from one store over another.

“Usually Asda, Tesco or Lidl’s as well... generally like to shop around, to see where the best value would be.”

Dual parent family, Large Town, Belfast

Participants shop in their main supermarket (or supermarkets) for the majority of the food items they wish to buy, but most, if not all, talk about visiting more 'local' shops to top-up their groceries in between their larger food shops. These 'local' shops are most likely to be smaller retailers, where participants will pick up perishable items such as milk, bread, processed meats and cheese which run out more quickly.

Most participants shop in supermarkets which are closest to home, with fewer stating that they travel to visit supermarkets which are not in their area. Those living in more rural areas need to travel a little further to reach a larger retailer, and they may plan their travel to the shops more than those who have several supermarkets close by. A small number of participants who live in more rural areas mentioned purchasing items from local farmers or from farmers' markets, such as eggs or potatoes.

There are mixed views among participants as to which supermarkets provide the best value or quality, but Asda and LIDL are frequently discussed in terms of value. Iceland is also perceived to be good value but noted by some as being more limited in their product ranges (for example, providing less fresh food options). Tesco is perceived to be good value for some participants; however, this is more likely to be tied to promotions such as Tesco Clubcard prices or Aldi Price Match on some products.

“I do find they price match and I think in my video last week I bought plums and I think Tesco price matched Aldi with plums for 59p and I don’t think I noticed that before. That sort of keeps me [loyal] too because I know they are trying to keep their prices down”

Single parent family, Intermediate Settlement, Armagh, Banbridge & Craigavon

A small number of participants shop in Marks and Spencer for some items, such as fresh fruit and vegetables and chilled foods. Some commented on the perception that Marks and Spencer are expensive but talked in their video diary about produce they had purchased from the ‘Remarkable Value’ range, which was perceived to provide both value and quality. Others explained that some of the ‘Dine In’ offers available at Marks at Spencer were appealing as this could often be a lower-cost alternative to a takeaway, for example pizza and sides for the family, which, in their view, would be better value at Marks and Spencer than ordering from one of the well-known pizza outlets.

Factors influencing buying behaviours

Price

Price is one of the key considerations that consumers have when planning for, and shopping for the family groceries. Every participant who took part in the research discussed increases in the cost of their grocery shop, and such price rises influence how consumers are shopping. Some mentioned trying to stick to a weekly or monthly food budget, some stated that once they would reach their budget they would consider if they really needed certain items, or if they could wait until the next shop for those items, and others mentioned shopping around for the best value on the products that they regularly buy.

Some participants use the ‘scan and shop’ devices in supermarkets to be able to monitor how much their shop will cost before they reach the till. Others started to use home deliveries through supermarket websites during the COVID-19 pandemic and have continued to do this after lockdown restrictions were lifted, as they feel that shopping in this way helps them to keep within a certain budget or is more convenient for them.

“I started doing it over lockdown, getting it delivered. It’s £6 a month for as many deliveries as you want....I find it easier doing it online, because when I go into the shop, I find I buy a lot of rubbish that I don’t need. I use the Asda shop as my basic shop, and then I found that when I started doing it, I was saving maybe £20 or £30 a week.”

Dual parent family, Large Town, Mid & East Antrim

Participants held assured opinions about which supermarkets to buy the items they regularly purchased at a price they felt offered the best value for money. Many also discussed the extent to which they felt certain supermarkets were ‘too expensive’ for basic household items, for example cleaning products and toilet rolls. A large proportion of participants mentioned visiting stores like B&M and Home Bargains for these items, as they feel that the supermarket retailers are too expensive. Some participants would also pick up branded canned foods from discounter stores as these were considered to be better value. Some also shopped in these for snack items such as chocolate or crisps, as they explained that they could buy more items for a better price compared to their regular supermarket.

“Toilet roll for instance... it is way cheaper in Home Bargains... but like everything it has gone up in price again.”

Family with older primary & secondary children, Small Town, Derry & Strabane

Quality and freshness

While price is important to consumers, they are not willing to compromise on perceived quality and freshness. Quality and freshness are key for consumers, who are looking for a combination of value for money while being able to access affordable, quality food.

Many participants have individual preferences when it comes to choosing meat. Meat is one food group that most participants consider carefully when doing their shopping and the most common types of meat that consumers are buying include minced steak, steak pieces, chicken, sausages and burgers. Some participants purchase their meat from large supermarket retailers, either from the chillers in the meat aisle or from an in-store butcher. Each participant tended to have their preferred retailer that they would regularly buy their meat from, and while the price may have varied across participants, the meats selected were always perceived to be of a high quality. Some preferred to buy their meat from an independent butcher due to perceived higher quality, or sometimes due to family routines and tradition, where parents have shopped at a local butcher, and this habit has been passed down the generations.

“It’s the way I was brought up, my dad was pernickety with food, and it would always have been the butchers and that’s stemmed on to me and I have now put it on to my kids, and my daughter is the same.”

Single parent family, Large Town, Belfast

Participants also pay close attention to the quality of their fresh fruit and vegetables. Preferences vary across participants in terms of which supermarkets people prefer to buy their fresh produce from. Many participants shop in one supermarket for some of their household staples including fruit, vegetables, meat or store cupboard items, but visit one or two more other stores to pick up something else. For example, purchasing meat and chilled foods in one supermarket and fruit and vegetables in another. This is often due to the perception that fresh fruit and vegetables are of a higher standard in one store over another.

“They seem to be good value and [their] stores are never as crowded but they are particular with their fruit and veg and it is always nicely presented, and it probably comes from the same wholesalers but it seems to look better.....”

Lone pensioner, Open Countryside & Small Village, Armagh, Banbridge & Craigavon

Use-by dates and best before dates are also something consumers are paying close attention to. Short dates on products are off-putting for consumers, who are likely to go to a different supermarket to find a similar product with a better date. Participants buy meat with the longest dates possible, but also look for good dates on fruit and vegetables and bakery items. Participants currently find use-by and best before dates to be shorter than they may have been previously, which can be frustrating.

“We would try to get a bargain, now even with the fruit and veg...to get it to last long. The fruit and veg just seems to be going rotten within two days. It doesn’t matter where you shop.”

Single parent family, Small Town, Antrim & Newtownabbey

Family preferences

To a certain extent, consumers buy similar food products on a weekly basis as most participants discussed having regular or favourite meals that they would make on repeat. This influences the type of

food items that consumers buy during their regular shop. Typical meals included pasta dishes such as lasagnes or spaghetti bolognese, curries, roast dinners or meat with vegetables.

“We’ve had chicken curry on a Saturday every night, maybe for the last 10 years! It’s a routine thing in our house”

Single parent family, Small Town, Mid & East Antrim

Many of the participants who took part in the AppLife diary exercise were shopping for their families, including children and it was evident that some consumers are influenced by their families’ preferences when doing their food shop.

“Son likes bakery things out of Lidl... [my shop is] sometimes tailored to what my son or what my partner would eat.”

Dual parent family, Large Town, Belfast

Accommodating the needs and preferences of children

Some mentioned that their children would often eat different meals or that younger children could be fussy when it comes to trying new brands. This would influence the cost of a food shop to some extent as parents are sometimes buying branded items that they know children will eat, rather than trying cheaper alternatives which have been wasted in the past. Catering for the preferences of different children within a household can also be stressful for some, when planning a grocery shop.

“I think the worst part of being a parent is deciding on dinner.”

Single parent family, Large Town, Belfast

A small number of participants have children with food allergies or intolerances, such as gluten intolerance. Most larger supermarkets offer a range of gluten-free products and consumers feel that they are able to access such items. One participant does her grocery shopping between Asda and Tesco and commented that the range of own-brand gluten-free products in Asda was extensive, and that her son enjoyed their gluten-free items. Tesco is also perceived to have a good range and sometimes the supermarkets are considered to have a better gluten-free offering within their own-brand ranges compared to more well-known gluten-free brands.

Several participants have children with an autism diagnosis, and they explained that this influenced what their children would or would not eat. Some discussed this in relation to which brands they would buy during their food shop, stating that their children had certain preferences, and are very likely to notice if an own-brand product has been used in place of the family’s usual larger brand item. One participant, who purchases some items in Marks and Spencer on a weekly basis, explained that they buy the same type of breaded chicken for their child from Marks and Spencer and that if they buy a similar product from another supermarket, their child will not eat it.

As with other parents, these participants mentioned that while larger brands are often more expensive, they are cost-effective, as they will not go to waste, as when own-brands are purchased, children will not eat them.

“My youngest wee boy you see is autistic and there’s not everything that he eats. And then my daughter doesn’t really eat red meat so you’re sort of a bit restricted. And then my other son says ‘just make me whatever’, then he says ‘I don’t want that’.”

Single parent family, Large Town Belfast

Participants with babies discuss essential items that they buy during their grocery shop, including nappies, food pouches, baby formula or follow-on milk. Availability and cost were mentioned by most participants with babies, as they explained that it was difficult to find baby formula in their regular supermarkets in recent weeks (this will be discussed further in Chapter 6). Participants who buy baby food are often basing their decision to buy on a perception that some products, such as organic ranges, are healthier, but these are deemed to be expensive.

Chapter Summary

Some participants plan for their food shop in advance by making shopping lists or meal plans. For those who don't, it is generally due to lack of time or because they are buying regular products every week and know what they need. Some consumers who are trying to stick to a budget look online for supermarket deals before heading to the shops. Consumers mainly do either a larger weekly or fortnightly shop, but some shop more often – several times a week up to every day – while fewer shop less frequently, stocking up on groceries once a month.

Participants shop at a range of supermarkets across NI including Asda, Iceland, LIDL, Marks and Spencer and Sainsbury's. Most participants do 'top-up' shops in between larger supermarket shops and visit stores such as Co-op, EUROSPAR, and SPAR. Asda, Iceland, and LIDL are more frequently associated with value for money than the other larger retailers. For some, Sainsbury's and Tesco are also perceived to provide value, but this is tied to the use of loyalty schemes such as Tesco Clubcard or Sainsbury's Nectar points.

There are several factors influencing buying behaviours, including price, quality and freshness and the preferences and needs of the wider family and children in the home. Some participants are loyal to one supermarket, while others shop around to try to look for the best prices on certain products. Quality is key to consumers who are looking for a combination of value for money, while being able to access affordable, quality food produce.

Consumers pay special attention to the freshness of meat and fresh fruit and vegetables and avoid short use-by dates. Often the person who does the shopping considers how to accommodate the whole family in terms of preferences and needs. Those with children who are fussy eaters can find food shopping challenging. Children with additional needs such as food intolerances or a diagnosis of autism may also be more limited in the foods they eat. Those with very young children or babies in the household also must factor in essential items such as nappies, baby food or formula to their regular grocery shop.

04

Affordability

Affordability

This chapter outlines findings which relate to the broader theme of 'Affordability'. The impact of perceived food price increases is discussed, as well as the financial considerations consumers have when deciding what to buy. Any differences across demographics are discussed as well as the wider impact of rising energy costs on consumers and how these impact families' spend on groceries.

The impact of food price increases

Awareness of food price increases

All participants who took part in the research indicated they had experienced rising food bills over time, which are believed to have increased steeply over the past 6 months to a year. Increases in food bills are not isolated to any one supermarket but have been felt by those shopping at all the major retailers in Northern Ireland. Many participants have seen their food bills increase by around £20 - £40 per week, depending on household size.

“Yes – price of food is mental at the moment. Used to be able to do a shop 1 year ago and could have got away with £40, £50 for a full weeks’ shop but now it is at least £80. Another baby in the family but she’s only 4 months and buying nappies and baby formula but shouldn’t have put the groceries up that much.”

Family with pre-school and younger children, Large Town, Newry, Mourne & Down

Price increases have been experienced across a range of different products, including household staples such as orange juice, bread, pasta, fruit and vegetables, canned food and meats. Participants have noticed higher prices for both supermarket own-brand ranges and fresh produce as well as larger brand name items, which reinforces the perception that it is difficult to shop for value at this moment in time, as prices are rising across the board.

“Even cheaper brands are still going up in price... times where dearer brand is cheaper than the cheaper brands when doing multipacks and stuff.”

Single parent family, Small Town, Antrim and Newtownabbey

Consumers may have started to notice marginal increases in their overall food shop approximately six months to a year before participating in this research, however, more recently consumers are noting significant increases in the prices of individual items, and this is something that consumers are seeing across multiple products.

“Things aren’t creeping up by 10p or 20p, things are going up 60p or double.”

Single parent family, Large Town, Belfast

The rising costs of items such as fresh meat products are also a concern for some consumers, who discussed a noticeable increase in the price of certain items in recent months, such as chicken. Other participants stated that they have reduced their consumption of red meat as a direct result of higher prices for these products. The cost of fresh meat is expected to rise further, which will likely impact food choices made by households in Northern Ireland, who consider fresh meat to be a staple and healthy component in their diet.

“They say by the end of the year chicken will be as dear as steak.”

Lone pensioner, Open Countryside & Small Village, Armagh, Banbridge & Craigavon

While all participants mentioned an increase in the cost of their regular food shop, many had not realised the extent of their overall increased expenditure on food. Some reported that taking part in this research had provided an opportunity for them to understand the true extent of their outgoings on food shopping, which was surprising for some. Some participants stated they did not regularly look at their food receipts or that they may not have been aware of how much more they were spending on food shopping as they would pay using a debit card and not always see the impact of the spend immediately. One participant uses cash when she visits a particular store, as a way to manage and limit the amount that she buys.

“It’s actually more expensive than what I thought it would be. Just looking at the receipt. I know that sounds stupid but seeing it on paper has made me realise how expensive it is....so that’s £66 for not actually that much.”

Dual parent family, Large Town, Belfast

Consumers feel that in addition to spending more on basic groceries, they are getting less for their money now compared to 6 months or a year ago. This can be frustrating for families, who look for ways to maximise the amount of food they can purchase by only buying essential items or opting for supermarket own-brands to make additional savings.

“Our groceries this week came to £124.84 and then after [Tesco] Clubcard it was £102.80.....a lot of it is Tesco’s own-brand, purely to make it more affordable for us.”

Family with pre-school and younger children, Large Town, Newry Mourne & Down

While participants are already feeling the impact of price rises, many expect prices to increase further in the context of the cost-of-living crisis. Some participants attribute the rising cost of food to EU Exit or the COVID-19 pandemic, which have both also been perceived to influence availability of certain items (this will be discussed further in Chapter 6).

“It is going up and up and up and up.... I knew with Brexit and stuff that it would go up, but it is going up daily.”

Single parent family, Small town, Antrim and Newtownabbey

Consequences and consumer behaviours in response to rising food bills

As mentioned in Chapter 3, some participants are shopping around to try to find the best value for money across multiple supermarkets and some use supermarket websites and apps to research deals and offers before going to the shops. A few participants avail of deals and offers in more local supermarkets such as Eurospar when doing a ‘top-up’ shop between larger food shops. Others report using use deals to try new products rather than paying the full price.

“If there was any deals, you know cause, the Eurospar I shop in you see a lot of the Tesco price checks.....There is a section in my local Eurospar that does deals on meats. And quick and easy meals. It’s things like that.”

Single parent family, Small Town, Mid & East Antrim

Some participants discussed reducing the amount of ‘treats’ that they would buy during their grocery shop, to keep food costs down. Those who have more strict food budgets also mentioned ‘going without’ as parents, to ensure that children in the household are fed wholesome, healthy meals and can have their own treats such as biscuits or chocolates.

“Yes, 100%. I find myself going without just as long as the kids has their lunches, as long as they have food.”

Single parent family, Small Town, Antrim and Newtownabbey

“I’m doing without some things, so that the girls can have more... The girls and the animals come first before me.”

Single parent family, Small Town, Mid & East Antrim

If prices for certain items are believed to have increased by too much, some consumers will look for alternative products such as supermarket own-brands, or by substituting, for example, one type of vegetable for another to make sure they are still eating healthy foods.

Some had noticed that during the COVID-19 pandemic when they had been food shopping online for home deliveries, this had helped them to reduce their overall food bills as they were able to better monitor how much they were spending (this will be discussed further in Chapter 6).

Participants also mentioned looking for reduced items in supermarkets, either in larger retailers or more local shops.

“Everything is going up...you can do all the crying you want but you can’t do anything about it... Everyone likes a bargain. Sometimes I would nip into the Co-op and they have stuff marked down, because the stuff is going out that day, so that is when you get a bargain.”

Lone pensioner, Open countryside & small village, Armagh, Banbridge & Craigavon

As discussed in Chapter 3, some of the larger supermarkets are perceived to provide better value overall. Even so, participants noted that prices have increased noticeably over time for both specific items such as meat and well as the general grocery bill.

“I could have done a shop in Lidl 2 years ago that would have been £40 but now doing the same shop for £70, £80.”

Family with pre-school and younger children, Small Village, Mid Ulster

For some participants, supermarkets like Sainsbury’s and Tesco, while perceived to be more expensive than Asda, Iceland, and LIDL, are considered to be affordable options when using loyalty schemes such as Tesco Clubcard and Sainsbury’s Nectar. Loyalty programmes and points cards make it attractive for some to do their larger grocery shopping at these stores.

“Tesco do a great deal with the Clubcard but if I was to go to Supervalu to do my shopping, I wouldn’t be able to do it.”

Single parent family, Small Town, Causeway Coast & Glens

Many participants feel that larger supermarkets are too expensive for household items such as cleaning products and toilet rolls and regularly buy these items from discounters such as B&M, Home Bargains, and Savers. Consumers feel that they can get similar quality for these items in these stores (including larger brand name products) compared to supermarkets, and at a cheaper price. Participants are therefore happy to make an additional trip to these stores either while they are out doing their food shopping or during a dedicated trip to stock up on household products.

“I think I got to Home Bargains [this week] for a few wee toiletries. They seem to be the cheapest for things like that, even the branded..”

Dual parent family, Large Town, Belfast

Some participants would go to discounter stores on a fortnightly basis for household items, cleaning products or pet food. Those living alone commented that they would stock up on household cleaning products and essentials less frequently such as every 6 weeks.

“Stopped buying cleaning products when doing grocery shop because [I] would go to B&M or Poundland because they are much cheaper than supermarkets.”

Lone pensioner, Intermediate Settlement, Fermanagh & Omagh

Other discounter stores such as Savers or Poundland were mentioned for value and those shopping in these stores are likely to buy toiletries, cleaning products and some store cupboard items. One participant explained that they are able to buy a multipack of certain snacks for close to the same price as individual items in the larger supermarkets, making it an appealing choice for a parent of young children.

“I'm going into the town today child free to stock up on my cupboard and cleaning foods. I'm going to go around a few different shops to find the best prices, but the majority will be purchased in Savers and Poundland because it's so much cheaper to shop in these shops.”

Single parent family, Small Town, Causeway Coast & Glens

The wider impact of rising energy costs

Many participants touched upon changes to other household bills such as electricity and gas prices and, for those who drive, the cost of fuel. Depending on individual circumstances, the impact of the rising cost of energy prices is felt differently across households. Some have noticed the increase in fuel costs but have not changed their behaviour in any significant way to overcome the additional expenditure. For others, the rising cost of food is compounded by rising energy bills, which are perceived to be increasing rapidly over a short space of time. This is worrying for the families who reported having to prioritise certain bills in line with when they are paid.

“You are putting [the money] from one pile to the other. Groceries this week. Next week it will be the gas. Week after will be the fuel for the car. It's never ending.”

Single parent family, Small Town, Antrim and Newtownabbey

A small number of participants highlighted that they live ‘day to day’ in relation to their finances, as their monthly outgoings had seen them struggling to keep up with household bills in addition to food costs.

“Gas and electric is ridiculous, and even the mobile phone bill went up in price. In general, my expenditure, my expenditure definitely outweighs the income and I would be into my bank draft and there are charges with that – it’s a hamster wheel and it’s a struggle.”

Single parent family, Small Town, Mid & East Antrim

Some participants who may have previously travelled more frequently to different supermarkets are now spending more time thinking about whether they feel an additional trip to the shops is ‘necessary’. Those who have noticed increases in the cost of petrol are now trying to reduce the number of supermarket visits to ensure that their petrol lasts as long as possible.

“The last 2 days I have put £40 in my petrol tank. And usually, £20 would have done me for at least 4, 5 days. I’ve actually found myself shopping around that as well, but that would drive you crazy. I have drove extra miles to try to fill up my tank to try to get that 2p or 3p cheaper.”

Single parent family, Small Town, Antrim and Newtownabbey

One participant also reported that they look in their freezer before making a journey to the shops, to see if they already have food at home. The same participant regularly freezes meals to reduce the number of journeys to the shop, due to fuel prices, and will visit the supermarket once their freezer is empty.

“I would try to obviously minimize the distance I’m driving and I’m trying to minimize the amount I’m having to nip down to the shop because that’s obviously using up more fuel. So, I think it is changing the way I am shopping.”

Dual parent family, Large Town, Belfast

For those making dedicated journeys to certain stores, for example, those who visit discount stores for cleaning products and toiletries, they are factoring in this additional journey in relation to fuel costs and trying to visit the shops while they are already making a car journey for another reason.

“I would always tie it in with other messages due to fuel prices.”

Lone pensioner, Intermediate Settlement, Fermanagh & Omagh.

Consumers are not just shopping around for value when it comes to food. Some discussed looking for better deals on petrol and would travel to different petrol stations to try to get better value. Others talked about having to fill up their car more often, and therefore would try to plan their trips to the shops around other outings, such as school runs. Consumers who pay for gas and electricity using pre-paid keypad meters have noticed they are not receiving as many units as they did a number of months ago, and this further highlights the challenges that some households are facing.

Some single parent families indicated that it could be a struggle to pay all the household bills, including energy bills, food bills and things like internet and phone bills. Those looking after children alone describe a juggle to keep up with meeting payments while managing everyday family life and caring for children. If consumers who find themselves in this situation do not have a wider support network, this can cause additional worry. At the same time, one participant stated that they receive help from family members due to the rising cost of fuel, but still found the rise in fuel costs “shocking”, indicating that those who do have additional family support are also facing difficult times financially.

“Have noticed things really go up in price, something shocking. For likes of me it is difficult, I don’t have anyone to turn to, to help financially if I am running low on money.”

Single parent family, Small Town, Mid & East Antrim

A number of participants expressed concern about what the future holds. While not all single parent families have the same financial circumstances, for those who have been impacted more keenly by the cost-of-living crisis, they sometimes have to make difficult choices. For these consumers, there is an expectation that the future will bring further financial challenges.

“I only had 34 quid left in my account, its stretch or starve, I have to stretch my food... has been like that for a long time and it is getting worse.”

Single parent family, Small Town, Mid & East Antrim

Perceptions on value for money

Participants’ opinions vary on whether they feel they get value for money from their food shop. Many feel that they can generally access healthy food and are able to meet their families’ needs. Some feel that they can get value for money, but they may need to shop around to find the best prices.

Perceptions of value for money are also linked to accessibility, as those who are living in larger towns with access to a wider range of supermarkets generally feel more able to access affordable foods. Those living in rural areas, either have to travel to a larger supermarket or shop in convenience stores close to home, which are perceived to be costlier than the larger retailers.

With the price increases seen across stores, however, many feel that it is becoming more difficult to get value for money from their typical grocery shop. For those who are feeling the strain more acutely, they feel that the rising costs are resulting in poorer choice for families in Northern Ireland. A number of participants mentioned that while food and energy costs are rising, rates of pay are not increasing to cover these additional outgoings.

“We are getting the same wage but everything else is going up – oil, fuel, everything.”

Single occupancy household under 65, Open countryside and small village, Derry and Strabane

“There has to be like a fairness in all of this somewhere. It has to be affordable. It has to be accessible for families to be able to get to have a *choice* rather than sticking to what I know and what I have because I know that’s what’s keeping us going. I don’t know. There is no such a thing as value for money any more I don’t think. It’s all just getting what you need and trying to make do.”

Single parent family, Intermediate Settlement, Armagh, Banbridge and Craigavon

Thinking towards the future, one participant feels that food prices are ‘getting out of hand’ and feels that essential groceries and household items should be price capped to ensure that everyone has access to those items which are considered to be a basic need.

“I personally think they need to put a price cap on the groceries. I think it’s getting out of hand now.....just even certain items, essential items. Where they really are just racking up the price on them. I think baby milk – I couldn’t get over the price of the baby milk. I feel sorry for anyone person who is having children over the next couple of months here. Because when I seen the price of baby milk it was up to £2. Who could afford it? I work, so I don’t get free baby milk.”

Single parent family, Small Town, Antrim and Newtownabbey

A small number of participants, including those who discussed financial struggles, are concerned for further price rises in the future – and how this might impact them and their families.

“I don’t want to live in the future, just want to live in the day because it’s scary. [My] two daughters are coming to the age of work and would like them to go into education but they might not have the option, they would have to go to work to keep this house and keep the roof over our head and keep us fed.”

Single parent family, Small town, Mid & East Antrim

Chapter Summary

Everyone who took part in the research indicated that they had experienced rising food bills in the last year. Price increases have been recognised across all the larger supermarket retailers and across a range of staple products such as orange juice, pasta, canned food, meat and fruit and vegetables. Consumers are concerned about the rising cost of food, which is expected to increase further over the coming months. Many had not realised the extent of their overall food spend, until they took part in the research and studied receipts more closely.

In response to the increase in food costs, consumers are shopping around to find better value. Most participants look for deals and promotions where they can and those who shop in Tesco and Sainsbury's find their loyalty schemes to offer good value. To reduce the overall cost of food, some households buy supermarket own-brand products, and some have reduced the amount of 'treats' they buy as part of their food shopping or look for cheaper alternatives to foods which have increased too much in price. Some who have tighter budgets also mentioned 'going without' to make sure that children had enough to eat.

Consumers had clear opinions about which supermarkets offered the best value for money but many participants shop in discounter stores for household items such as cleaning products, toiletries and non-perishable foods, which are perceived to be much more expensive in the larger retail supermarkets.

Participants also discussed the rising costs of other bills, such as electricity, gas and fuel prices. The rising cost of food is compounded by rising energy bills, which are perceived to be increasing rapidly over a short space of time. This is worrying for some participants who sometimes have to prioritise certain bills on certain weeks, in line with when they are paid.

Consumers have mixed views on whether they feel they get value for money from their current shop. Those who live in rural areas need to travel further to shop at larger retailers which are perceived to be the best value (while more local convenience stores are believed to be significantly more expensive). Those who are under greater financial strain also feel it is becoming more difficult to get value for money from their typical grocery shop.

Accessibility

This chapter aims to outline consumers views on how easy or difficult it is to access food either by travelling to their local supermarket or via home delivery, and the extent to which consumers feel they can access healthy foods. Perceptions of what makes a food 'healthy' are also discussed as well as how often participants avail of other food options in their area e.g., takeaway or restaurant meals, and what motivates consumers to buy from other food outlets.

Proximity and variety of food retailers

Most participants feel they can access a good range of supermarkets and food retailers in their local area. Many participants reported that they live close to a number of the larger supermarkets and while few participants lived close to all of the larger supermarkets, most feel that they have a good number of options when it comes to food retailers.

Participants tend to shop in supermarkets that are closest to where they live for convenience, but those who live further away from a preferred store do not typically travel to supermarkets outside of their town on a regular basis, unless they are coordinating this trip with another journey. This is mainly due to convenience and an active consideration around fuel costs.

For those living rurally, access to a range of large supermarkets can be reduced and these consumers will often need to travel further than urban or suburban dwellers to visit a larger chain supermarket. Consumers who live in more rural areas tend to visit the supermarket less frequently and are more likely to plan their shopping trip and are less likely to make spontaneous trips to the shops than urban participants.

“Does involve getting into the car and going....but I live in a small village.”

Lone pensioner, Open countryside and small village, Armagh, Banbridge and Craigavon

“Where I live there is one shop in our village and it's a Costcutter. It's ok for me but it is really expensive, you couldn't really do a full shop in it.”

Single occupancy household under 65, Open countryside and small village, Derry & Strabane

When participants were asked if there were any types of food retailers that they would like to see in their area, that they currently do not have – for example, smaller independent retailers – most participants stated that they feel they are able to access everything they need. Some buy their meat from local butchers and are satisfied with the choice that they have. A small number of participants commented that they had seen some smaller independent retailers close through the COVID-19 pandemic, but that this did not have a direct impact on their ability to access food.

A couple of participants mentioned that they would like to have an Iceland closer to where they live, as they believe Iceland provides good value for money and some feel that Iceland provides better quality for frozen meals.

“I think an Iceland would really help a lot of us. And it is good value for money. I personally find it good value for money.”

Single parent family, Small Town, Antrim & Newtownabbey

A couple of participants mentioned that they had travelled to the Republic of Ireland to shop in ALDI, as it is considered by some to be better value than any of the supermarkets available in NI, and one participant feels they have a better range of products. Another participant noted the cost for particular items such as baby food pouches were much better value in ALDI compared to any of the larger supermarkets in the North.

“I would go down to Dundalk for ALDI. There’s just more selection of stuff.... it’s LIDLs only bigger.”

Single parent family, Large Town, Belfast

Ease of travel and access to supermarkets

A large proportion of participants travel to supermarkets by car, whether their chosen supermarkets are close to home or a little further afield. Some participants walk to local shops in their area if they are planning to buy fewer groceries, for example, a ‘top-up’ shop.

“I travel by car to LIDL but would mostly walk to the SPAR and the butchers. It’s only a 10-minute walk and it also gets my steps up”

Lone pensioner, Intermediate Settlement, Fermanagh & Omagh

The car is central to many consumers lives and for most participants their car gives them the flexibility and convenience to be able to shop around and visit a range of different supermarkets in their area. The necessity to drive to a supermarket differs based on region, with those who live in larger towns stating that they could walk to a number of supermarkets – but this would not be convenient as they would find it difficult to travel home with a larger amount of groceries. Only one participant mentioned taking a bus to their preferred supermarket, however, some others (particularly those living in urban areas) indicated that they lived nearby to good transport links.

“I’ll be travelling by car. The local shopping centre that’s near us is about 12 mile, 15 miles away so it will take us 10, 15 minutes, maybe more depending on traffic to get there.”

Family with pre-school and younger children, Open countryside and small village, Mid Ulster

Larger families and those with younger children depend on their car as a means to travel to supermarkets for necessities. One older participant feels nervous driving after spending a lot of time at home during the COVID-19 pandemic and therefore only drives to supermarkets where they feel they can park easily. Some consider themselves lucky to have a car as they feel that it adds a layer of security should they need to make a spontaneous trip to a supermarket. Those living in smaller towns and villages also depend upon their car due to limited options in their area.

“It’s great to have a car, touch wood, because I can go to a 24-hour Tesco, if I was really struggling for instance for baby milk or nappies...It’s not too far if you have a car but it must be terrible if you don’t have a car, because we are really limited around where we are.”

Single parent family, Small Town, Antrim & Newtownabbey

Only a small number of participants rely on taxis to take them to and from the shops, or state that relatives would take them to do their grocery shopping. For those using taxis, it is only if they have

purchased more than planned and therefore feel they would struggle to travel home by bus. Those who travel to the supermarket with family members, may do this as a temporary solution while they are unable to reach the shops in their own car.

“Would get a lift if I don’t have the car..... my car is off the road at the minute, normally drive myself, but car is off the road and I just can’t afford to fix it at the minute, it is in a garage and I don’t know when I’m going to get it back. But my sister takes me now I don’t have it.”

Single parent family, Small town, Mid & East Antrim

Online ordering and home deliveries

A smaller proportion of participants regularly place online grocery orders for home delivery. Some participants order their groceries online from time to time, and this is typically due to convenience around family plans or a busy schedule. One participant would occasionally opt for an online grocery order instead of visiting their regular supermarket, as this can be less challenging than going to a supermarket with the children.

“I sometimes do online shopping depending on who’s with me. I have four kids. One has ADHD, one has ADHD suspected. So, there is times where it’s easier for me to just do it online.”

Family with pre-school and younger children, Large Town, Newry Mourne & Down

Several participants explained that they had first availed of home deliveries during the COVID-19 pandemic, during times where they had to isolate at home, or because they wanted to avoid making too many trips to a supermarket. Experiences of online grocery shopping during the COVID-19 pandemic varied. For some, online food shopping was such a good experience that they largely continued to do most of their food shopping online once COVID-19 restrictions eased. One participant highlighted that through placing weekly online orders, they realised how much they had previously been spending in-store on items they didn’t feel they needed and that by monitoring how much the shop was going to cost by looking at the online food basket, they were able to reduce their weekly spending.

“I find it easier doing my shopping online, because when I go into the shop I buy a lot of rubbish that I don’t need so I use the ASDA shop as my basic shop and then I found that when I started doing it I was saving maybe like £20 or £30 a week”

Dual parent family, Large Town, Mid and East Antrim

For others, issues around availability of items they had ordered, or unsuitable substituted items was off-putting, driving some consumers back to the supermarket aisles. Differences in pricing for online deliveries was also mentioned by some.

“It’s only £6 a month and would be more beneficial to order it on a Friday morning.”

Family with older primary & secondary school children, Small Town, Derry & Strabane

Consumers who order their groceries online also feel they benefit from having someone else assist them with bringing heavier items, such as cleaning products into their home. This was mentioned by one pensioner living alone to be particularly helpful, and this participant would plan a home delivery to come around the time they need to replenish bulkier and heavier items. A number of participants also feel that the websites they use to order their groceries from are well laid out and easy to navigate. Consumers

who place online grocery orders with both Asda and Sainsbury's feel that the process is made simple as they can add their 'Favourites' directly into their online basket and add any additional items they may need after that, which keeps their shopping time to a minimum.

"I use my favourites list to do my shopping and then basically work off that."

Dual parent family, Large Town, Mid and East Antrim

Access to a healthy, affordable diet

Consumers generally feel they can access healthy food to meet theirs and their families' needs largely because most participants believe they can travel to a range of different supermarkets. For those who are loyal to one larger supermarket chain, or who simply prefer shopping in the same place, they also feel that they can access a variety of healthy food items in that one store. A small number of participants commented they feel that it is less affordable, in their opinion, to eat a healthy diet, as healthy ingredients (including fresh meats, fruit and vegetables) are more expensive than some other food items such as frozen, processed food or cheaper cuts of meat. One participant who had been on a Slimming World diet in the past, and had recently started to follow the diet plan again, said:

"I've noticed, see when you are eating healthier, like trying to stick to a diet, I seem to spend more. You know, constantly replenishing."

Single parent family, Small Town, Antrim and Newtownabbey

Another participant had visited a discounter store to buy snack items snack items for lunches such as dried noodles and bought some crisps and chocolate for the children, indicated that they feel that healthy foods are expensive.

"[This] is not healthy really. Poundland don't offer healthy stuff, I guess because it's expensive and people aren't really going in there for expensive items."

Single parent family, Small Town, Causeway Coast & Glens

While most participants provided similar responses when asked what they felt a healthy diet meant to them, some highlighted that what might be healthy in their opinion may not be healthy to someone else. Generally, consumers are thinking about whether or not they have included enough healthy food items in their regular shopping basket, but fewer are actively paying close attention to everything they buy in terms of an item's healthfulness. Participants were more likely to avoid buying an item due to a perceived higher cost rather than its perceived healthfulness.

"Everyone's definition of healthy is different"

Single parent family, Large Town, Belfast

What does 'healthy' mean to consumers?

When asked to discuss what 'healthy' meant to them, the most common responses included eating fresh food over frozen, for example, fresh meats, fruit and vegetables. Many feel that cooking from scratch is a good way to ensure that they are eating a healthy diet and meals including fresh meat, potatoes and vegetables are considered by most to be indicative of a healthy diet, perhaps reflecting broader preferences in Northern Ireland for traditional home cooked meals. Other meals that are considered to be healthy include salads, soups and pasta dishes.

“Salads, a lot of salads. Pastas and tuna pastas. That is what I would usually take for work. Baked potatoes maybe.”

Single occupancy household under 65, Open countryside and small village, Derry & Strabane

Fewer participants discussed any specific meal attributes which they felt made a meal ‘healthier’, such as a specific nutritional breakdown. Some did state that they would look at the traffic light labelling on the front of food packaging, but this was more likely if they were purchasing a product that they were unfamiliar with. Others are more particular about the meat they purchase and would look at label for things like meat content (percentage) or quality assurance labels.

“I would maybe look at labels if it’s something I haven’t got before. There are usually things that are on my shopping list so I would know what’s in it.... I’d have a wee look at the wee coloured bit at the bottom and at the front, you know the green, the yellow and the red? The wee traffic light style one.”

Dual parent family, Large Town, Belfast

Some participants were more likely to look at food labelling if buying a certain type of food or drink for their children, with lower sugar options being something that parents are mostly looking for. One participant felt they would automatically trust food manufacturers to produce ‘healthy’ products for children and for this reason they typically did not spend too much time looking at food labels, until they realised that one drink they regularly bought had a high sugar content, which has made the participant more aware of what hidden sugars or additives might be in a product.

“You’re trusting the supermarket and the people who make the stuff to say, this is safe.”

Single parent family, Small town, Antrim and Newtownabbey

Other participants with babies mentioned buying specific branded food items for their baby such as the Ella’s Kitchen food pouches. These are perceived to be a quality item, organic and something that is ‘good’ for baby. Some stated that while these pouches were expensive, their baby always ate them and therefore this was more economical than buying alternatives that might go to waste. Using these pouches was also more resourceful in terms of time for some, who had spent time preparing their own food purees at home, and their little one had not eaten them.

For those who indicated that cooking from scratch provided a healthier diet, some cooking habits varied across participants. Some preferred to buy their fresh meat more regularly throughout the week from a butcher, rather than buying this as part of a larger shop. This is largely due to a desire for fresh produce and a hesitance among some to buy supermarket meat. Conversely, others would buy meat packs from the supermarket butcher including for example, minced beef, topside of beef, chicken breasts, pork chops, burgers and sausages, and these would dictate the meals for the week.

Some participants, including those who are living alone, batch cook meals or buy meats in bulk to freeze and cook in smaller portions when they need to. This method of cooking is preferred for lone households or smaller families to reduce waste while being able to enjoy a home cooked meal.

“If you get like 20 chicken [breasts] I just divide it and freeze it...Use it then for slow cooker dinners or pies or whatever.”

Single occupancy household under 65, Open countryside and small village, Derry & Strabane

Another participant reduced food waste by freezing bananas in portions, which would later be used to make fruit smoothies for the family.

Batch cooking and freezing meals in portions is also seen as a convenient and affordable way to eat at a later date, without relying on supermarket pre-prepared meals, which are not believed to be healthy by many participants.

“I tend to stay away from pre-prepared meals. I tend to batch cook. I would rarely cook just something that’s the equivalent of one meal. I usually try to make four portions and then I would freeze it and then I have this as my convenience food. I also find that cooking my own and freezing it is more economical.”

Lone pensioner, Intermediate Settlement, Fermanagh & Omagh

A small number of participants stated that they do not tend to freeze their leftovers as they are concerned about the safety and quality of this and have always only eaten their meals fresh.

Many participants do include some frozen and processed items in their meal planning, and this is usually for convenience meals during the week, and for children, especially those who are fussier eaters and perhaps do not eat the same food as the rest of their family. Some parents highlighted that they were not always happy to give their children frozen or processed foods, but they wanted to make sure that they were eating something. Some explained that their children could be fussy even around the brands of processed items (such as chicken nuggets) and they may need to buy these products from a particular supermarket, even if it is not the main supermarket for the rest of the food shop.

“I’ve a wee boy that only eat chicken nuggets, French fries or chips. So that’s the reason why we have to do two different shops.”

Family with pre-school and younger children, Open countryside and small village, Mid Ulster

Some participants discussed techniques they use to help them with meal planning, shopping or cooking. One participant uses online videos, such as TikTok videos, which have shown her ways to make meal plans and shopping lists to help with organisation. As mentioned in Chapter 3, others use recipe books including those that are calorie controlled or ‘diet friendly’. While some feel that eating healthily and sticking to diet plans can be costly, others feel that being on diet plans such as Slimming World have given them the tools to prepare healthy family meals more easily and focus on freshly prepared meals.

“Slimming World saved me in that way. I went years ago, and it changed my way of cooking.”

Single parent family, Intermediate Settlement, Armagh, Banbridge & Craigavon

Use of other food outlets

Participants were also asked to discuss if they had other food outlets in their area, such as local restaurants or takeaways, and how often they might buy food from these kinds of restaurants. A large proportion of participants were able to name a number of restaurants close to where they lived, mainly for takeaway meals such as pizzas, kebabs, fish and chips, and Chinese food. Fewer participants lived close to sit-in restaurants, but most stated that they did not eat out in restaurants very often. At most, a smaller number of participants eat in restaurants around once a month, but the majority would do this much less frequently, or for a special occasion such as a family birthday.

Unsurprisingly, those living in more rural areas felt they had less choice when it comes to takeaway options compared to those living in larger towns. Almost all participants stated that they would order food from a takeaway restaurant occasionally – for most participants this would be on a weekly basis, usually at the weekend for a ‘treat’. Some might eat from takeaways a couple of times a week, and this is for convenience and for times where due to busy schedules and after school activities, participants are tired and want to be able to arrange dinner quickly.

“We’d usually try to do one takeaway a week, for a wee weekend feel one. And we’d usually either get the Chinese or a kebab-pizza mix.....probably one or two takeaways a week – the weekend one and maybe if we’ve taken our son swimming, the [chippy] on the way back up, just to save any hassle.”

Dual parent family, Large Town, Belfast

While a takeaway is a weekly treat, many participants feel that they are now paying more for their usual takeaway order, and this has prompted some to think about ways they can eat a similar meal for a cheaper price. For example, a couple of participants feel that it is more cost effective to buy pizzas and sides (such as chicken wings and garlic bread) from supermarkets like Marks and Spencer as this can be cheaper than a pizza restaurant and is perceived to be ‘nicer’ for some as well.

“I’ve found even with the takeaways the prices are ridiculous now.....I was able to go into Marks and Spencer and get that pizza, chicken wings and garlic bread for probably about £8.....you could maybe go in [to Marks and Spencer] and it would maybe cost you £15 and you could feed like a full family”

Single parent family, Large Town, Belfast

Chapter Summary

The majority of participants feel they can access a good range of supermarkets and smaller independent retailers in their immediate area. This varies somewhat by region as those living in more rural areas have more limited access to a wider range of larger supermarkets. Some feel that the smaller convenience stores belonging to large supermarket chains can have lower availability and often be more expensive. Most consumers travel to the supermarket by car, even if they live very close to a supermarket as this is the most convenient way of travel, especially when carrying heavy bags. Some are more likely to walk to smaller local shops for top-up shops or to pick up a few items, while fewer travel by bus or taxi.

Some participants use home delivery services for their grocery shopping, and many tried this for the first time during the COVID-19 pandemic and have continued to shop in this way after lockdown restrictions eased. For some, placing an order for home delivery is convenient around their family lives, or to provide assistance if a larger order is needed, for example, one that may include heavy or bulky items such as cleaning products. For others, ordering groceries online saves time and can save money as consumers are able to track what they are spending as they add items to their online basket. Most feel that delivery charges are reasonable.

When asked to think about what 'healthy' means to them, most participants indicated that fresh ingredients, those typical of a traditional Northern Ireland diet (including fresh meat, vegetables, and potatoes) and homemade meals were considered to be healthy. Conversely, most believe that frozen or processed meals are unhealthy. At the same time, consumers do buy some processed or frozen meals for convenience, with some families relying more on these kinds of foods than others.

Participants discussed using techniques such as batch cooking, freezing portions and leftovers, following recipes and following tutorial videos online for support with meal planning. Most participants order a takeaway as a weekly treat – typically once a week for convenience and as a break from cooking for the night. While this is a habit that most consumers stick to, many feel that takeaways, like groceries, are becoming more expensive and some are looking for alternatives such as buying supermarket fast food.

06

Availability

Availability

This chapter outlines consumers views on availability of food items across supermarket retailers in Northern Ireland, including any perceived differences in availability over time and perceptions around potential reasons for a change in availability. Specific items that are perceived to be less widely available are also discussed.

General perceptions on availability

Most participants reported having experienced changes in availability of certain foods and household items, to a greater or lesser degree. This can at times be frustrating for consumers who may need to visit a different supermarket or wait until they next do their shopping to try to buy the product again.

“One time I went into Tesco and they had no bananas, chicken or meat at all and had to go back in the morning and they had it restocked.”

Dual parent family with children, Large Town, Derry and Strabane

Generally, however, most consumers are happy to choose an alternative product – for example, substituting one type of vegetable for another, or a type of fish for another. Some feel that since the COVID-19 pandemic, people have become more adaptable to change.

“I think since lockdown, everyone takes it on the chin and finds an alternative.”

Young person aged 18-24 living independently, Village, Newry, Mourne and Down

There is a perception among some that items that are subject to availability changes may fluctuate in price once they are available again, which is worrying. Some have already experienced this and feel that price increases on items such as sunflower oil can be attributed to the global change in demand and supply.

"I thought the vegetable oil was quite expensive, £5.99, not sure how much it costs really but apparently it is scarce now, so I was lucky getting it."

Lone pensioner, Village, Derry & Strabane

For consumers who had tried using online grocery orders for either home delivery or the Click and Collect service, and had not been satisfied with the service, lack of availability of certain items and many substituted items were the main cause. This was frustrating for some, who felt that if they had been in the store themselves, they would have been able to easily choose a more suitable alternative.

Products perceived to be subject to availability issues

A wide range of different types of food and other household items were reported to have been missing on occasion from supermarket in Northern Ireland. The most commonly mentioned were:

- Fresh fruit and vegetables
- Meat products
- Juices

- Tinfoil
- Sunflower oil
- Certain cereals
- Certain sizes of branded canned items e.g., baked beans
- Baby formula/milk
- Baby food

Some products that consumers have noticed being unavailable at times are considered to be staple items or typical household products, which is confusing for some participants who would be more likely to understand if a more 'specialist' or premium item was unavailable. Foods such as broccoli, iceberg lettuce and sunflower oil are examples of the types of products that have been mentioned by participants. Participants took part in the research after Russia launched military action in Ukraine in February 2022. While participants may not have considered any potential impacts to UK food imports at this time, the wider impacts of the conflict may have influenced the availability of certain products in NI supermarkets. Ukraine supplies key produce to North Africa, the Middle East, the EU and China¹⁶.

“These are everyday items – you’re thinking how is it so difficult to get these?”

Single parent family, Large Town, Belfast

For other food items that are not simple ingredients but relatively basic products, consumers can also find it confusing when certain supermarkets have not stocked them for a period. One participant discussed trying to get onion rings in Marks and Spencer but that they had not been able to buy them in weeks.

“He said they’re due in, in a couple of weeks. They’re only onions in batter, I’m not asking him for a delicacy like caviar or squid or anything!”

Single parent family, Large Town, Belfast

Similarly, some local supermarkets have had limited availability of pre-packed sandwiches – another product which is felt by many to be a basic item, popular with many consumers and not something which is perceived to be a speciality product. One supermarket (Co-op) was reported to have very low stock of sandwiches over a period of time and the staff had explained during one week that this was due to a ferry crossing issue when there was an incident with a P&O ferry. This led one participant to question why there would be low availability of a product that they felt could easily be produced in Northern Ireland and they believed did not need to be shipped from Great Britain.

¹⁶ [The effect of the war in Ukraine on UK farming and food production - House of Commons Library \(parliament.uk\)](https://www.parliament.uk/library/research-briefings/briefing/snippets/2022/04/22-the-effect-of-the-war-in-ukraine-on-uk-farming-and-food-production)

“I looked at her and I went, ‘can you not make sandwiches in Northern Ireland?’.....It’s a sandwich, it’s a staple thing? There’s plenty of places in Northern Ireland make sandwiches. Why is the Co-op going across the water when it could be made here? Why bring stuff in from other countries when you can get [them] from your own country?”

Single parent family, Large Town, Belfast

Several participants who have young babies at home, reported low availability of baby food, baby formula or follow-on milk. Availability of these items seemed to be low across different supermarkets and the impact of this for consumers was believed to be mainly financial, as they could source the products elsewhere (mainly from local chemists), but this was typically at a significantly higher price. Baby nappies were also affected by availability issues, with some parents only able to source them in a particular size and would look for the next best option (e.g., a different brand) if they could not find their usual product.

"Did try to get baby food, it has been 3 weeks now and Tesco haven't had it in. It is £9.50 in Tesco, whereas in the local chemist it is £11.50. Will more than likely have to go to the chemist to get the baby food."

Family with pre-school and younger children, Large Town, Newry, Mourne and Down

“About 2 months ago ordered it and it didn’t come...went out to the chemists and stocked up on it, but they limited the number you could buy.....it’s a lot dearer in the chemist.”

Family with pre-school and younger children, Village, Mid Ulster

Reduced availability would sometimes impact multibuy offers, leaving consumers to decide if it was still worthwhile purchasing an item if they were unable to benefit from the ‘buy one get one free’ deal available:

"Normally get these strawberries and this is the last packet. I am in a dilemma over whether I should buy them or not. Because they are usually 2 for 5 pounds, but this one single packet is 3 pound. Which is kind of expensive. And there is nothing else literally, the blueberries that are there are off, everything else practically empty. Never seen it so bad. But we really, really like our strawberries in our house, so I might go ahead and buy this pack."

Family with older primary and secondary children, Small Town, Derry and Strabane

Another issue raised by many is that of shorter use-by dates or poor quality of fresh food items. Consumers report that while some supermarkets have reduced availability on items they would like to buy, some supermarkets have also been offering more product lines which are perceived to have shorter use-by or best before dates, for example, on products like fresh fruit and vegetables, breads and other bakery items. One participant nodded to potential supply chain issues as they had heard from a member of staff in one store say that certain products were taking so long to reach Northern Ireland, they needed to mark down the items in price.

“He said the stuff that was coming in, was taking so long to come from England, Marks and Spencer was nearly having to reduce everything because there was only a day or two left on it”

Single parent family, Large Town, Belfast

Some participants commented that some fresh produce was visibly poor in quality (fruit or vegetables), while others found that certain supermarkets would stock bread with very short dates which is unappealing, and many customers are unlikely to buy something this close to its best before date. At the same time, a small number of participants mentioned they would purchase items close to or on their use-by dates to freeze –or for non-perishable items.

Changes in availability over time

Looking at more specific time-related changes, some participants discussed varying availability in supermarkets depending on the time of day they would visit – or even the day of the week. Some had become familiar with the days of the week that certain supermarkets would receive their stock and a small number would coordinate their grocery shop for this day, to ensure a wider availability and freshness of the items they would normally buy.

More broadly, some participants indicated they had noticed changes in availability of certain items over a longer time period, mainly from the end of 2021 and into the first months of 2022. Some mentioned reduced meat products in supermarkets.

“It hasn’t been too bad lately, but there has been a spell over Christmas or the start of New Year’s, a problem to do with lorry drivers or something and there hadn’t been things on the shelves. It hasn’t been too bad lately, but I think two weeks ago I’d been looking at the different green vegetables....and there was hardly any green vegetables [in Tesco] – the likes of broccoli, sugar snap peas.”

Dual parent family, Large Town, Belfast

For consumers who had experienced reduced availability of a frequently purchased item, they often stated that the product they had been unable to purchase had been missing from their local supermarket for weeks. This leads some consumers to believe that there is a wider shortage of such items, which accounts for the empty shelves in the supermarket.

"Been trying to get tin foil in Tesco for weeks now, and there doesn't seem to be any every week, not sure why there is such a shortage, but I haven't been able to get it."

Dual parent family, Large Town, Derry & Strabane

While not something that affects most consumers, tourism and seasonality can impact availability for some. One participant who lives in the Causeway Coast and Glens District Council explained that at certain times of the year, she would find there is reduced availability in the main supermarkets in her town as caravan owners have bought grocery supplies for their holiday. This would be frustrating as the other smaller independent supermarkets are perceived to be much more expensive.

“It’s a small Tesco in comparison to other towns. It’s a very busy Tesco because Portstewart is a seaside sort of place where people come on their holidays and stuff.....if it’s Easter weekend or something and you’re going to go to Tesco, there’s never any bread left....they come and there’s thousands of them sometimes and they buy all the fresh food. Then you’re forced to buy in the smaller shops, which are far more expensive.”

Single parent family, Small Town, Causeway Coast & Glens

Perceptions on factors influencing availability

Those who stated they had experienced changes in the availability of certain food items in their local supermarkets were asked to discuss any reasons, if any, they feel may have contributed to this change. Some consumers were unsure, or were unable to provide a reason for this, but many others attributed these changes in availability to the impacts of both the COVID-19 pandemic and the ever-changing circumstances around EU Exit and the Northern Ireland Protocol. While participants did not discuss either COVID-19 or EU Exit in great detail, it was evident that through news and media reports and word-of-mouth, that consumers felt that both were contributing to supply issues in Northern Ireland.

“Before I never really had a problem with picking stuff up. But I find now, I don’t know if it’s COVID, Brexit or what it is – stuff is, you’re finding it a wee bit harder to find. Sometimes you’re going from one supermarket to another.”

Single parent family, Large Town, Belfast

For consumers who have been experiencing low availability of certain products for more than six months, COVID-19 was believed to be the main factor contributing to empty shelves. For some, however, basic items that have been low in stock as Northern Ireland has moved out of the COVID-19 pandemic, leaves some consumers confused as to why a lack of availability persists. Availability may have been impacted by the Russia-Ukraine conflict, however, at the time that the research took place, consumers did not explicitly attribute any shortages to this.¹⁷

“Most of it is there, but with COVID it was hard to get things. Parsnips, there was no loose ones, nothing and it threw me. The odd time pasta and rice [was missing] and that’s post-COVID.”

Single parent family, Intermediate Settlement, Armagh, Banbridge & Craigavon

Some feel that Northern Ireland has been disproportionately affected by supply problems, as a direct result of its geo-political circumstances, more specifically due to the Northern Ireland Protocol. In turn, some feel that consumers in Northern Ireland are bearing the brunt of the supply chain issues, when it comes to access to food and household products.

“I just think they’re not getting the products in now and I don’t know if it’s to do with Brexit or the Protocol or anything like that. I just don’t understand it. Because you can get it in England. I follow girls in England on Instagram and they’re getting the stuff that we can’t get. And I even seen it going down to Dublin, you were getting stuff that you couldn’t get [in Northern Ireland].”

Single parent family, Small Town, Antrim & Newtownabbey

¹⁷ The conflict in Ukraine has impacted farmers’ ability to tend to and harvest crops. As wheat production and labour have been affected by the Russia-Ukraine conflict, this has had a direct impact on Ukraine’s exports.

Not only the larger supermarket chains have been affected, as according to consumers they have experienced a lack of availability in more local shops, and within chain restaurants. While some consumers are unable to say for sure if the changes they are seeing in stores and restaurants are due to transit issues relating to the NI Protocol, the perception among some is that Northern Ireland is getting a 'raw deal'.

“With the sea border, noticed a lot of empty spaces, especially in EUROSPAR and the Costa Coffee, I don't know if it's down to goods getting into NI but bit of a raw deal”

Single parent family, Small Town, Mid & East Antrim

Some consumers have tried to rationalise why certain items have become less available over the last year or recent months, and some feel that due to issues with transit and border checks, individual supermarkets may be making tough decisions on product lines and stock ordering – continuing to stock the items that are most popular, while no longer offering their usual range of products.

“If there are less lorries coming, then they are going to go with what makes them the most profit and the bestselling stuff.”

Lone pensioner, Open countryside and small village, Armagh, Banbridge & Craigavon

There is also the perception among some that issues relating to EU Exit and the Protocol are increasing prices in supermarkets, due to increased costs faced by supermarkets, which are then passed on to the consumers. One participant stated:

“Because people have to charge more, because it costs more to get it into the country”

Dual parent family, Large Town, Derry & Strabane

A number of participants also discussed a perceived change in some product sizes. Some feel that across different supermarkets, products that they were previously buying at a certain price, may remain at that price but now have less of the product in the packaging. This is tied to the views of some other participants who feel that some of the deals or offers in supermarkets currently, are 'not really offers', but products advertised as offers but are either very close to the full price or are a smaller version of an original-sized product, advertised as a deal. This indicates that consumers in Northern Ireland are savvy shoppers, who pay attention to detail when it comes to value for money.

“Some things in LIDL haven't come in for a few weeks and when it does, it's a smaller packaging for the same price.”

Family with pre-school and younger children, Open countryside and small village, Armagh, Banbridge & Craigavon

Chapter Summary

Most consumers have experienced lack of availability to some degree. Consumers will generally choose an alternative if something is not available, but others may need to travel to another store – or pay a higher price elsewhere for a product if it is not available in their regular supermarket, which can be frustrating.

Items that were frequently reported to be affected by lower availability included meat, fresh fruit and vegetables, juices, oils and baby formula and baby food. Largely, these products are considered by most to be staple household items and in some cases essentials, which leaves consumers feeling confused and frustrated when they try to understand why these products are not on the supermarket shelves.

In addition to changes in availability, many commented that they were finding shorter use-by and best before dates or fresh produce that was visibly poorer in quality and linked to short dates, which is unappealing and unsatisfactory for consumers, who feel freshness is key.

Consumers had noticed availability changes most notably in the last six months, but before this time also and attributed the changes to the impacts of both the COVID-19 pandemic and changing circumstances around Brexit and the Northern Ireland Protocol. Some feel that Northern Ireland is “bearing the brunt” of supply chain issues related to the Protocol, while others feel that the issues around availability will inevitably lead to an increased cost to the consumer

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Summary and conclusions

Summary and conclusions

In the current economic climate, more specifically, in the context of the cost-of-living crisis, households in Northern Ireland are facing unprecedented increases to their fuel, energy and food bills. The cost of living is changing at a rapid pace, and consumers in Northern Ireland are already feeling the effects of this as their outgoings increase, while their income remains the same. This research aimed to explore the lived experiences of consumers in Northern Ireland and assess how easy or difficult they found it to access a healthy and affordable diet.

A number of themes have emerged from this research, relating to the lived consumer experience. These are outlined below:

The needs and preferences of consumers are individual

Individual households have their own unique circumstances, food preferences, and dietary needs. This is based on a number of factors including family size and type e.g., whether it is a single occupancy household, or a single or dual parent family, disposable income and meal preferences. Consumers shop in supermarkets that are local to them, but will also make trips to other stores, including independent retailers, to obtain food items to meet their needs and preferences; to source quality ingredients, and to look for value for money.

Some families describe having children who are either fussy eaters, or who have a diagnosis of autism or ADHD, and in these circumstances shopping together with the children or choosing meals that they will eat and enjoy can be challenging. This often leads to parents having less time in a supermarket to buy their groceries or opting for children's favourite food items, which may be a larger brand name or convenience food, to ensure it is eaten and does not go to waste.

Those with very young children and babies have additional items that they buy on a regular basis, including baby food, formula or follow-on milk – each of which have been subject to availability issues. These consumers are unable to go without, so must source them from other retailers, usually at a higher cost. Those who have children with allergies or food intolerances must also factor this into their grocery shop, looking for gluten-free options at an affordable price, or dairy alternatives. These families are unable to go without these products as this would mean a potential risk to children becoming ill or experiencing discomfort from consuming allergens. If suitable gluten and dairy free options are not available, consumers must source these products elsewhere, which again, may be at a higher cost.

Some are following diet plans or are thinking more actively about managing their diet and weight, and this will influence the types of food they will buy. Should a participant want to find a particular product that will fit into their diet plan, they may travel to another supermarket. Those following Slimming World, or a similar plan in the past have developed skills in meal planning and cooking and others follow recipe books, Tik Tok or online tutorials.

A number of participants indicated that they shop for the same brands or in the same supermarkets and independent retailers that their parents did, and that they have always done this, and in some cases are passing these preferences down to their children. This highlights that food choices are very personal and can be driven by habit and tradition.

Consumers have high standards when it comes to quality and freshness

Consumers in Northern Ireland have high standards when it comes to fresh produce including meat, fruit and vegetables. For some, this results in shopping in one supermarket for non-perishable items and meats, while visiting another supermarket specifically to buy fruit and vegetables, due to perceived quality differences between supermarket chains.

Meat is central to the diet of many NI consumers, including those that took part in this research. Consumers are very particular when it comes to where they will buy their meat and they are looking for value, but above all, quality. For many, this means looking no further than their local independent butcher, which is perceived to be the gold standard for quality and freshness. Others will purchase meat from supermarket butcher counters, and many consumers want the reassurance that their meat products are local and fresh. Some will purchase meat from the chiller aisles in supermarkets but will rely on the visible freshness of the product, with any meat items with shorter dates being off-putting for many. Some also look at the labelling for quality assurance or the meat content percentages.

Short use-by dates are not only scrutinised when it comes to meat, but for most other fresh food items including fruit and vegetables, and bakery items. Many feel that in recent months, some supermarkets are stocking more products with shorter use-by or best before dates, which is not considered to be satisfactory. In response, most participants will avoid choosing these items, instead visiting another supermarket for a fresher alternative. This indicates that while many consumers largely remain loyal to their usual supermarket chain, they are not willing to compromise on quality and will shop elsewhere. Some consumers will also make more frequent trips to smaller local stores to pick up everyday essentials, which need replenished more often.

Healthy eating versus convenience

Consumers believe that a healthy diet includes fresh food over frozen, including fresh meats and fish, salads, soups, pasta dishes, fruit and vegetables. Meals that are described by participants as staples in their household are typically reflective of traditional Northern Irish cuisine. Many feel that 'homemade' meals cooked from scratch are indicative of a healthy way of eating and more participants are likely to feel that this is the most important element of a healthy diet, rather than placing any strong emphasis on monitoring specific food groups or reducing/avoiding certain ingredients.

Consumers are concerned with sourcing healthy foods for young children and babies and mention organic baby food pouches as a product they perceive to be 'good'. Some discuss buying their children's favourite fresh or frozen fruit and for a small number, fruit is seen as a 'treat' to replace more processed snacks, which are becoming more expensive. Conversely, some parents are less concerned with children eating processed foods as they feel that eating these products occasionally is not harmful. Few participants are preoccupied with food labels or ingredients lists but may look at the traffic light labelling on new purchases or look for the sugar content on drinks marketed for children.

Many indicate that processed or frozen food items are perceived to be 'unhealthy', as well as snacks such as biscuits, crisps or chocolate. Households are generally buying a combination of fresh food ingredients as well as convenience foods. At the same time, many consumers rely on processed foods to some extent, either for convenience, to have these items at home for a 'treat', or for children who are described to be fussier in their preferences. For families with children who will only eat certain things, prepared meats (like chicken strips or chicken nuggets) and frozen foods (such as pizza or chips) have become a bit of a lifeline, not only because the children like these foods, but because parents want to make sure their children are eating something rather than picking through another meal.

Some families are purchasing larger quantities of processed foods than others, such as frozen food or sugary and salty snacks. A small number of participants comment that they visit certain supermarkets for value, in addition to other supermarkets, and while they do not necessarily believe that the foods on offer in these supermarkets are the healthiest, some feel that 'healthier' food is expensive. For this reason, buying processed food items at a low cost, is perceived to be a way to make a food budget go further.

Affordability permeates all aspects of the consumer experience

Affordability is a thread that runs through the entire consumer experience and relates to both accessibility and availability. In the context of the cost-of-living crisis NI consumers are facing rising costs and unpredictable access to certain food items across their usual supermarkets.

Increases in gas, electricity and fuel bills are placing strain on household budgets and some families are struggling to keep up with their bills. The lowest earning households and single parent families are disproportionately affected by rising food bills. For these families, looking for value, making use of food that is already in the cupboards or freezer, and changing the frequency of the regular grocery shop around other bills that are due is a reality. All consumers, irrespective of their individual circumstances are noticing steep increases in the cost of their food shop – and are also changing their habits due to the rising cost of fuel, coordinating shopping trips around other outings, and taking the car to the shops less frequently.

Many are savvy shoppers and will shop around to find the best deal on their regular household food items. Some use websites or apps to look for weekly offers, or avail of deals they see in store, in both the larger supermarkets and smaller local retailers. Some consumers are changing their habits, buying less 'treats', impulse buys, or any other items that are seen as 'non-essential'.

While most feel able to access a healthy diet, many feel that healthier foods are more expensive.

Changes in availability have also influenced consumer perception of cost, as they feel that foods that are more frequently unavailable – such as fresh fruit and vegetables, meat, juices and oils – are getting more expensive when they re-appear on shelves.

Those living in more rural areas have no choice but to travel further than urban dwellers to get to a larger supermarket, and with the higher petrol and diesel prices, this adds to overall costs. Those living in rural towns and villages, will often be limited to small convenience supermarkets where they can buy essentials, but where costs are perceived to be higher. While some smaller towns will have a chain supermarket, it is also believed that these stores have higher prices than the superstores found in larger towns e.g., Tesco Express versus Tesco Extra.

It is evident that consumers are having to start thinking about how they can change their shopping habits to both meet theirs and/or their families' needs while trying to minimise the very real impact of the cost-of-living crisis. Consumers are unsurprised by price rises, considering the current economic climate, but find the prospect of further price hikes – against a backdrop of stagnated income – to be increasingly concerning.

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Appendices

Appendices

Appendix 1. Pre-interview Discussion Guide

22-010960 CCNI Food Poverty research Customer Journeys Initial interview Discussion Guide

Introduction (5 mins)

Thank participant for agreeing to take part.

Introduce self/Ipsos– Moderator stress role as independent organisation and that we are here to listen to participants' views and opinions. Aim to put participant at ease – reassure them that as the moderator of this interview, you will also be on hand to answer any questions during the research exercise.

Outline background/ objectives of the project – Ipsos UK have been commissioned by The Consumer Council for Northern Ireland (the Consumer Council) to understand consumers' food shopping experiences in Northern Ireland, and how easy or difficult it is for consumers with a particular household income or less, to access a healthy and affordable diet. Your participation in the research will involve taking part in this brief interview, completing a number of tasks within the Ipsos UK's app, AppLife (including one store visit where you will record your experiences of doing your regular grocery shop), and a final interview. I will give you more detail during this conversation today.

Explain confidentiality/ anonymity – Your participation is completely voluntary. You can change your mind at any time and choose to withdraw your participation without giving a reason. Only the Ipsos research team will have access to personal data such as contact details (name, number, email address). This data will be stored securely and deleted securely after the project has closed. The Ipsos team and the Consumer Council will have access to your AppLife posts.

Mention recording/ obtain permission to record – With your permission, I will record the interview today just so I can listen back and make sure anything included in our final report, has been reported accurately. With your permission, we would like to share your app posts with our client (this includes video, audio and written submissions), the Consumer Council may wish to publish some of the data on their website.

Are you clear on how your personal data will be used?

Moderator: GAIN CONSENT FROM PARTICIPANT – ASK PARTICIPANT TO CONSENT TO HAVING ALL DATA SHARED WITH CLIENT OR SOME DATA (AUDIO, PHOTO & TEXT) OR ONLY ANONYMISED DATA. RECORD PARTICIPANT PREFERENCE WITHIN THE PARTICIPANT PROFILE.

If you feel more comfortable to have video footage shared, but without your face being shown, that is absolutely fine. You can focus your camera on your grocery shopping or food items and talk us through various elements of the tasks.

Before we share any AppLife data with the client, we will show you what we intend to share and you will have the opportunity to decide if you would prefer not to share anything we have included.

Do you have any questions at this stage?

Are you happy to proceed with the first stage of the research on this basis?

General shopping habits (10mins)

The purpose of this call is just to find out a little more about you and to give you a quick overview on what we would like you to do as part of this research exercise.

Let's dive in.

How often would you say you do a food shop (daily/weekly/monthly?) Why do you shop in this way?

Probe to understand if frequency of grocery shop is tied to specific factors e.g., distance to shops, transport, family size and lifestyle etc, payday

- Do you do one main shop, or do you regularly go to the shops to pick up what you need?

And how often, if at all, would you say you plan for your food shop? For example:

- Making a shopping list?
- Making a meal plan?
- Looking at what food items and other items (cleaning/ toiletries etc) you currently have at home?
- If you don't plan for your food shop, what do you typically do instead?

What factors, if any, influence the kinds of things you might buy during your regular shop?

Possible probes:

- Family's food preferences
- Family size
- Lifestyle e.g., buying for convenience
- Cost
- Time to shop
- Special offers / BOGOFs
- Dietary requirements/choices e.g., coeliac, vegan, allergies, organic
- Nutrition e.g., looking for food which is low in fat, salt, sugar etc.
- How 'healthy' food is perceived to be

Are there any factors which influence what you don't buy during your regular shop? Why is that?

Possible probes:

- Typical shopping habits e.g., preferred brands
- Cost
- Availability

Do you tend to go to one supermarket, or do you shop around? Why is that?

- Have you always shopped in this way or has this changed over time?
- [If shopping habits have changed over time] Why is that?

Why do you shop at [insert supermarkets listed]?

Probe around:

- Proximity to home
- Ease of access e.g., public transport, less distance to drive there, can walk there
- Availability of food items compared to other supermarkets
- Value/ affordability of food items compared to other supermarkets

Overview of AppLife tasks (10 mins)

I will now give you some information about the tasks we would like you to complete.

We would like you to download the Ipsos app, AppLife (I will send you access instructions by email). Within the app, you will find XX tasks with associated questions. We would like you to complete these tasks by <this time next week>. If you are having any issues or have any queries at all, please feel free to send questions via the app – we will be moderating the app posts and will communicate with you

directly, both to respond to any queries you have and to ask any follow-up questions based on your posts.

Task 1: As part of the first task, we would like you to record a video telling us about your trip to the shops – where you plan to go and why, what kind of things you might buy and how you plan to get there.

Moderator note: *if participant normally places an online order for home delivery, explain that we still want to understand their experiences of this, and that we will have specific questions in the app relating to online food shopping.*

Task 2: As part of the second task, we would like you to do a typical food shop in the supermarket – or one of the supermarkets – you would normally go to. We would like you to record your experience in store using video and photo footage, bringing us with you as you do your shop! There will be more detailed instructions within the app, which will tell you the kinds of things we would like you to talk about/ show us. If you normally go to more than one shop, please feel free to post in the app about your experience in each shop you go to.

If you like, and you feel more comfortable doing so, you can take someone with you while you complete this exercise. **Moderator reinforce that participant is to answer the questions on their recording alone/ fully.**

Moderator note: *feedback any tips from the researcher store visit exercise to point out any key information and to reassure the participant.*

Please focus your video on the products within the store and store displays/ refrigerators – please do not take footage of other customers or staff. If you wish to take the video in selfie mode and talk into camera, you can also do this (if you are comfortable to do so).

Please be reassured that we do not expect you to discuss anything you are not comfortable discussing, while you are in public/ in the supermarket

[Moderator ensure that participant is aware that we don't expect them to talk about personal circumstances/ affordability in public, and if they wish to talk about this in a video recorded at home, that is also their choice and it is not expected if they aren't comfortable to do so].

[If participant is unable to record video footage/ uncomfortable to do this e.g., over 65] Explain that, if possible, we would like them to take some photos either in store, showing the kinds of items they are buying and the kinds of things they are looking at in the store. They may also send us photos of some of the items they have purchased once they have unpacked their shopping at home. They can also send us a photo of their receipt. They can answer the questions in the app as text responses, to provide more detail on the photos provided. If they are unable to take part using AppLife, we they can send us audio recordings and photos in addition to their pre- and post-interview.

Task 3: The third task involves telling us more about your purchased items, once you have brought them home. If you wish, you can complete the store visit one day and the other tasks on a different day, but all tasks must be started and completed within one week.

Task 4: The fourth and final task involves answering some questions on the cost of your shopping. We would like you to keep your receipt so you can tell us a little bit about the cost of your shopping and your views on this.

All tasks will not appear in the app at the same time – you have to complete a task to move on to the next one!

Post-interview

After you have completed the tasks, we would like to speak to you again to follow-up on some of your responses and to ask you some further questions about your food shopping. This interview will last between 35-40minutes.

Moderator note: *ask participant for their availability for follow-up interview and record.*

Thank and close

Thank you for your responses and your time today! I will follow-up by email to give you the access instructions for AppLife. I look forward to seeing your posts and speaking to you again soon.

Appendix 2. Post-interview Discussion Guide

22-010960 CCNI Food Poverty research Post-task Interview Discussion Guide

Introduction (5 mins)

Thank participant for their participation so far and explain the purpose of the post-interview (to further explore some of the participant response from the AppLife tasks and to explore views on grocery shopping in more detail).

Mention recording/ obtain permission to record – With your permission, I will record the interview today just so I can listen back and make sure anything included in our final report, has been reported accurately.

Consent – Moderator, obtain consent and record.

Re-cap of store visit (10 mins)

Having looked at your AppLife posts from the diary tasks, I'd just like to touch on some of the things that were mentioned.

Moderator note down any questions which were not fully answered through the AppLife posts and probe.



Potential probes may include

- Any plans made before doing their shop (shopping lists, meal plans, checking what food is in the house, looking up special offers) – **TASK 1**
- Reasons for buying items purchased in store (price, fresh or frozen items, promotions, individual preferences) – **TASK 2**
- Reflections on food shop once it was unpacked at home (size of shop, storage of food, how long this shop will last before needing to buy groceries again) – **TASK 3**
- Reflections on the cost/ value for money of the shop – **TASK 4**

Accessibility (10 mins)

How would you describe the choice and range of shops in your area? Why do you say that?

- Do you feel there are enough supermarkets to choose from? Why?

- Do you feel your local area has the right types of stores to meet your needs? *Probe around preferences for larger chain supermarkets/ smaller independent stores and why*
- Are there any types of stores you would like to see in your area e.g., independent retailers, greengrocers, butchers etc?

To what extent, if at all, do you feel it is easy to travel to the supermarkets/grocery stores in your area? Why?

- To what extent, if at all, is your choice of supermarket influenced by where you live?
- Do you feel you are unable to shop in particular stores based on where they are located? How does this make you feel?
- Has your ability to travel to supermarkets changed as fuel prices have increased? How do you feel about this? What do you do differently now?
- Would you be able to reach local supermarkets by public transport? Is this something that is important to you?
- In the app-task you told us that you travel to the supermarket [by car/ public transport/ on foot/ you get groceries delivered instead]
 - **[If travelling by car]** How far are you willing to drive to a supermarket? And to what extent, if at all, would you be likely to travel further to a particular store? Is this something you do? Why is that?
 - **[If travelling by public transport]** How far are you willing to travel on public transport to a supermarket? Why?
 - **[If travelling on foot]** If you walk to any supermarkets, how far do you need to walk to get to there? To what extent, if at all, does this influence where you shop? Does this influence how often you shop?
 - **[If ordering online]** If you arrange a home delivery, are you restricted at all in which supermarkets deliver to your address? How does that make you feel?

Do you buy food from other food outlets in your area, such as takeaways, restaurant chains, or local restaurants/cafes?

- What kinds of takeaways do you buy? Why is that? *Probe around food preferences, cost, convenience*
- How often would you say you buy food from takeaways?
- How often, if at all, would you eat in local restaurants? *Probe around reasons for eating out – convenience, treat, special occasion, local promotions*
- How would you describe the range and choice of takeaways/ local restaurants in your area? Does this influence how likely you are to buy food from these places?

To what extent, if at all, do you feel you are able to access or afford 'healthy' foods in the shops and supermarkets in your local area? Why do you say that?

- [If not covered in the AppLife tasks] What does 'healthy' mean to you?
- [If not already covered] When you do your grocery shopping, to what extent, if at all, do you think about how 'healthy' the foods you are buying are?
- If yes, what kinds of things are you looking for? *Probe around fresh food vs. ready meals/convenience foods, fruits and vegetables,*
- To what extent, if at all, do you look at food labels before you buy an item? *Probe around looking at the traffic light system, looking at ingredient lists, perceptions of different types of products e.g., gluten-free, low-fat, sugar-free, any foods perceived to be 'healthy'*
- Are there any kinds of foods that you think are less healthy? Which foods are they? Why do you think that?

Availability (5 mins)

How easy or difficult do you find it to buy the foods items that you like to buy, in your local supermarkets?

- Are there any food items that you feel are more or less difficult to access in your local shops? What are these? How does this make you feel?
- If you are unable to find a particular food item, what do you do? Do you buy this elsewhere or do you go without?

To what extent, if at all, do you feel the availability of certain food items changed over time?

- How long has this been the case?
- What do you think the reasons for this may be?
- [If participants mention low availability] To what extent, if at all, does it concern you that certain food items are unavailable?

Has the availability of certain foods changed the way in which you shop? If yes, how has this changed?

[If ordering online] If you arrange a home delivery, how often, if at all, are your items substituted? Has this changed over time? To what extent, if at all, is this a problem for you?

Affordability (5 mins)

In your AppLife posts, you said that your grocery bill was [more expensive than expected/ less expensive than expected/ about right]. Can you tell me a little bit more about that?

- [If more/less expensive] Why do you think that is?
- Do you think the price of your shop would be more, less or about the same in other supermarkets? Why do you say that?

[If not covered in the app task] Do you have a budget in mind before you do your shopping?

- What kind of things influence your food budget? *Possible probes: family size, cost of other bills, food preferences, food needs (special diet etc), cost of travel, cost of delivery service, pay dates...*
- Does your food budget vary or is it usually the same? Why is that?
- How easy or difficult would you say it is to stick to your budget? Why is that? How does that make you feel?
- Do you buy items from large brands, items from supermarket own-brands, or a combination of both? Why is that?
- What kinds of items do you buy from larger brands/ supermarket brands? Why?

If you don't have a set food budget, are there any cost considerations that you have in mind when doing your shopping in store? Why is that?

Do you look for any offers or special promotions in-store?

- What kinds of offers or promotions are appealing to you, if any? Why is that? *Probe around loyalty card discounts e.g., Tesco Clubcard, Nectar points, Multibuy offers (3 for 2, 4 for £X etc), reduced to clear, £1 offers.....*

[If not covered already] Do you think the cost of your shopping has changed over time?

- Why do you think that is?
- How did this week's shop compare in price to a similar shop you may have done 6 months ago? What about 12 months ago?
- How, if at all, has this affected the way that you shop?

Would you say you get 'value for money' from your typical grocery shop? Why do you say that?

Final thoughts/ Wrap-up (5 mins)

That's everything that I wanted to ask you today!

Thank you so much for your participation in the interview today and for taking part in the AppLife diary tasks. Your responses are going to be really helpful for our client, the Consumer Council.

Is there anything else that you would like to add before we finish up?

The findings of this research will be collated into a written report (anonymised) for the Consumer Council, and we will also produce some short compilation videos to include some of the AppLife posts of all our participants who took part in this research. These videos may be published on the Consumer Council's website. As agreed in the pre-interview and via your response to the consent form, you have stated that you are happy for the following data to be shared:

Read as appropriate:

- Your video, audio, photo and text posts
- Your audio recordings, photos and text posts
- Your photos and text posts
- Only anonymised data (responses from the interviews/ text posts)

Is this correct?

Thanks once again – your incentive payment will be processed in the coming days and this is usually paid within 1-2 weeks.

Thanks again, take care!

Our standards and accreditations

Ipsos' standards and accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Our focus on quality and continuous improvement means we have embedded a "right first time" approach throughout our organisation.



ISO 20252

This is the international market research specific standard that supersedes BS 7911/MRQSA and incorporates IQCS (Interviewer Quality Control Scheme). It covers the five stages of a Market Research project. Ipsos was the first company in the world to gain this accreditation.



Market Research Society (MRS) Company Partnership

By being an MRS Company Partner, Ipsos endorses and supports the core MRS brand values of professionalism, research excellence and business effectiveness, and commits to comply with the MRS Code of Conduct throughout the organisation. We were the first company to sign up to the requirements and self-regulation of the MRS Code. More than 350 companies have followed our lead.



ISO 9001

This is the international general company standard with a focus on continual improvement through quality management systems. In 1994, we became one of the early adopters of the ISO 9001 business standard.



ISO 27001

This is the international standard for information security, designed to ensure the selection of adequate and proportionate security controls. Ipsos was the first research company in the UK to be awarded this in August 2008.



The UK General Data Protection Regulation (GDPR) and the UK Data Protection Act (DPA) 2018

Ipsos is required to comply with the UK GDPR and the UK DPA. It covers the processing of personal data and the protection of privacy.



HMG Cyber Essentials

This is a government-backed scheme and a key deliverable of the UK's National Cyber Security Programme. Ipsos was assessment-validated for Cyber Essentials certification in 2016. Cyber Essentials defines a set of controls which, when properly implemented, provide organisations with basic protection from the most prevalent forms of threat coming from the internet.



Fair Data

Ipsos is signed up as a "Fair Data" company, agreeing to adhere to 10 core principles. The principles support and complement other standards such as ISOs, and the requirements of Data Protection legislation.

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