‘THE BIG SQUEEZE’ IS A MAIL METRO MEDIA RESEARCH SERIES THAT TRACKS THE ONGOING IMPACT THAT THE COST OF LIVING CRISIS IS HAVING ON CONSUMERS FINANCES AND BEHAVIOURS ACROSS A BROAD RANGE OF CATEGORIES.

EACH WEEK WE ASK OUR MATTERS COMMUNITY MEMBERS ABOUT THEIR BEHAVIOURS IN ONE CATEGORY TO ASCERTAIN IF AND HOW IT HAS BEEN IMPACTED BY THE COST OF LIVING CRISIS.

OUR AIM IS TO OFFER USEFUL INSIGHTS AND PRACTICAL GUIDANCE ON HOW BRANDS CAN NAVIGATE THIS DIFFICULT AND TUMULTUOUS PERIOD.

THIS WEEK WE’RE FOCUSING ON HOUSEHOLD PRODUCTS AND PERSONAL ITEMS. WE WERE PARTICULARLY INTERESTED IN HOW THE INCREASE IN THE COST OF LIVING MIGHT IMPACT THE WAY CONSUMERS SHOP FOR ESTABLISHED BRANDS AND THE LOYALTY SHOWN TOWARDS THEM.
METHODOLOGY

We wanted to find out peoples feelings on their household finances, their current spending across FMCG categories and more specifically, changes in brand loyalty across these categories.

**Approach:**
10 mins online survey, respondents recruited through Matters Community Survey

**Fieldwork:**
6th – 11th May 2022

**Sample:**
410 Respondents

Data is weighted to be representative of readership by age, gender and social grade
WHAT WILL WE COVER?

1. KEY FINDINGS
2. SPENDING BEHAVIOUR ACROSS CATEGORIES
3. THE BIG SQUEEZE AND BRAND LOYALTY
4. MMM FMCG SHOPPER ARCHETYPES
5. IMPLICATIONS FOR BRANDS
THE CURRENT STATE OF PLAY...

- Whilst 3 in 4 of adults are still feeling comfortable with their current finances, a significant group are being hard hit. 1 in 10 are having to go without essentials – this rises to 1 in 5 under-35s

CATEGORY BEHAVIOURS

- Spend on personal items is being cut the most, with spend on household items taking priority

- Females and C2DEs are most conscious of cutting spending with adults cutting spending on clothing the most (58%)

- Adults are least loyal to brand when it comes to household supplies whilst over half stick to well-known deodorant and shampoo brands

- 1 in 4 are increasingly paying attention to price promotion – own labels pose a potential threat

- Older groups are least likely to compromise on brand – is this a valuable target for brand advertising?
“SPENDING BEHAVIOUR ACROSS CATEGORIES”
7 in 10 have made changes to their shopping habits

Under 35s and family groups are making the most changes, 1 in 5 of these groups are going without essential items

The most common behaviours involve reducing, budgeting and compromises

Q – Continuing to think about your household finances, how would you describe your current spending behaviour?

Source: Grocery Shopping Matters Community Survey (April-May 2022)
Base: 410 Respondents

- I am actively trying to cut down the amount I spend
- I am spending less on treats / luxury items
- I try to stick to a budget
- I am spending less on things for me (e.g. clothes)
- I have not really changed my spending habits
- I am having to make compromises on where I spend
- I have to go without essential items to make ends meet
Spending on personal items is being cut the most

Spend on products for the home is more resilient

Q – Thinking about your spending habits in each of the following categories, how would you describe your consumption habits / attitude to spending in each category over the last 3 months?

[Bar chart showing]

- Clothing: 58% have actively tried to spend less / cut my consumption, 41% have not changed.
- Beauty & Personal Care: 49% have actively tried, 47% have not.
- Food: 56% have actively tried, 41% have not.
- Homecare: 59% have actively tried, 38% have not.

Source: Grocery Shopping Matters Community Survey (April-May 2022) Base: 410 Respondents
Females and C2DEs are more concerned about cutting their consumption

Males and ABC1s are less conscious of cutting their consumption

Q – Thinking about your spending habits in each of the following categories, how would you describe your consumption habits / attitude to spending in each category over the last 3 months? (Actively tried to spend less)

Source: Grocery Shopping Matters Community Survey (April-May 2022)

Base: 410 Respondents

<table>
<thead>
<tr>
<th>Category</th>
<th>Male</th>
<th>Female</th>
<th>ABC1</th>
<th>C2DE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food</td>
<td>35%</td>
<td>38%</td>
<td>46%</td>
<td>46%</td>
</tr>
<tr>
<td>Beauty &amp; Personal Care</td>
<td>39%</td>
<td>47%</td>
<td>51%</td>
<td>56%</td>
</tr>
<tr>
<td>Homecare</td>
<td>33%</td>
<td>41%</td>
<td>43%</td>
<td>43%</td>
</tr>
<tr>
<td>Clothing</td>
<td>52%</td>
<td>64%</td>
<td>55%</td>
<td>65%</td>
</tr>
</tbody>
</table>
“THE BIG SQUEEZE AND BRAND LOYALTY”
Consumers are less loyal to household cleaning brands than they are to other product categories

Only 1 in 10 adults are loyal to one brand when purchasing household cleaner items

Q – Thinking about your shopping habits for the following product types, which statement best describes your current brand purchasing behaviour?

- I am not loyal to any particular brand
- There are only a few brands I would consider
- I am loyal to one particular brand

Source: Grocery Shopping Matters Community Survey (April-May 2022) Base: 410 Respondents
Females and those with kids are the most loyal to brand

1 in 4 females and those with kids are loyal to brand when purchasing laundry detergents and haircare products.

<table>
<thead>
<tr>
<th>Product Type</th>
<th>Male</th>
<th>Female</th>
<th>Kids</th>
<th>No Kids</th>
</tr>
</thead>
<tbody>
<tr>
<td>Household Cleaners</td>
<td>12%</td>
<td>10%</td>
<td>20%</td>
<td>18%</td>
</tr>
<tr>
<td>Laundry Detergents</td>
<td>21%</td>
<td>27%</td>
<td>27%</td>
<td>15%</td>
</tr>
<tr>
<td>Deodorants</td>
<td>21%</td>
<td>23%</td>
<td>21%</td>
<td>22%</td>
</tr>
<tr>
<td>Shampoos &amp; Conditioner</td>
<td>18%</td>
<td>24%</td>
<td>24%</td>
<td>23%</td>
</tr>
</tbody>
</table>

Q – Thinking about your shopping habits for the following product types, which statement best describes your current brand purchasing behaviour? NET: Loyal

Source: Grocery Shopping Matters Community Survey (April-May 2022) Base: 410 Respondents
Nearly half of adults stick to well-known brands when shopping for deodorants and shampoos & conditioners

Q – Imagine you were to shop for each of the following product types tomorrow, which, if any, of the following type of brand, are you most likely to buy within each category?

Source: Grocery Matters Community Survey (April-May 2022) Base: 410 Respondents

- **Household Cleaners**: 33% Well-known brands, 29% Own label brands, 23% 1 in 2 55+ opt for well-known brands when shopping for laundry detergents, 10% The cheapest, irrespective of brand, 10% Premium brands
- **Laundry Detergents**: 42% Well-known brands, 23% Own label brands, 19% The cheapest, irrespective of brand, 10% Premium brands
- **Deodorants**: 48% Well-known brands, 14% Own label brands, 21% The cheapest, irrespective of brand, 11% Premium brands
- **Shampoo & Conditioner**: 47% Well-known brands, 17% Own label brands, 15% The cheapest, irrespective of brand, 14% Premium brands

51% of females choose well-known shampoos and conditioners.
1 in 4 are now looking for well-known brands on offer - own label pose a potential threat to brands

Those 55+ are less willing to compromise with 2 in 5 claiming their purchase habits haven’t changed across all categories

Q – Thinking now about how your attitude may have changed to purchasing the following product types since your last purchase, which, if any, of the following statements most applies?

- It hasn’t changed
- I would now look for well-known brands on offer
- I would now look for cheaper, own brand products
- I would now look to buy more eco-friendly products

Source: Grocery Shopping Matters Community Survey (April-May 2022)
Base: 155 Respondents

- Household Cleaners: 29% (It hasn’t changed), 37% (I would now look for well-known brands on offer), 23% (I would now look for cheaper, own brand products), 10% (I would now look to buy more eco-friendly products)
- Laundry Detergents: 34% (It hasn’t changed), 39% (I would now look for well-known brands on offer), 19% (I would now look for cheaper, own brand products), 7% (I would now look to buy more eco-friendly products)
- Deodorants: 41% (It hasn’t changed), 24% (I would now look for well-known brands on offer), 23% (I would now look for cheaper, own brand products), 8% (I would now look to buy more eco-friendly products)
- Shampoo & Conditioner: 43% (It hasn’t changed), 23% (I would now look for well-known brands on offer), 24% (I would now look for cheaper, own brand products), 6% (I would now look to buy more eco-friendly products)
“MMM PORTFOLIO
FMCG SHOPPER
ARCEHTYPES”
MMM readers are more likely to be conscious of quality and the environment when purchasing FMCG products.

- **Quality Connoisseurs**
  - YOU – i177
  - The Weekend – i175
  - Daily Mail Saturday – i171

- **Prudent Purchasers**
  - inews.co.uk – i111
  - MailOnline – i103
  - thisismoney.co.uk – i103

- **Environmental Empathisers**
  - Metro – i210
  - 'I' Newspaper – i190
  - YOU – i154

- **Bargain Hunters**
  - MailOnline – i105

- **Savvy Shoppers**
  - Metro.co.uk – i144
  - Mail On Sunday – i141
  - YOU Magazine – i141

- **Routine Buyers**
  - Metro.co.uk – i105
  - thisismoney.co.uk – i105
  - MailOnline – i103
  - Daily Mail Saturday – i103

*Based on those who fall within TGI FMCG Segmentation, 35% of total UK population are unclassified.*
“IMPLICATIONS”
IMPLICATIONS FOR ADVERTISERS

THEMES THAT MATTER

SHOW THAT QUALITY LASTS
With people cutting back on personal and home items, show that the quality of your products are superior to own label products and can end up saving consumers more money in the long term.

SHOW YOU UNDERSTAND
Women and lower income groups are more likely to be feeling the pressure of the big squeeze. Show how your products can help relieve the pressure and feature people and situations they can relate to.

BE VISIBILE
Consumers are becoming more conscious of pricing when making purchases. Ensure consumers are aware of offers so as to continue attracting consumers to well-known and/or premium brands. Don’t discount the value of older consumers.

PERSONAL CUTS
3 in 5
MMM readers say they are cutting spend on clothing and 1 in 2 in beauty and personal care products.

UNEVEN IMPACT
WOMEN + C2DEs
Significantly more likely to claim they are cutting spend than men and ABC1s.

BRAND PRESSURE
1 in 4
MMM readers across key FMCG categories say they now look for cheaper own brand products.

OPEN TO PROMOTION
1 in 4
MMM readers say they would now look for well-known brands on offer when shopping for household and personal items.

AGE AND LOYALTY
55+
MMM readers are less likely to compromise on brand choice.
Our powerful print and digital portfolio reaches key retail audiences at scale.

From parents to bargain hunters and beauty lovers, we have publications that can deliver scale, engagement and attention.

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