We wanted to find out about peoples current spending behaviours, and more specifically, grocery shopping habits. We wanted to understand how these habits may have changed since April 2022, including changes to how and where they shop.

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

**Fieldwork Dates:**
6\(^\text{th}\) – 11\(^\text{th}\) May 2022
18\(^\text{th}\) – 30\(^\text{th}\) August 2023

**Sample:**
771 Respondents

Data is weighted to be representative of readership by age, gender and social grade.
'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 REVISIT A SERIES OF QUESTIONS PREVIOUSLY ASKED IN APRIL 2022 TO UNDERSTAND HOW OUR READERS GROCERY SHOPPING HABITS HAVE CHANGED AS THE COST OF LIVING CRISIS CONTINUES.
COST OF LIVING – GENERAL BEHAVIOURS

• Household finances remain similar to April 2022 – 3 in 4 feel comfortable with their current finances, 1 in 4 are struggling

• Readers are continuing to implement measures to control their spending – 2 in 5 are spending less on luxury items and spending less on things for themselves

• Readers are putting extra thought into their meals – 3 in 4 are trying to waste less food, 1 in 2 are planning meals more

GROCERY SHOPPING

• 2 in 3 have seen changes to how they shop within the last 6 months with changing the brands they purchase seeing the largest change over the last 18 months (31% vs 24%).

• There has been little change to frequency of shopping – Doing one main and several smaller shops each week remains the most popular way to shop for half our readers

• Price (55%), promotions (52%) and loyalty offerings (38%) are the factors most likely to have increased in importance when choosing where to shop

• Loyalty schemes are increasingly important to our readers - 7 in 10 agree companies should advertise their loyalty schemes and 1 in 2 tend to shop at and spend more in shops they are a member of a loyalty scheme

KEY FINDINGS 2: GROCERY SHOPPING
KEY FINDINGS 2: SUPERMARKETS & TRENDS

PERCEPTIONS OF SUPERMARKETS

- Aldi (51%) and Lidl (48%) are perceived to be doing the best at holding prices during the cost-of-living crisis.
- Tesco (55%) and Sainsbury’s (50%) are recognised most for helping through additional initiatives due to their popular loyalty schemes.
- M&S (86%) and Waitrose (82%) score highest when it comes to offering quality, own brand products.
- M&S (72%), Waitrose (66%) and Co-op (59%) are viewed as the most trustworthy, suggesting a link between quality and trust.

FIVE KEY SUPERMARKET TRENDS

1. Battle of the Brands – 1 in 3 have changed the brands they purchase, switching out well-known brands for supermarket own brand products or value ranges. Suggesting brands will have to battle harder for ensure loyalty.
2. Loyalty Scheme Lovers – 9 in 10 are members of a supermarket loyalty scheme. Loyalty scheme offerings have become more important, influencing shop choice and boosting spend. Being transparent on pricing / offers is key.
3. Price is of Prime Importance – 1 in 2 view price as more important in choice of supermarket than 6 months ago, with 3 in 5 now shopping at more affordable supermarkets. Shoppers are wanting to be kept updated of prices.
4. Rise of the Savvy Grocery Shopper – 3 in 5 are shopping at multiple supermarkets to find the best deals or seeking out yellow labels. Over 4 in 5 are paying more attention to offers.
5. Making a Meal of it – Readers are being more mindful of their eating and cooking habits. 1 in 2 are planning their meals more, encouraging them to eat seasonally, batch cook or to cook from scratch.
IMPLICATIONS FOR ADVERTISERS

THEMES THAT MATTER

ALL FOR AFFORDABILITY
3 in 5
MMM readers are now shopping at more affordable supermarkets and 1 in 2 consider price more important

BATTLE OF THE BRANDS
1 in 3
MMM readers have changed the brands they purchase in the last 6 months, switching to supermarket and value ranges

LOYALTY LOVERS
2 in 5
MMM readers consider a loyalty scheme offering more important when choosing where to shop than 6 months ago

MAKING A MEAL OF IT
1 in 2
MMM readers are planning their meals more, with 2 in 5 cooking from scratch more and 1 in 3 doing more batch cooking

POPULAR CONTENT
6.7m
Article views on 3800 articles relating to supermarkets in the last 12 months. 7 in 10 turn to newsbrands for COL help

HIGHLIGHT OFFERS AND PRICE MATCHES
Price-conscious shoppers continue to shop around to find the best deals.
Highlight available offers, additional incentives i.e. coupons, as well as all important product price matches to help attract consumers.

SHOW VARIETY OF BRANDS AVAILABLE
Many consumers are increasingly switching between brands / ranges to control their spending, but not in all categories.
Showcase the variety in product ranges available to cater to all budgets and appeal to a broad array of shopper types.

SHOWCASE LOYALTY BENEFITS
Loyalty schemes are considered a great way to save and can determine where people shop.
Showcase your unique reward scheme offering to encourage returning customers as well as first timers. Be transparent with deals and offers.

PROVIDE MEALTIME INSPIRATION
Consumers are becoming more mindful of what and how they cook, planning ahead to save money.
Provide meal inspiration in the form of low-cost recipe ideas to help shoppers and encourage the purchase of featured products or alternatives.

USE NEWSBRANDS
Shoppers are turning to newsbrands to understand more about how they can help them navigate these difficult times.
Whether it’s in digital, social or print, our newsbrands are a trusted voice for consumers and are a great place to engage them.
USE MAIL METRO MEDIA AND SUPERCHARGE YOUR CAMPAIGN

POWER OF MAIL METRO MEDIA

62p in £1
of all weekly expenditure on food, drink and household products was by our readers (£2.8bn)

50%
average call to action score on our campaigns within the supermarkets category

6.7M
Article views on supermarket content in 2023

REACHING ALL AUDIENCES

26M
Adults who always on the lookout for special offers (62% reach)

20M
Adults who are the main shopper within their household (64% reach)

5.3M
Adults who are the main shopper within their household and have kids (63% reach)

MAIL METRO MEDIA DATA SEGMENTS

MAIL METRO MEDIA DATA SEGMENTS

Source: TGI, August 2023
GROCERY BEHAVIOURS
READERS ARE PUTTING EXTRA THOUGHT INTO THEIR MEAL PLANNING SO THAT THEY CAN SAVE MORE MONEY AND WASTE LESS FOOD

2 in 5 are eating seasonally or cooking from scratch, 1 in 3 are batch cooking or buying longer life products

Q - To what extent do you agree or disagree with each of the following statements? [NET: Agree]

<table>
<thead>
<tr>
<th>Food &amp; Drink Habits – NET: Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am eating less expensive items / food stuffs (e.g. eating less meat) 50%</td>
</tr>
<tr>
<td>I am trying to cut down on food / drink waste 73%</td>
</tr>
<tr>
<td>I am eating seasonally 45%</td>
</tr>
<tr>
<td>I am cooking from scratch more 43%</td>
</tr>
<tr>
<td>I am drinking less alcohol 45%</td>
</tr>
<tr>
<td>I am eating healthier food 40%</td>
</tr>
<tr>
<td>I am buying more longer life products 36%</td>
</tr>
</tbody>
</table>

Source: The BIG Squeeze Supermarkets Survey (August 2023)
Base: 771 Respondents
Price (55%), promotions (52%) and loyalty offerings (38%) are the factors most likely to have increased in importance when choosing where to shop.

Q - Compared to 6 months ago, have the following factors become more or less important to you when choosing where to shop for groceries? [More Important]

<table>
<thead>
<tr>
<th>Factors More Important in Supermarket Choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price of food and drink products 55%</td>
</tr>
<tr>
<td>Promotions and offers available 52%</td>
</tr>
<tr>
<td>Loyalty scheme offering 38%</td>
</tr>
<tr>
<td>Quality of food and drink products 26%</td>
</tr>
<tr>
<td>Range of brands available 22%</td>
</tr>
<tr>
<td>Location of grocery shop 20%</td>
</tr>
<tr>
<td>Range of local food and drink products 18%</td>
</tr>
<tr>
<td>Sustainable packaging options e.g. refills, non-plastic 22%</td>
</tr>
<tr>
<td>Variety of ways to shop i.e. self-scan options 17%</td>
</tr>
<tr>
<td>Availability of non-food products i.e. clothing 10%</td>
</tr>
</tbody>
</table>

Source: The BIG Squeeze Supermarkets Survey (August 2023)
Base: 497 Respondents
1 in 2 always shop where they have a loyalty card and tend to spend more where they are members

7 IN 10 BELIEVE COMPANIES SHOULD ADVERTISE THEIR LOYALTY SCHEMES, WITH 2 IN 3 CONSIDERING THEM A GREAT WAY TO SAVE MONEY

Q – Please state your level of agreement or disagreement with each of the following statements. [NET: Agree]

- **70%**
  - Companies should advertise / promote their loyalty schemes to customers

- **65%**
  - Loyalty schemes are a great way for customers to save money

- **51%**
  - When shopping, I always go to the places where I have a loyalty card

- **51%**
  - I tend to spend more in stores where I am a member of a loyalty scheme
SUPERMARKET BEHAVIOURS
READERS ARE INCREASINGLY SHOPPING AT MORE AFFORDABLE SUPERMARKETS, WITH TESCO THE MOST POPULAR PLACE TO SHOP

Those 55+ are significantly more likely to regularly shop at upmarket supermarkets

Q - Continuing to think about how your grocery shopping habits may have changed recently, to what extent do you agree or disagree with each of the following statements
[NET: Agree] / Thinking again about your grocery shopping habits, where out of the following do you regularly shop for groceries? By regularly, we mean at least once a month.

- 61% are now shopping at more affordable supermarkets

- 56% regularly shop at Tesco
- 39% regularly shop at Sainsbury’s
- 37% regularly shop at Aldi
- 32% regularly shop at Lidl
- 29% regularly shop at Asda
- 21% regularly shop at Morrisons
- 19% regularly shop at M&S
- 18% regularly shop at Iceland
- 17% regularly shop at Co-Op
- 14% regularly shop at Waitrose

Top 10 Supermarkets

Source: The BIG Squeeze Supermarkets Survey (April 2022, August 2023) *Kantar 2023
Base: 410 / 771 Respondents

Aldi (-0.1%) & Lidl (-0.1%) lost market share in September, with Tesco (+0.2%) and Sainsbury’s remaining top based on ramping up loyalty schemes and reductions*
DISCOUNT SUPERMARKETS ARE MOST LIKELY TO BE SEEN TO BE HELPING WITH THE COST OF LIVING THROUGH MAINTAINING THE PRICE OF ITEMS

The big four and upmarket supermarkets fall behind when it comes to communicating how they are helping with the crisis

Q - When thinking about supermarkets, which, if any, of the following phrases do you associate with [INSERT SUPERMARKET]?

“Is doing well at holding the price of items and/or helping with the cost of living”

Top 10 Supermarkets
Average Score = 34%

<table>
<thead>
<tr>
<th>Supermarket</th>
<th>Brand Score</th>
<th>Average Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aldi</td>
<td>51%</td>
<td></td>
</tr>
<tr>
<td>Lidl</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td>Iceland</td>
<td>46%</td>
<td></td>
</tr>
<tr>
<td>ASDA</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>TESCO</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>Sainsbury’s</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>M&amp;S</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Morrisons</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>Waitrose</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Co-op</td>
<td>17%</td>
<td></td>
</tr>
</tbody>
</table>
TESCO (55%) AND SAINSBURY’S (50%) ARE RECOGNISED MOST FOR HELPING THROUGH ADDITIONAL INITIATIVES DUE TO THEIR POPULAR LOYALTY SCHEMES

With the unavailability of a rewards scheme, Aldi falls behind on the perception of providing additional initiatives

Q - When thinking about supermarkets, which, if any, of the following phrases do you associate with [INSERT SUPERMARKET]? 

“Is looking to help customers through additional initiatives i.e., loyalty cards”

Top 10 Supermarkets
Average Score = 38%

TESCO 55%
Sainsbury’s 50%
Co-op 45%
Waitrose 43%
Morrisons 42%
Lidl 36%
Iceland 36%
M&S 32%
Asda 31%
Aldi 15%

Source: The BIG Squeeze Supermarkets Survey (August 2023) Base: 771 Respondents
UPMARKET SUPERMARKETS ARE RECOGNISED MOST WHEN IT COMES TO OFFERING GOOD QUALITY, OWN BRAND PRODUCTS

Whilst Iceland scores lowest on quality, amongst the big four supermarkets Morrisons and Asda lag behind

Q - When thinking about supermarkets, which, if any, of the following phrases do you associate with [INSERT SUPERMARKET]?

“Own brands are generally of good quality”

Top 10 Supermarkets
Average Score = 65%

<table>
<thead>
<tr>
<th>Supermarket</th>
<th>Brand Score</th>
<th>Average Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>M&amp;S</td>
<td>86%</td>
<td></td>
</tr>
<tr>
<td>Waitrose</td>
<td>82%</td>
<td></td>
</tr>
<tr>
<td>Co-op</td>
<td>72%</td>
<td></td>
</tr>
<tr>
<td>Sainsbury’s</td>
<td>70%</td>
<td></td>
</tr>
<tr>
<td>Aldi</td>
<td>67%</td>
<td></td>
</tr>
<tr>
<td>Lidl</td>
<td>62%</td>
<td></td>
</tr>
<tr>
<td>TESCO</td>
<td>62%</td>
<td></td>
</tr>
<tr>
<td>Morrisons</td>
<td>54%</td>
<td></td>
</tr>
<tr>
<td>ASDA</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td>Iceland</td>
<td>47%</td>
<td></td>
</tr>
</tbody>
</table>

Source: The BIG Squeeze Supermarkets Survey (August 2023)
Base: 771 Respondents
5 KEY GROCERY SHOPPING TRENDS
Many have continued switching out brands either by choosing more supermarket own brand products or buying from supermarket value ranges. Well-known brands will have to battle harder to ensure loyalty.

1 in 3

Have changed the brands they purchase in the last 6 months (vs 24% in April ‘22)

Those **struggling** are most likely to have changed brands (44%)

Q - Thinking about your grocery shopping habits. Over the last 6 months, how, if at all, have your habits changed?

- **74%** "I am buying more supermarket own brand products"
- **64%** "I am buying more products from supermarket value ranges"

Source: The BIG Squeeze Supermarkets Survey (April 2022, August 2023)

Base: 771 / 252 / 497 Respondents
LOYALTY SCHEME LOVERS

Loyalty schemes have become more important to readers. They’re increasingly influencing readers’ choice of shop and encouraging them to spend more but are also coming under increasing scrutiny.

Q – Thinking about the retailers where you are a member of a loyalty club / scheme. In which, if any, of the following categories do they operate? / Q - Compared to 6 months ago, have the following factors become more or less important to you when choosing where to shop for groceries? [More Important]

9 in 10* (92%) of readers are members of a food retailer / supermarket loyalty scheme

2 in 5 (38%) Consider a loyalty scheme offering more important than 6 months ago

1 in 2 (51%) Tend to shop at and spend more in shops they are loyalty scheme members

Source: Retailer Loyalty Survey* (May 2023) / Source: The Big Squeeze Supermarkets Survey (August 2023) Base: 783 / 771 Respondents
PRICE IS OF PRIME IMPORTANCE

With the cost-of-living crisis continuing to bite, readers are increasingly shopping at more affordable supermarkets to cut costs, with price having become more important to 1 in 2.

Q - Compared to 6 months ago, have the following factors become more or less important to you when choosing where to shop for groceries? [More Important] / Continuing to think about how your grocery shopping habits may have changed recently, to what extent do you agree or disagree with each of the following statements? [Base: Changed Habits / NET: Agree]

1 in 2
Consider the price of products when choosing where to shop more important than 6 months ago

3 in 5
“I am now shopping at more affordable supermarkets”

Source: The BIG Squeeze Supermarkets Survey [April 2022, August 2023]
Base: 771 / 252 / 497 Respondents
The Rise of the Savvy Grocery Shopper

Readers have become savvier when shopping, with over 3 in 5 shopping at multiple supermarkets to find the best deals or seeking out yellow labels. Over 4 in 5 are paying more attention to offers and reductions.

Q - Continuing to think about how your grocery shopping habits may have changed recently, to what extent do you agree or disagree with each of the following statements?

[Base: Changed Habits / NET: Agree]

- Over 3 in 5 (63%) of readers are shopping at multiple different supermarkets to find deals
- 83% “I am paying closer attention to product offers and reductions”
  - Over 35’s are paying the most attention to offers (90%)
- 61% “I am seeking out the reduced section of the supermarket”

Source: The BIG Squeeze Supermarkets Survey [April 2022, August 2023]
Base: 252 / 497 Respondents

↑ = Significant at 95% confidence
### MAKING A MEAL OF IT

Readers are being more mindful when it comes to their eating and cooking habits. 1 in 2 are planning their meals more by eating seasonally, cooking from scratch more or batch cooking.

Q - To what extent do you agree or disagree with each of the following statements? [NET: Agree]

<table>
<thead>
<tr>
<th>MINDFUL EATING</th>
<th>CONCIOUS COOKING</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 in 2 (49%) of readers</td>
<td>2 in 5 are cooking from scratch more</td>
</tr>
<tr>
<td>are planning their meals more</td>
<td>1 in 3 are cooking in batch</td>
</tr>
<tr>
<td>1 in 2 are eating seasonally</td>
<td>2 in 5 are eating healthier food</td>
</tr>
</tbody>
</table>

Source: The BIG Squeeze Supermarkets Survey (April 2022, August 2023)  
Base: 252 / 497 Respondents