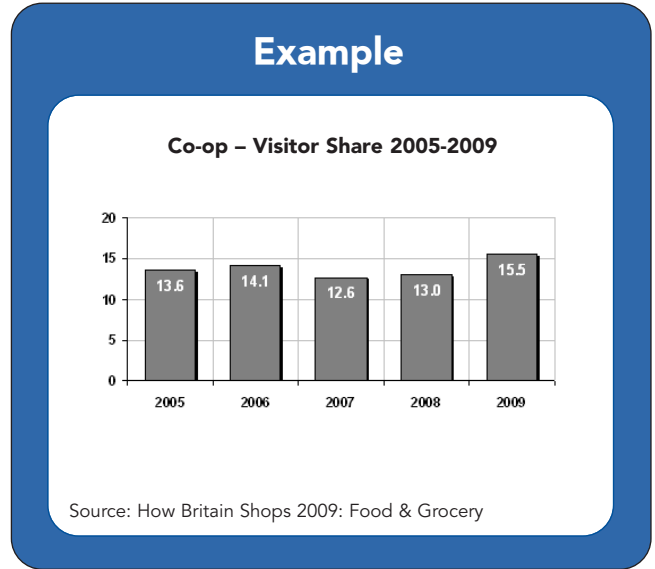


# How Britain Shops 2009 - Food & Grocery

Consumers are shopping around more in the food & grocery sector than they have ever done in the past. Since the first How Britain Shops survey in 1999, consumers have consistently visited 1.8-2.0 stores in addition to their main store. This year that rating has shot up to 2.5. With consumer confidence plummeting and shoppers taking more care of their finances, they are being motivated to visit more retailers to search out the best value.

## Some key questions answered by this report:

- How has loyalty towards more premium operators such as Marks & Spencer and Waitrose been impacted by the onset of recession?
- Have the Big Four been able to maintain their main user share?
- Which operators main users shop around the most?



## Companies profiled in this report:

- Aldi
- Asda
- Co-op
- Iceland
- Lidl
- Marks & Spencer
- Morrison
- Sainsbury
- Somerfield
- Tesco
- Waitrose

## Table of Contents (Slides 109

## Tables 100

## Figures 129)

### EXECUTIVE SUMMARY

- Key Findings
- Profile of shoppers by sector
- Penetration of shoppers by sector
- Retailer usage
- Main user share by region
- Conversion rates
- Shopping around
- Loyalty
- Drivers of loyalty/disloyalty

### COMPANY PROFILES

- Key findings
- Visitors
- Main users
- Conversion rates
- Loyalty
- Competitors

### FIGURES

- Share of shoppers (%) 2005-09
- Shopping around 2009
- Preference stores (%) 2009
- Profile of shoppers by gender, age bracket & socio-economic class (%) 2005-09
- Proportion of consumers who shop within sector by demographics & TV region (%) 2009
- Concentration of main user share of Top Five retailers 2005-09
- Average rate of conversion from visitor to main user (%) 2009
- Rate of conversion from visitors to main users by retailer (%) 2009
- Average number of other stores used
  - All 2005-09
  - By retailer 2009

- % change in loyalty rates since last year by retailer 2009
- Proportion of loyal main users identifying drivers of loyalty (%) 2005-09
- Visitor share, main user share, conversion rates & loyalty (%) 2005-09
- Visitor share, main user share, conversion rates & loyalty by demographic group (%) 2009

### TABLES

- Profile of shoppers by region 2009
- Share of active shoppers
  - Regularly using each retailer, 2005-09
  - Using a given retailer as their main store, 2005-09
  - Naming a retailer as their main store by TV region 2009

- Average rate of conversion from visitor to main user by TV region 2009
- Average number of other stores used by TV region 2009
- Proportion of shoppers that are loyal to their main store by TV region 2009
- Detailed drivers of loyalty (%) 2009
- Loyalty/disloyalty scores by retailer (%) 2005-09
- What disloyal users preferred about other stores (%) 2005-09
- Visitor share, main user share, conversion rates & loyalty by region 2009
- Drivers of loyalty/disloyalty 2009
- Potential change 2009
- Other retailers & stores used 2009