



Welcome to ShopperWatch, a partnership between Checkout and Behaviour & Attitudes (B&A). Every month, ShopperWatch tracks shopper opinions on retailer advertising, new product launches, and retailer and brand promotions. This month's edition examines consumer opinions about fresh produce in store, and what characteristics are most important when purchasing from this category.



The first aspect of the *ShopperWatch* feature asks over 500 shoppers for their opinions on what's hot on the shelves and on the screens each month.

TOP TV FOOD AND DRINK ADVERTS	TOP NEW PRODUCTS/ PACKAGING	TOP BEST PROMOTIONS OR OFFERS
<ol style="list-style-type: none"> <li>1. Avonmore Super Milk - 'Let Your Little Heroes Shine'</li> <li>2. Aldi: 'I Buy It' - Smoothie</li> <li>3. Aldi: Porridge</li> <li>4. McDonnell's Curry Sauce: India</li> <li>5. Coca-Cola: Brotherly Love</li> </ol>	<ol style="list-style-type: none"> <li>1. Tayto: St Patrick's Day Crisps</li> <li>2. Müller: New Flavours</li> <li>3. Galaxy: Duet</li> <li>4. Galberts: Pancakes</li> <li>5. Philadelphia: New Flavours</li> </ol>	<ol style="list-style-type: none"> <li>1. Aldi: 'Super 6'</li> <li>2. M&amp;S: Dine In For 2</li> <li>3. Uncle Ben's: Buy 3, Get A Free Wok</li> <li>4. Alpro Milk: €2</li> <li>5. Easter Eggs: 3 For €5</li> </ol>

\*Results based on 519 online interviews with adults aged 16+, quota controlled in terms of gender, age, socio-economic status, region and grocery shopper. Fieldwork was conducted via B&A's Acumen Panel from 2 to 9 February 2016. ShopperWatch questions are spontaneous in nature, with open-response questions.

## Avonmore Lets Its Little Heroes Shine

Milk brand Avonmore has certainly been getting noticed of late. The Glanbia-owned brand was the biggest spender on out-of-home advertising in January, and now its 'Let Your Little Heroes Shine' campaign, for its Super Milk range, has taken the top spot in this month's Top TV Food and Drink Adverts chart, having placed in fourth position last month.

From a retail perspective, Aldi continues to make its mark, as two of its commercials - 'I Buy It' and 'Porridge' - occupy second and third place, one month on from the discounter taking first place for its 'Unbelievable Value' campaign. Elsewhere, McDonnell's Curry Sauce ad moves up one spot to fourth, and Coca-Cola's 'Brotherly Love' ad drops from second to fifth.

In the Best New or Never-Noticed-Before Products/Packaging rankings, Tayto's St Patrick's Day crisps come out on top. The new limited-edition packaging is decorated in the colours of the Irish flag,

with ingredients displayed on the packs 'as Gaeilge' - a patriotic move from Ireland's leading crisp brand. New flavour variations from Müller and Philadelphia were noticeable enough for these brands to gain a place in this month's list, while Galberts Pancakes (4th) also feature, no doubt benefitting from the recent Pancake Tuesday.

There isn't much more that can be said about Aldi's Super 6 promotion as it takes the top spot in the Best Promotion/Offer rankings for the umpteenth time. It is a campaign that is testament to the popularity of the discounter, embedding itself into the minds of consumers. Uncle Ben's offer of a free wok with the purchase of three of its products also gets noticed, while Alpro Milk proves that round pricing is still popular among consumers, with a €2 offer.

The run-up to Easter always sees a number of promotions on chocolate eggs, and this year was no different, with 3-for-€5 deals also resonating with consumers.

# Keeping It Fresh

In this month's ShopperWatch report from Behaviour & Attitudes, to coincide with Checkout's annual Fresh issue, we look at Irish shoppers' approach to fresh-produce purchasing and the importance of quality and value for money in the fruit, vegetable and meat/poultry/fish categories.

There's no doubt that fresh produce plays a major role in the shopping habits of Irish consumers. Some 95% of the 509 people surveyed by Behaviour & Attitudes say that they regularly purchase fresh fruit and vegetables when grocery shopping, with 88% buying fresh meat, 82% fresh poultry and 61% fresh fish.

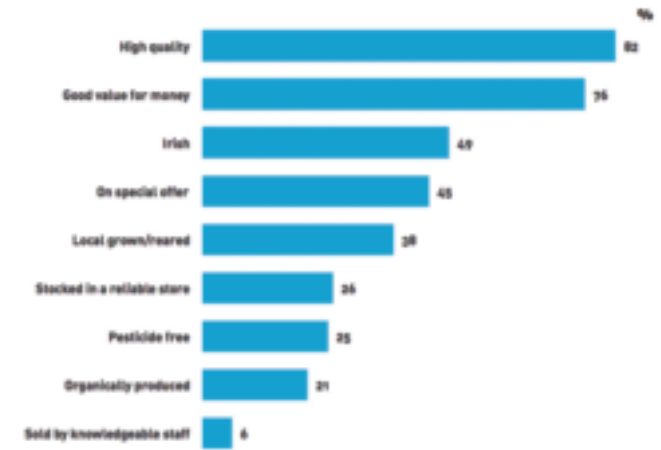
## ISSUES PEOPLE TAKE INTO ACCOUNT WHEN BUYING FRESH MEAT [N:509]



As shown in the graph above, when it comes to purchasing fresh meat, the issue of quality remains extremely important for consumers, with 81% of those surveyed indicating that they take it into account. While not shown here, it is a similar situation when it comes to fresh poultry or fresh fish, with 80% and 85%, respectively, citing quality as a key consideration. Whether the produce they are buying is Irish or not also plays a major role when consumers are making their choices. When it comes to meat, it is the second-most decisive factor, with 70% of consumers factoring in provenance as a purchasing consideration. This is also high when it comes to fresh poultry (69%), however less than half of fresh-fish consumers (49%) list provenance as a key consideration.

As has come to be expected, consumers are consistently looking for the best value for money when shopping, and this is no different when it comes to purchasing fresh meat, fresh poultry or fresh fish. Roughly two thirds of respondents to this month's survey indicated that value for money is an important factor when purchasing fresh meat (67%), fresh poultry (65%) and fresh fish (64%).

## ISSUES PEOPLE TAKE INTO ACCOUNT WHEN BUYING FRESH VEGETABLES [N:509]



In a March 2015 ShopperWatch report, it was found that the most prevalent signifiers of high-quality fresh fruit and vegetables are that they are not bruised, smell fresh and are blemish-free.

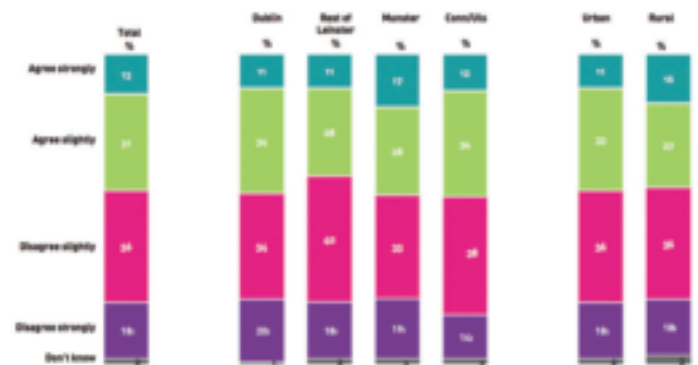
One year on, this opinion remains, with consumers valuing quality well above any other factor when it comes to buying vegetables (82%).

Just as with meat, fish and poultry, value for money is also key to encouraging consumers to pick up fresh vegetables, with 76% citing it as a key consideration (witness the rise of deals like Aldi's Super 6 offer as evidence of this).

The third most important factor for consumers when purchasing fresh vegetables is that they are Irish, with 49% stating that they take into account whether or not the product is domestically produced.

While not shown here, a similar appreciation of quality is seen when it comes to fresh fruit, with 84% indicating that quality is the most important factor they consider when purchasing. Value for money is also high, at 77%, however, provenance is not valued as highly as it is with regard to vegetables, with 39% of respondents saying that they take into account whether or not fruit is domestically produced.

## STICKING TO A BUDGET IS MORE IMPORTANT THAN HOW FRESH FOOD IS PRODUCED [N:509]



Consumers, in general, have become more socially aware in recent years. For example, a study from Empathy Research last year found that almost one in six Irish consumers (15%) regularly seeks out Fairtrade products when shopping.

However, as this graph shows, there is an almost 50/50 split between those who feel that sticking to a budget is more important than how fresh food is produced. Some 13% agree strongly that sticking to a budget is more important to them, with 31% only agreeing slightly. Interestingly, those in the 'family stage' age group (35-54) agree with

this sentiment more than anyone else, indicating that families are still restricted when it comes to grocery spending. Overall, however, slightly more consumers believe that how food is produced is more important than sticking to a budget (54%), with this proportion higher among females (59%) than males (45%).

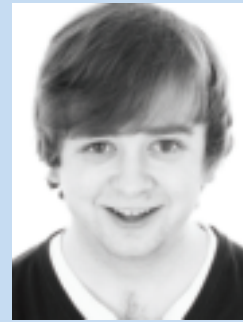
I WOULD LIKE TO SEE SUPERMARKETS MAKING AN EVEN GREATER EFFORT TO STOCK AND SELL WONKY FRUIT AND VEGETABLES [N: 509]



‘Wonky veg’ refers to products that may not be ‘perfect’ in terms of shape and size, but are perfectly palatable nonetheless, and are often available at reduced prices in stores. This month’s survey asked to what extent consumers agree that supermarkets should be making more of an effort to stock these ‘wonky’ products.

In total, 86% of those surveyed agreed that more effort should be made, with 52% agreeing strongly and 34% agreeing slightly. Slightly more male consumers (87%) than female consumers (83%) agree with this statement.

In a similar survey in March last year, only 57% of those surveyed were aware of ‘wonky veg’, indicating the level to which this medium has now been acknowledged and embraced by consumers.



## More Opportunities For ‘Wonky Veg’

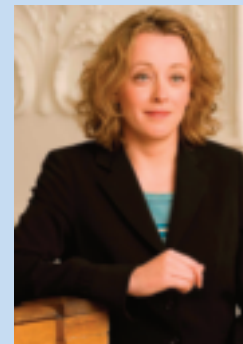
BY NIALL SWAN  
 SENIOR REPORTER, CHECKOUT

It comes as no surprise that the desire for high quality is prevalent across the board for discerning Irish shoppers when purchasing fresh produce. Smell and touch are always the key sensory influences when judging the quality of fresh produce, and it is evident that this will always remain the case.

In light of recent disputes between the Irish Farmers’ Association and Kerry Foods in relation to the display of the Bord Bia Quality Mark on fresh produce, it is interesting to note just how important a role that knowing that a product is Irish plays when consumers are making purchases in the fresh-produce categories. Irish consumers are consistently attracted to the Bord Bia sticker as a means of ensuring that they are making the right decisions for themselves and their families when it comes to the meat and poultry products they choose to purchase.

The huge leap in popularity of so-called ‘wonky veg’ is an extremely interesting development. Indeed, just in the past month, Tesco in the UK has announced that it will start selling the misshapen veg products in its stores, some 18 months on from their initial roll-out on this side of the Irish Sea. Rival Asda also offers a similar range, which trades under the name ‘Beautiful on the Inside’.

The ‘wonky veg’ phenomenon proves that, despite the importance of quality in the eyes of the customer, the attractiveness of a product that gives value for money is always going to draw in customers. In previous years, we would have listed appearance as a key signifier of quality in fresh produce, but it appears as if this is no longer applicable, and it is up to retailers to take advantage of this relatively new trend.



## Loyal Shoppers Look To The Land

BY MARTHA FANNING, DIRECTOR,  
 BEHAVIOUR & ATTITUDES

As a society with agrarian roots in the not too distant past, it is not surprising that quality fresh produce, in tandem with fairness for those working in the agricultural world, should come through in our survey to coincide with the Checkout Fresh issue.

Given the economic difficulties of our much more recent past, value for money is close to the surface as well.

The recovery has not been felt in many households, thus the recessionary tactics adopted over the last seven or eight years will be retained for the foreseeable future. How to strike the balance between quality fresh produce, fair remuneration to farmers, and value for money to the shopper is a significant challenge. Measures such as ‘wonky’ fruit and vegetables should be seen as just the start.