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.*

The first aspect of the *ShopperWatch* feature asks 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 PROMOTIONS OR OFFERS
1. Avonmore Super Milk: Our Weather	1. Kellogg's Coco Pops: Resealable bags	1. Dunnes: Spend €50 and get €10 voucher back
2. Kerrygold Butter : Memories in the Making	2. Actimel yoghurt drink	2. Aldi: Super 6 Fruit & Veg
3. Cadbury's: Mum's Birthday	3. Avonmore milk	3. Knorr Soup: 3 for €3
4. M&S: Spend it well	4. Lucozade Zero	4. Tesco: 3 meats for €10
5. Cadbury's: It's Creme Egg Hunting Season	5. Yoplait fruit yoghurts	5. Pampers: Buy 1 get 1 free

* Results based on 500 online interviews with adults aged 18+, quota controlled in terms of gender, age, socio-economic status, region and grocery shopper. Fieldwork was conducted via the B&A Acumen Panel from 28 February 2018 to 4 March 2018. All questions were spontaneous in nature with open response questions.

Weather & Nostalgia are Big Winners

It is particularly apt, given the havoc wreaked by the 'Beast from the East,' that the Avonmore Super Milk ad, which charts the impact that our changeable weather has on the nation, was the most popular TV ad this month. The ad reinforces our national obsession with the unpredictability of Irish weather and contrasts that very cleverly with the consistency and reliability of Ireland's most purchased consumer brand. Taking the second place spot this month is the Kerrygold Butter ad, which also offers the viewer re-assurance of its consistency and reliability via a kitchen conversation that reveals the fond memories of home and childhood that the brand evokes for many Irish people. Cadbury's claimed the number three and number five spots with their occasion-driven advertising – the 'Mum's Birthday' and 'It's Creme Egg Hunting Season' ads. Marks & Spencer's 'Spend it Well' ad came in at number four this month, emphasising that the retailer is just as much about value for money as it is about a premium product portfolio.

The top new products and packaging reflect the Irish consumers' continuing love affair with all things healthy and natural, with Actimel's yoghurt drink and Yoplait's fruit yoghurts taking the second and fifth spots respectively. Lucozade Zero makes an appearance in fourth place, indicative of a growing move away from sugar-sweetened drinks on the part of the consumer. But the top spot goes to Kellogg's Coco Pops' resealable bags, showing the extent to which consumers appreciate convenience and ease of use for their favourite buys.

When it comes to the best promotions, Dunnes takes the top spot with its spend 50 and get a €10 voucher back campaign, with fellow retailers Aldi and Tesco taking the second and fourth place positions respectively with the Super 6 fruit and vegetables offer from Aldi and the 3 meats for €10 offer from Tesco. The Knorr Soup brand came in third place with its 3 for 3 promotion, while the Pampers buy 1 get 1 free promotion claimed this month's fifth place position.

Free-from Food Forum

In a follow up report on the category, this month's ShopperWatch study by Behaviour & Attitudes completes its examination of free-from foods.

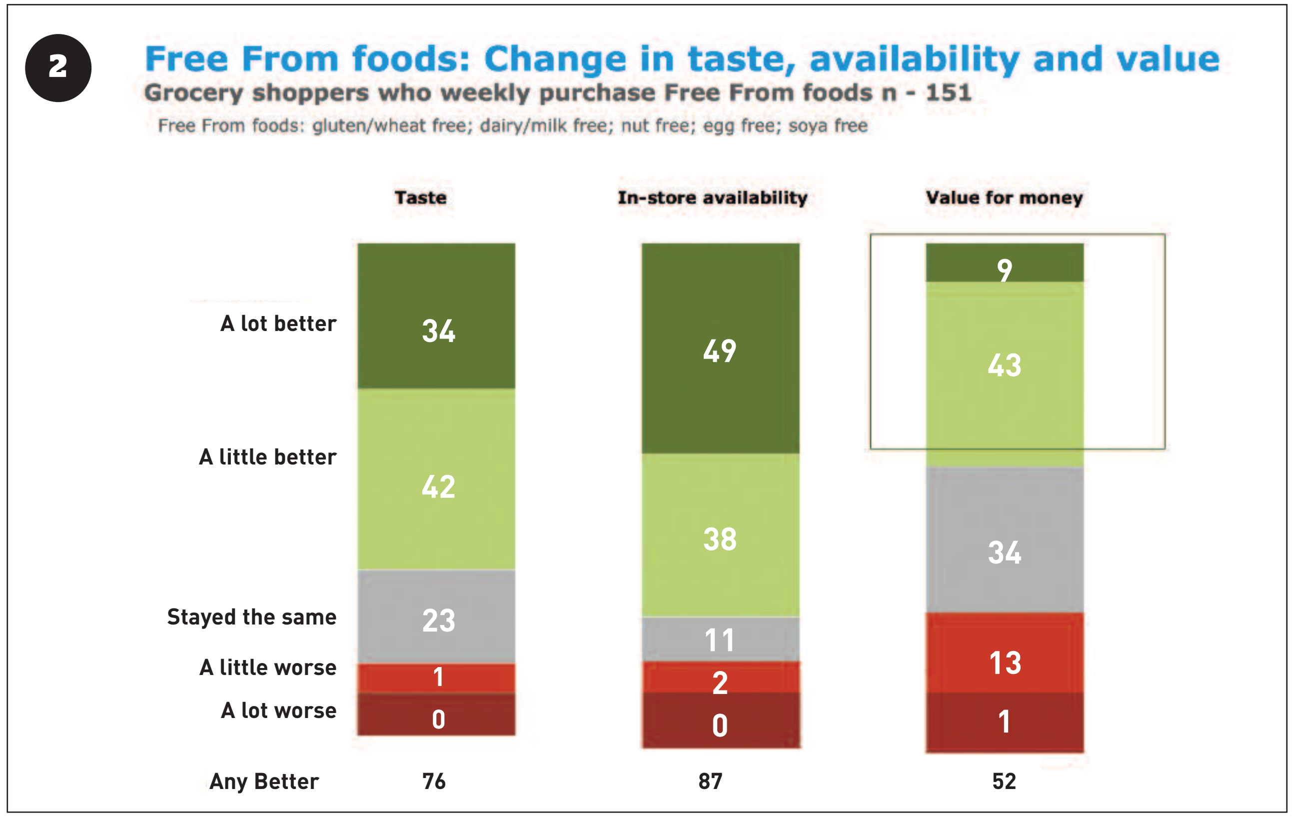
The research undertaken for this month's ShopperWatch looks into consumer purchasing patterns of free-from foods, such as gluten free, wheat free, dairy free and nut free foods.

Reasons for purchasing

48% of the 500 respondents to Behaviour & Attitudes' online survey said that they buy free-from foods because they are healthier for them. 41% of those surveyed said that they buy these products because they prefer to remove certain ingredients from their diet. Just over a fifth of the respondents said that they are inclined to purchase items from this category due to the fact that one or more family members must eat certain free-from foods as they suffer from a condition such as coeliac disease or are dairy intolerant. 17% of grocery shoppers said that they need to eat certain 'free from' foods because they suffer from a condition such as coeliac disease, dairy intolerance etc. 16% agree that one or more family members like these products, as they prefer to remove certain ingredients from their diet, and the same percentage said that one or more family members like these products because they are generally healthier. 15% of those surveyed said that they buy these products because of general concerns that they have over the way animals are treated or food is sourced. Finally, 6% of the respondents said that they buy these products because they are a vegan or wish to follow a vegan diet.

1: Satisfaction in taste, availability and value

The evaluation of the free-from offering among regular purchasers is reasonably positive when it comes to both the taste and in-store availability. However, 53% of regular purchasers are dissatisfied with the value for money of the category. As this chart indicates,



36% of those surveyed said that they are extremely satisfied with the taste. However, almost a fifth of the respondents said that they are extremely dissatisfied with the taste of the foods within this category. When in comes to in-store availability, 31% said that they are extremely satisfied, 39% are satisfied, and 30% agreed that they are extremely dissatisfied regarding in-store availability. Regarding value for money, 11% said that they are extremely satisfied, 36% are satisfied and 53% are extremely dissatisfied when comes to value for money for free-from foods.

2. Change in taste, availability and value

The category dynamic is very positive. 76% of regular purchasers say the taste is getting better, 87% say availability has improved, and 52% indicate that value for money has got better in the 'last year or two'. On the other hand, 14% appear to be dissatisfied when it comes to the taste of free-from foods. The same percentage agree that food items within this category don't offer value for money. As this chart indicates, 13% appear to be unhappy with the in-store availability of free-from foods. ■

Free-from Reigns

by DONNA AHERN,
News Editor, *Checkout* Magazine

One of the most interesting findings in this month's ShopperWatch is that, when it comes to purchasing free-from foods, the majority of those surveyed said that their main reason for purchasing free-from foods was their desire to remove certain ingredients from their diet. This is further evidence of consumers increasing concerns about what they are putting into their bodies. It also proves that the healthier lifestyle trend is showing no signs of abating and that what some might have thought was a fad looks likely to be a lifestyle choice that is here to stay. It is also interesting to see that 6% of the respondents said that they buy these products because they are a vegan or follow a vegan diet. While this is a small percentage, it shows that there is a growing market for plant-based lines of food, as well as for meat-free and dairy-free alternatives. This is something that grocery retailers should be very mindful of.

Free-From Curve On the Up

by JOHN O'MAHONY,
Director, Behaviour & Attitudes

Last month we confirmed that when we refer to 'free-from' we are really talking about wheat/gluten free and dairy free products. This month's research highlights that lifestyle reasons are the key drivers of growth in the category.

Free-from used to be largely the preserve of those with a medical dietary condition. Today, that is the case for only about one in three of the category's regular purchasers. And these 'lifestyle' based purchasers are prepared to put up with a lot - only 36% are extremely satisfied with the taste of their free-from products and over half bemoan the category's poor value for money.

However, the curve is moving upward. Three in four believe that the taste is getting better and over half indicate that value for money is improving. Let's return to this category in time to confirm if we are anywhere near the plateau yet.