Northern Ireland Take Home Food and Drink Purchases (2014 and 2018)

November 2020

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Glossary

Term	Definition
Discounters	Discounters are defined as a store which uses price as its defining feature, it must also follow the discount model of having extremely tight cost control and very focused buying.
Free sugars	Any sugar added to food or drink products by the manufacturer, cook or consumer including those naturally found in honey, syrups and unsweetened fruit juice.
Frequency	The average number of times a food or drink category has been purchased in a specified period.
Healthier foods/drinks	Food and drink categories in which the majority of products are not high in fat, sugar or salt.
HFSS foods/drinks	Food and drink categories in which the majority of products are high in fat, sugar and salt (HFSS).
Money off promotions	Food and drink purchased using a promotion that has reduced the price of the product. e.g. X% off marked price, marked price reduced by £X, special price or trial price.
Take home food and drink	All food and drink purchased and brought into the home. This excludes takeaways delivered to the home and food ordered at restaurants. This data does not take into account food waste.
Total spend	£ spent on take home food and drink for all households.
Total promotions	The total combined spend/volume of food and drink via money off and volume promotions.
Total volume	Standard volume (kilograms, litres, packs) bought on take home food and drink for all households.
Volume promotions	Food and drink purchased using a promotion that included an additional amount of product for no extra cost. e.g. multibuys, X% extra free, buy one get one free, Xg/ml extra free.

Demographic group definitions

Grade	Social Status	Description
A	Upper Middle	Higher managerial, higher administrative, or higher professional
B	Middle	Intermediate administrative, intermediate professional, senior managerial
C1	Lower Middle	Supervisory or clerical, junior managerial, junior administrative, junior professional
C2	Skilled Working	Skilled manual workers; generally, having served in apprenticeship
D	Working	Semi and unskilled workers
E	Non-Earners, State Benefits Only	Those receiving state benefits only

Lifestage definitions

Lifestage	Description
Pre & Young Family	Main Shopper under 45 years Youngest child under 5 years
Middle Family Mix	Middle Family (age of youngest child 5 – 9 years) Older Family (age of youngest child 10 – 15 years) Older Dependents (main shopper over 45 years, no children, 3+ adults)
Empty Nesters & Retired	45 – 64 years, 1 - 2 adults, no children 65+ years, 1 – 2 adults, no children

Summary

- In 2018, the Northern Ireland population spent more money on take home food and drink and shopped more frequently than in 2014.
- Following the introduction of the Soft Drinks Industry Levy[1], the data indicates that there has been a decrease in total volume of Regular Soft Drinks, and an increase in total volume of Diet Soft Drinks.
- The Pre & Young Family lifestage are purchasing more Pizza, Chocolate Confectionery, Total Soft Drinks, Potato Products, Crisps & Savoury Snacks in 2018 than in 2014.
- There has been a reduction in spend on promotion for both foods that are high in fat, sugar and salt and healthier foods. However Northern Ireland consumers are still spending more on high fat, sugar and salt foods on promotion than healthier foods.
- ABC1 households and the Pre & Young Family lifestage have the highest share of spend on promotion than the other demographics.
- Data on take home food and drink purchases of Northern Ireland households correlate with the latest findings from the National Diet and Nutrition Survey[2], which shows that Northern Ireland households are consuming more sugar, fat and saturated fat than the recommended daily intake[3] and not enough fibre.

Background

The Food Standards Agency (FSA) in Northern Ireland (NI) has a remit for dietary health surveillance which provides a comprehensive understanding of what NI consumers are eating and purchasing as well as their attitudes and behaviours with regards to food. This data is important in creating an evidence base that informs policy development, implementation and evaluation.

The monitoring of take home food and drink purchases in NI forms one part of the FSA's dietary health surveillance. The FSA in NI commissioned Kantar Fast Moving Consumer Goods (FMCG) to provide the purchasing data detailed within this report. Kantar FMCG is an international company dealing in consumer knowledge and insights based on continuous consumer panels.

The aim of this report is to explore take home food and drink purchases in NI, examining key trends and identifying food and drink categories that are of concern to dietary health.

This report was prepared by Victoria King and Emily Chan, Dietary Health team, FSA in NI.

Methodology

Recruitment and sample size

Kantar FMCG recruit panellists through use of both mail outs and email recruitment. Incentives are used to reward participation, which include vouchers from most high street retailers.

650 households are chosen to reflect all NI households by region and demographics. For some aspects of the data, weighting is applied to ensure the panel is reflective of the NI population and their purchasing habits.

Data collected from panellists

Kantar FMCG aim to collect data on all food and drink purchases brought into the home. Food and drink products purchased and consumed out of the home are not included such as supermarket meal deals, restaurant meals and food on the go. This data does not account for food waste.

In each household, a ‘main shopper’ is designated and defined as the person who is mainly responsible for grocery shopping in each household. Panellists are provided with a handheld scanner to scan purchases once brought into the home. Panellists scan the barcodes of purchased items alongside their shopping receipt, which collects the product prices. Using a codebook provided, panellists scan unbarcoded products such as loose breads, fruit and vegetables.

Data outputs

Once the data has been collected from the panel and weighted (if necessary), the following outputs are available;

- Shopper key performance indicators such as spend, volume, frequency and promotions.
- Product information such as nutritional content and brand.
- Retailer information such as name and location.
- Shopper profiling such as demographics.
- Shopper attitudes.

Please note that not all of the data outputs are presented in this report.

The FSA in NI commission Kantar FMCG to provide data for take home food and drink purchasing on 36 different categories which include:

1. Total Food and Drink
2. Total Alcohol
3. Beer & Lager
4. Spirits
5. Plain Breads
6. Morning Goods
7. Bread with Additions
8. Pasta, Rice, Noodles including flavoured varieties
9. Breakfast Cereals
10. Vegetables
11. Fruit
12. Juice & Milk Based Drinks
13. Chocolate Confectionery
14. Sweet Confectionery
15. Ice Cream, Lollies & Sorbets
16. Crisps & Savoury Snacks
17. Total Soft Drinks
18. Regular Soft Drinks
19. Diet Soft Drinks
20. Ready Meals (excludes pizza)
21. Pizza
22. Meat
23. Fish
24. Oily fish
25. Meat Products/Processed Meats, Poultry, Fish, Meat Alternatives etc (e.g. pies, sausages, pastries, burgers etc)
26. Potato Products
27. Yoghurts & Fromage Frais
28. Other Dairy (Cheese/Milk)
29. Puddings
30. Fats & Oils
31. Cooking Sauces, Table Sauces & Dressings
32. Dips & Salads
33. Soups
34. Biscuits
35. Savoury Biscuits & Crackers
36. Cakes

The above food and drink categories have been aligned to those food and drink categories included in Public Health England's (PHE) sugar[4] and calorie[5] reduction programmes.

For all 36 categories, the following data is available:

- total spend and volume
- spend and volume on promotion and by type of promotion
- nutritional values (calories, fat, saturated fat, protein, sugar, fibre and sodium).

The analyses within this report have been conducted by the FSA in NI. Data presented within this report was collected in 2014 (52 weeks ending 4th January 2015) and 2018 (52 weeks ending 30th December 2018). This report will only compare data in 2014 to 2018 data.

Kantar FMCG has suggested some interpretations of the data provided within this report which are based on observations of the retail environment and wider trends and are not necessarily supported by evidence.

Results

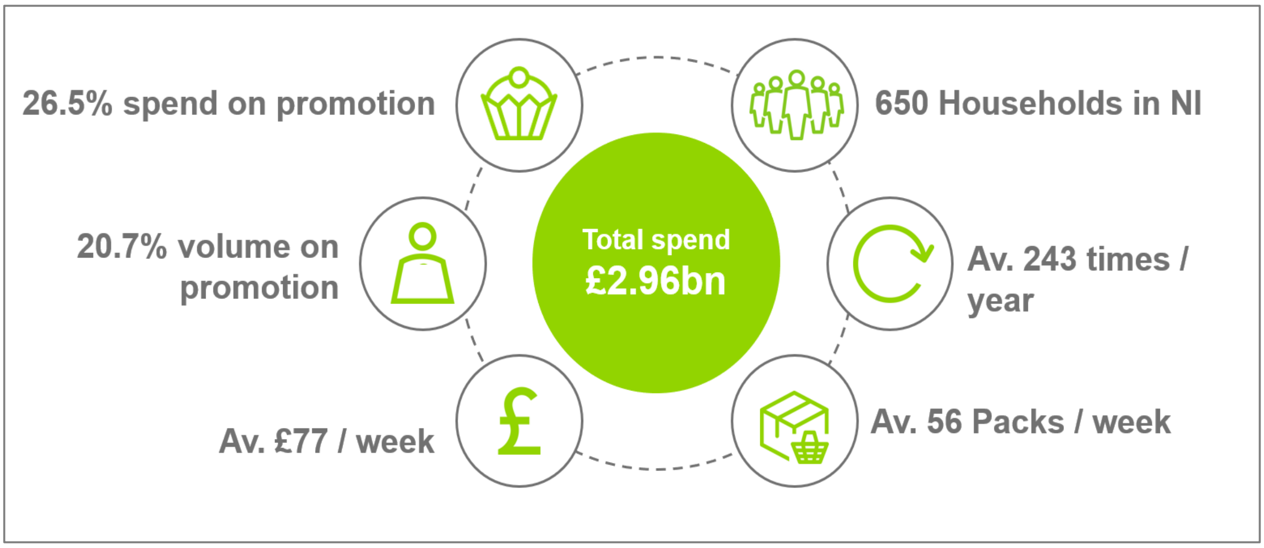
Northern Ireland headlines

In 2018, the total spend on take home food and drink purchases in NI was £2.96 billion. Since 2014 there has been a 5.6% increase on total spend.

On average, in 2018, NI consumers spent £77 per week on 243 shopping occasions. Both the average number of shopping occasions and the average price of the shopping basket increased in 2018 when compared to 2014.

In 2018, 26.5% of the total spend and 20.7% of total volume of take home food and drink purchases were on promotions.

Figure 1. Headline figures for NI in 2018.



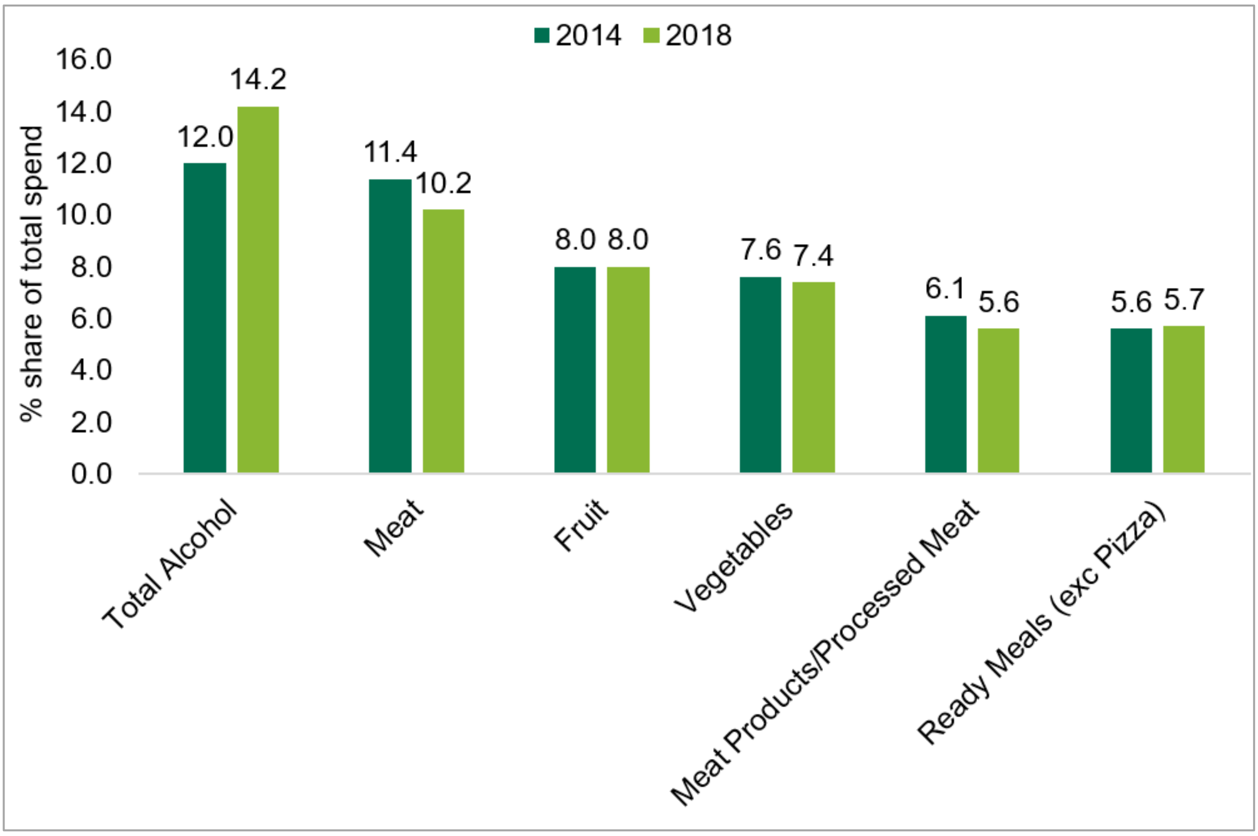
Spend

In 2018, Total Alcohol had the highest share of total spend at 14.2% (Figure 2), whilst Bread with Additions had the lowest share of total spend at 0.3% (data not shown). Total Alcohol and Bread with Additions have consistently had the highest and lowest share of spend since 2014 (data not shown).

The food and drink categories included in Figure 2 have also had the highest share of total spend consistently since 2014.

Figure 2 also shows that NI consumers are spending less on Meat, Vegetables and Meat Products/Processed Meat in 2018 compared to 2014.

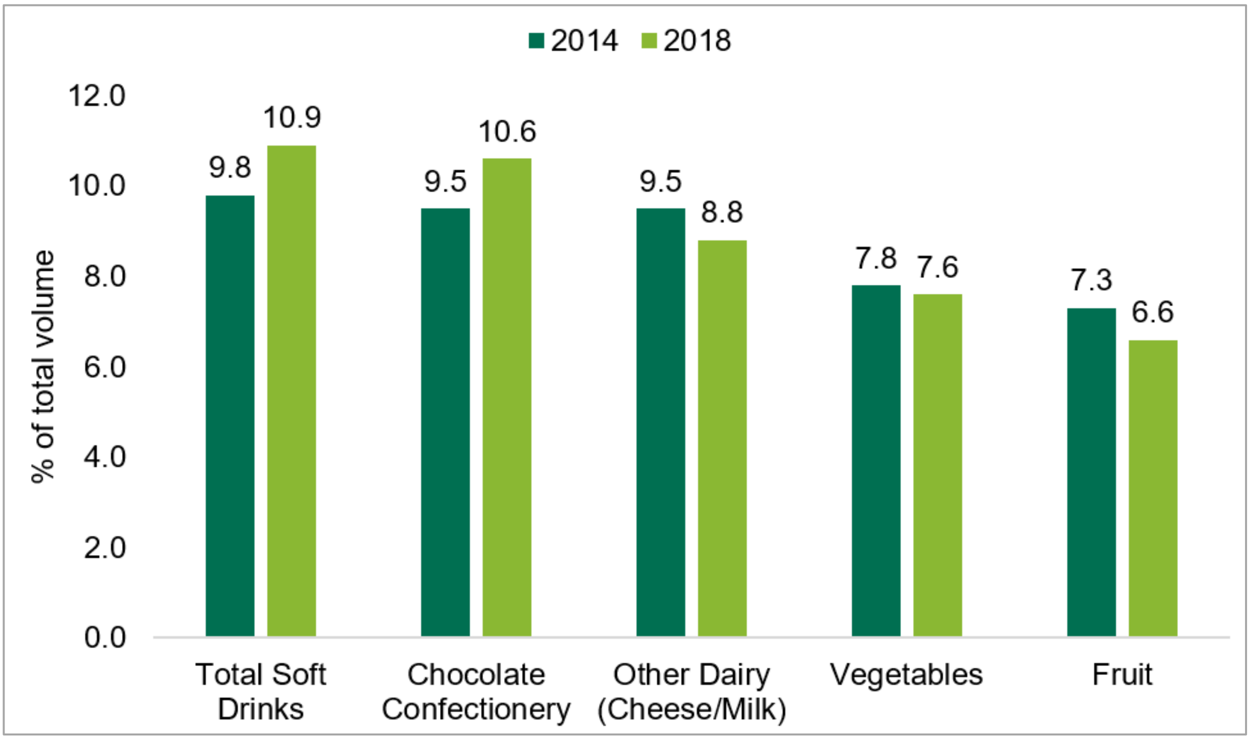
Figure 2. Top six food and drink categories with the highest percentage (%) share of take home food and drink purchases (by total spend) in 2014 and 2018.



Volume

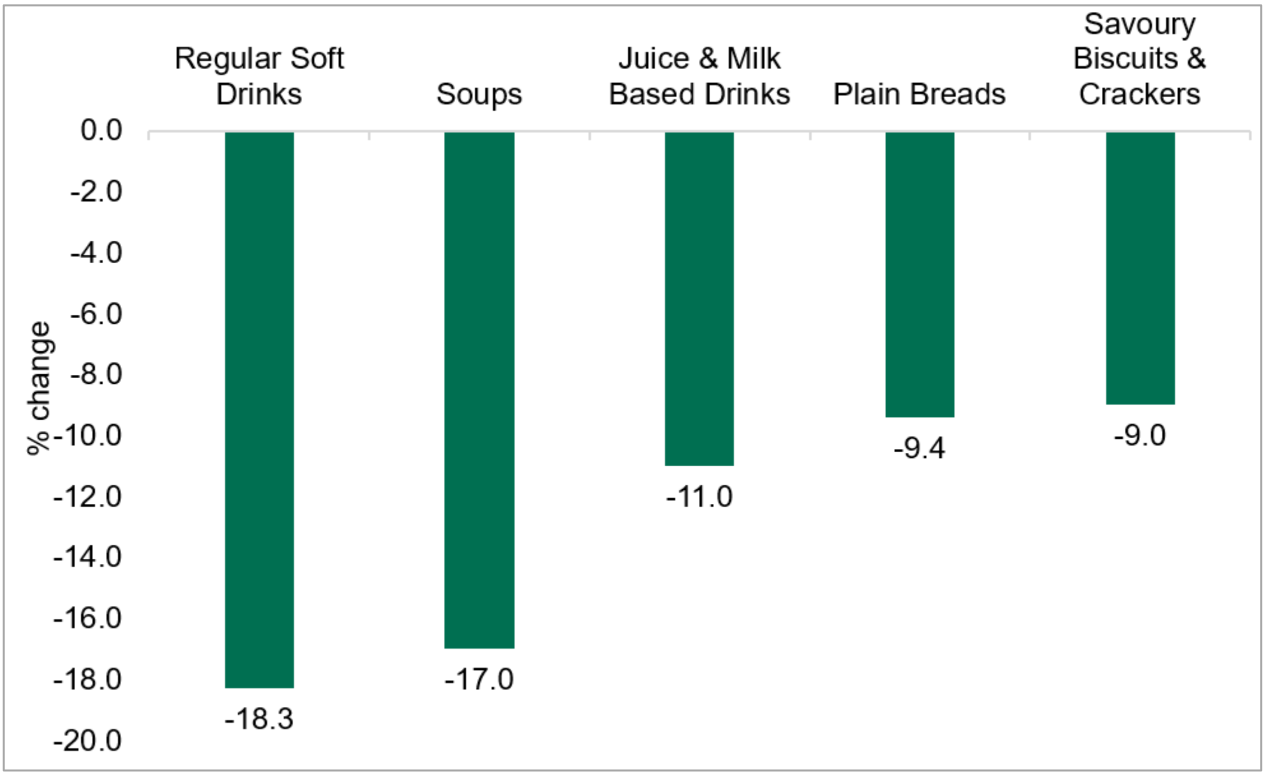
In 2018, Total Soft Drinks had the highest share of take home food and drink purchases by total volume at 10.9% (Figure 3) and Oily Fish had the lowest share at 0.1% (data not shown). The share of total volume on Chocolate Confectionery has increased in 2018 when compared to 2014. In 2018, Other Dairy, Vegetables and Fruit decreased in share of total volume when compared to 2014.

Figure 3. Top five food and drink categories with the highest percentage (%) share of take home food and drink purchases (by total volume) in 2014 and 2018.



Figures 4 and 5 show the take home food and drink categories that have the greatest increases and decreases in total volume from 2014 to 2018. Regular Soft Drinks and Soups are the top two categories with the greatest decreases in total volume since 2014 (Figure 4).

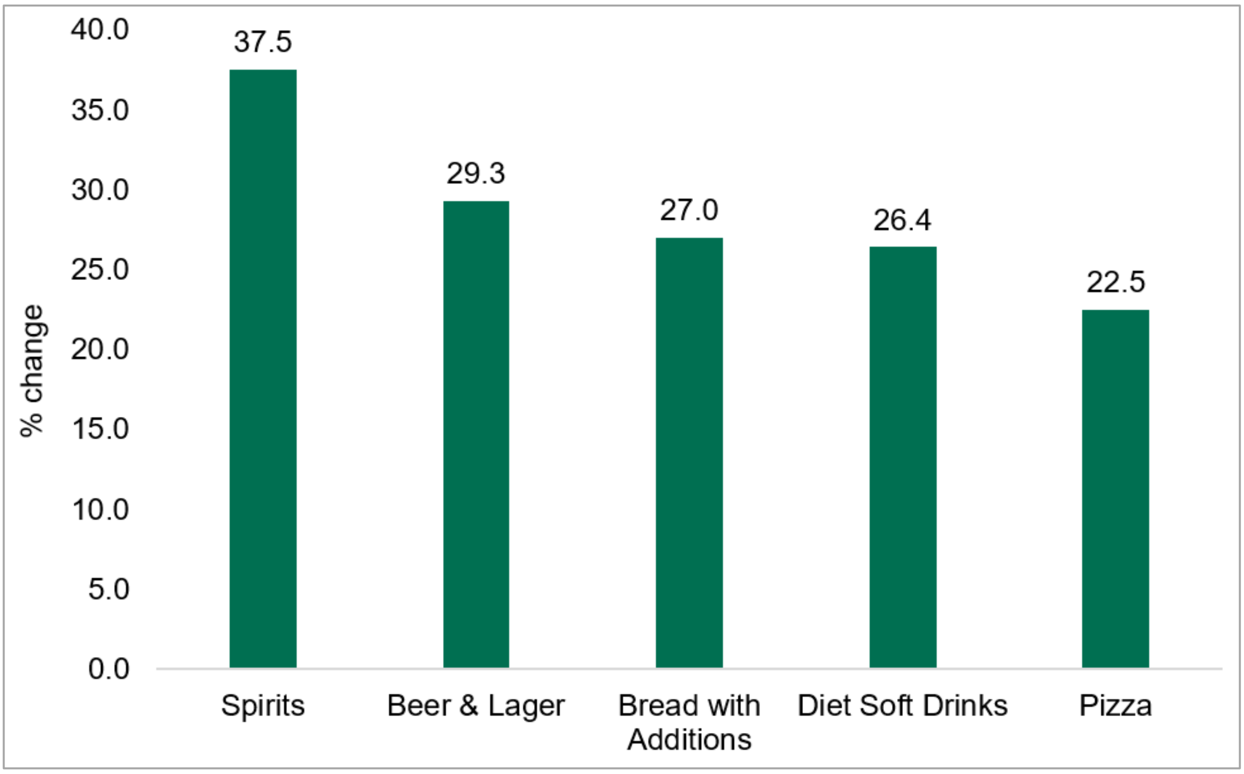
Figure 4. Top five take home food and drink categories with the greatest percentage (%) decrease in total volume in NI from 2014 to 2018.



The food and drink categories with the greatest increase in total volume in 2018, in comparison to 2014 (Figure 5) were Spirits and Beer & Lager (37.5% and 29.3% respectively). Also, Bread with Additions and Pizza have increased in total volume in 2018 in comparison to 2014, at 27% and 22.5% respectively.

Following the introduction of the Soft Drinks Industry Levy[1] the data indicates that there has been a decrease in total volume of Regular Soft Drinks (Figure 4), and an increase in total volume of Diet Soft Drinks (Figure 5).

Figure 5. Top five take home food and drink categories with the greatest percentage (%) increase in total volume in NI from 2014 to 2018.



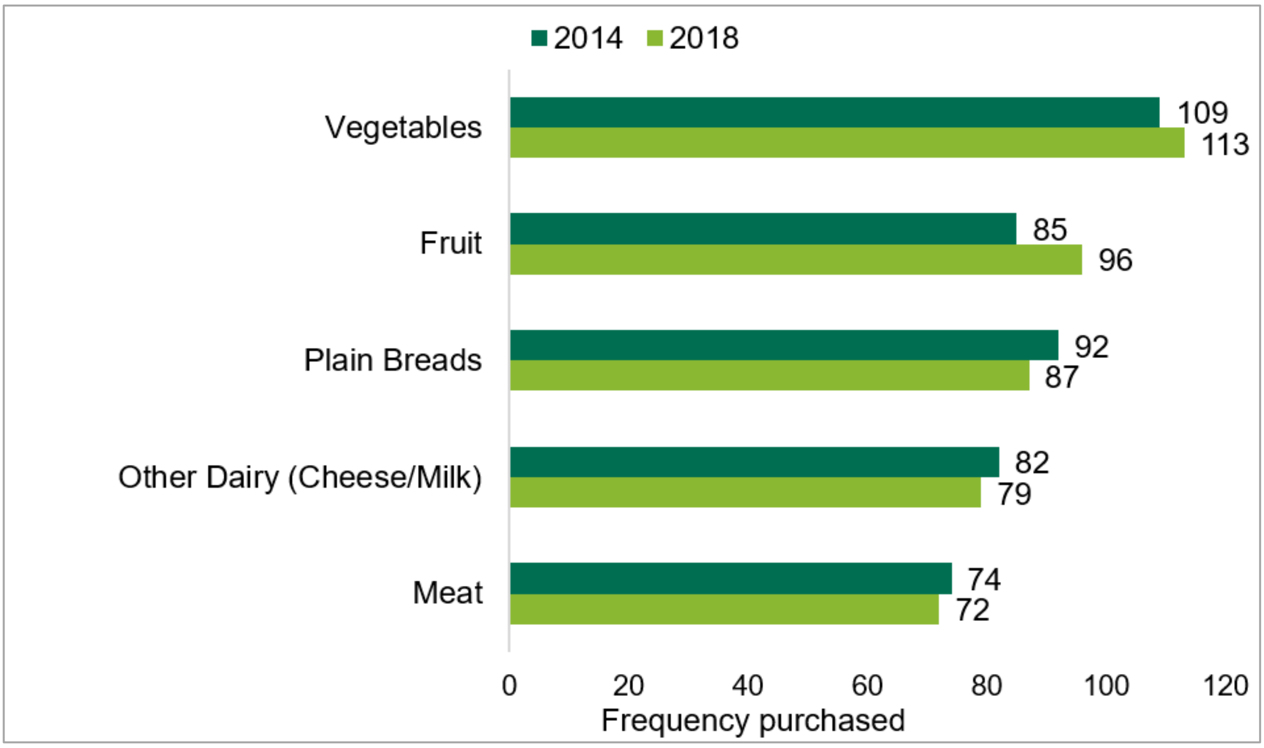
Frequency

On average, NI consumers purchased Vegetables on 113 different shopping occasions in 2018 (Figure 6). The frequency in which NI consumers purchased both Fruit and Vegetables increased in 2018 when compared to 2014 (Figure 6), while the percentage share of total spend and total volume of Fruit and Vegetables has remained fairly stable (Figures 2 and 3).

In contrast, the frequency of consumers purchasing Plain Breads has decreased (Figure 6) in conjunction with a decrease in the total volume of Plain Breads (Figure 4). In addition, the total volume of Bread with Additions has increased since 2014 (Figure 5).

The frequency in which NI consumers purchased Other Dairy and Meat decreased in 2018 when compared to 2014 (Figure 6). This is in line with a reduction in share of total spend (data not shown) and total volume for Other Dairy (Figure 3) and a reduction in share of total spend for Meat (Figure 2).

Figure 6. Top five food and drink categories purchased most frequently in 2014 and 2018.



Demographic purchasing

Kantar FMCG data is analysed based upon different demographics, including socio-economic status, lifestage and urban/rural classification. Urban and rural families have been profiled using ACORN postcode profiling. Due to the limited sample sizes, we cannot directly compare demographics.

Beer & Lager and Spirits were among the top five food and drink categories showing the greatest increases in total volume since 2014 among both ABC1 and C2DE households, with a greater increase for ABC1 households (Figures 7 and 8).

However, C2DE households had a greater increase in total volume of Total Alcohol (26.9%) (Figure 8) than ABC1 households (16.3%) since 2014 (data not shown).

Figure 7. Top five take home food and drink categories with the greatest percentage (%) increase in total volume from 2014 to 2018 for ABC1 households.

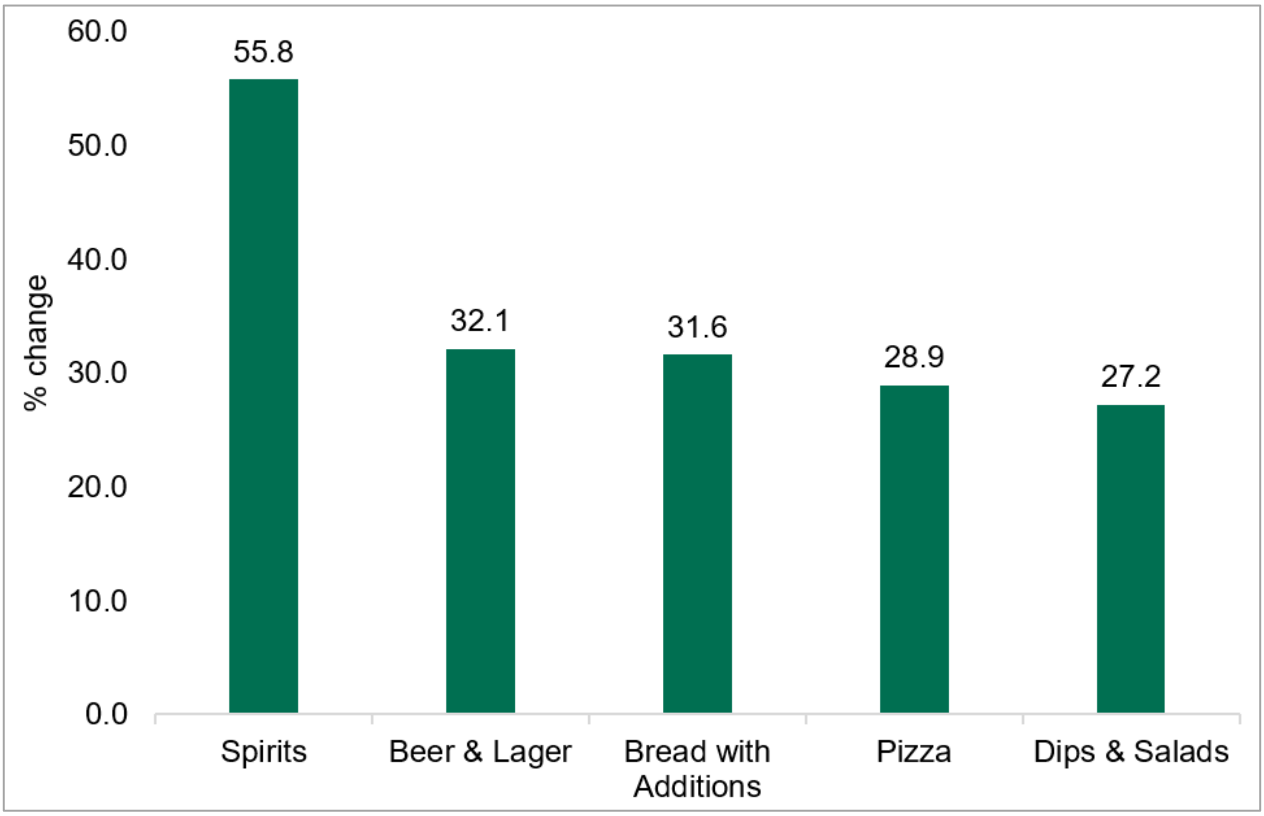
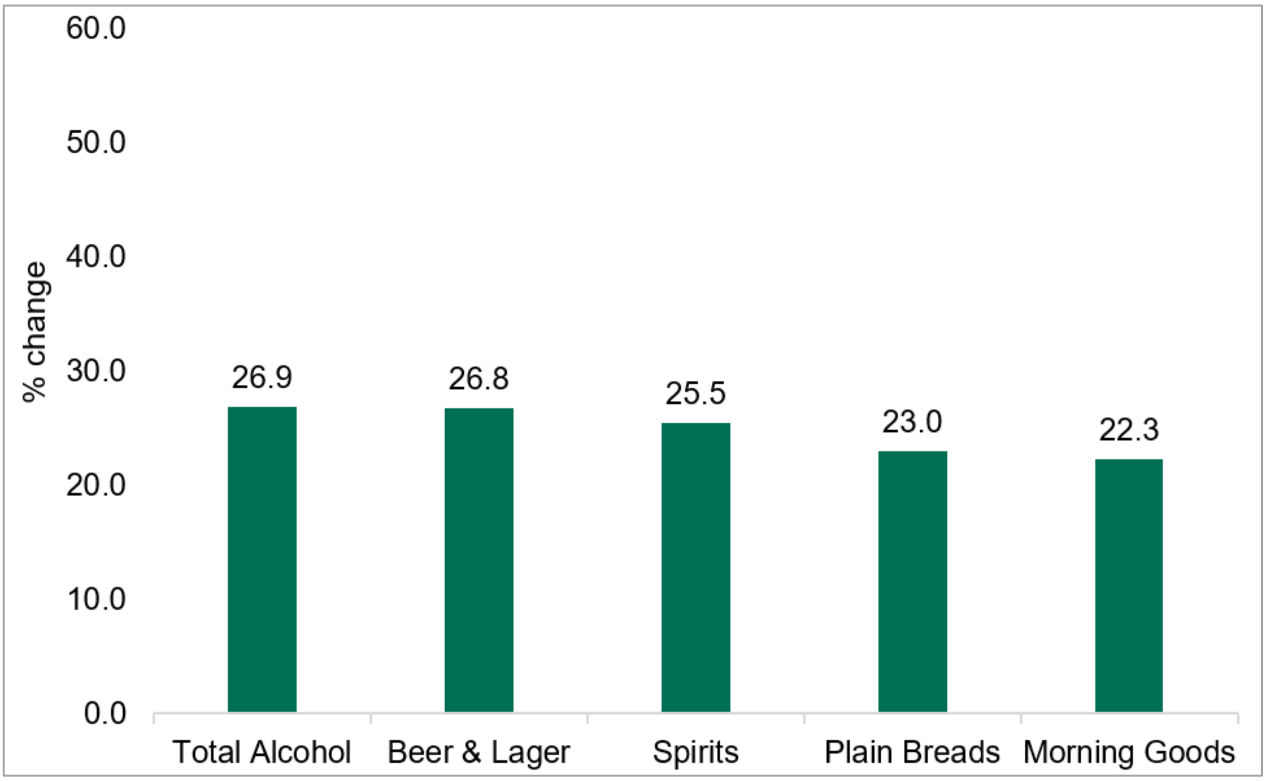


Figure 8. Top five take home food and drink categories with the greatest percentage (%) increase in total volume from 2014 to 2018 for C2DE households.



The top five food and drink categories with the greatest decreases in total volume for both ABC1 and C2DE households were categories that are included in PHE's sugar[4] and calorie[5] reduction programmes (Figures 9 and 10), with the exception of Plain Breads. This means that NI consumers purchased less of these categories compared to 2014.

Savoury Biscuits & Crackers and Soups were categories amongst the top five food and drink categories that both ABC1 and C2DE households had the greatest decreases in total volume since 2014, with a greater decrease seen in C2DE households (Figures 9 and 10).

ABC1 households had an increase of 27.2% in total volume of Dips & Salads purchased since 2014 (Figure 7), while C2DE households had a decrease of 10.3% (Figure 10).

Additionally, C2DE households had an increase of 23% in total volume of Plain Breads purchased (Figure 8), while ABC1 households had a 10.9% decrease in total volume of Plain Breads purchased (Figure 9).

Figure 9. Top five take home food and drink categories with the greatest percentage (%) decrease in total volume from 2014 to 2018 for ABC1 households.

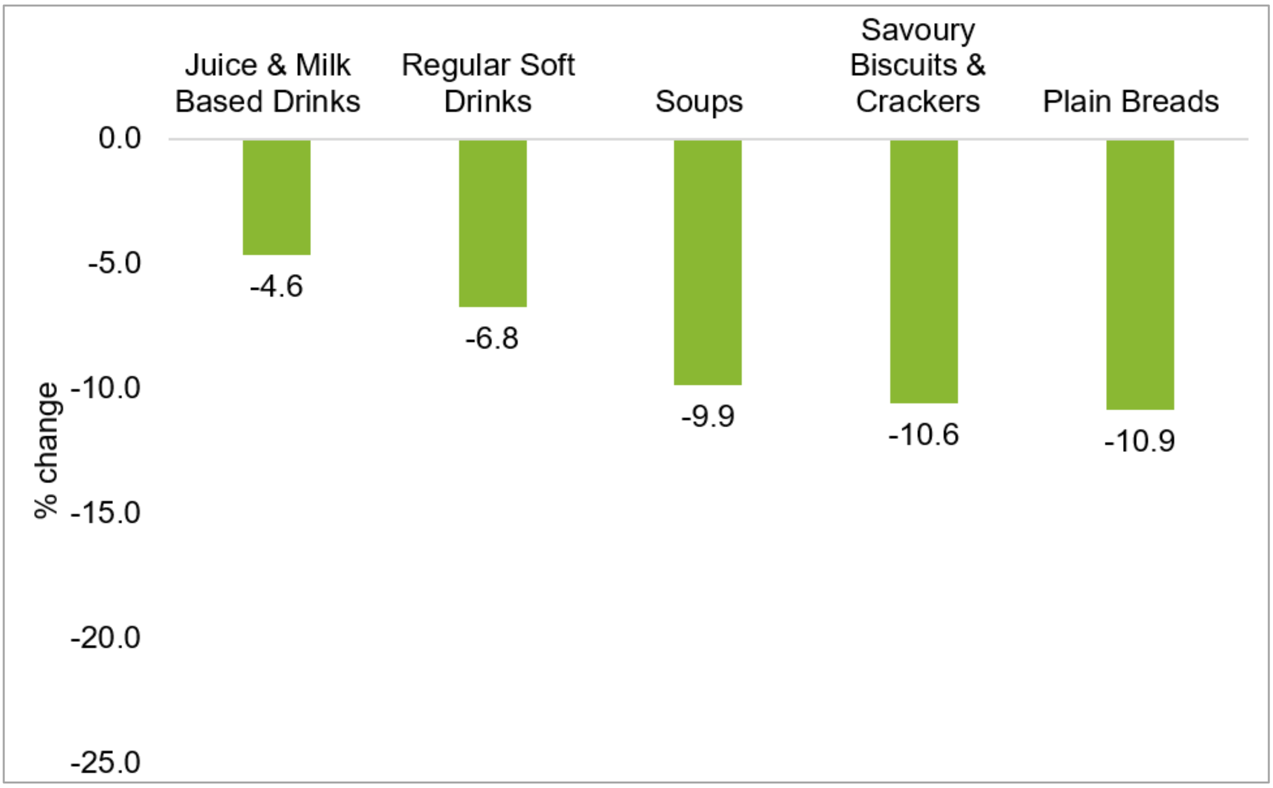
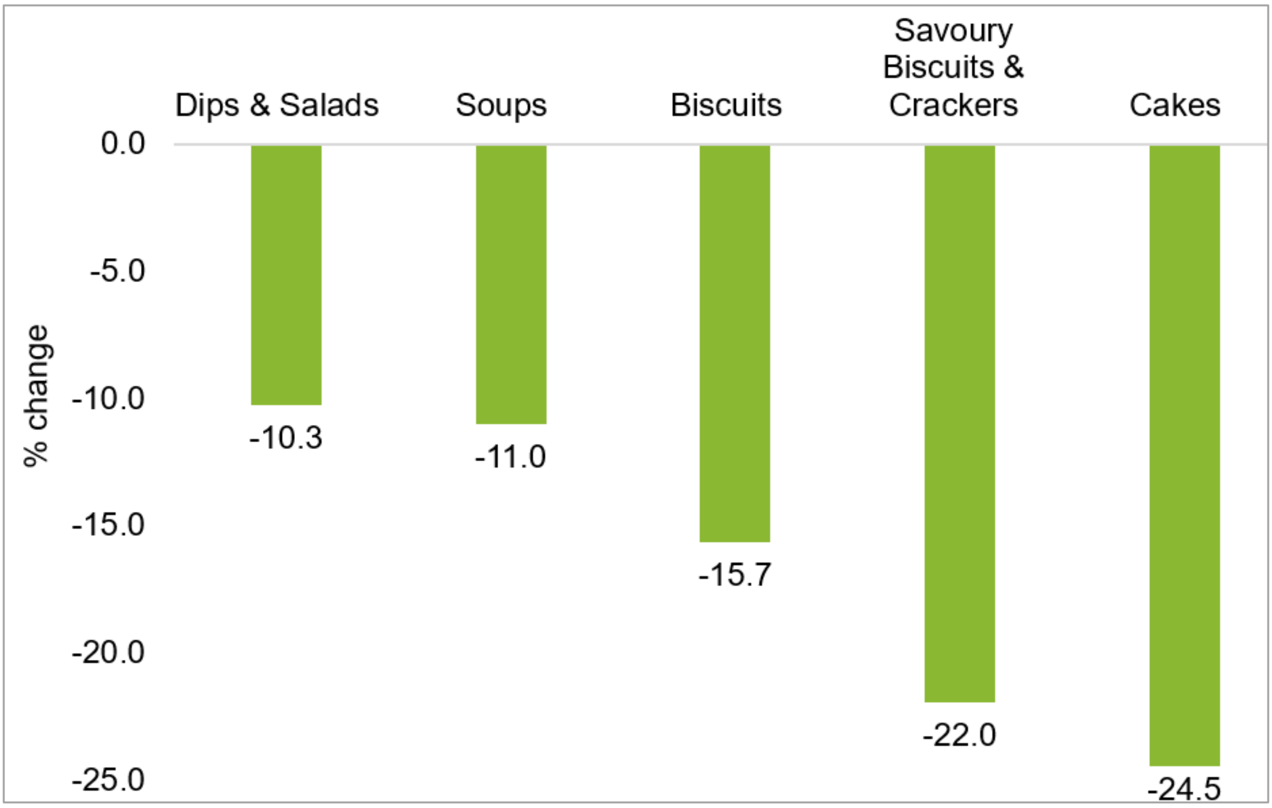
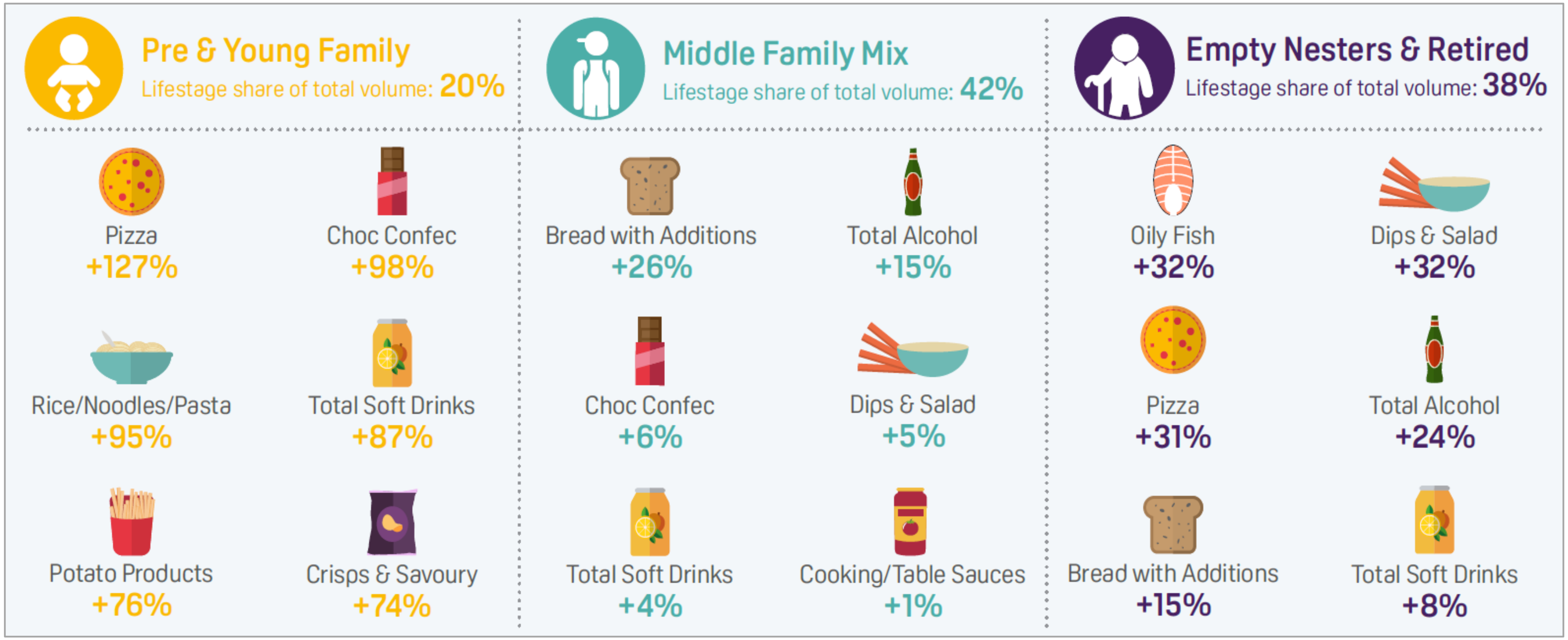


Figure 10. Top five take home food and drink categories with the greatest percentage (%) decrease in total volume from 2014 to 2018 for C2DE households.



The food and drink categories that have increased in total volume (purchased by lifestage) since 2014 to 2018 are shown in Figure 11. There has been a 127% increase in total volume of Pizza purchased by the Pre & Young Family lifestage. For the Middle Family Mix lifestage there has been an increase in purchasing of Bread with Additions by 26% since 2014. Also, since 2014 there has been a 32% increase in total volume purchased of Oily Fish and Dips & Salads for the Empty Nesters & Retired lifestage.

Figure 11. Top six food and drink categories increasing in volume purchased since 2014 to 2018 for each lifestage.



Nutrient purchasing

Kantar FMCG collects data on nutritional values from product packaging on take home food and drink purchases. The nutrient values are combined with the purchasing information to provide nutrient volumes by product, food category and for the total take home food and drink market. Data is captured on the following eight nutrients;

- Calories
- Fat
- Saturated fat
- Carbohydrates
- Total sugar
- Fibre
- Protein
- Sodium

Based on take home food and drink purchases in 2018, NI consumers purchased more total sugar, fat and saturated fat than the recommended daily intake (RDI)[3], and not enough fibre (Figure 12). This data is in line with the findings of the National Diet and Nutrition Survey (NDNS)[2]. However, purchasing of total sugar and fat per person per day has decreased by 8g respectively in 2018 in comparison to 2014, whilst the purchasing of protein and fibre decreased by 1g. Purchasing of carbohydrates, saturated fat and sodium per person per day did not decrease in 2018 in comparison to 2014 (Figure 12). This data only represents what is purchased for use within the home, therefore food and drink consumed out of home e.g. takeaways, on the go or in restaurants are not represented.

Figures 13 and 14 show the food and drink categories with the highest contribution to total sugar and calorie purchasing. Fruit is the highest contributor to total sugar purchasing (Figure 13). It is important to note that Kantar FMCG data does not differentiate between natural and free sugars. However, from the categories containing free sugars, the highest contributor of free sugars in 2018 comes from Chocolate Confectionery. In Figure 14, it highlights that Plain Breads are the highest contributor to calorie purchasing in 2014 and 2018.

Figure 12. Take home food and drink purchasing of nutrients per person per day (g) in 2018 vs 2014.

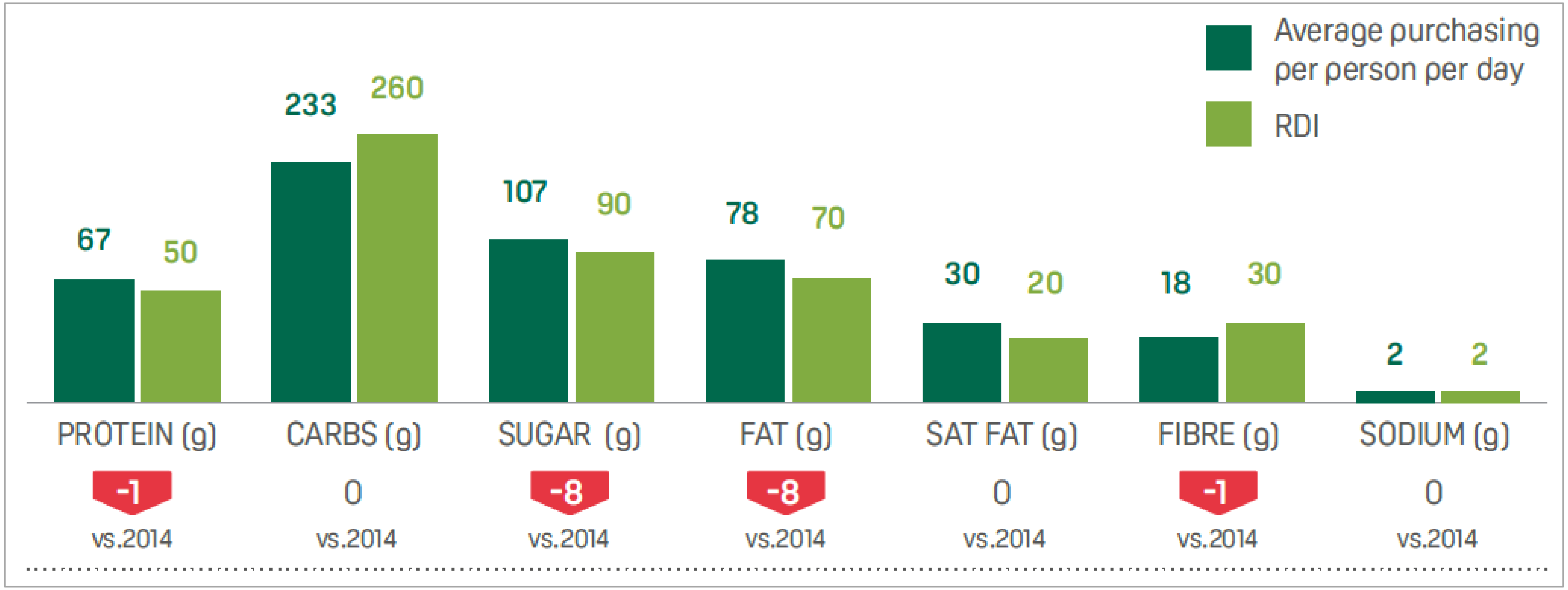


Figure 13. Top ten percentage (%) contributors to total sugar purchasing in NI consumers based on take home food and drink purchases in 2014 and 2018.

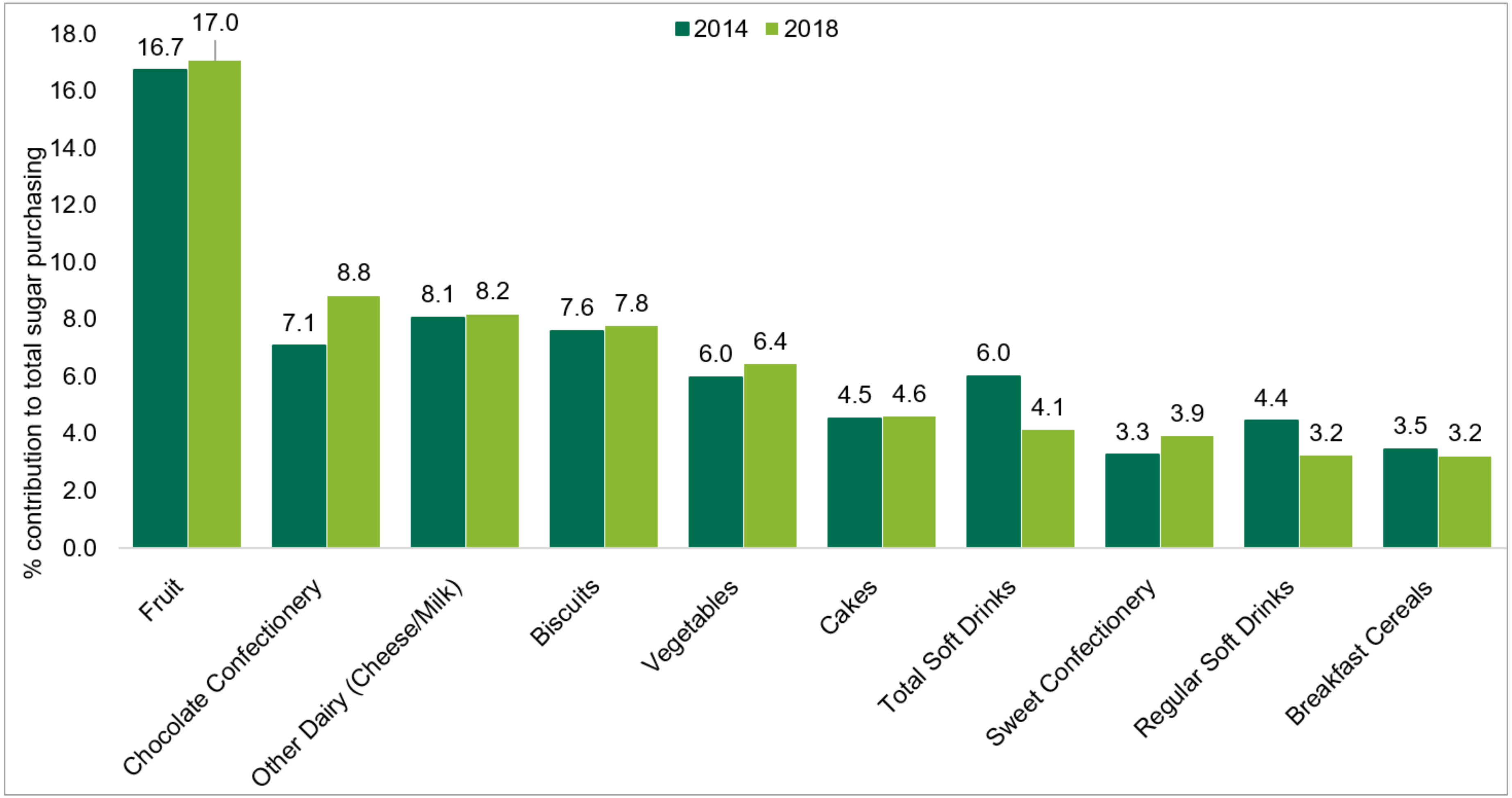
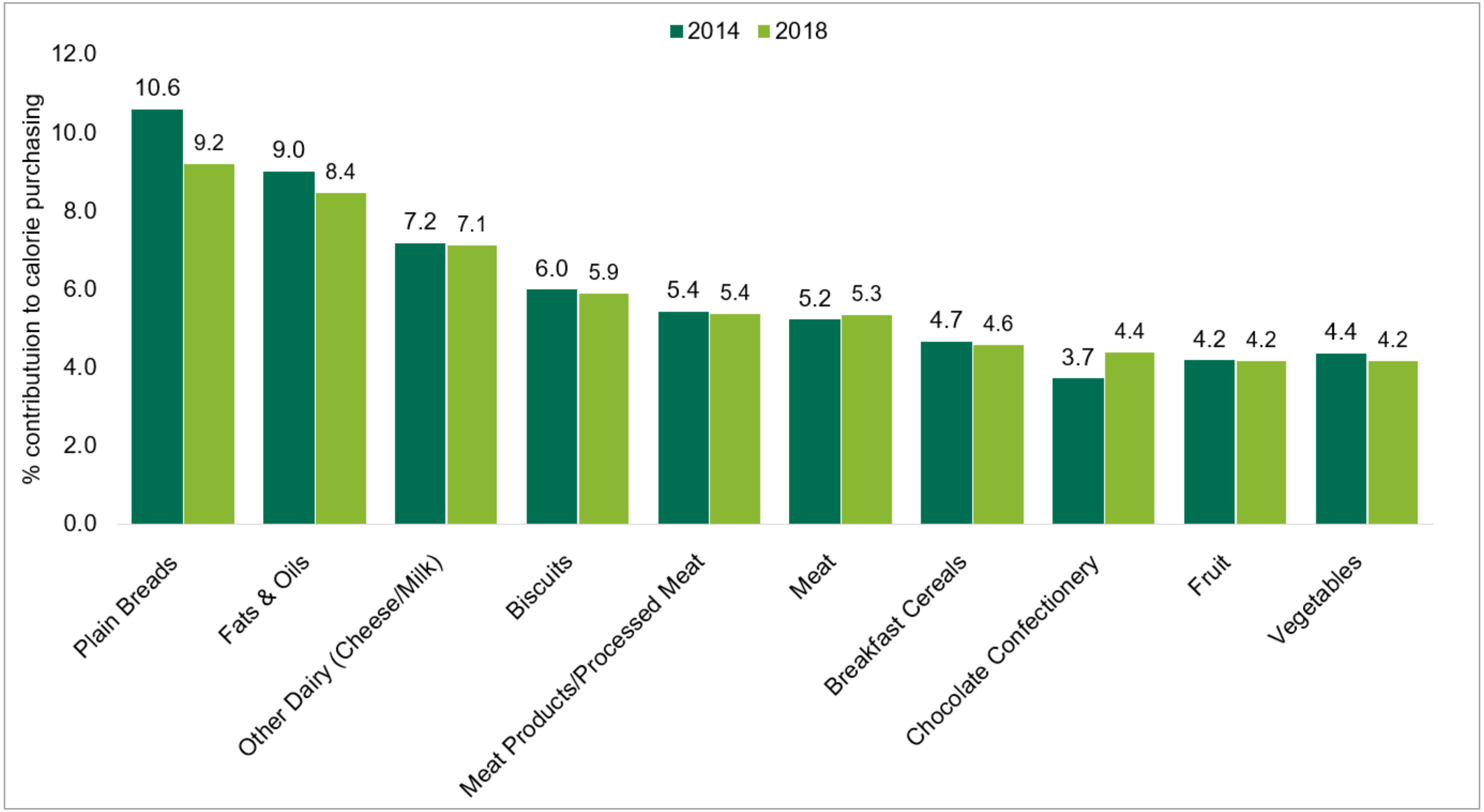


Figure 14. Top ten percentage (%) contributors to calorie purchasing in NI consumers based on take home food and drink purchases in 2014 and 2018.



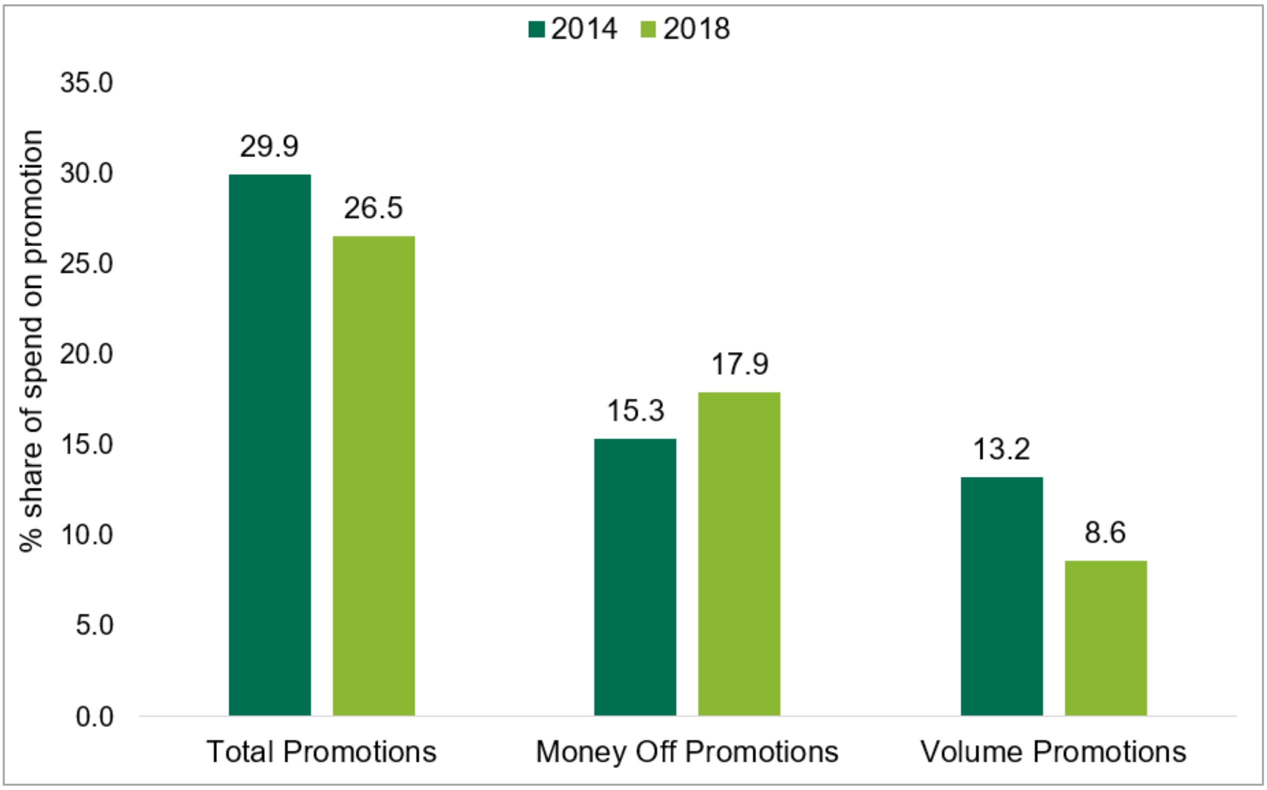
Promotions headlines

The Department of Health and Social Care (DHSC) outlined proposed actions on restricting promotions in the 'Childhood Obesity: a plan for action. Chapter 2' report[6]. In 2019, the DHSC consulted on restricting promotions of products high in fat, sugar and salt (HFSS) by location and by price[7] and are further committed to this in their 'Tackling obesity: empowering adults and children to live healthier lives'[8] policy.

In comparison to 2014, total spend on take home food and drink purchases on promotion in NI has decreased from 29.9% to 26.5% in 2018 (Figure 15). Figure 15 also shows that volume promotions (e.g. buy one get one free) have decreased since 2014, whilst money off promotions have increased.

Kantar FMCG reported that the data in Figure 15 is reflective of the wider Great Britain market, where retailers are moving to everyday low prices and the popularity of the discounters[9] has reduced the amount of money spent on promotions.

Figure 15. Percentage (%) share of spend on promotion based on promotion type in NI in 2014 and 2018.

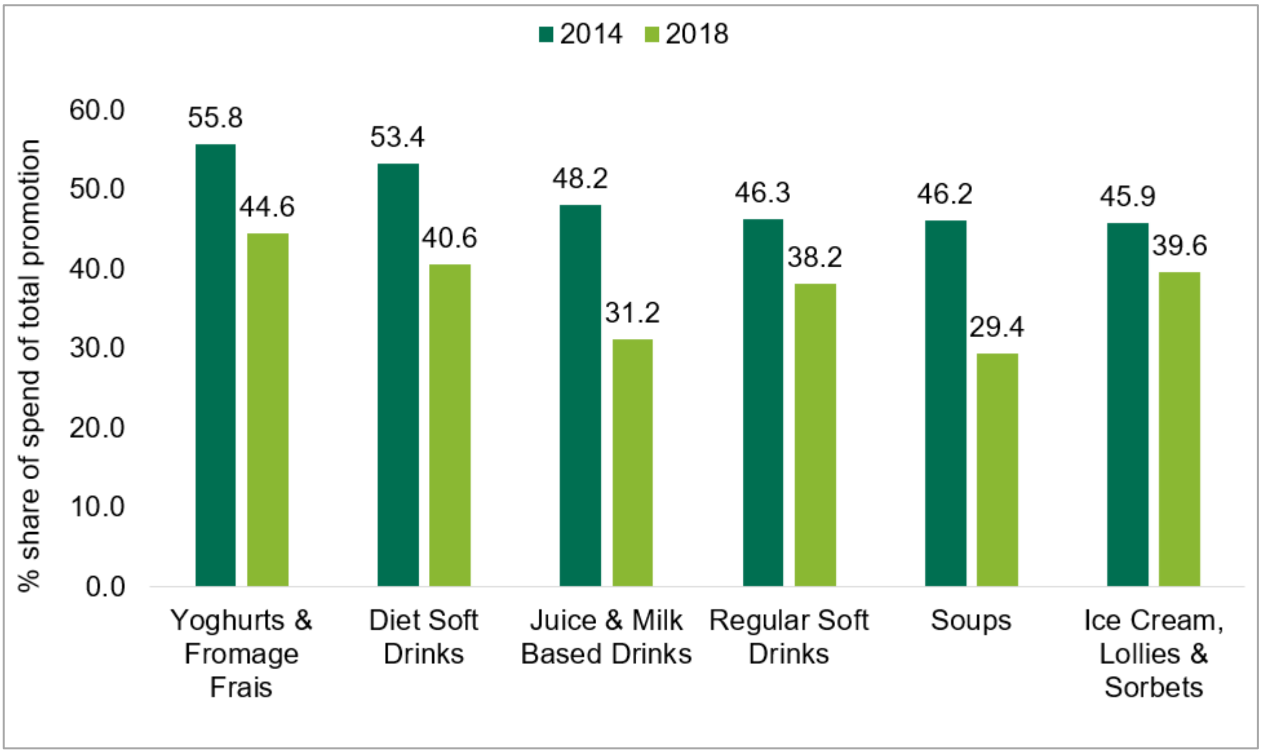


Spend on total promotion

In 2018, the Yoghurts & Fromage Frais category had the highest share of spend on total promotions at 44.6% (Figure 16) and Plain Breads had the lowest share of spend on total promotions at 9.2% (data not shown). Kantar FMCG suggested that as Plain Breads are a staple food item within the diet and bought frequently by the NI consumer (Figure 6), promotional activity for this food category is low and/or not required regularly to generate sales.

The majority of the food and drink categories had a decrease in spend on total promotions in 2018, in comparison to 2014 (Figure 16). Some categories had a slight increase in share of spend on promotion, for example Spirits had the greatest increase in spend on total promotion of 7% from 2014 to 2018 (26% and 33% respectively, data not shown).

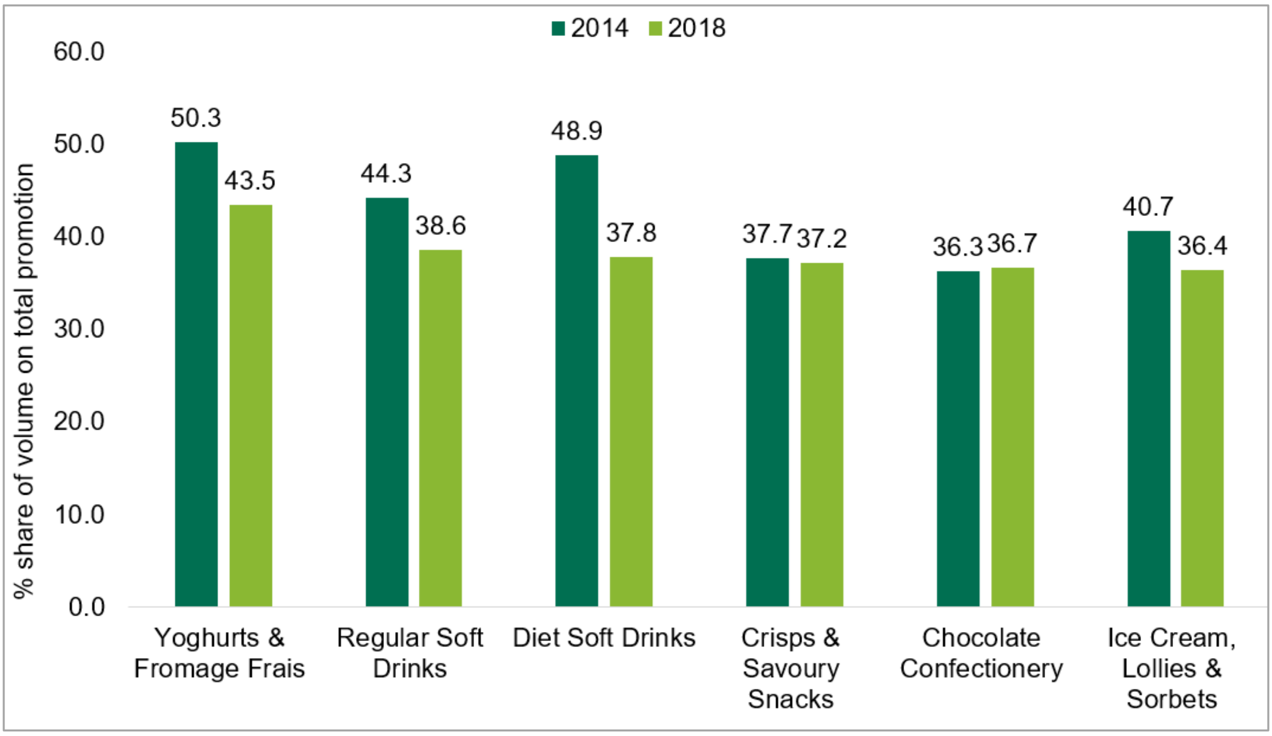
Figure 16. Top six take home food and drink categories with the highest percentage share (%) of spend on total promotions in 2014 and 2018.



Volume on total promotion

In 2014 and 2018, the Yoghurts & Fromage Frais category had the highest share of volume on total promotions at 50.3% and 43.5% respectively (Figure 17). In 2018, Plain Breads had the lowest share of volume on total promotions at 10.7% (data not shown).

Figure 17. Top six take home food and drink categories with the highest percentage share (%) of volume on total promotions in 2014 and 2018.



HFSS and healthier food and drink on promotion

To further align with the DHSC consultation on restricting promotions[7], the FSA in NI and Kantar FMCG grouped 36 food and drink categories (as seen on page 10) as either high in fat, sugar and salt (HFSS) or healthier foods and drinks (see Appendix 1 for the specific categories).

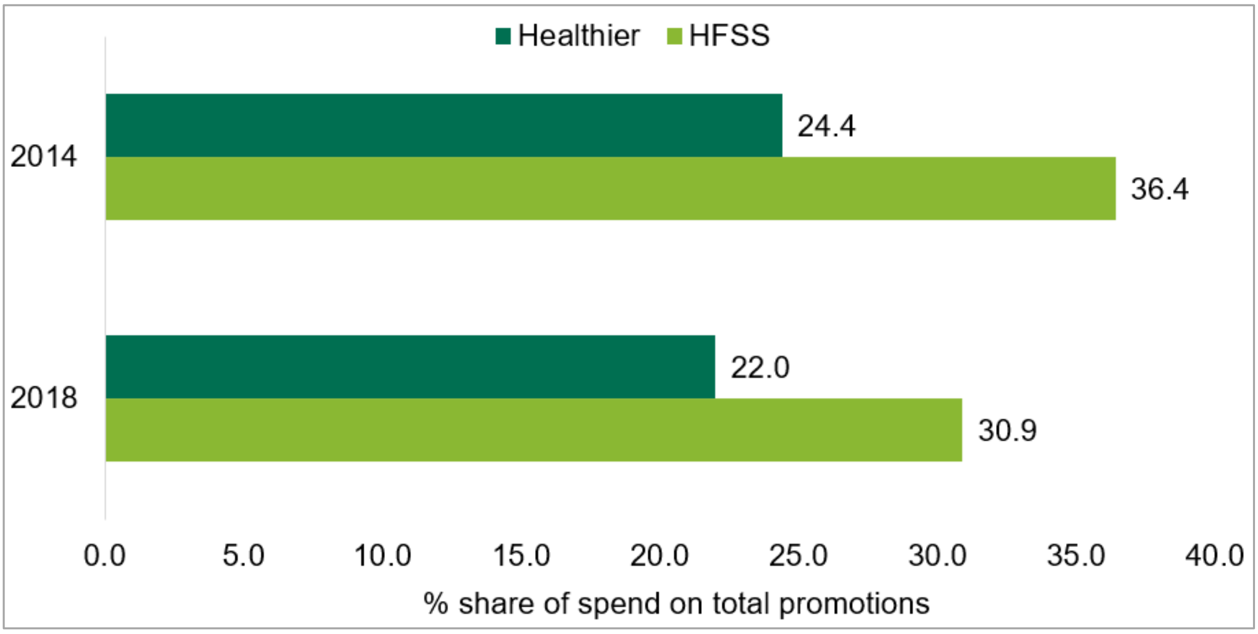
The following three categories were excluded from this analysis;

- Total Alcohol
- Beer & Lager
- Spirits

Fats & Oils were excluded as the products within this category were predominantly naturally high in fat and would skew analysis. Total Food and Drink and Total Soft Drinks were also excluded as other food categories included in the analysis form the basis of these two categories.

There has been a reduction in spend on total promotions for both HFSS and healthier foods in 2018 in comparison to 2014. The reduction in spend on total promotions since 2014 was greater for HFSS foods than healthier foods, (5.5% and 2.4% respectively). However, HFSS foods still had a higher share of spend on total promotions than healthier foods in 2018 when compared to 2014. In other words, NI consumers are still spending more on HFSS foods than healthier foods when on promotion but overall, the total spend on promotion has reduced.

Figure 18. Percentage (%) share of spend on total promotions for HFSS and healthier foods in 2014 and 2018.



Demographic purchasing on promotion

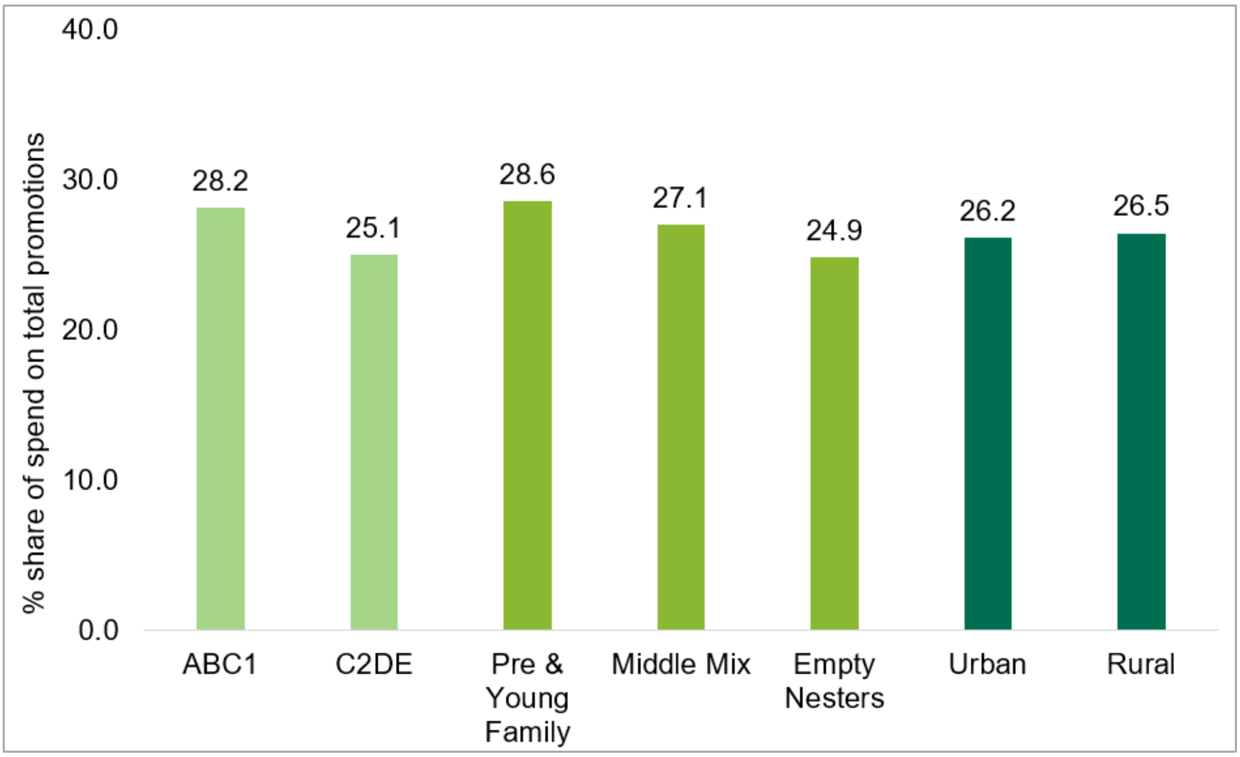
In 2018, ABC1 households and the Pre & Young Family lifestage had a higher share of promotional spend (Figure 19), when compared to C2DE households and other lifestages. This finding is similar to 2014 except that in 2014, the Pre & Young Family lifestage had the lowest share of spend on promotion than the other lifestages (data not shown).

Kantar FMCG provided the following possible explanations as to why ABC1 households spend more than C2DE households on promotion;

- ABC1 households have a higher level of disposable income and are therefore more likely to purchase ‘nonessential’ foods, which are more likely to be on promotion.
- Households from lower socio-economic backgrounds often opt for retailers ‘own brand’ products rather than branded promotional products, as these are often cheaper without any promotion.

Further research on NI consumers’ attitudes and behaviours towards food and drink promotions would provide clarity on why certain demographics have a higher spend on promotion than others.

Figure 19. Percentage (%) share of spend on total promotions in 2018 by demographic type.



Conclusions

The NI population spent more money on take home food and drink and shopped more frequently in 2018 than in 2014. In 2018, NI consumers bought more Chocolate Confectionery and less Oily Fish than in 2014 and spent more on Total Alcohol and less on Meat and Vegetables. Following the introduction of the Soft Drinks Industry Levy[1], the data indicates that there has been a decrease in total volume of Regular Soft Drinks (-18.3%), and an increase in total volume of Diet Soft Drinks (+26.4%).

In 2018, the Pre & Young Family lifestage purchased more Pizza, Chocolate Confectionery, Total Soft Drinks, Potato Products, Crisps & Savoury Snacks than in 2014, all of which are included in PHE's sugar[4] and calorie reduction[5] programmes. In contrast, the Empty Nesters & Retired lifestage purchased more Oily Fish (+32%) than in 2014 but also purchased more Pizza (+31%) and Total Alcohol (+24%).

The take home food and drink purchasing data correlates with the results of the NDNS[2] which shows that NI households are consuming more sugar, fat and saturated fat than the RDI[3] and not enough fibre. Based on the take home food and drink data, the highest contributor of free sugars purchasing among NI consumers in 2018 was Chocolate Confectionery and the highest contributor of calories purchasing came from Plain Breads.

Whilst there has been a reduction in spend on promotion for both HFSS and healthier foods since 2014, NI consumers are still spending more on HFSS foods on promotion than healthier foods. The reasons why ABC1 households and the Pre & Young Family lifestage spent more on food on promotion are not entirely clear and this could be explored further in future research.

The findings of this report provide a valuable insight on how consumer purchasing patterns in NI influence dietary health outcomes. This information will be considered in conjunction with NI specific data from the NDNS[2] and the FSA's Food and You[10] Survey to build a picture of what NI consumers are eating, buying and thinking with regards to food. The findings will be important for future dietary health policy decisions and any knowledge gaps identified will considered in future research.

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Appendices

Appendix 1: HFSS and healthier food categories

30 food and drink categories analysed as part of this report.

High in fat, sugar and salt (HFSS):

- Morning Goods
- Breakfast Cereals
- Juice & Milk Based Drinks
- Chocolate Confectionery
- Sweet Confectionery
- Ice cream, Lollies & Sorbets
- Crisps & Savoury Snacks
- Regular Soft Drinks
- Ready Meals (excludes pizza)
- Pizza
- Meat Products/Processed Meats, Poultry, Fish, Meat Alternatives etc
- Potato Products
- Yoghurts & Fromage Frais
- Puddings
- Cooking Sauces, Table Sauces & Dressings
- Dips & Salads
- Biscuits
- Savoury Biscuits & Crackers
- Cakes

Healthier:

- Plain Breads
- Bread with Additions
- Pasta, Rice, Noodles including flavoured varieties
- Vegetables
- Fruit
- Diet Soft Drinks
- Meat
- Fish
- Oily Fish
- Other Dairy (Cheese/Milk)
- Soups

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