THE SHOPPER VIEW 2025

Latest developments shaping the way we shop

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10th Sept 11am

Shopper Intelligence
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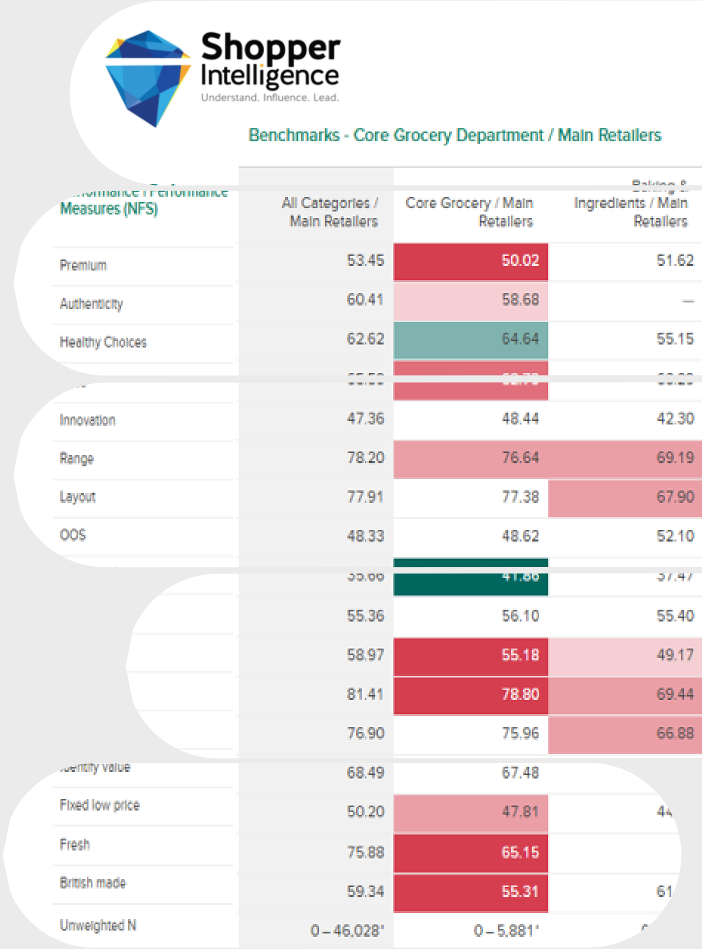
Where does the insight come from?

- Quarterly shopper tracking survey
- Full Path to purchase
- All Major retailers
- Category level (225)
- Robust samples (n=70-80K)

What do we deliver?

- Category level insights
- Benchmarking / context
- Indisputable shopper facts
- Expert opinion
- Online data tool



Measures (NFS)	All Categories / Main Retailers	Core Grocery / Main Retailers	Ingredients / Main Retailers
Premium	53.45	50.02	51.62
Authenticity	60.41	58.68	–
Healthy Choices	62.62	64.64	55.15
Innovation	47.36	48.44	42.30
Range	78.20	76.64	69.19
Layout	77.91	77.38	67.90
OOS	48.33	48.62	52.10
		41.88	
	55.36	56.10	55.40
	58.97	55.18	49.17
	81.41	78.80	69.44
	76.90	75.96	66.88
	68.49	67.48	
Fixed low price	50.20	47.81	
Fresh	75.88	65.15	
British made	59.34	55.31	
Unweighted N	0 – 46,028'	0 – 5,881'	

MAT Q2 2025

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Over 1 Million Interviews - 15 years ongoing tracking

Contents

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The generational divide

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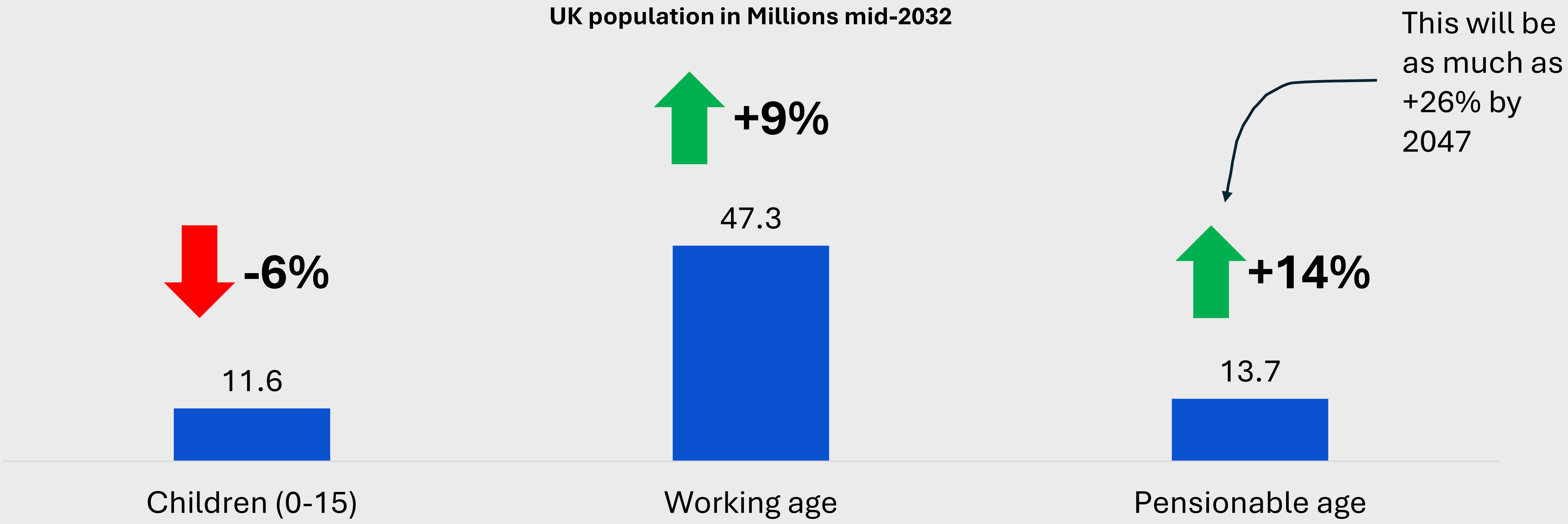
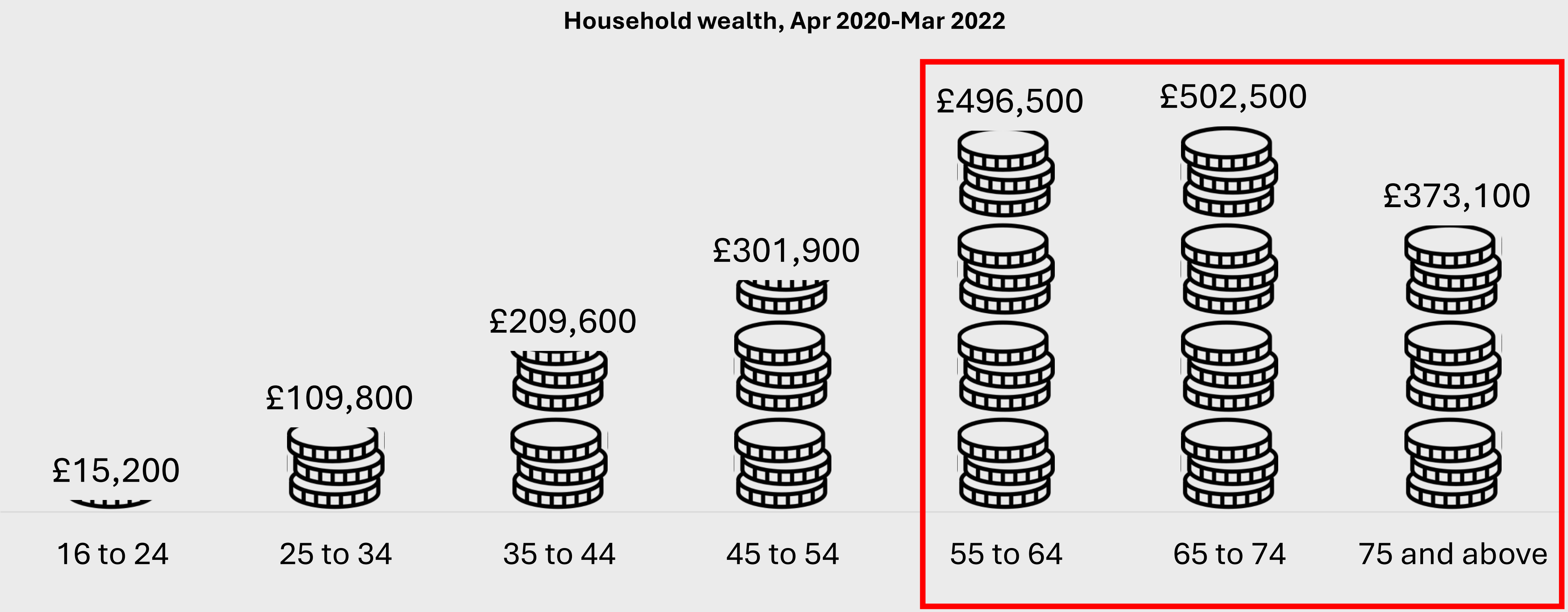
In the next 7 years we will see a 14% increase in the pensionable-age population



Source: ONS, population in millions, % change since mid-2022

This is significant because the older generations hold the wealth!



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Source: ONS

Gen Z

- Digital natives
- Social media savvy
- Politically and socially conscious
- Pessimistic and anxious
- Enrichment over luxury

Understanding the differences in how we shop will become key to winning in-store

Boomers

- Strong work ethic
- Traditional values
- Competitive and educated
- Optimistic outlook
- Financially strong

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A few simple steps will help to achieve this:

What are the key shopper differences

How does this play out in my category

What do I need to do to drive growth and win

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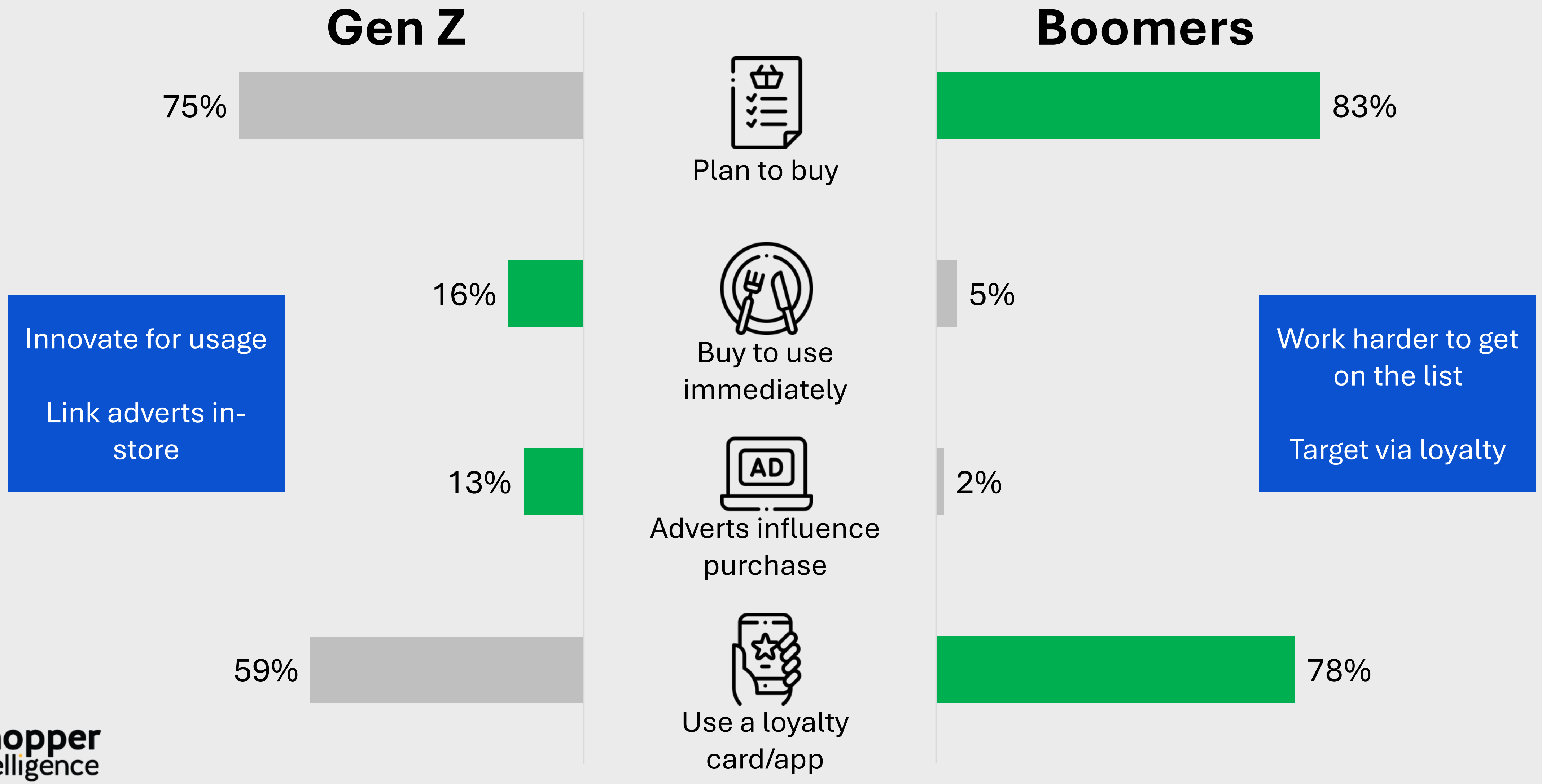
Boomers are more intentional with their shop, whilst Gen Z are in the moment



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% shoppers, all categories, total market, green indicates significant over-index

Engagement in-store is significantly more likely amongst Gen Z; Boomers are more focussed, but is this changing?

Gen Z

Grab & Go 61%
-4%

Browse 33%
+12%

Boomers

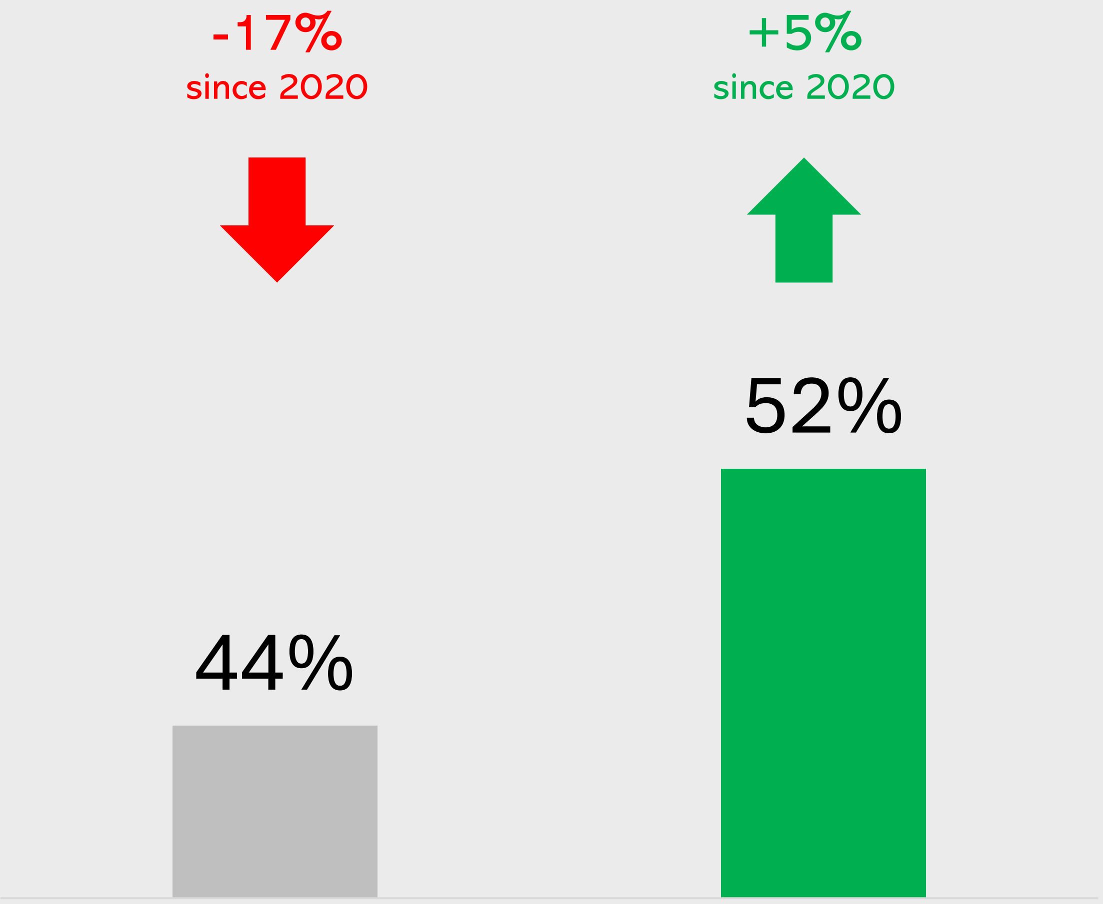
70% Grab & Go
-11%

25% Browse
+71%

% shoppers, all categories, total market, vs. 5 years ago

Loyalty is also much stronger amongst Boomers, and the gap appears to be widening over time

“Do most of my grocery shopping at this retailer”



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% shoppers, all categories, total market, vs. 5 years ago, green indicates significant over-index

Both shopper groups prioritise Quality and Price

But outside of these top 2 priorities things do differ:

Gen Z		Boomers
Range	1	Layout
Healthy Options	2	Range
Navigation	3	Navigation

Gen Z

Lots of choice

Focus on health

Boomers

Easy to shop

Avoid frustration

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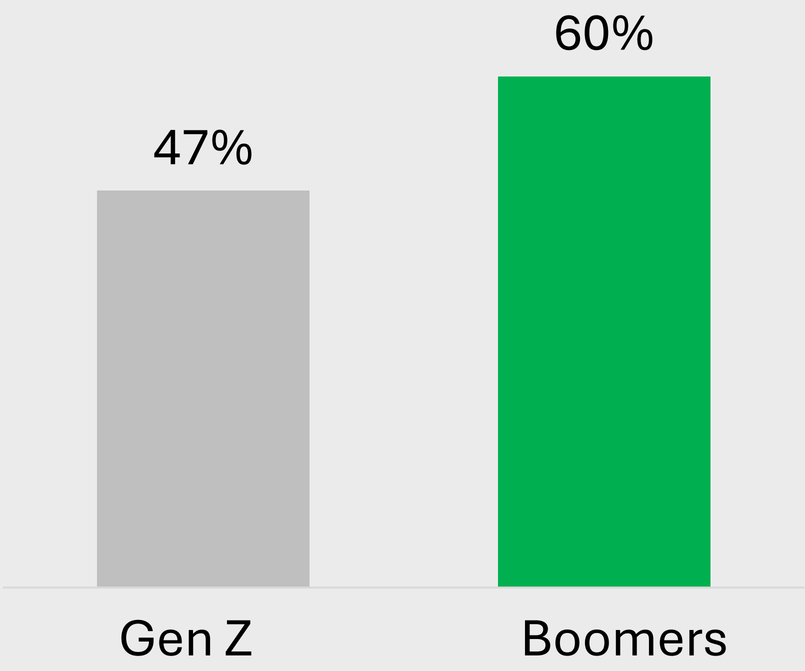
all categories, total market, green indicates significant over-index

The ‘easy’ experience Boomers want is also wedded to availability at home and on shelf

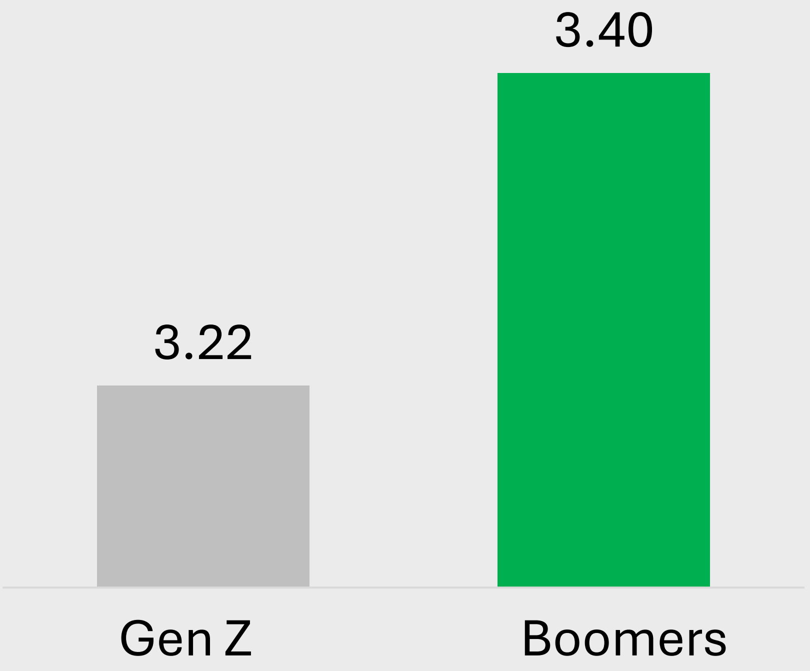
“I don’t want to run out”

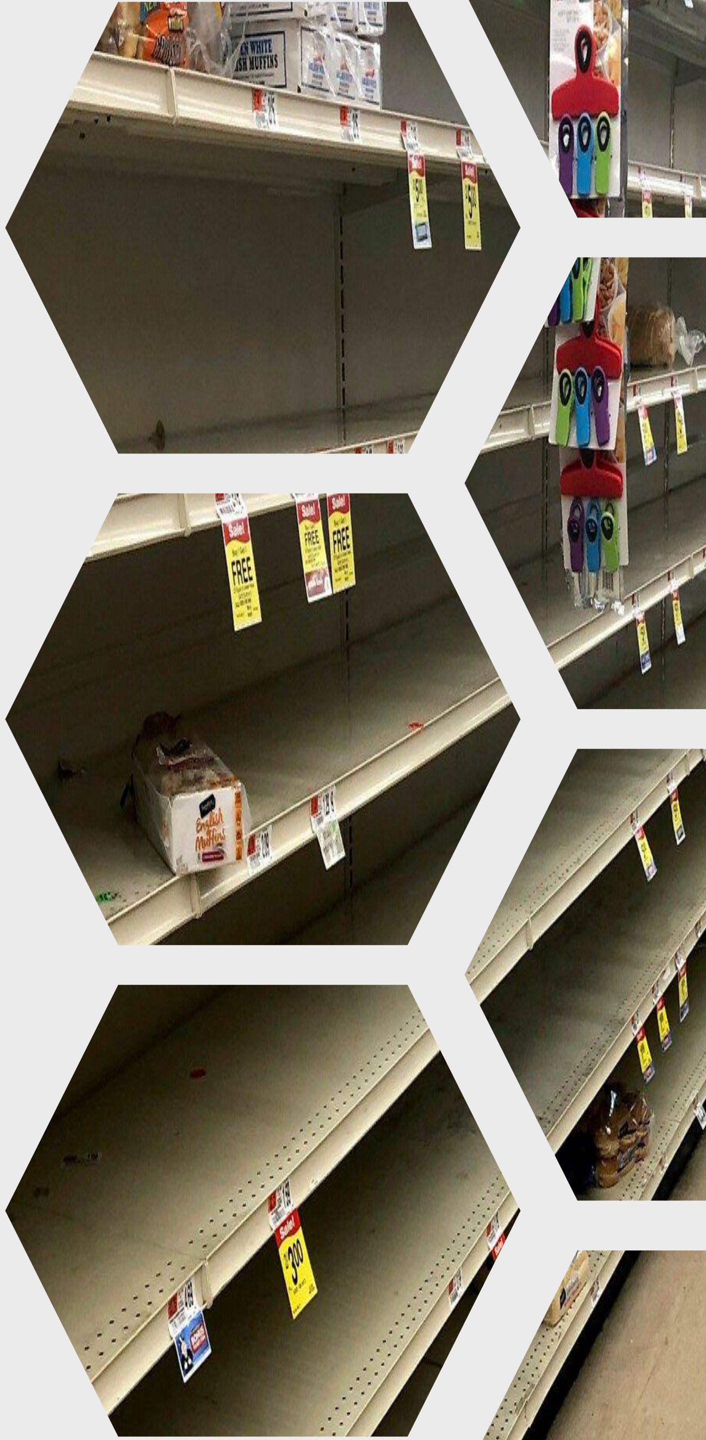
[% net agreement with statement]



Importance of availability

[mean average, 5=most important]





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Do any of these Boomer ‘traits’ play out in your category..

Heavily planned	Eggs	Frozen Vegetables
Focussed on grab & go	Facial Tissues	Prepared Salads
Drives loyalty	Fresh Pork	Soft Fruit & Berries
Layout a priority	Chilled Dips	Female Deodorants
Availability is key	Pre-packed Block Cheese	Jams & Spreads

categories amongst top 5 for each metric

What do we do with this insight to drive category growth?

1. Do Boomers buy my category, and to what extent is this the case?
2. How is this trending over time?
3. Which shopper traits do they exhibit?
4. Is this different to shopper norms for my category?
5. How do I adapt my category to prepare for these developments?

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One example of this..

Frozen vegetables

Boomers do buy the category at above the department average levels, this is also increasing over time

These shoppers are heavily planned and very focussed on layout and availability – significantly more than the norm for the Frozen Vegetables category

Possible actions – adapt marketing message to be targeted to boomers pre-store; focus on simple layout for core SKU's with appropriate stock holding to maximise availability

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Private label, brands and driving loyalty

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LOYALTY

Does a loyalty programme really drive shopper loyalty?

..or is it better to have a strong private label offering?

..or perhaps the best brands with strong marketing support is the way to go?

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Does loyalty card use drive traffic?...No!

Use a loyalty card/app

44%

Driving the trip to store is really more of a category trait, e.g. Fresh Vegetables

Do not use a loyalty card/app

43%

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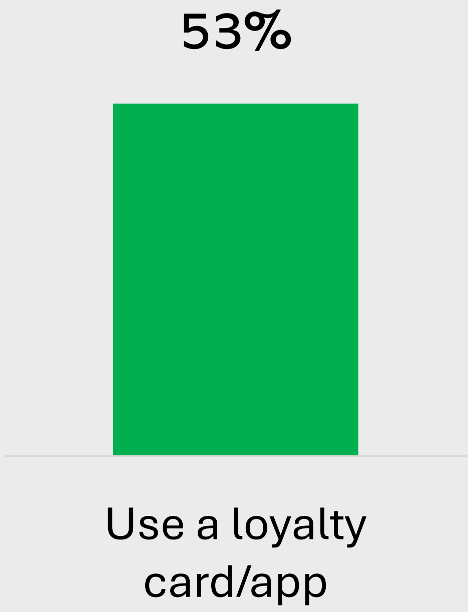
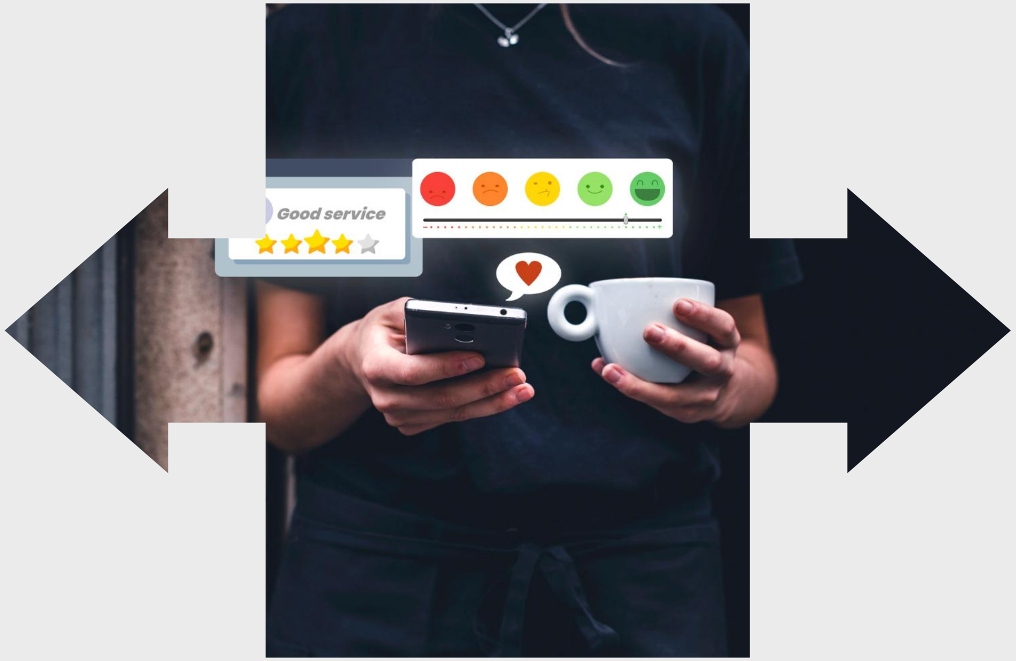
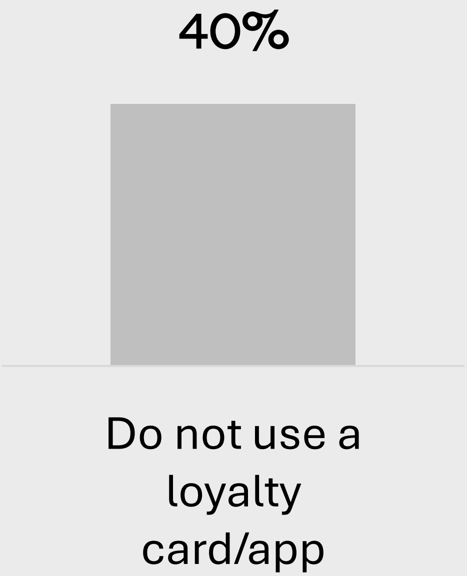
all categories, total market, % agreement with traffic statements

But funnily enough it does encourage loyalty!

"I do most of my grocery shopping at this retailer"







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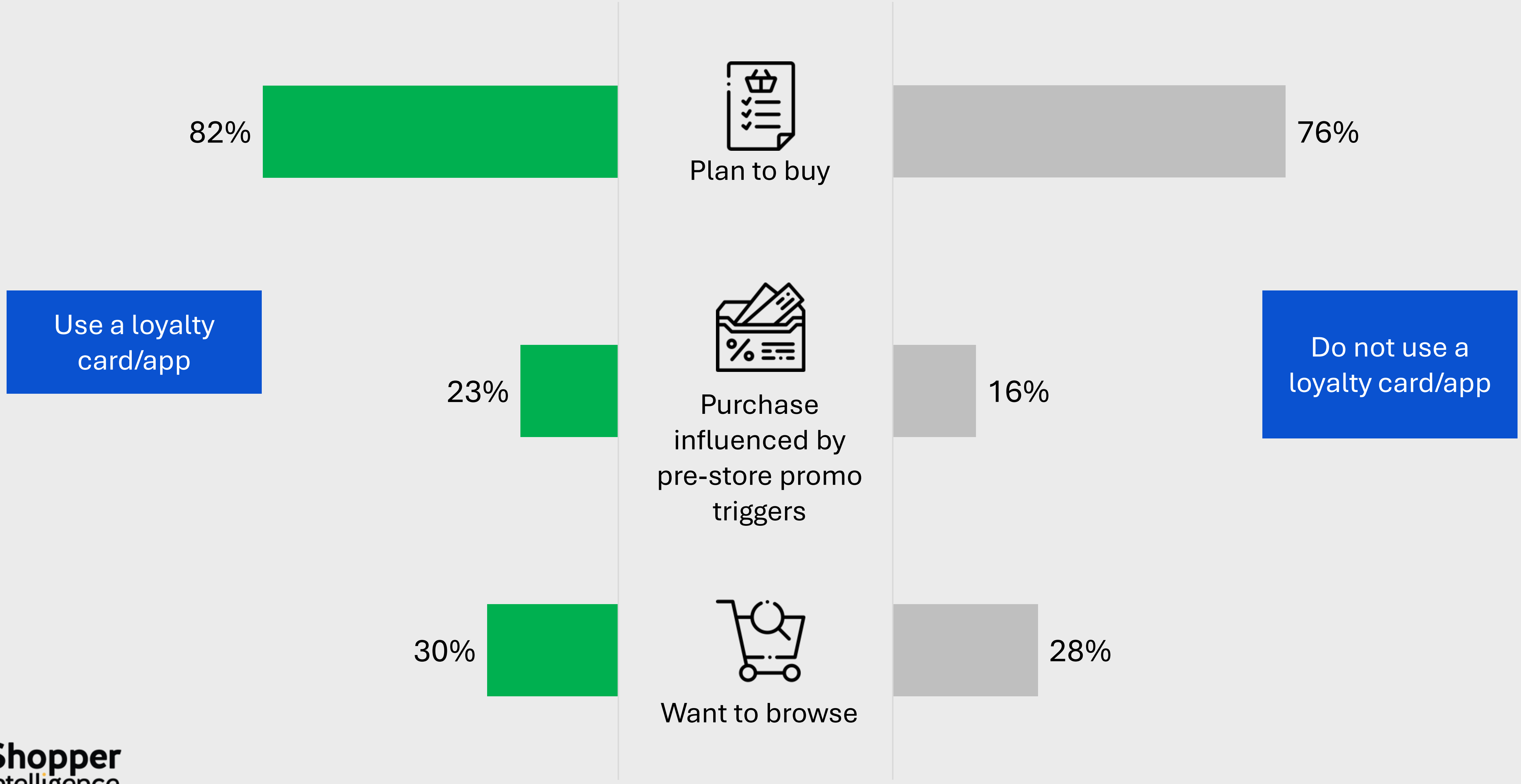
% shoppers, all categories, total market, green indicates significant over-index

Loyalty cards also drive purchase intention and engagement



% shoppers, all categories, total market, green indicates significant over-index

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Loyalty card specific offers also help..

	Use a loyalty card/app	Do not use a loyalty card/app
Promotions drive the trip	44%	38%
Buy extra due to promotions	47%	39%
Only bought because of the promotion	20%	8%

% net agreement; % shoppers, all categories, total market, green indicates significant over-index

So, loyalty schemes do impact shoppers – but the main focus is really all about price

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None of this appears to drive Price satisfaction however

Shopper satisfaction..

	Overall **PRICE** satisfaction	Price	Offers	EDLP
Use a loyalty card/app	68%	72%	66%	58%
Do not use a loyalty card/app	68%	74%	62%	60%

Use a loyalty card/app

Do not use a loyalty card/app

Could this be because the consistent ‘strong’ loyalty card offers create a perception that without these, prices are generally high in the retailer

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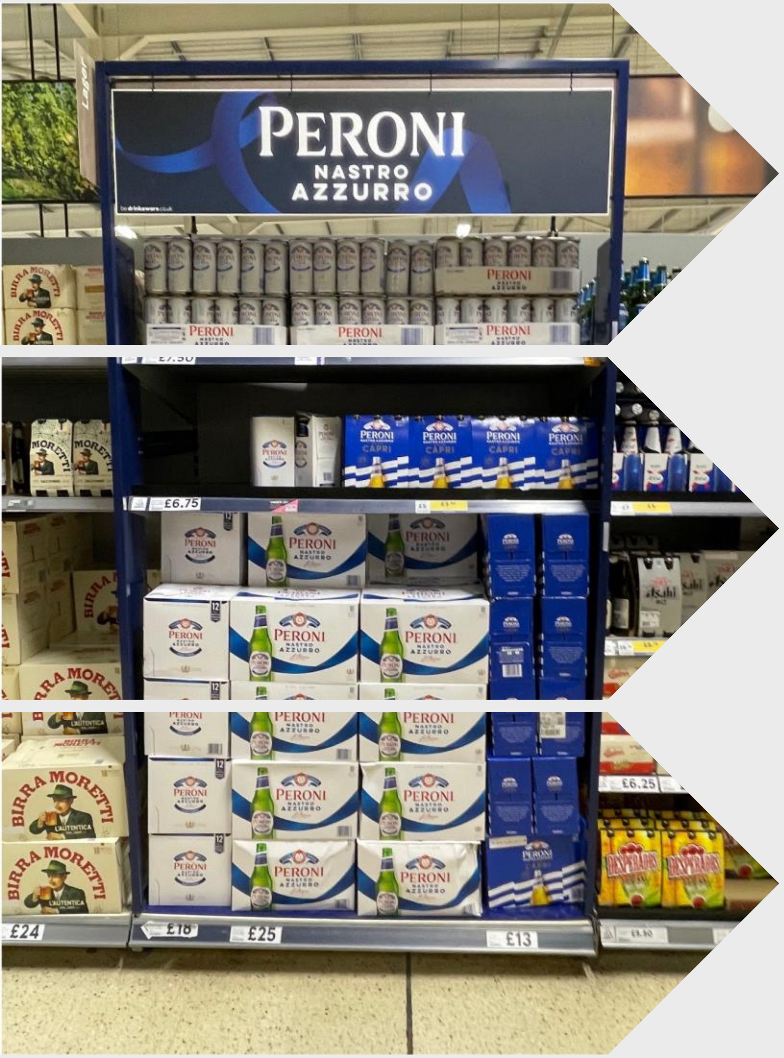
% net agreement, all categories, total market, green indicates significant over-index

Can brands help – right now, we're seeing an explosion of retail media around branded bays..



Key purchase trigger – unplanned purchases

A sign/pictures/screen for a specific brand or the category around the main shelf

40%	35%
Brand shoppers	PL shoppers

% unplanned shoppers, all categories, total market, green indicates significant over-index

So perhaps that means we should work on attracting more branded shoppers?

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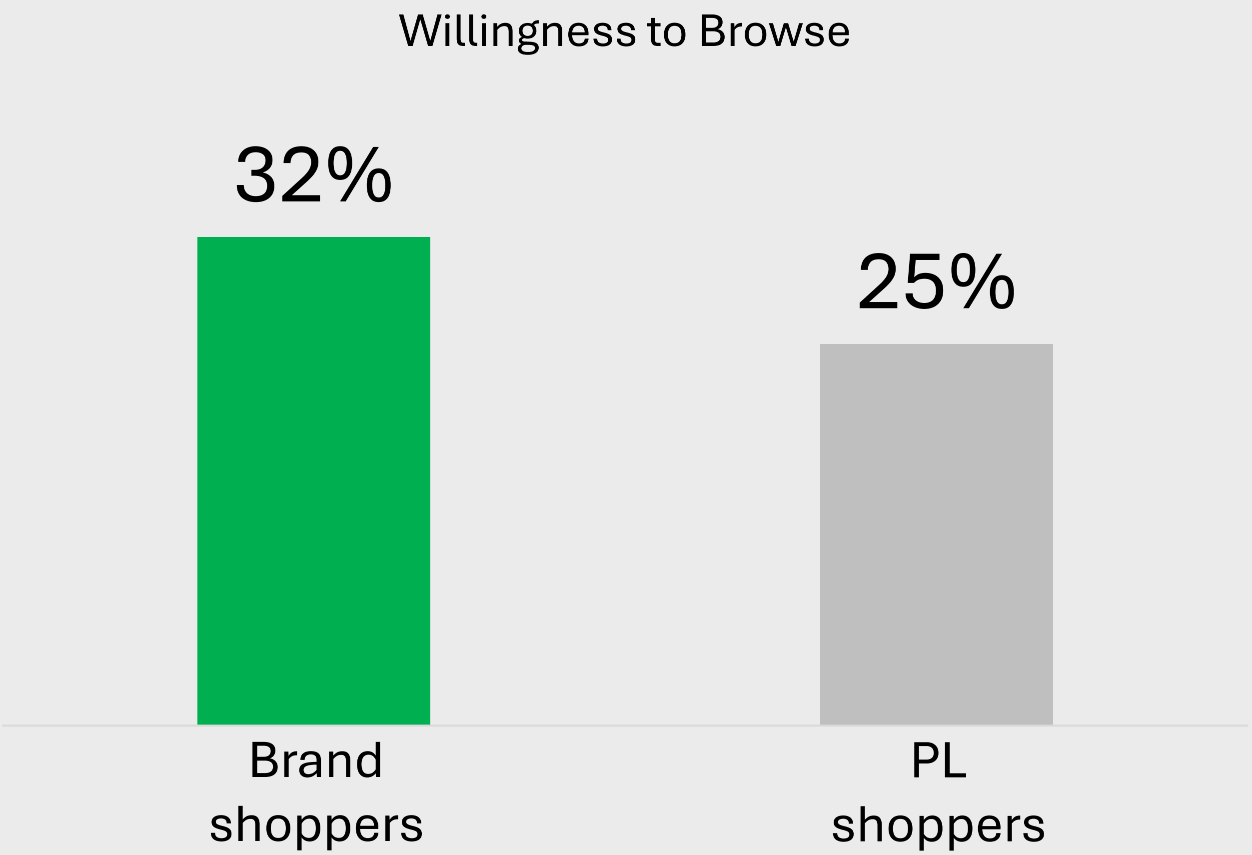
These shoppers are certainly more engaged



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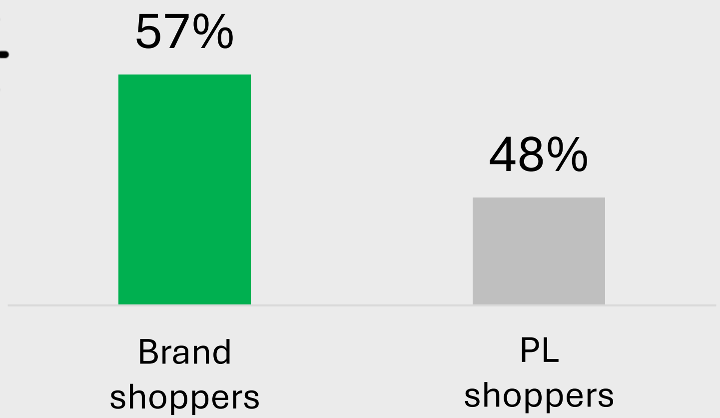
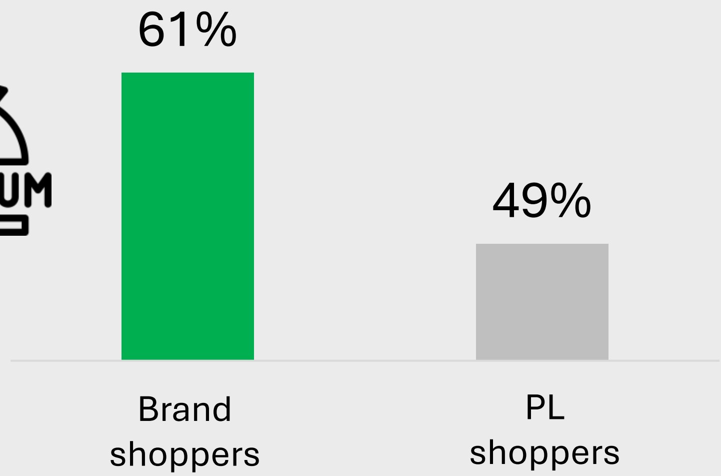
% shoppers, all categories, total market, green indicates significant over-index

Brands also drive the premium and innovation agenda, giving greater growth potential for stores

"sometimes buy extra to try new and different"



"don't mind paying more for better quality"



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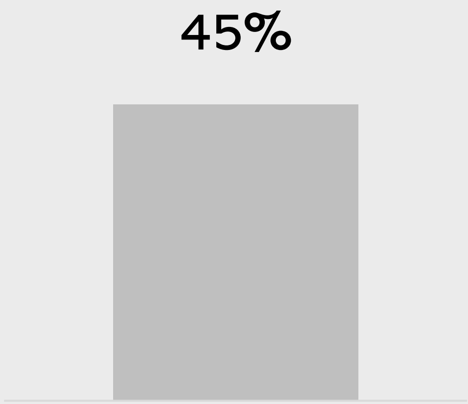
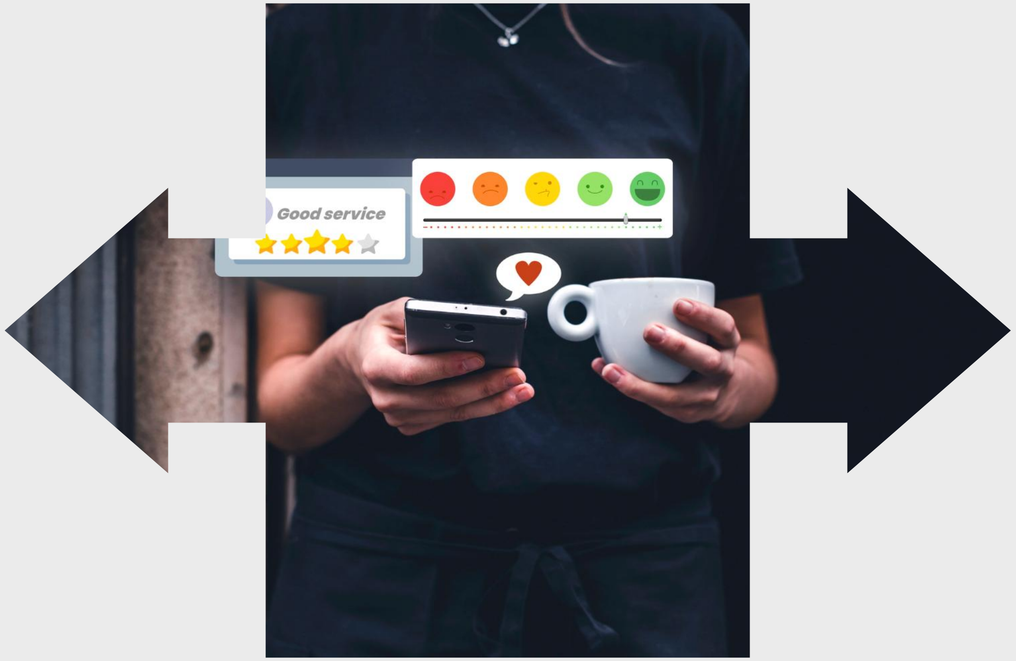
% net agreement, all categories, total market, green indicates significant over-index

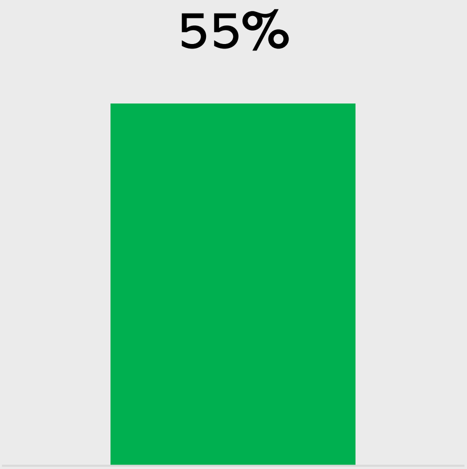
But, what about PL, its this not brands that drives better loyalty..

“I do most of my grocery shopping at this retailer”



Brand shoppers





PL shoppers

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% shoppers, all categories, total market, green indicates significant over-index

And purchase intention is stronger with shoppers who buy PL

Planned to buy

Brand shoppers	PL shoppers
78%	83%

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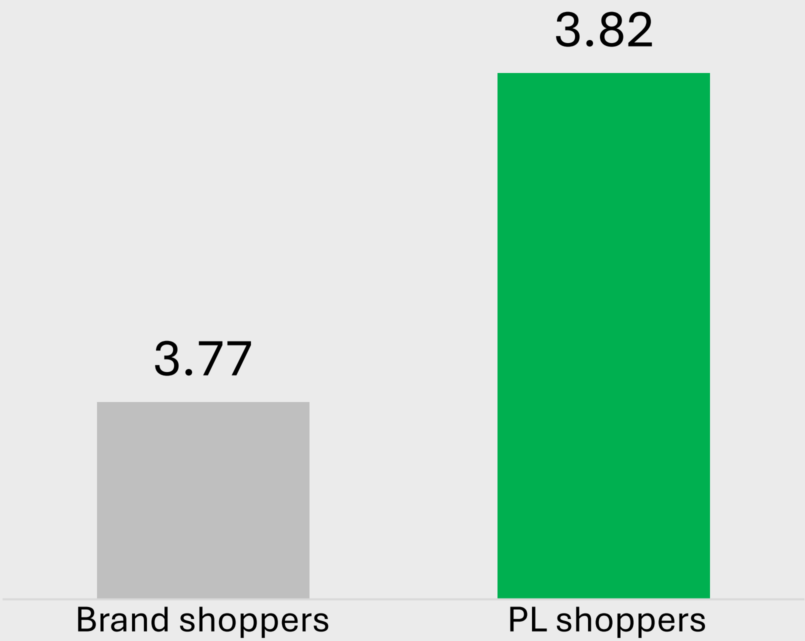
% shoppers, all categories, total market, green indicates significant over-index

PL shoppers are however less certain about quality

Importance of quality
[mean average, 5=most important]



Importance of fresh
[mean average, 5=most important]

Branded shoppers place less importance on Quality (there's more trust that its there already), focusing here with PL could be an additionally effective tool to drive long term shopper loyalty

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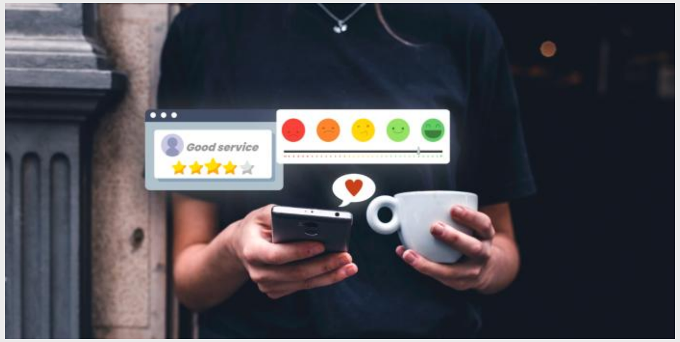
all categories, total market, green indicates significant over-index

So, perhaps its really about a good mix!

+

+



Brands can help drive growth

PL is better for driving loyalty

Loyalty schemes drive intention

Can be tempted to buy elsewhere

Harder to drive trade up and basket spend growth

Risk that sole focus becomes price

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Premiumisation and the cost-of-living crisis

There is no mistaking we’re still in a cost-of-living crisis

Reeves disappointed after economy unexpectedly shrinks

Why is UK inflation still rising?

Reeves must raise tax to cover £41bn gap, says think tank

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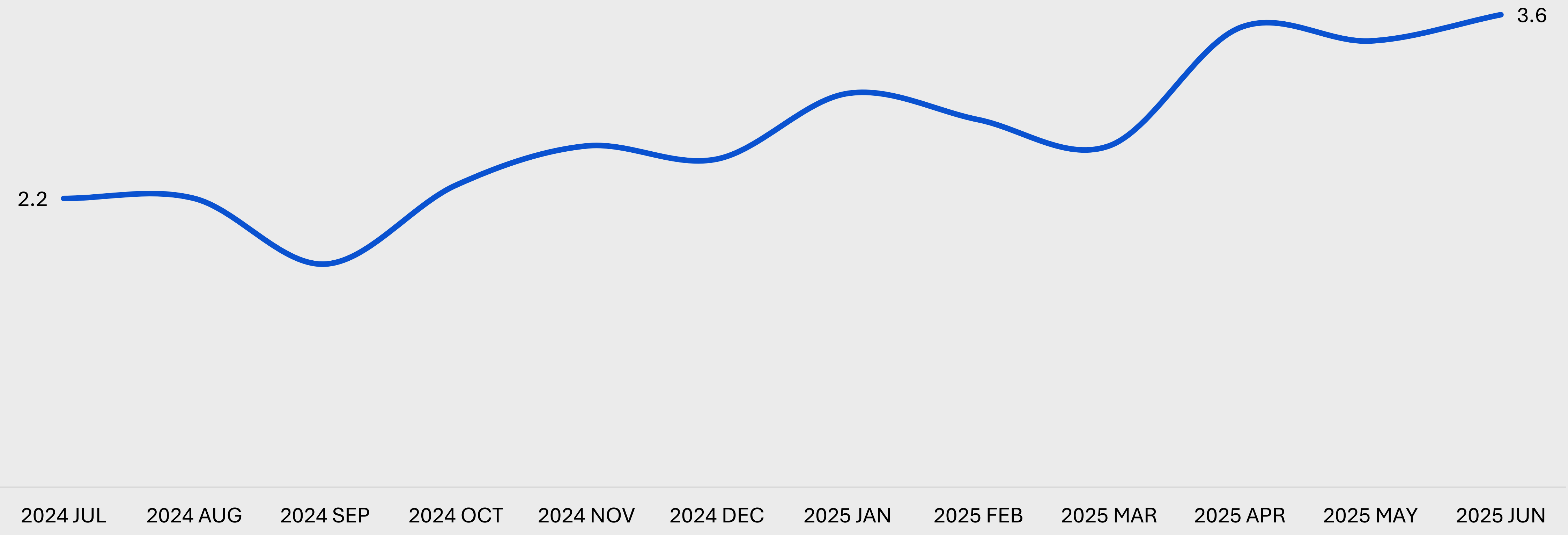
Prices are still rising and this affects the way we shop



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Source: ONS, CPI since mid-2024

We talked about this in one of our webinars last year..

Buy less

"I buy less often"

11%

Pay less

"I buy more special offers"

27%

"I buy cheaper alternatives"

15%

"I buy bigger 'bulk' packs"

12%

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% shoppers, all categories, total market, 2024 results

Has this changed? In 2025, 62% are adapting, but that's down -6%

Buy less  -19%

Pay less  -4%

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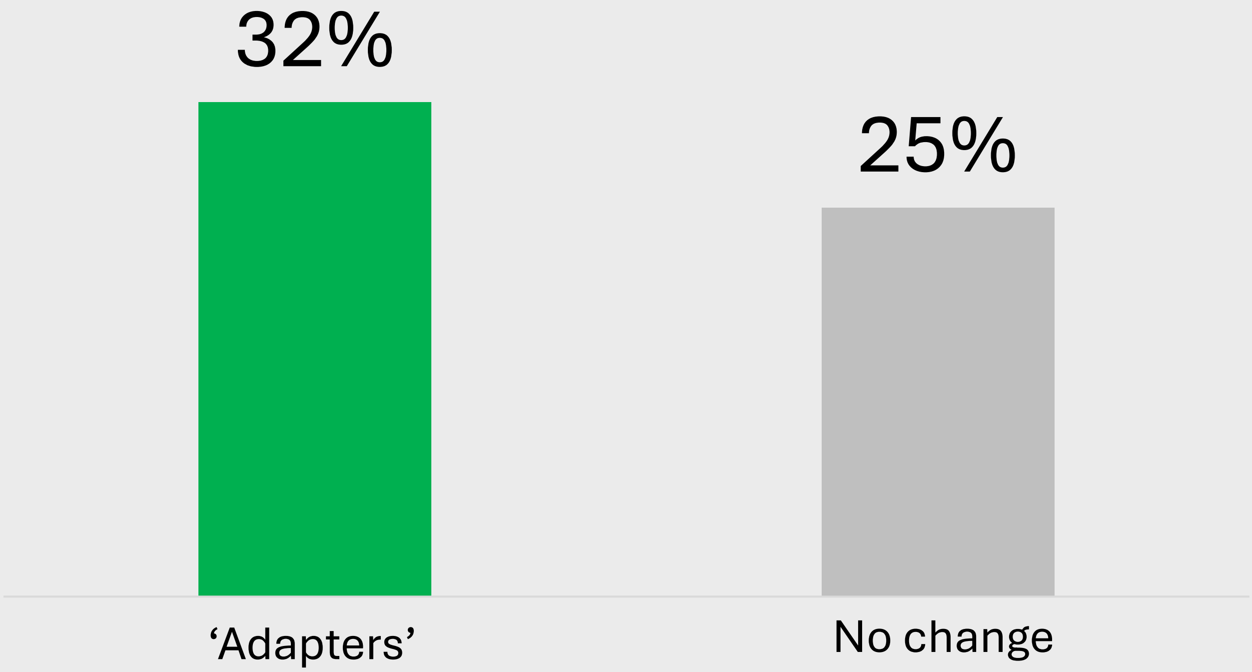
% change '25 vs. '24, all categories, total market

‘Adapters’ are still the larger group, what do they do?

‘Adapters’ will take more time shopping..

Willingness to Browse



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% shoppers, all categories, total market, green indicates significant over-index

They're also much more likely to be influenced before the trip

Planned/pre-store purchase triggers

	'Adapters'	No change
Catalogue/ Magazine	12%	5%
Advert	13%	5%
Internet info	8%	3%
Coupons	6%	3%

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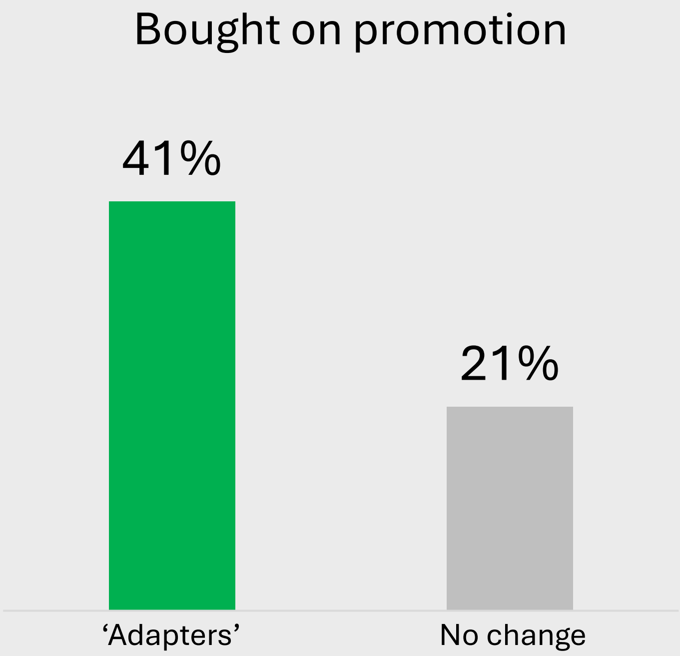
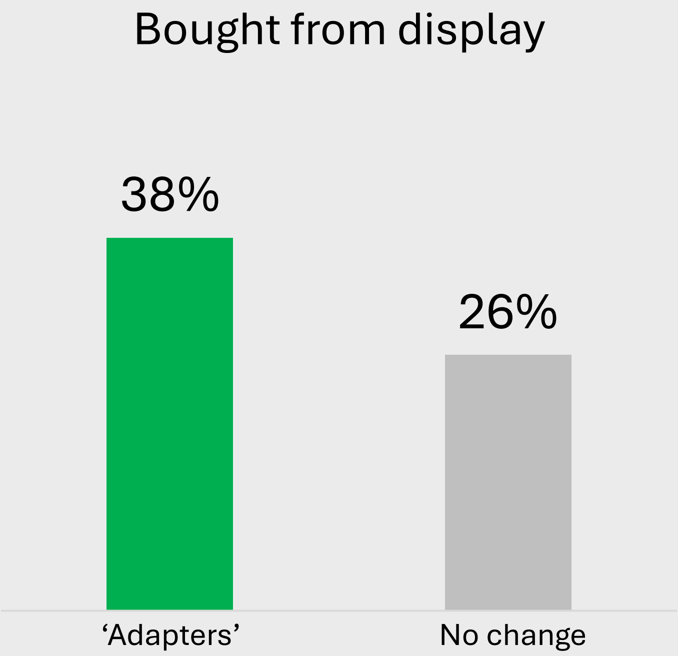
% shoppers, all categories, total market, green indicates significant over-index

And ‘adapters’ will hunt the deals, wherever they are





% shoppers, all categories, total market, green indicates significant over-index

But whilst they'll try PL – they're less happy with it

Tried any PL

58% 'Adapters'

53% No change

Definitely would buy again

75% 'Adapters'

80% No change

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% shoppers, all categories, total market, green indicates significant over-index

With all this happening, is premiumisation still an option?

Buy less	Pay less	No change
-19%	-4%	+12%
8% of shoppers	54% of shoppers	35% of shoppers

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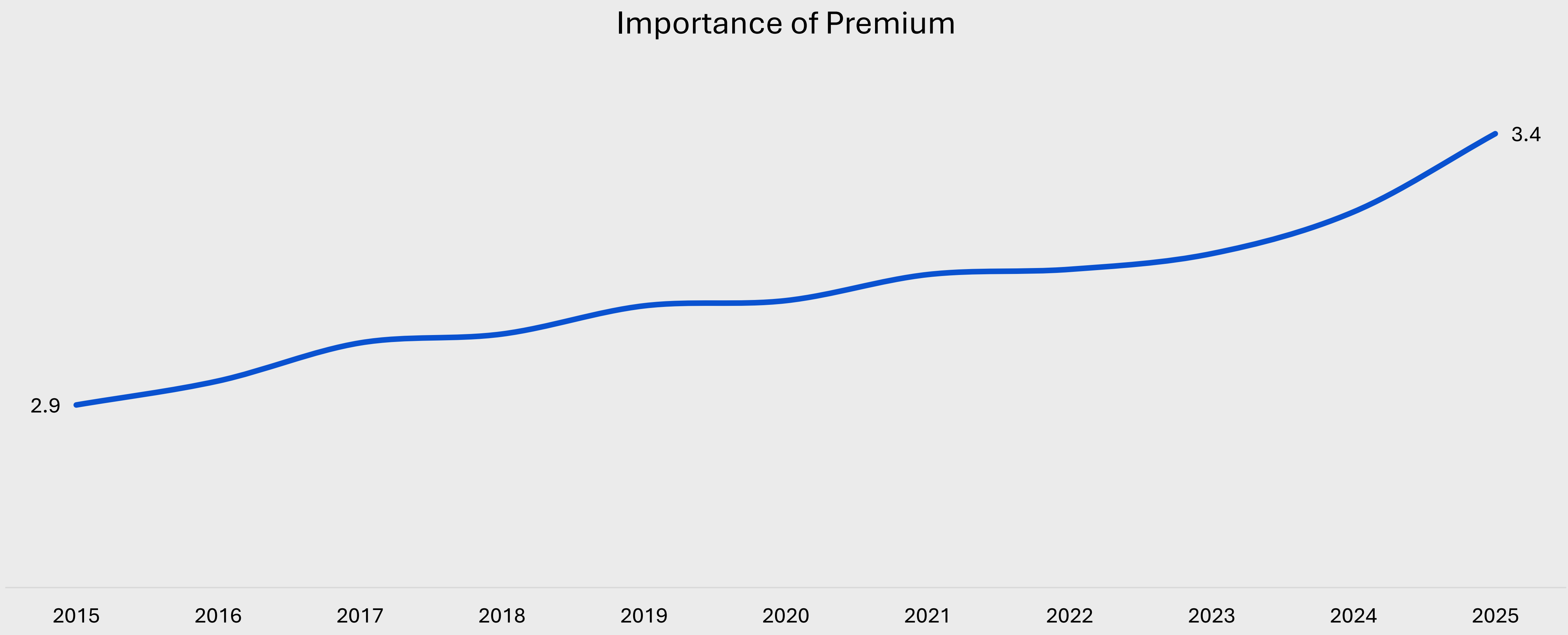
% shoppers and YOY change, all categories, total market, green indicates significant over-index

And the trend towards premium continues..



Mean importance (1 to 5=most important), all categories, total market

How should we approach a strategy for premium?

Isolate a target group

Identify their unique shopper traits

Develop execution aligned to this

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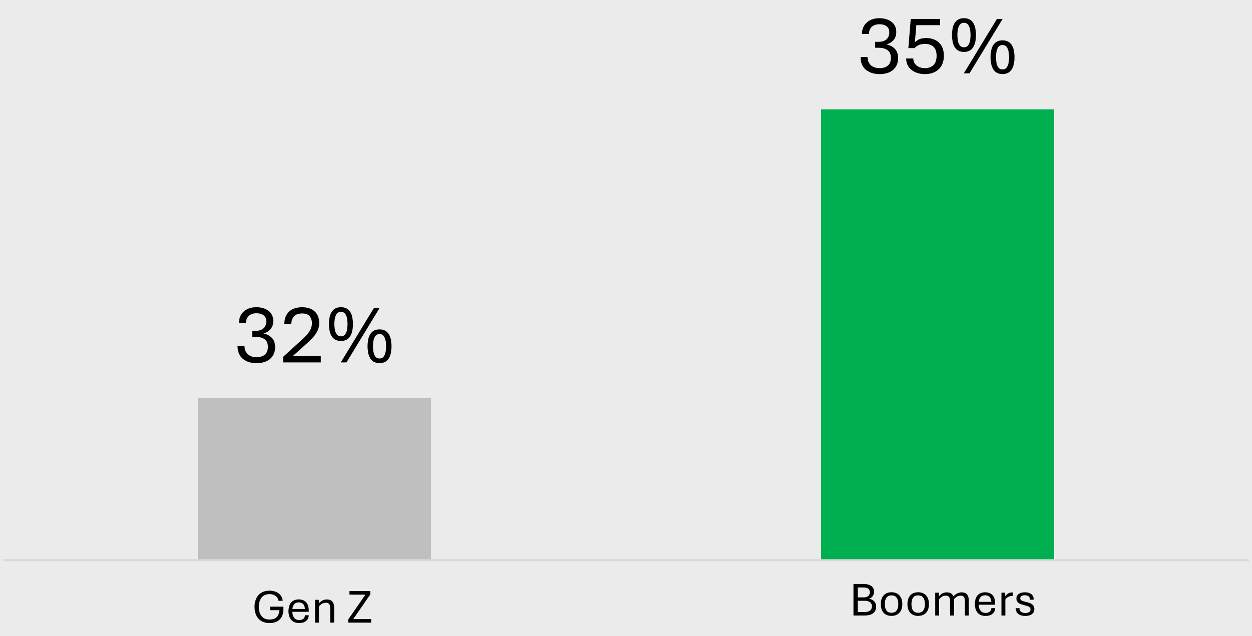
Don’t forget, we know the growing older population hold the wealth – so targeting them could open up the premium opp

“Look around and am open to new”

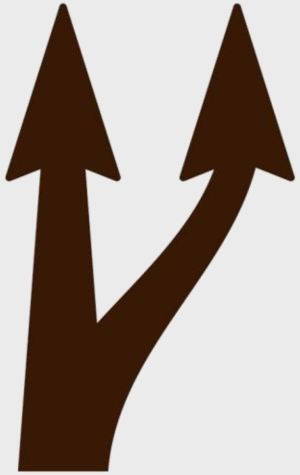


% shoppers for whom premium is important, all categories, total market, green indicates significant over-index

These Boomers are also less brand loyal, they will switch brand

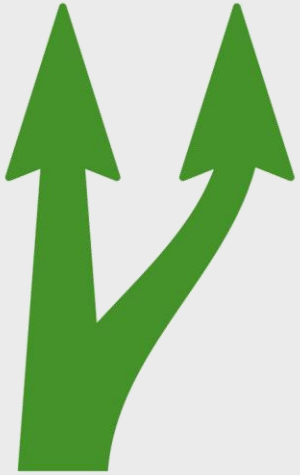
“I will switch brand if I can’t find my choice”

19%



Gen Z

26%



Boomers

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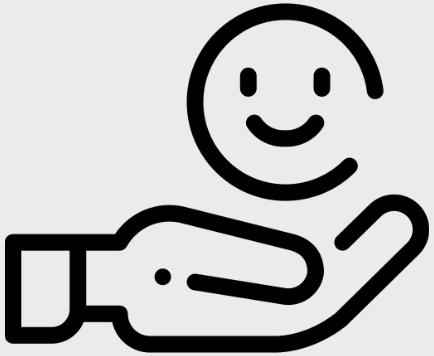
% shoppers for whom premium is important, all categories, total market, green indicates significant over-index

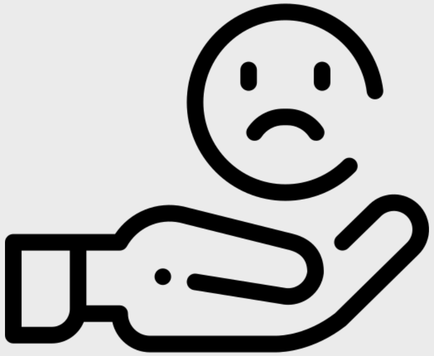
Put greater focus on innovation to resonate with these shoppers

Satisfaction with innovation



62%

Gen Z



54%

Boomers

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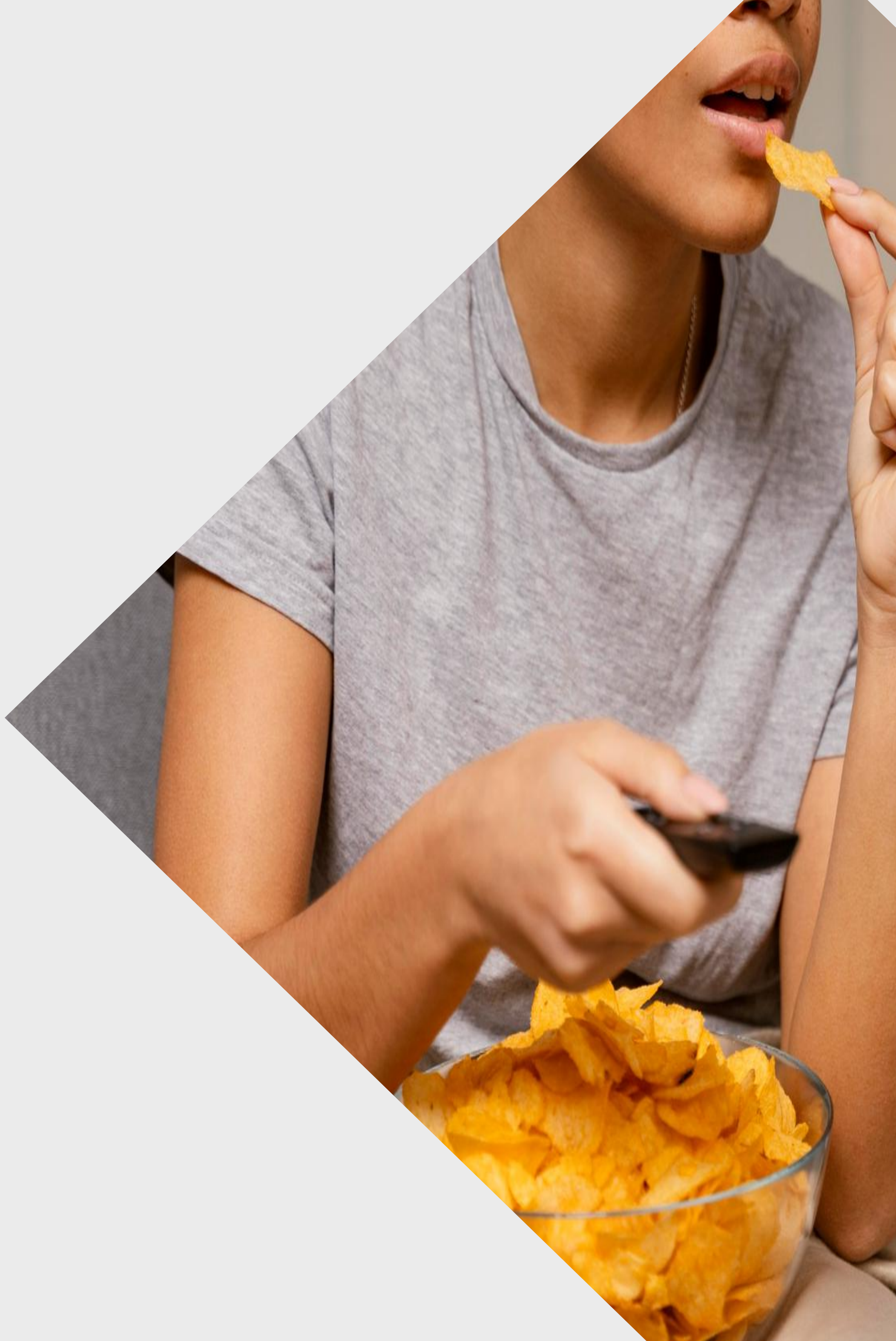
% net agreement (shoppers for whom premium is important), all categories, total market, green indicates significant over-index

The growth of snacking



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This section will be covered in:

The Shopper View Part II

2nd October 2025 @ 11am
30 mins

[Register here]

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https://shopperintelligence.com/resources/uk/

...AND LOADS MORE!

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Thank you for joining us!

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