Shopper Typologies and Segmentation in the UK Food & Grocery Sector 2012
SAMPLE EXTRACT
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Evolution is a research led consultancy specialising in shopper marketing. 
We deliver original research, analysis and insight into shopper motivations and behaviour for manufacturers, retailers and agencies.

Our insights help clients understand and influence shopper motivations and behaviour in store, enabling them to drive improved performance.

- Evolution offer a broad range of products & services for clients in the field of shopper marketing:-
  - Research led consultancy
    - Tailored research, analysis and insight for retailers, manufacturers and agencies.
    - Our consultants bring a wealth of experience having worked with FMCGs, retailers and agencies on a diversity of shopper marketing projects.
    - These projects range from providing focused answers to specific questions to co-ordinating large-scale multi-discipline shopper marketing programmes.

- Off the shelf insight reports
  - Shopper Insight Series - In depth research, analysis and insight into shopper motivations and behaviours in store.
  - Strategic Insight Series - Strategic trends facing manufacturers and retailers in the field of shopper marketing.
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By using more detailed shopper demographics to examine our extensive catalogue of 2011 research we are able to present a thorough analysis of shopper behaviour for a more comprehensive range of shopper typologies than those presented in the individual reports. We are able to cover areas such as retailer choice, technology, spend and health providing a clearer picture of what is important to certain shoppers and how particular groups behave.

It is important to note that this report provides a general understanding of each segment. We understand that individual behaviour can vary within each segment but for purposes of analysis we define the overall average behaviour of each segment.
Shoppers can be defined by their demographics. The very basic demographics included in all of our reports are categories such as age, gender, social class, relationship status and if children are living at home. These personal factors have an influence upon shopping behaviour and attitudes of the individual shopper.
In this report the focus is initially upon the following 5 key demographics:

1. **Gender** – The simplest of social demographics, shoppers are either male or female. There are many preconceptions about how men and women shop differently and this report aims to explore these further.

2. **Age** – Understandably, the age of a shopper has a high impact on their behaviour and attitudes. For example, a teenager’s shopping habits are likely to be very different to an over 65’s, as they are at a different stage in their life.

3. **Social class** – split into AB, C1, C2, DE, social class leads to great differences in circumstances for shoppers. Those in lower social classes have tighter budgets to stick to, whereas higher social classes have more disposable income. However, as we will see, social class is not always a clear segregation to examine behaviour by, as the relationship between class and income is not a straightforward one.
4. **Relationship status** – Relationship status can be broken down into several categories including singletons, in a relationship, separated, divorced and widowed. A main shopper who is in a couple is also buying for their partner when it comes to food and groceries (as by our definition we only include those married and living with a partner, not shoppers who are in a relationship but living separately). Singletons, on the other hand, are highly likely to be the sole consumer of any items bought.

5. **Children** – A couple without children shop very differently to parents. Parents are shopping for even more consumers and with childcare taking up a large amount of their time they are unlikely to spend as long shopping as couples without children. They are also likely to have different concerns in their role as caregiver. Furthermore, the age of the parents will have an effect on their shopping behaviour, as an 18 year old mother is likely to shop differently to a 35 year old mother. As such, this report will consider parents aged 18-34 and parents aged 35-54 to gather a clearer picture of what is important to different parents.
As well as having an influence on shopping behaviour on their own, demographics also interact with one another to create a more complete shopper profile. For example, although it is well researched that men and women shop differently, younger men are also likely to shop differently to older men. This demonstrates gender and age interacting together to form certain beliefs and behaviours of the shopper. Therefore, this report also considers the shopping behaviours and attitudes of the following demographic groups:

6. **Gender by class** – gender can also be crossed by social class, providing us with a more thorough picture of what is important to men and women of different social classes.

7. **Couples by age** – as couples represent such a large proportion of the population it is possible to break them down into smaller categories to get a more detailed picture of how different couples shop. Therefore, couples by age is also a focus of this report as, for example, younger couples are at a different stage in their life to older couples.
8. Couples by social class – couples may have a shared income as there are two people to bring money into the household. However, it is important not to assume this as the social class of a couple is based solely on the profession of the main earner in the household.

9. Relationship by gender – It is well known that men and women shop differently and obvious that relationship status will have an effect on shopping behaviours. We are also able to compare the interaction between relationship and gender. For example, do women in a relationship shop the same as a man in a relationship? Or do women shop the same regardless of relationship status?
The more we know about a shoppers’ demographics the better understanding we can attain about their shopping attitudes and behaviour. Ultimately, this allows us to learn more about how different shoppers shop. Each group we examine represents at least 10% of the population to make the research both reliable and valuable.

It is also important to note that shoppers can fall into more than one of the categories examined. A 28 year old professional married mother falls into nine categories: female, 25-34 years of age, social class AB, couple, 25-34 year old couple, AB couple, AB female, female in a relationship and a 18-34 year old parent. Therefore, we appreciate that when targeting shoppers it is often more specific than a single segmentation examined but this report provides a general picture of the beliefs and behaviours of each segment as a basis for understanding the complete shopper.
Demographic categories – Gender by social class

More men work in professional roles than women, therefore leading to there being more males than women in social classes AB and C1.

- Gender can be examined in more detail, by considering social class as well. Although most social classes are almost evenly split between male and females, more females are in social class DE than males. 14.7% of the population are DE females, whereas 9.9% of the population are DE males.
The income of different social classes reflects in the supermarket they choose as their main shop. Higher social class shoppers are likely to choose high end supermarkets whereas lower class shoppers are likely to choose budget supermarkets.

The big four retailers are stable among all shoppers. Waitrose and Marks and Spencer are popular with AB shoppers, this popularity dropping off by C2 shoppers. At this point budget supermarkets like Iceland, Lidl and Aldi become more popular.
When it comes to technology, couples in social class AB are most likely to shop online for food and groceries.

Couples in social class DE are far less likely to shop online for food and groceries.

Smartphone ownership increases with social class.
Young shoppers attitudes towards spend vary the most across the year, as they are more sensitive to external factors such as heating bills or the excitement of Christmas.

Young shoppers are the most concerned about price when shopping for food and groceries. This is especially noticeable after the summer months, when factors such as heating bills start to put pressure upon finances.

The drop in concern over cost in December could be due to a relaxation of concern with Christmas. Shoppers buying presents and food for the festive season see it as a treat and celebration that is a one off.
Planning is a function of time and budget.

Planning is proportional to time and budget. Those with more time are able to plan more than busy shoppers who just pick up items as and when they are needed. Also, shoppers on tighter budgets are more likely to plan their food and grocery shopping.

As such, planning is common among the over 65s and social class DE shoppers as they often have more time to plan and rely upon a budget.
Men and women prefer different offers and promotions. Women and young shoppers are the most likely to utilise coupons and vouchers, whereas men prefer straightforward multi-buy offers.

Men and social class DE shoppers are likely to look for multi-buy offers. However, AB male shoppers are the least likely to like discounts, as these shoppers are the most affluent.

Women are more likely to use coupons and vouchers than men. This is regardless of relationship status.

Young shoppers (under 34s) are also more likely to favour coupons and vouchers. This is also true of couples of this age. To do this they utilise sites such as Moneysavingexpert.com, Groupon.co.uk and Myvouchers.co.uk.
There are four different shopping missions when it comes to food and grocery shopping.

- **On the go**: For consumption immediately, for example lunch while out or takeaways.
- **Top-up**: Often reactive based on particular need(s) between the main shop.
- **Main trolley**: Main household shops, usually planned covering most categories. Often at weekend.
- **Stock-up**: Planned, infrequent and often high volume. Typically once a month.

Since all shoppers are different, these themes offer a broad framework. We find that some shoppers for example conduct only top-up missions, never actually going on a main trolley or stock-up trip. The most common type of mission for each demographic will be examined in this section so as to understand such differences in behaviour.
Evolution examined its extensive collection of previous reports to identify and analyse 9 different shopper typologies. These reports use a combination of quantitative and qualitative research methods to gather a wide range of data. These include preliminary surveys, main surveys, focus groups and secondary research drawing on Evolution’s proprietary databases, national statistics, news and industry resources.

The specific methodology for the separate reports is available within each report. However, all of Evolution research follows the same basic framework, presented on the following page.
Evolution’s methodology

- Evolution carries out a preliminary survey of around 100 shoppers, to test questions for the main survey.
- Detailed secondary and desk research is conducted to define the topic area, macro drivers and trends, scope and examples of within the research topic.
- Initial insights gained are used to help further design the main survey.
- A main survey is completed by at least 1,000 UK adults who are the primary household shopper for food & grocery.
- Focus groups are carried out to further enhance the secondary research and main quantitative survey.
- Comprehensive and detailed assessment of all the data received was then used to discover insights.
- Throughout this process, primary research was supported by secondary research drawing on Evolution’s proprietary databases, national statistics, news and industry resources.

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