

## Key Results

### 1. Where do you do mainly do your grocery shopping? (Q1a)

78% of those surveyed shop at either Coles or Woolworths. Aldi only has a 6% market share of 'main' supermarket shopped at.

Supermarket	N size	%
Woolworths	435	42%
Coles	379	36%
IGA	82	8%
Aldi	57	6%
Other, please specify	86	8%

Base: All respondents

### 2. Where else do you do your grocery shopping? (Q1b)

Supermarket	N size	%
Coles	408	39%
Woolworths	384	37%
IGA	285	27%
Aldi	159	15%
Other, please specify	251	24%

Base: All respondents

### 3. Which of the following responses best describes why you choose to shop at your main supermarket (you may choose more than one answer). (Q2)

The main reason respondents chose to shop at their main supermarket is primarily driven by convenience (73%). Parking is also important (39%).

Only one quarter of respondents chose price as a reason for choosing their supermarket. Petrol shop-a-dockets were chosen as a reason by 18% of respondents, and 9% of respondents chose 'other rewards points schemes'.

Reason	N size	%
Convenient location	763	73%
Parking	402	39%
Product variety	331	32%
Opening hours	265	26%
Price	264	25%
Quality	198	19%
Petrol shop-a-dockets	192	18%
Fresh food sections (e.g. fruit & vegetables, deli, bakery)	183	18%

Other rewards points schemes	88	9%
Other	150	14%

Base: All respondents

#### 4. How do you find comparing prices between supermarkets? (Q3a)

Around one in three respondents find it difficult to compare prices between supermarkets, while a quarter do not compare prices between supermarkets.

Only 13% find it easy to make comparisons between supermarkets.

	N sizes	%
Very difficult	105	10%
Difficult	278	27%
Neither difficult nor easy	225	22%
Easy	119	11%
Very easy	18	2%
I don't compare prices between supermarkets	288	28%

Base: All respondents

#### 5. Why do you find it difficult to compare prices between supermarkets? (*multiple response*). (Q3b -answered "Very difficult" or "Difficult".)

Those who found it difficult to compare prices between supermarkets, (37%), were asked the reason why they found it difficult.

Reason	N size	% of total sample	% of those who found it difficult
There are too many special/sales	186	18%	49%
The product sizes are different in the various supermarkets	167	16%	44%
The brand names are not the same	169	16%	44%
The quality of the products are not the same	139	13%	36%
Other	97	9%	25%

Base: Respondents who found it very difficult or difficult to compare prices between supermarkets (n=383)

#### 6. How useful would you find it to make product price comparisons if there was clearer marking on the shelf about the price per mL or gram, (eg: Pasta, 20cents/100 grams ; Cooking oil, 50 cents/100 mL). (Q4)

89% of respondents would find 'unit product pricing' useful.

	N size	%
Very useful	647	62%
Somewhat	285	27%

useful		
Not at all useful	72	7%
Don't know	24	2%

Base: All respondents

**7. Compared to 3 years ago, do you feel that you are spending less, more or about the same proportion of your household income on groceries (*groceries includes packaged food, fresh fruit and vegetables, and fresh meat*). (Q5)**

83% of respondents feel that they are spending more of their household income on groceries compared to 3 years ago.

	<b>N size</b>	<b>%</b>
Spending less	24	2%
Spending more	866	83%
About the same	126	12%
Don't know	18	2%

Base: All respondents

**8. Compared to 3 years ago, do you think you have more, less or about the same choice of which supermarket chains that you can visit? (Q6)**

	<b>N size</b>	<b>%</b>
More	311	30%
Less	207	20%
About the same	513	49%
Don't know	8	1%

Base: All respondents

**9. How do you usually find out about supermarket specials and sales? (Q7).**

Respondents are mostly finding out about Supermarket specials and sales through letter box drops (which they appear to be reading) and in-store promotions. These are both relatively cheap advertising mediums.

Supermarket advertising of sales and specials reaches 85% of respondents.

	<b>N size</b>	<b>%</b>
Letter box drops	502	48%
In store	424	41%
Newspaper/magazine advertising (including 'liftouts')	206	20%
TV advertising	81	8%
Word of mouth	25	2%
Radio advertising	6	1%
I don't find out about specials or sales	157	15%
Don't know/ can't remember	6	1%

Base: All respondents

**10. Do you feel that there is sufficient price competition between supermarket chains? (Q8).**

Only 16% of respondents feel that there is enough competition between supermarket chains.

	<b>N size</b>	<b>%</b>
Yes	163	16%
No	663	64%
Don't know	209	20%

Base: All respondents

**11. Where do you usually buy your grocery products (packaged goods, etc)? (Q9a)**

	<b>N size</b>	<b>%</b>
Woolworths	432	42%
Coles	388	37%
IGA	81	8%
Aldi	57	6%
Other	77	7%

Base: All respondents

**12. Where do you usually buy your fresh fruit & vegetables? (Q9b)**

Over a third of respondents are buying their fresh fruit and vegetables from Supermarkets.

	<b>N size</b>	<b>%</b>
Fruit & vegetable shop	407	39%
Woolworths	200	19%
Coles	138	13%
IGA	37	4%
Aldi	23	2%
Markets	118	11%
Other	115	11%

Base: All respondents

**13. Where do you usually buy your fresh meat? (Q9c)**

43% of respondents are still purchasing their fresh meat from a butcher, however, 45% are making their purchase from a Supermarket.

	<b>N size</b>	<b>%</b>
Butcher	451	43%
Woolworths	240	23%
Coles	165	16%
IGA	39	4%
Aldi	22	2%
Other	97	9%
N/A	25	2%

Base: All respondents

### 3.0 Demographics

#### 14. Gender:

There is a skew towards females in the sample, however this is likely to be due to the fact that we asked for one of the household's main grocery buyer to complete the survey.

	<b>N size</b>	<b>%</b>
Male	368	35%
Female	664	64%

#### 15. Age:

	<b>N size</b>	<b>%</b>
35 years or less	104	10%
36-40 years	124	12%
41- 55	391	38%
56-65 years	264	25%
66 years or more	155	15%
Prefer not to answer	1	0%

#### 16. State of residence:

	<b>N size</b>	<b>%</b>
NSW	351	34%
Victoria	257	25%
Queensland	195	19%
South Australia	85	8%
Western Australia	83	8%
Northern Territory	4	0%
ACT	51	5%
Tasmania	15	1%

#### 17. Which one of the following ranges best describes your total annual household income before tax?

	<b>N size</b>	<b>%</b>
Under \$35,000	89	9%
\$35,000 to \$49,999	77	7%

\$50,000 to \$74,999	183	18%
\$75,000 to \$99,999	183	18%
\$100,000 to \$149,999	225	22%
\$150,000 and over	162	16%
Prefer not to answer	115	11%