



Value of Welshness, Retail

November 2022

NEW

Value of 
Welshness
Retail 2022

Value of Welshness 2022 is the latest in a series of pieces of insight to understand customers attitudes towards Welsh Food and Drink

Value of Welshness

Shopper

Consumer

Guest

Online
Shopper 2022

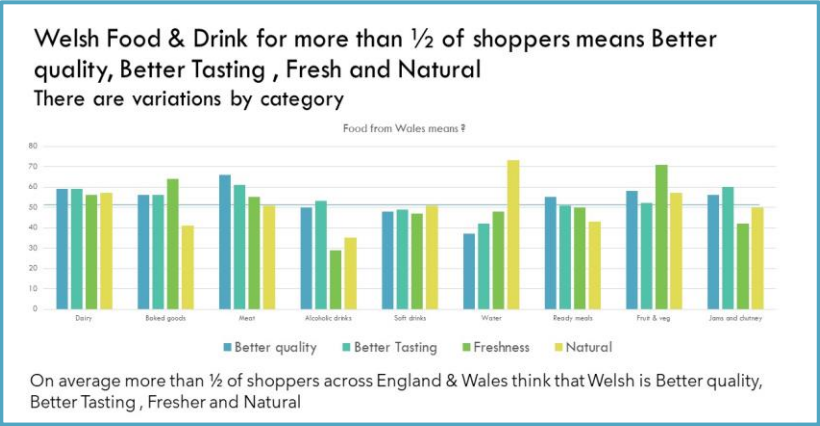
Shopper In
Store
Interview 2019

Online and
Street Survey
2017

Welsh Values
Attitudinal
Online 2020

OOH
preferences
2021

Looking back at previous Value of Welshness research



Welsh Food and Drink Six Attitudinal Types



Adventurers
Unique experiences
and variety



Food Lovers
The ritual of cooking
and quality



Healthy Lifestyle
Health and
wellness



Busy Lifestyle
Speed and
convenience



Ethical Eaters
Sustainability and
ethical sourcing



Traditionalists
Familiarity

Top 1 16%

14%

15%

9%

11%

36%

Top 2* 16%

14%

17%

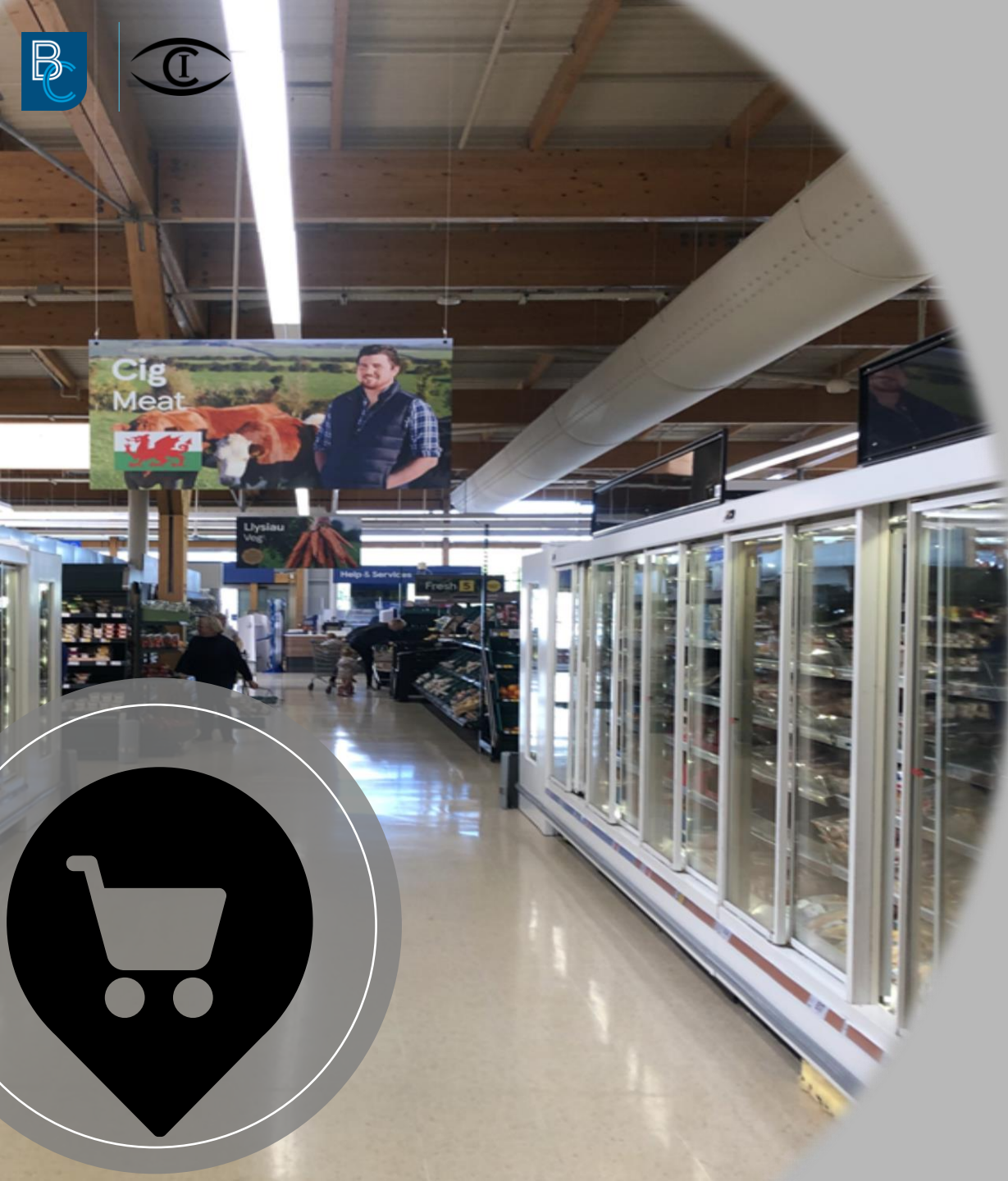
12%

15%

26%



MRQqual Value of Welshness 2022 400 Welsh Shoppers
And which of these two statements, that you selected at the previous question, is the one that you most identify with?

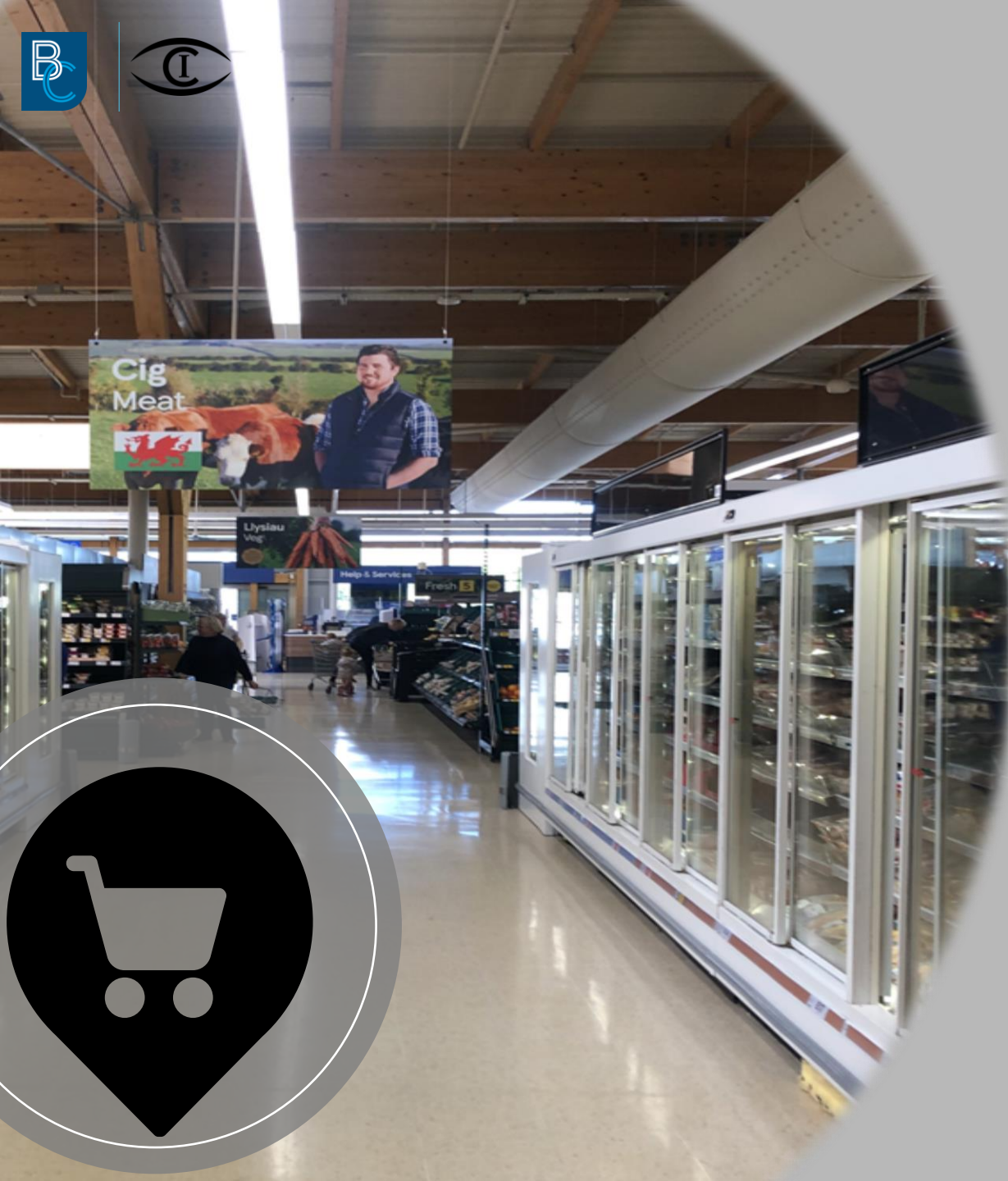


- Welsh Shoppers preference for Welsh Food and Drink
- Retailers Support of Welsh
- Welsh food and drink influence in Retailer choice
- English Shoppers preference for provenance

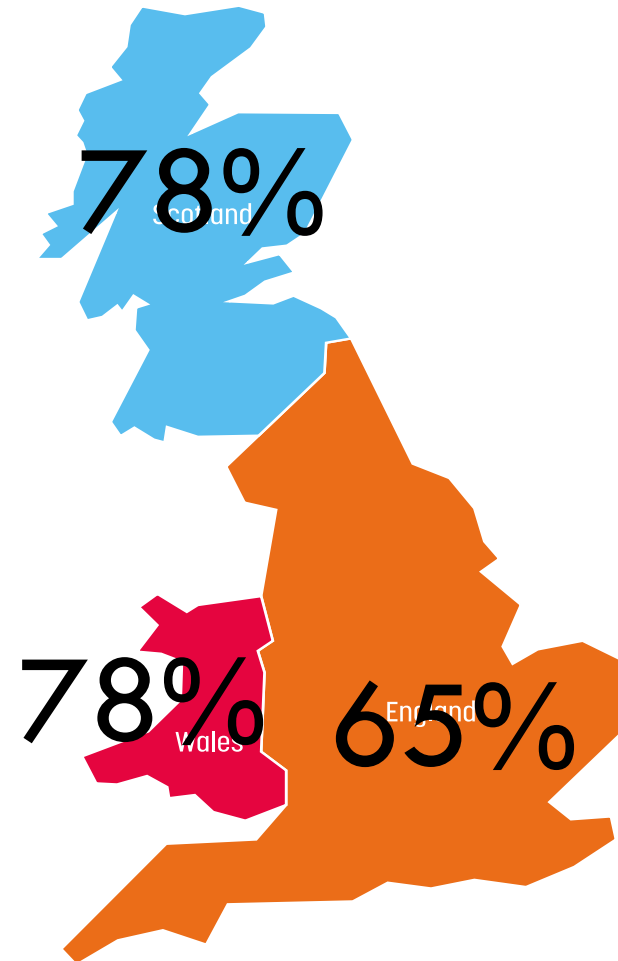


Welsh Shoppers preference for Welsh Food and Drink 2022

1. Given a choice would Shoppers like to buy Welsh Food and Drink ?
2. Do Shoppers intend to purchase more or less Welsh Food & Drink in these times?
3. Will shoppers pay more for Welsh Food and Drink?



Local Provenance is as important in Wales as in Scotland, and for 2/3 or English Shoppers



Given a choice, which one of these would you prefer to buy?

Excluding Category Non-Buyers



For Top Items 8/10 Welsh shoppers would prefer to buy Welsh products



Food Lovers are slightly more likely to choose Welsh

72%
**Shoppers would
choose Welsh**

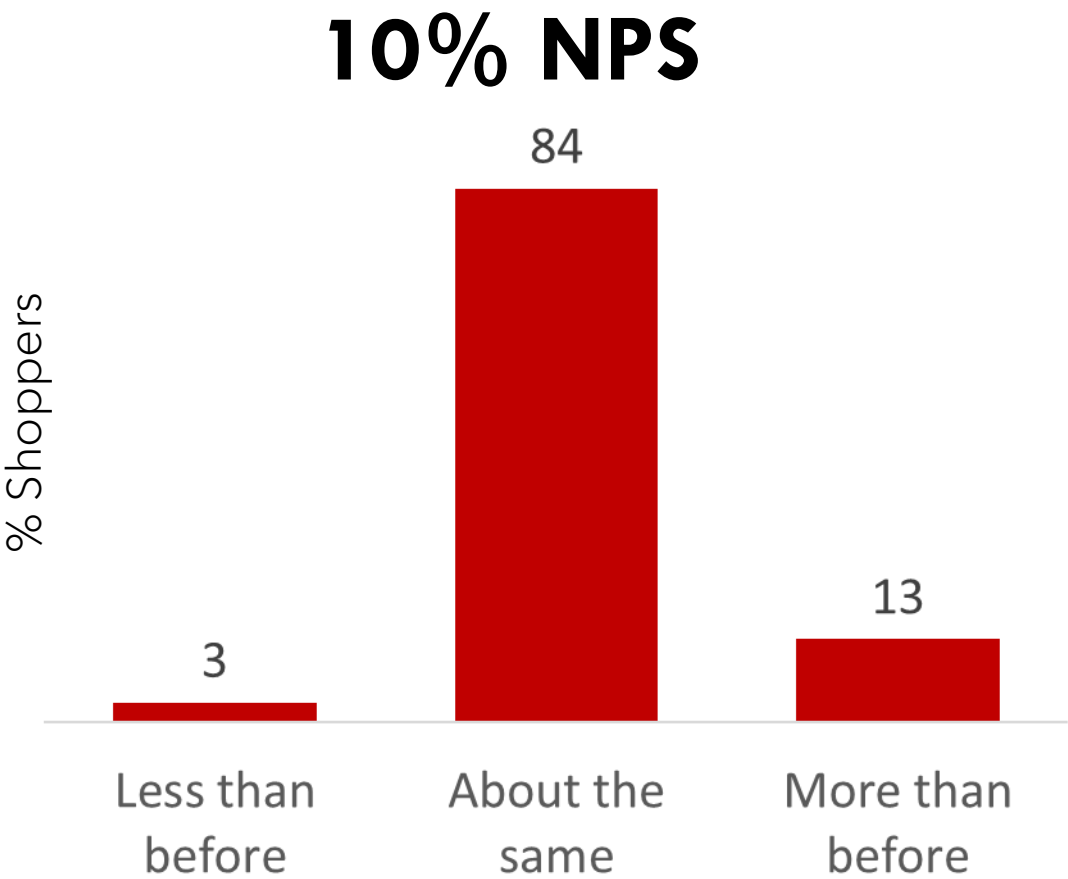


Given a choice of British vs Welsh, then 8/10 would choose Welsh



Source: Value of Welshness Research WG 2022, 400 shoppers On-line
Given a choice, which one of these would you prefer to buy? Expressed Preference British vs Welsh

97% of Shoppers aim to buy the same or more Welsh products



15%



8%



12%

NPS



16%



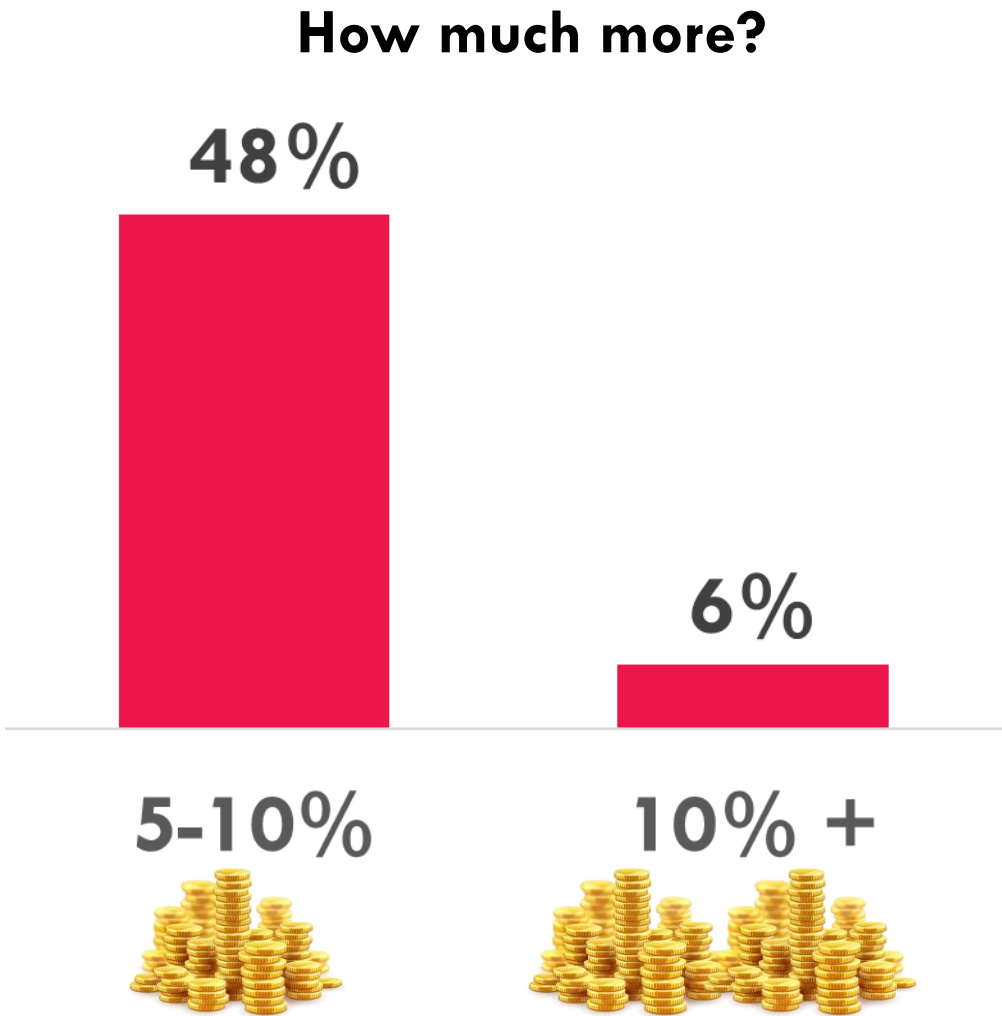
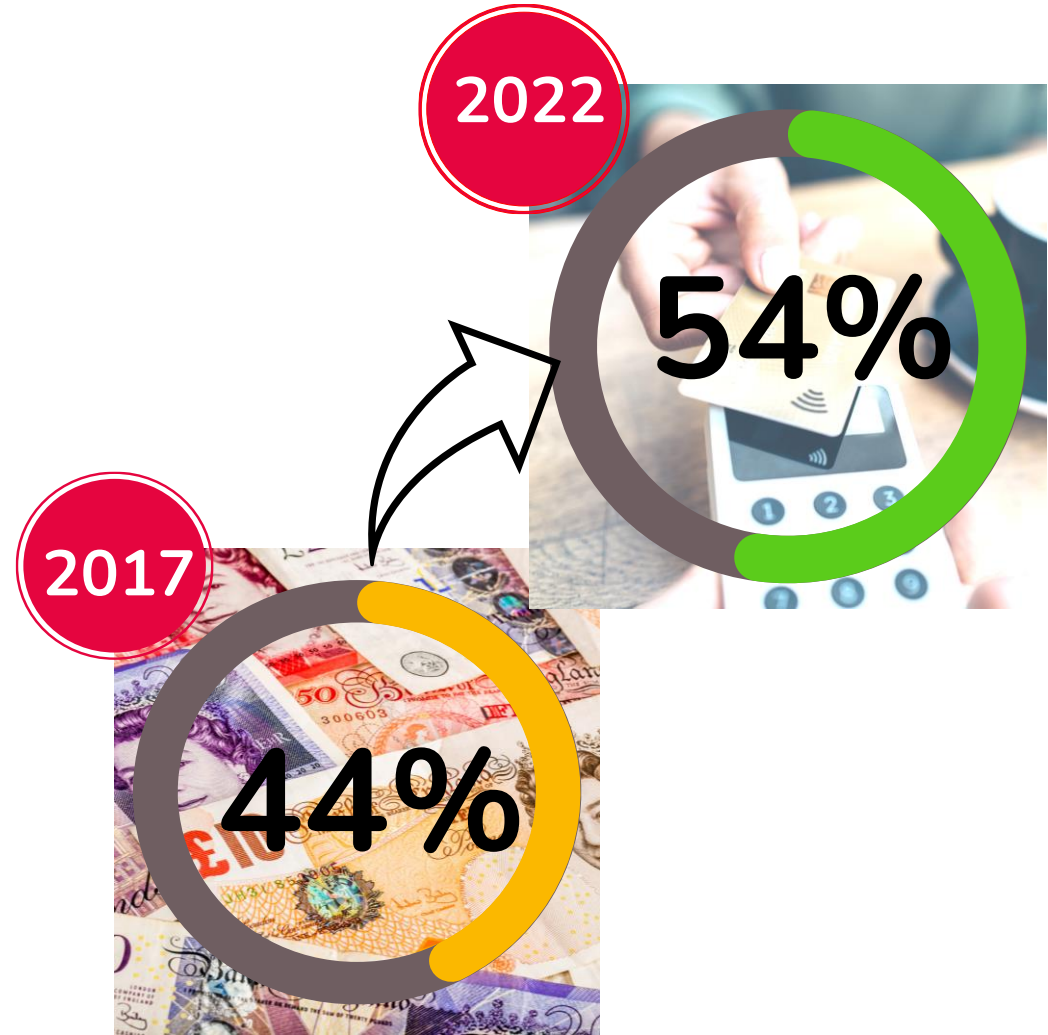
12%

NPS



6%

More than 1/2 of Shoppers will pay more for Welsh Food and Drink





Retailers Support of Welsh and Welsh food and drink influence in Retailer choice

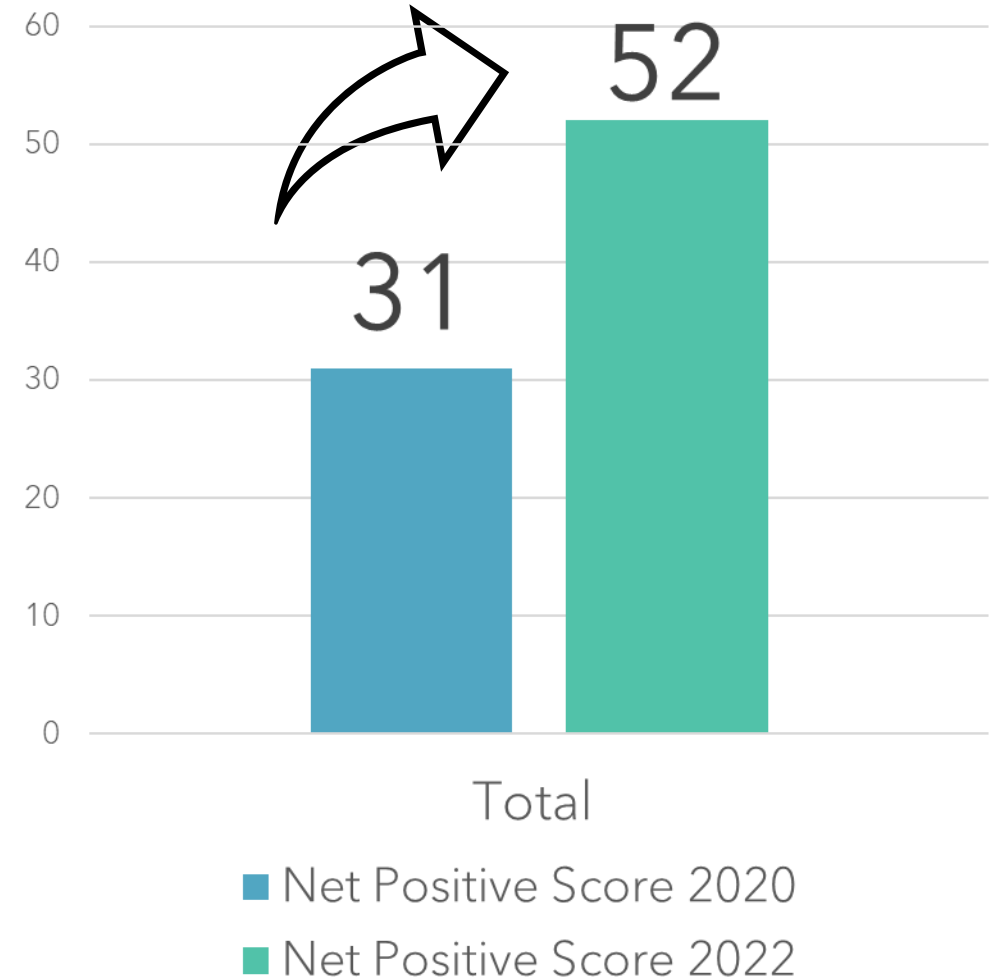
1. Do Shoppers think Retailers do Welsh Well?
2. How important is a range of Welsh Food and Drink in Store Choice?
3. Do Shoppers want More Welsh Food and Drink?



More Shoppers think that Retailers have a good range of Welsh F&D

6/10

My retailer has a good selection of Welsh Food & Drink

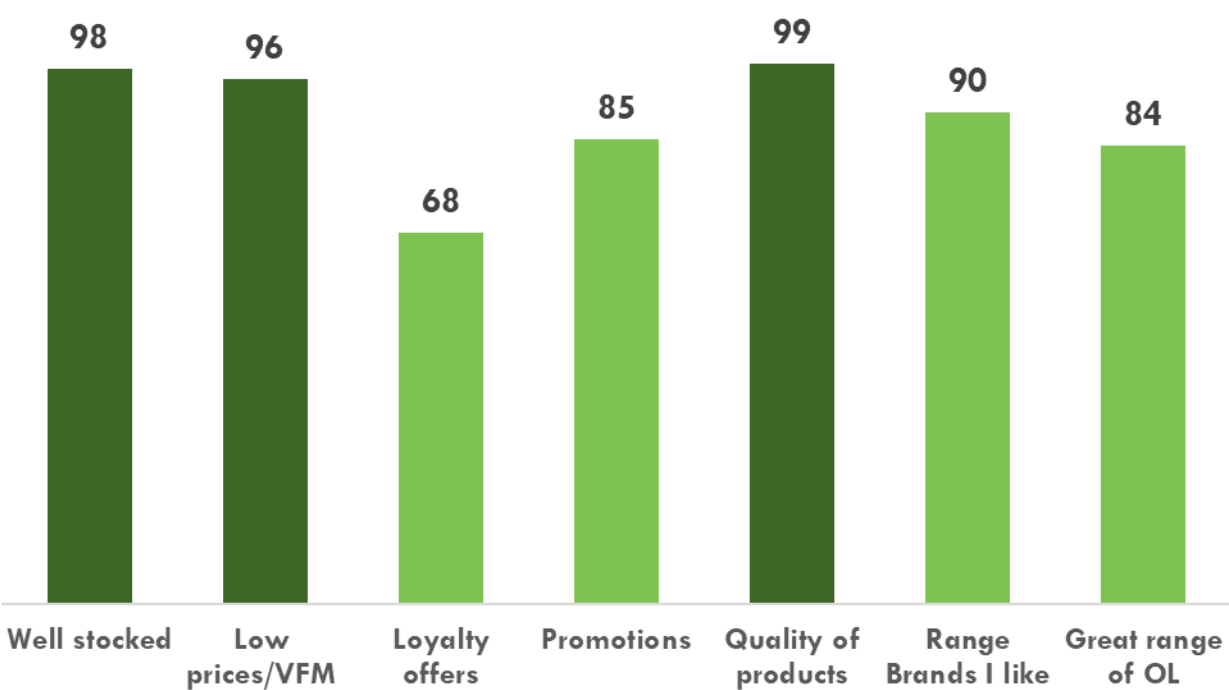


Availability, Quality, Price and Ease of Shop all hygiene factors

Convenience and Experience



Price, Availability, Core offer

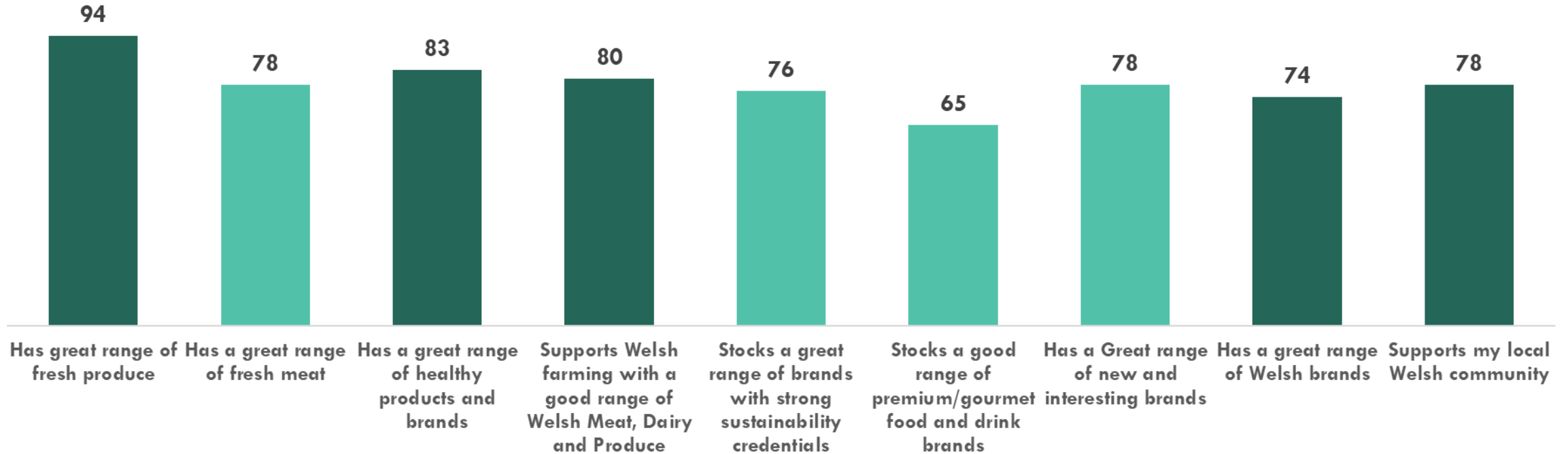


MRQual On-line Research Sept 2022 400 Welsh Shoppers

How important is each of the following to you in terms of why you do your main grocery shopping at (MAIN SHOP)?

Top 3 - Fresh Produce, Health and Welsh Produce

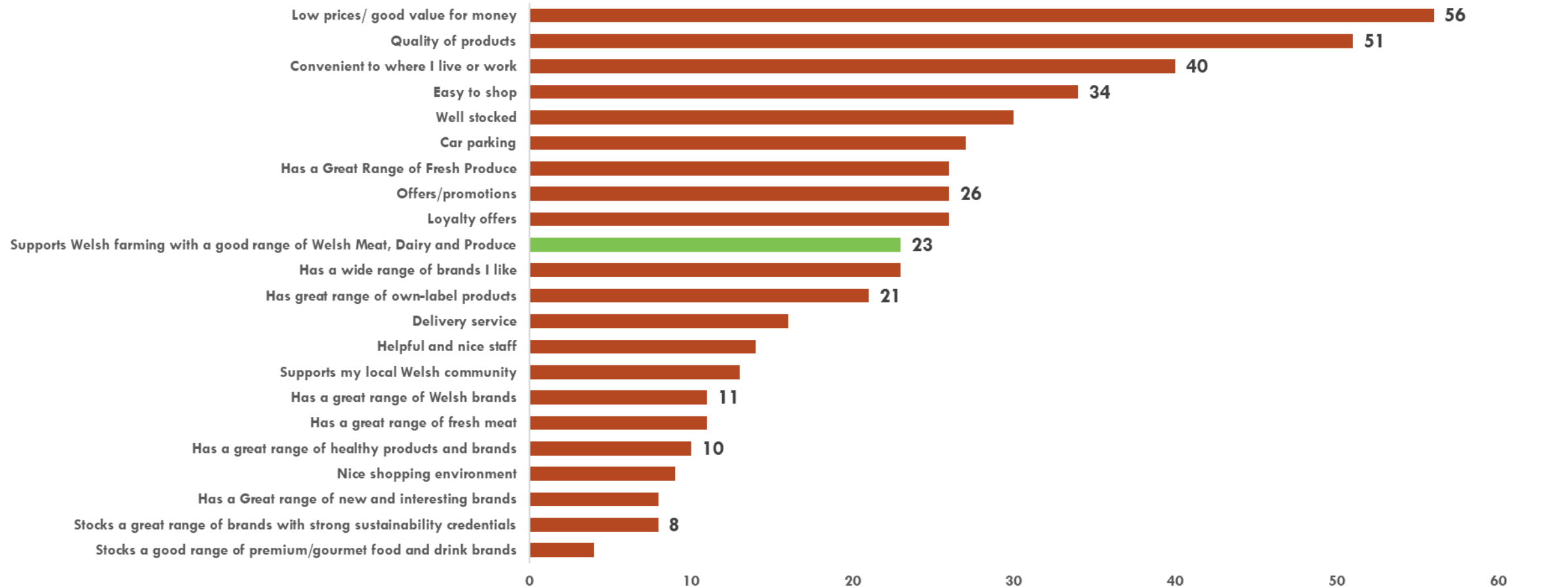
Depth of Offer



- **8/10 Shopper say it's important for their retailer to have a good range of Welsh Meat, Dairy and Produce**
- **¾ Shoppers say its important to have a great range Welsh Brands**

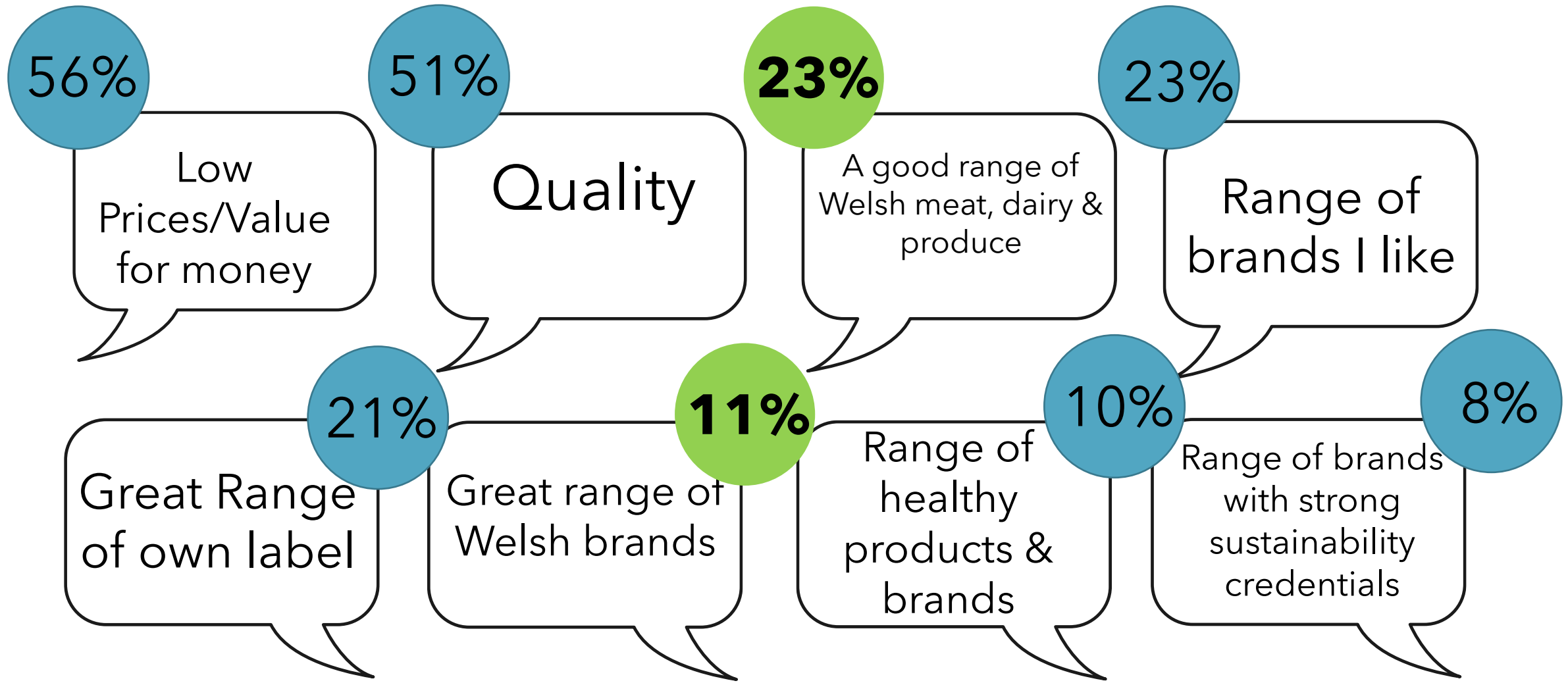
For 1/5 of Shoppers Stocking a good range of Welsh, Meat, Dairy and Produce is a top 5 reason for store choice, higher than a great OL range

Shoppers Top 5 Reasons for Store Choice



MRQual On-line Research Sept 2022 400 Welsh Shoppers
Please tick the top five reasons for shopping at [pipe in answer]

For 1/5 of Shoppers Stocking a good range of Welsh, Meat, Dairy and Produce is a top 5 reason for store choice, higher than a great OL range



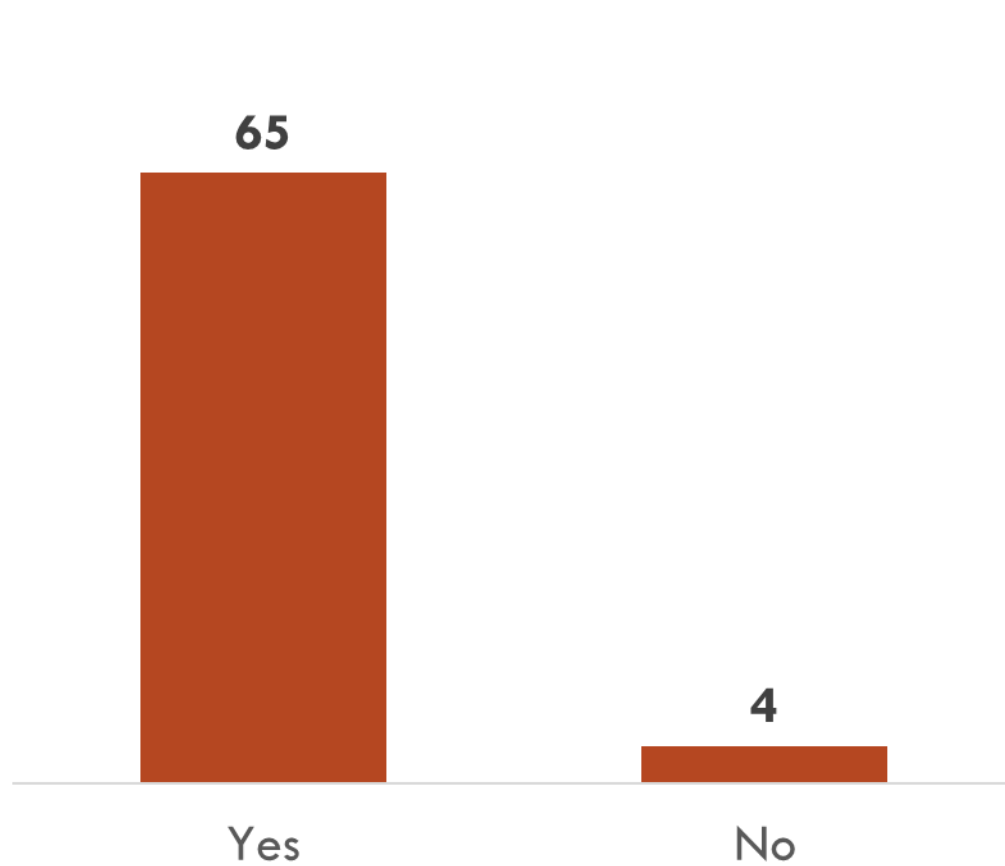
Welshness driving store choice most for Food Lovers and Ethical Eaters

Indexed Shoppers Top 5 Reasons for Store Choice



MRQual On-line Research Sept 2022 400 Welsh Shoppers
Please tick the top five reasons for shopping at [pipe in answer]

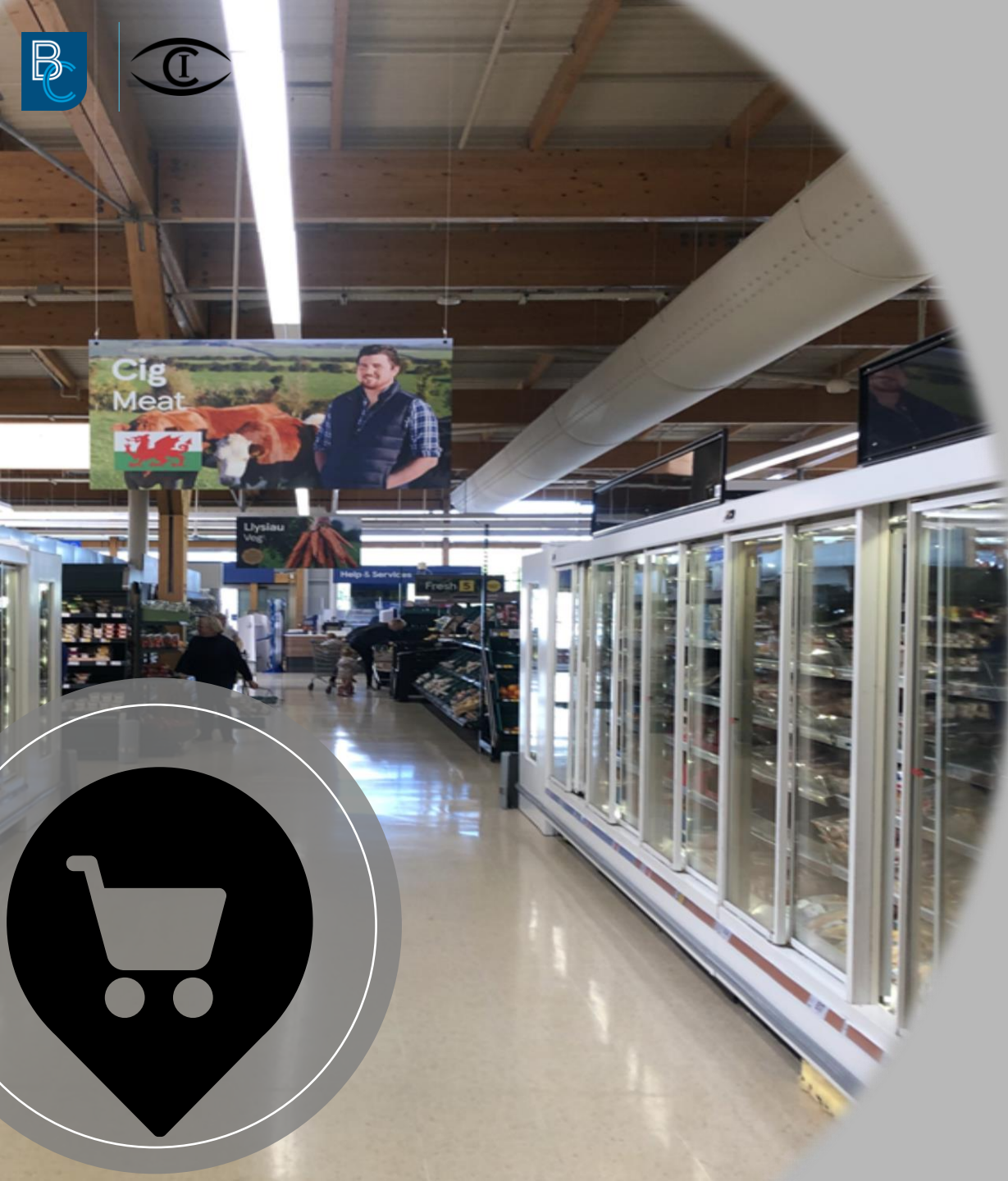
2/3 of Shoppers would like More Welsh Products in store



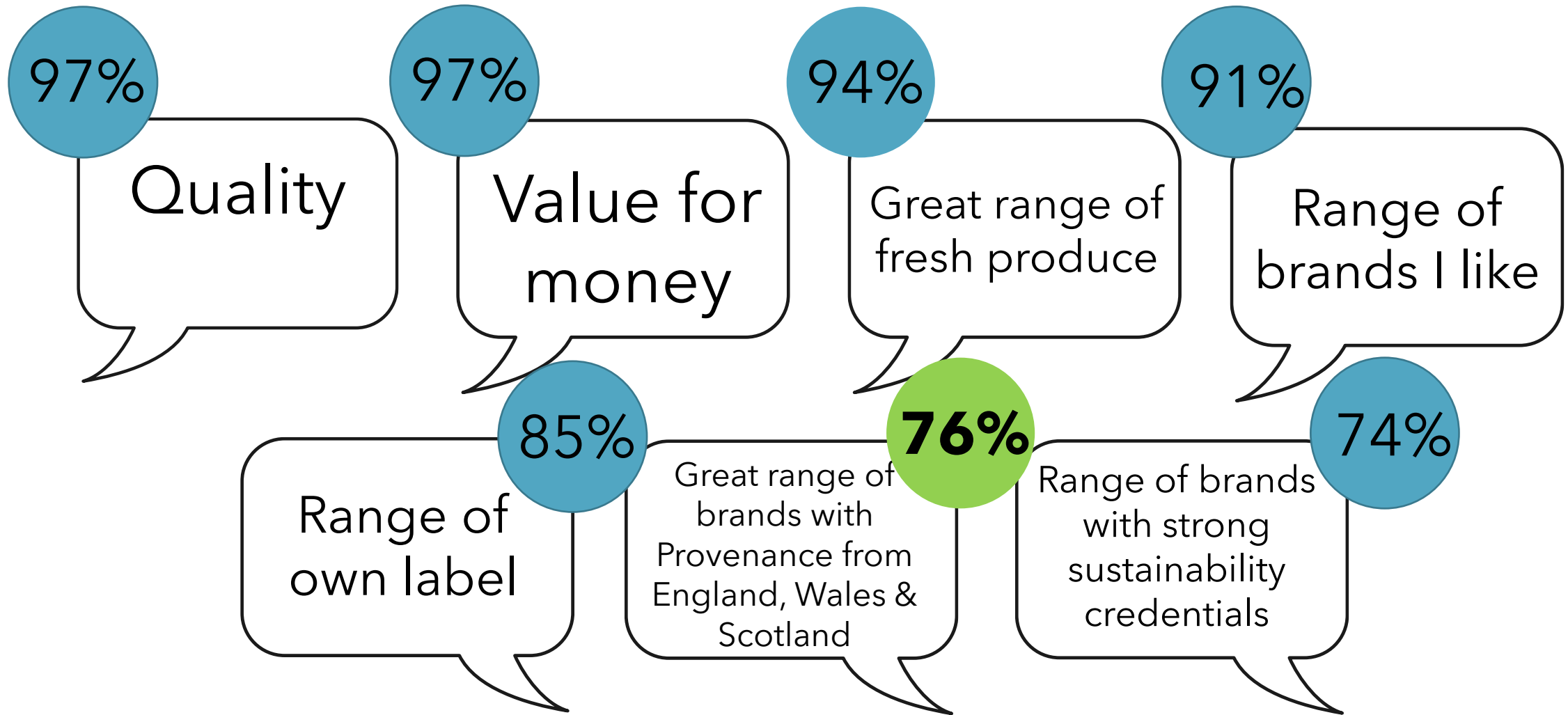


Shopper perceptions and attitudes about Food and Drink (F&D) with Provenance English Shoppers

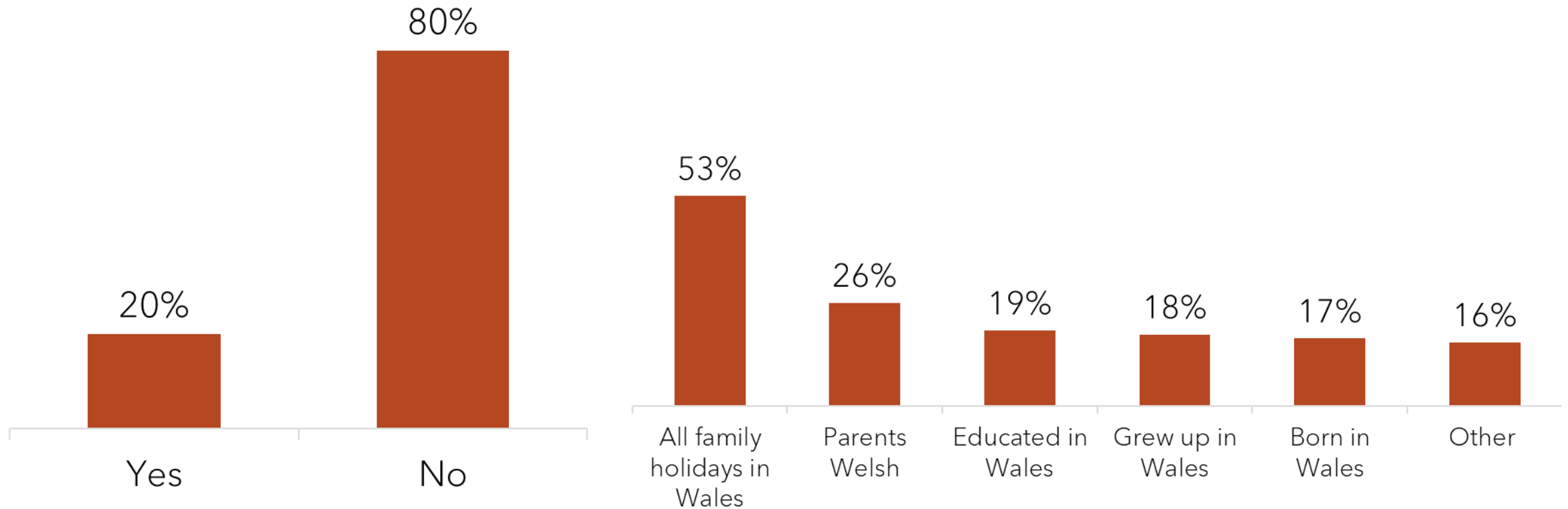
1. Understanding the importance of Food and Drink with Provenance
2. English shoppers affinity to Wales
3. Does Welshness add value to Brands for English Shoppers
4. Do Shoppers intend to purchase more or less Food and Drink with Provenance?



$\frac{3}{4}$ of English & Scottish Shoppers think stocking a range of great brands with provenance is important



Affinity to Wales – 1 in 5 English Shoppers feel partly Welsh

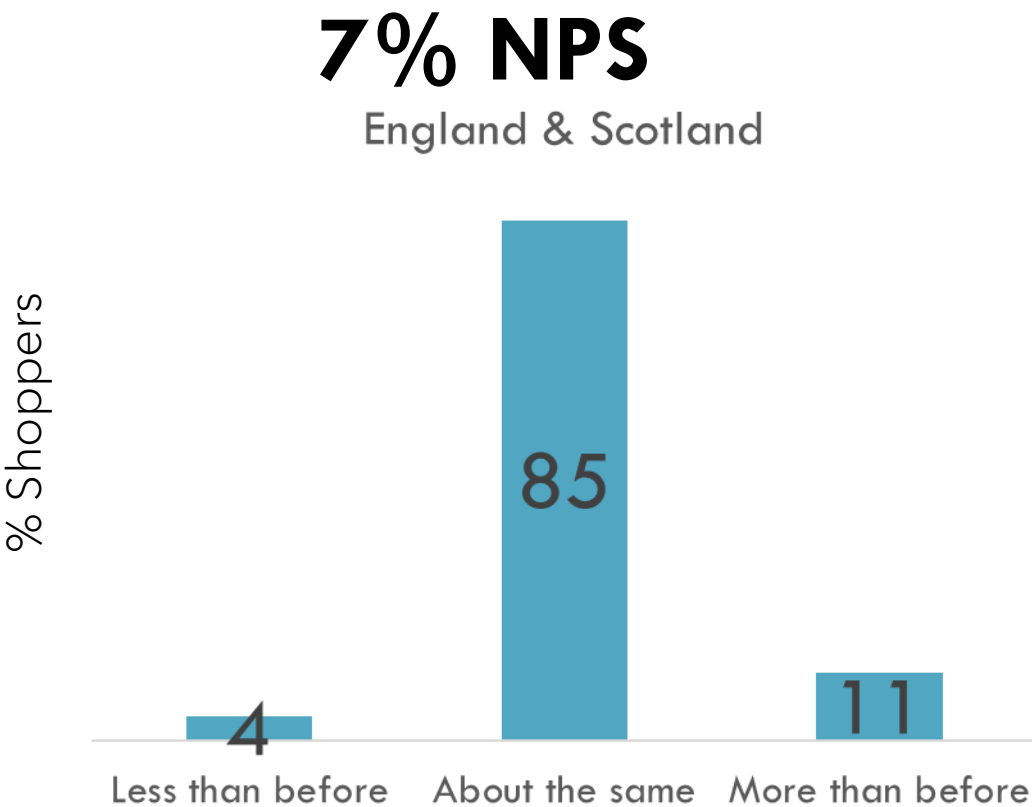


1/3 English shoppers see Welshness on pack, they are more likely to buy

Does seeing 'Welshness' on the pack, such as this, make you any more likely to buy these products?



96% of Shoppers aim to buy the same or more products with Specific Provenance



NPS



NPS



Opportunity to drive Welsh for Win-Win

- For Top Items 8/10 would prefer to buy Welsh
- For 1/5 Welsh is a reason for store choice
- More than 1/2 will pay more for Welsh
- Shoppers think Retailers are offering a better range of Welsh than in 2020
- 2/3 think Retailers should stock more Welsh



- 3/4 stocking E W S range with provenance is important
- 1/5 feel partly Welsh
- 1/3 seeing Welshness are more likely to buy



1. Maximise Hero Brands in Hero Welsh Categories to drive Welsh
2. Collaborate where possible to create stronger presence in Categories
3. Create a WIN-WIN Retailers Hero – Halo Effect



End

NEW

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