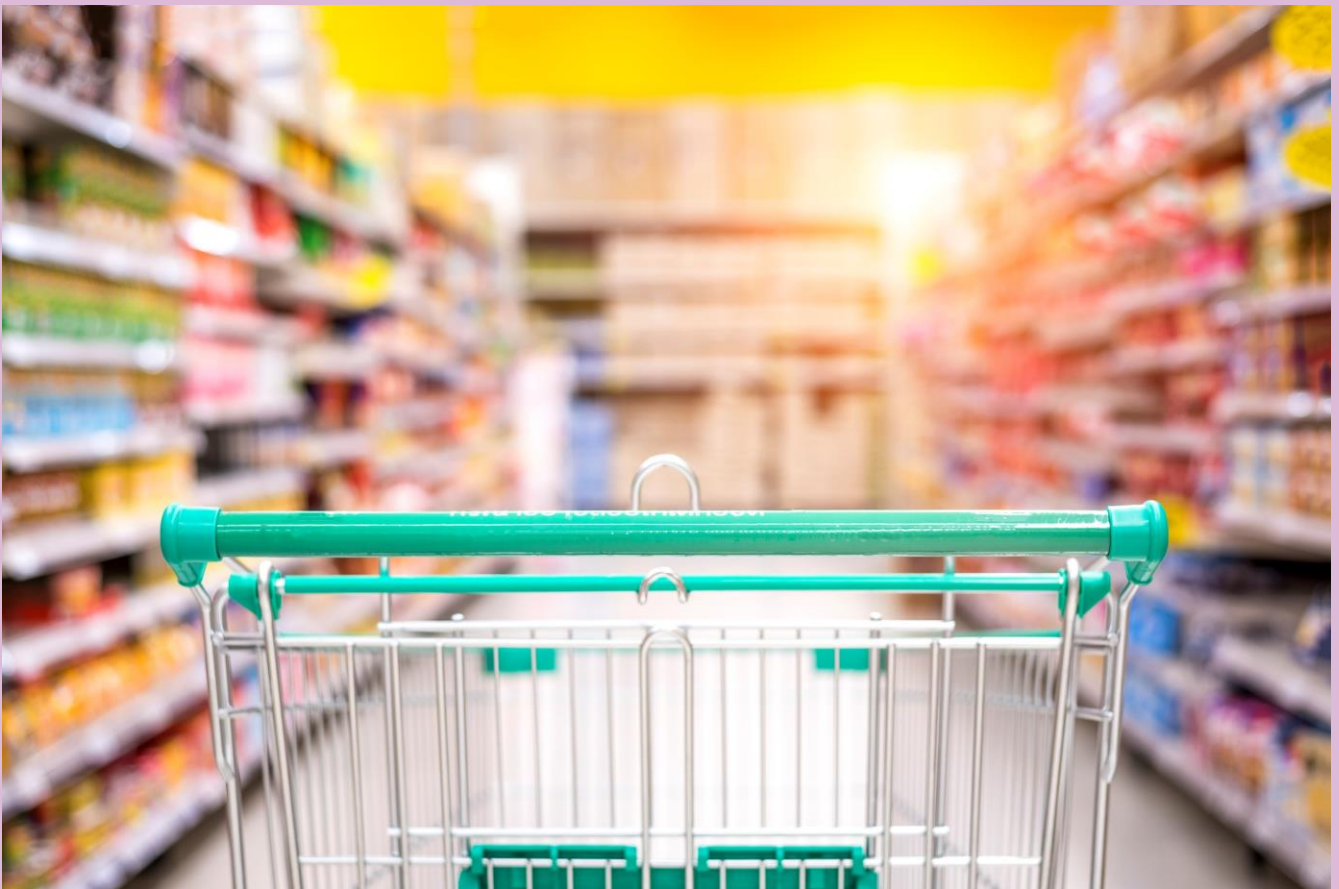


NatCen Opinion Panel July 2024

Technical information



SEPTEMBER 2024

We believe that social research has the power to make life better.

By really understanding the complexity of people's lives and what they think about the issues that affect them, we give the public a powerful and influential role in shaping decisions and services that can make a difference to everyone. And as an independent, not for profit organisation we're able to put all our time and energy into delivering social research that works for society.

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Introduction

In July 2024, the NatCen Opinion Panel conducted a survey amongst its panel members on behalf of the Competition and Markets Authority (CMA) to collect data on attitudes and experiences around loyalty pricing.

This document outlines some of the technical information related to the survey and associated dataset, including what data are included, questionnaire wording, the sample design, fieldwork approach, and information on the weighting approach.

If you have any questions about the data, or the information in this document, please get in touch at panel.info@natcen.ac.uk.

Key figures

Fieldwork dates	5/7//2024 –4/8/2024
Total complete interviews	2,719
Web interviews	2,585 (95%)
Telephone interviews	134 (5%)
Survey response rate	58%
Overall response rate	5%

1. Survey dataset

This section summarises the information included in the survey dataset.

1.1 Sampling and weighting information

Sampling information

The sample design for the British Social Attitudes Survey (BSA) and Life in Northern Ireland survey (LNI) (and therefore the NatCen Opinion Panel which is recruited via the BSA and LNI surveys) involves stratification and clustering (see Section 3). These design features affect standard errors and should therefore be taken into account in analysis.

Variables are provided to allow for this:

- **Panel_PSU** indicates the Primary Sampling Unit from which the panellist was recruited in their recruitment survey
- **Panel_Strata** indicates the sampling stratum from which the panellist was selected. This is a simplified version of the strata ID variable used in the recruitment survey. Each code indicates a different region

Non-response weight¹

Survey estimates from random probability samples are affected by non-response; if this is not addressed it can cause estimates to be biased. To ensure the achieved sample of respondents is representative of the population, a set of non-response weights has been computed to account for non-response to the recruitment surveys, refusal to join the panel, and non-response in the survey of panel members itself.

The weighting variable for this dataset is **Jul24_Weight**.

The weight was also 'grossed' (i.e. scaled up) to produce counts at population-level, that is estimates for numbers of people in the UK population, rather than in the responding sample. The weighting variable to be used for population-level estimates is **Jul24_GrossWeight**.

The grossing weights were calculated by adjusting the final survey weights, which were initially scaled to have a mean of 1 and a total sum of 2,719. These weights were then rescaled to represent the total population of adults aged 18 and over. This was done by dividing each weight by the achieved sample size (2,719) and multiplying by the total number of adults aged 18 and over (53,646,829). The population figure came from the mid-2022 population estimates (post census data).

1.2 Survey paradata

Two pieces of survey paradata are included in the survey dataset:

- **Jul24_IntDate** gives the date on which the survey was completed;
- **Jul24_IntMode** gives the mode in which the survey was completed (online or on the telephone).

¹ More information about the non-response weight is provided in Section 3.

1.3 Questionnaire data

The datasets include all substantive questions carried by the survey and funded by CMA. The questionnaire content is shown in Section 4, indicating variable names.

1.4 Fed-forward data

Because NatCen Opinion Panel members are interviewed regularly, we possess a wealth of background information on our panellists which can be used in analysis. These variables are indicated with the preface 'Cur_'. All data will have been updated in the last six months, with the exception of relatively 'static' variables such as ethnicity or sex.

The following variables are included in this dataset as standard:

- Latest sex
- Latest age category (grouped) (DV)
- Latest highest educational qualification achieved
- Latest class identity
- Latest tenure (grouped)
- Latest main economic activity (grouped)
- Latest NS-SEC analytic class (DV)
- Latest subjective income
- Latest household income (2021) (grouped)
- Latest household income – equivalised (2021) (grouped) (DV)
- Latest number of people in household (grouped) (DV)
- Latest household type (DV)
- Latest relationship status (grouped)
- Latest whether respondent has any children (0-18) in the household (DV)
- Latest urban/rural indicator 2011 (England & Wales) (grouped) (DV)
- Latest urban/rural indicator 2011 (Scotland) (grouped) (DV)
- Latest urban/rural indicator 2011 (Northern Ireland) (grouped) (DV)
- Latest urban/rural indicator 2011 (United Kingdom - combined) (DV)
- Latest government office region (DV)
- Latest political party identification (grouped) (DV)
- Latest ethnic group (grouped) (DV)
- Latest frequency of internet use (grouped)
- Latest disability status (DV)

1.5 Derived variables and back-coding

1.5.1 Derived variables

Additional derived variables have also been computed based on the survey data and included in the dataset:

GroShopMode3

A three-category grouped variable based on GroShopMode.

TotalLPJoin12Mths4

A frequency of loyalty schemes joined in the last year based on SuperLPJoin.

LPUseComb

A variable highlighting usage of loyalty schemes at main shops based on SuperLPFreq.

LPUseTopComb

A variable highlighting usage of loyalty schemes at top-up shops based on SuperLPFreqTop.

LoyalPricesSavNonSq

A two-category variable based on LoyalPricesSavNon and LoyalPricesSavNon2.

PromLP

A variable highlighting whether loyalty prices are main factor or otherwise that would increase likelihood of shopping at a particular supermarket based on PromPref and PromPrefS.

LPJoinReas

A variable highlighting whether loyalty prices are main reason or otherwise for joining a loyalty scheme within the 12 months based on SuperLPJoinWhy and SuperLPJoinWhyS.

LPUseReas

A variable highlighting whether loyalty prices are main reason or otherwise for using a loyalty scheme more than 12 months ago based on LPUseWhy and LPUseWhyS.

LPDataComf1 – LPDataComf7

Three-category grouped variables based on LPDataComfSup and LPDataComfOth.

LoyalPrices1 – LoyalPrices4

Three-category grouped variables based on LoyalPrices.

LoyalPricesSavMemTrust

A two-category grouped variable based on LoyalPricesSavMem.

LPMemReg

A variable summarising membership of loyalty schemes at supermarkets used regularly for shopping based on SuperUsed and SuperLP.

LPMemNotReg

A variable summarising membership of loyalty schemes at supermarkets not used regularly for shopping based on SuperUsed and SuperLP.

LPUseMoreYearCount

A frequency of loyalty schemes used more than 12 months ago based on LPUse.

LPJoinComb

A variable highlighting when loyalty scheme memberships were joined based on SuperLPJoin.

LPUseYearComb

A variable highlighting usage of loyalty schemes whilst doing shopping compared to 12 months ago based on LPUse.

Detailed information on the derivation of these variables can be provided on request.

1.5.2 Back-coding

Open text 'other – please specify' answers provided by respondents were reviewed, with answers back-coded as appropriate into existing answer categories or into some newly created answer categories as outlined below:

- LPUseNoWhy – I was not aware the supermarket had a loyalty scheme; my partner or relative is a member; I'm unable or struggle to use the app.

-
- LPUseWhy – I moved closer to shop or shop opened near me; I started using the app or mobile version.
 - SuperLPFreqWhy – I struggle with or don't want to use app; I forget to use it.
 - SuperLPJoinWhy – I moved closer to shop or shop opened near me; I was prompted by a family member or friend to join; offer or promotion for joining.

2. Sampling and fieldwork

2.1 Panel recruitment and sampling

Recruitment surveys

The NatCen Opinion Panel is based on a random probability design, with panel members originally selected at random and considerable effort put in to maximise participation to minimise the risk of bias.

Panel members in Great Britain were recruited from the British Social Attitudes survey (BSA) which interviews those aged 18 and over across Britain (south of the Caledonian canal). The BSA is a high-quality, random probability survey: addresses are selected at random, and considerable effort is expended to achieve an interview. For BSA 2015 to 2019 fieldwork was conducted face-to-face, with individuals selected at random. However, initially in response to the COVID-19 pandemic, from 2020 BSA has been conducted using a ‘push-to-web’ methodology, with up to two adults in a household asked to take part and encouraged to take part online (although an opt-in telephone option was also available)².

Panel members in Northern Ireland were recruited from the Life in Northern Ireland Survey (LNI) which interviewed people aged 18 and over in Northern Ireland in 2023. Like the BSA from 2020, the LNI is a random probability survey, conducted using a ‘push-to-web’ methodology, with up to two participants in a household allowed to take part and encouraged to take part online (although an opt-in telephone option was also available).

Those interviewed as part of the BSA and LNI were asked if they would like to join the Panel at the end of their interview.

Sampling

For this survey, all panel members recruited from BSA 2015 onwards and LNI, who had not subsequently left the panel or become ‘inactive’, were eligible to be invited. Of these, a random sub-sample of 4,700 cases were selected, maintaining the probability-based design. Odds of selection were adjusted based on extent to which a panel member had characteristics that were over- or under-represented in the full panel sample, improving the representativeness of the issued sample. The model used information on panel members’ age, sex, region, household structure, income, education, economic activity, ethnicity, tenure, social class, interest in politics and party support, and their odds of selection adjusted accordingly. The odds of selection were also adjusted to over-represent people living in Northern Ireland and Wales to enable analysis of experiences within those countries. Separate samples were taken from BSA and LNI and each was stratified by the variables used in weighting (see below).

2.2 Fieldwork

² More details of the BSA sampling approach can be found here: bsa.natcen.ac.uk

Fieldwork design

Fieldwork followed a sequential mixed mode design. Panel members were initially invited to participate in the research online, and sent multiple reminders by post, emails and/or text message. If they had not completed the interview after two weeks (and if telephone numbers were available), they were then contacted by NatCen's Telephone Unit to encourage online completion or offer an interview over the phone. In this way we were able to include those who are unable or unwilling to complete online. A £5 Love2Shop voucher was sent as a 'thank you' to those who participated.

The fieldwork period lasted for 31 days. Although most participants completed within the first week, this ensured that everybody had the opportunity to take part, and not only those that are 'readily' available. Web fieldwork ran from 5th July to 4th August and telephone fieldwork ran from 14th July to 4th August.

To improve sample quality, fieldwork resources were balanced away from those who are typically over-represented in the sample and that take part regularly and targeted at those who are under-represented in the sample and take part less regularly.

Response rates

The probability design allows us to apply statistical theory to the study, including tests of statistical significance or the 'margin of error'. Response rates are a simple indicator of quality for surveys of this sort and are provided in the below table for different parts of the sample.

This survey achieved a 58% response rate overall among those panellists invited to participate. Although our sampling design means we cannot strictly calculate a meaningful 'overall' response rate that takes account of non-response at the recruitment interview and at the point of recruitment to the panel, our best estimate gives a figure of 5%³.

Survey response

	BSA 20-23	BSA 15-19	SES 23
Response to the survey			
Issued	3,926	374	400
Deadwood	1	1	0
Achieved	2,275	260	184
Survey response rate	70%	58%	46%

³ The overall response rate was calculated by multiplying the survey response rate by the proportion of the estimated eligible individuals for the recruitment survey that are still active panel members for each recruitment survey, and then weighting these figures based on how many cases from each sample source was issued to this study.

3. Weighting

Non-response to NatCen Opinion Panel surveys can occur at various points: the recruitment survey, the invitation to join the panel (at the end of the recruitment interview), subsequent attrition from the Panel, and the survey of panel members itself. The recruitment surveys are already weighted to adjust for non-response, and we compute further weights to adjust for non-response at the subsequent stages. The final weight is the product of these weights. This multi-stage approach is ideal because the correlates of non-response can be different at each stage.

These are the three weights we have computed:

1. **Recruitment survey weight:** The weights from the recruitment surveys followed similar designs: selection weights to adjust for uneven selection probabilities; non-response weights computed via logistic regression models of response (at address level) to adjust for differential non-response; calibration to population estimates.⁴
2. **Sampling weight:** this weight adjusts for selection probabilities used in the sampling process and all non-response/attrition that occurs after the recruitment surveys but prior to sampling.

First, a logistic regression model was created to derive non-response weights to adjust for non-response that occurred prior to sampling i.e. at the panel recruitment stage plus any subsequent attrition. The following variables were used as predictors in the model: age and sex groups, region, household type, household income, education level, ethnicity, tenure, social class group, economic activity, political party identification, and interest in politics. The non-response weight was the inverse of the probability of joining/remaining in the panel.

As described above, a random subsample of panel members was selected for this survey. Weights were used to adjust the probabilities of selection, therefore a “sample selection” weight was computed to account for these differential selection probabilities (equal to the inverse of the probability of being selected for the sample), including the over-sampling in Wales and Northern Ireland. The final “sampling weight” is the product of the recruitment survey weight, the panel non-response weight and the sample selection weight.

3. **Survey weight:** this weight is used to adjust for non-response to this panel survey.

A logistic regression model was used to estimate the probability of response for each panelist issued to the survey. The panel survey weight was equal to the inverse of the probabilities of response. This weight adjusts for non-response using the same variables as used for the panel recruitment weight above i.e. age and sex groups, region, household type etc.

Two different models were used for the BSA respondents, one for BSA15-19 (the BSA face-to-face surveys) and one for BSA20-23 (the BSA push to web surveys). Another model was used for LNI respondents with predictors equivalent to those used in the BSA models. In each case, the resulting survey weight was multiplied by the sampling weight to create the final set of weights. The weights for LNI and BSA respondents were scaled before they were combined so that the proportion of respondents from NI and GB respectively is in line with the UK population.

⁴ More details on the BSA weight can be found at bsa.natcen.ac.uk

4. Questionnaire specifications

Introduction & screening questions

{ASK ALL} [1 item]

CMAIntro

The first set of questions is about how your household shops for groceries.

By groceries we mean the purchase of items in the following categories for your household, either online or in a physical store:

- fresh, frozen and non-perishable food and drink
- household cleaning products
- and personal hygiene products

Groceries do not include items such as takeaway food, restaurant meals or clothing.

{ASK ALL} [1 item]

WhoShop

Generally, who does the grocery shopping for your household?

Please consider both online and in store grocery shopping.

WEB: ""

TEL: "INTERVIEWER: READ OUT"

1. I do all or most of the grocery shopping
2. I share the responsibility with someone else
3. Others in my household do it
4. Others outside of my household do it (e.g. a relative or carer)
5. Each person does their own grocery shopping

START FILTER: IF WhoShop = 1,2,5

Grocery shopping habits

{ASK ALL} [1 item]

GroShop

Which one of the following statements best describes the grocery shopping you {IF WhoShop= 2: "personally"} do?

Please think of your usual habits. Disregard occasions where you might have forgotten an item and went to a shop just for that.

WEB: ""

TEL: "INTERVIEWER: READ OUT"

-
1. I mainly do big grocery shops once a week, or every fortnight [HS HELPLINK: By 'big grocery shops' we mean your main grocery shop where you buy a large quantity of items to cover your household needs.]
 2. I do a combination of big grocery shops and smaller top-up shops [HS HELPLINK: By 'top-up shops' we mean smaller shops where you buy fewer items – perhaps between big shops, or for a special occasion]
 3. I mainly do small grocery shops every day or a few times a week [HS HELPLINK: By 'small grocery shops' we mean purchasing items as needed or in smaller quantities, rather than doing a large shopping trip.]

{ASK ALL} [1 item]

GroShopMode [FLIP SCALE]

Do you do your grocery shopping in a physical shop, online (for home delivery or click and collect), or a mixture of both?

WEB: ""

TEL: "INTERVIEWER: READ OUT"

1. I always do my grocery shopping in a physical shop
2. I do most of my grocery shopping in a physical shop
3. I do about half of my grocery shopping in a physical shop, and about half of it online
4. I do most of my grocery shopping online
5. I always do my grocery shopping online

{ASK ALL} [3 items]

SuperUsed [MULTICODE]

Which, if any, of the following supermarkets do you use regularly for your {IF GroShop = 2: "big"} grocery shopping?

By regularly we mean at least once a month.

{IF GroShop = 2: "A question about supermarkets used for your top up shops will follow this question."}

{WEB: "Please select all that apply"}

INTERVIEWER: READ OUT EACH OPTION AND CODE ALL THAT APPLY

- 1 Aldi
- 2 Asda (including "Asda Express" stores)
- 3 Co-op
- 4 Iceland
- 5 Lidl
- 6 Marks and Spencer (M&S) (including "M&S Simply Food" stores)
- 7 Morrisons (including "Morrisons Daily" stores)
- 8 Ocado
- 9 Sainsbury's (including "Sainsbury's Local" stores)
- 10 Tesco (including "Tesco Express" stores)
- 11 Waitrose (including "Little Waitrose" stores)
- 12 None of the above

{ASK IF GroShop = 2} [3 items]

SuperUsedTop [MULTICODE]

Which, if any, of the following supermarkets do you use regularly for your top-up grocery shopping?

By regularly we mean at least once a month.

{WEB: "Please select all that apply"}

INTERVIEWER: READ OUT EACH OPTION AND CODE ALL THAT APPLY

- 1 Aldi
- 2 Asda (including "Asda Express" stores)

-
- 3 Co-op
 - 4 Iceland
 - 5 Lidl
 - 6 Marks and Spencer (M&S) (including "M&S Simply Food" stores)
 - 7 Morrisons (including "Morrisons Daily" stores)
 - 8 Ocado
 - 9 Sainsbury's (including "Sainsbury's Local" stores)
 - 10 Tesco (including "Tesco Express" stores)
 - 11 Waitrose (including "Little Waitrose" stores)
 - 12 None of the above

Views on promotions

{ASK ALL} [2 items]

PromPref [MULTICODE: RANDOMISE 1...8]

Which, if any, of the following types of promotions or rewards makes you more likely to shop at a particular supermarket?

{WEB: "Please select up to three"}
 INTERVIEWER: READ OUT EACH OPTION AND CODE UP TO THREE

- 1 Points-based rewards
- 2 Lower prices for particular products offered to loyalty scheme members only
- 3 Free items (such as hot drinks or newspapers)
- 4 Personalised offers (for example, money off vouchers for items I frequently buy)
- 5 Discounts off my shopping (for example, a percentage off if I spend over a set amount in a month)
- 6 Price Matching to other supermarkets
- 7 Dine-in or meal deals
- 8 Multi-buy offers (for example, 'buy one, get one free' or '3 for 2')
- 9 Other (please specify)
- 10 None of the above

{ASK IF MORE THAN ONE ANSWER SELECTED AT PromPref} [1 item]

PromPrefS [SINGLE CODE – KEEP ANSWER ORDER AS SHOWN AT MULTICODE]

And what would you say is the main type of promotion or reward that would make you more likely to shop at a particular supermarket?

WEB: ""

TEL: "INTERVIEWER: READ OUT"

NOTE TO PROGRAMMER: ONLY DISPLAY ANSWERS SELECTED AT [PromPref]

- 1 Points-based rewards
- 2 Lower prices for particular products offered to loyalty scheme members only
- 3 Free items (such as hot drinks or newspapers)
- 4 Personalised offers (for example, money off vouchers for items I frequently buy)
- 5 Discounts off my shopping (for example, a percentage off if I spend over a set amount in a month)
- 6 Price Matching to other supermarkets
- 7 Dine-in / meal deals
- 8 Multi-buy offers (for example, 'buy one, get one free' or '3 for 2')
- 9 Other (please specify)

Loyalty Schemes use (or no use)

START FILTER: IF SuperUsed = 1...11 OR SuperUsedTop = 1...11

{ASK ALL}

LPIntro

The next set of questions is about supermarket loyalty schemes.

{ASK ALL} [3 items]

SuperLP [MULTICODE]

Which, if any, of the following supermarket loyalty schemes are you a member of?

Please include loyalty schemes you are a member of but do not currently use.

{WEB: "Please select all that apply"}

INTERVIEWER: READ OUT EACH OPTION AND CODE ALL THAT APPLY

- 1 Asda Rewards
- 2 Co-op Membership
- 3 Iceland Bonus Card
- 4 Lidl Plus
- 5 M&S Sparks
- 6 Morrisons More
- 7 Ocado - Smart Pass
- 8 Sainsbury's - Nectar Card
- 9 Tesco Clubcard
- 10 myWaitrose

- 11 None of the above

**ASK IF {SuperUsed = 2 OR SuperUsedTop = 2 AND SuperLP NE 1,
SuperUsed = 3 OR SuperUsedTop = 3 AND SuperLP NE 2,
SuperUsed = 4 OR SuperUsedTop = 4 AND SuperLP NE 3,
SuperUsed = 5 OR SuperUsedTop = 5 AND SuperLP NE 4,
SuperUsed = 6 OR SuperUsedTop = 6 AND SuperLP NE 5,
SuperUsed = 7 OR SuperUsedTop = 7 AND SuperLP NE 6,
SuperUsed = 8 OR SuperUsedTop = 8 AND SuperLP NE 7,
SuperUsed = 9 OR SuperUsedTop = 9 AND SuperLP NE 8,
SuperUsed = 10 OR SuperUsedTop = 10 AND SuperLP NE 9,
SuperUsed = 11 OR SuperUsedTop = 11 AND SuperLP NE 10,
SuperLP = 11} [2 items]**

LPUseNoWhy [MULTICODE: RANDOMISE 1...8]

You said you're not a member of the loyalty schemes at the following supermarket(s) that you use regularly for grocery shopping:

{INTERVIEWER: READ OUT AS NEEDED}

{PROGRAMMING: Bulleted list of the supermarkets where they have shopped regularly but have not joined the loyalty scheme}

Why is this?

{WEB: "Please select all that apply"}

INTERVIEWER: READ OUT EACH OPTION AND CODE ALL THAT APPLY

- 1 I think the rewards/promotions of the scheme aren't worth the effort
- 2 I don't want to have to use an app on my phone
- 3 I don't want to share my personal data and/or shopping information with the supermarket(s) concerned
- 4 I think the loyalty scheme(s) are complicated and confusing
- 5 I'm already a member of enough loyalty schemes
- 6 I've just not got around to it/ I'm planning to at some point
- 7 I don't shop there often enough to make it worthwhile
- 8 {IF SuperUsed = 3 OR 8, OR SuperUsedTop = 3 OR 8: "I didn't want to pay to be a member"}
- 9 Other (please specify)

{IF SuperLP = 1...10} [2 items]

SuperLPJoin [COLLAPSIBLE GRID: FLIP SCALE]

When did you join {IF ONE CODE at SuperLP: "this loyalty scheme"; IF MORE THAN ONE CODE at SuperLP: "these loyalty schemes"}?

If you're not sure, please give your best estimate.

WEB: "Please select one answer in each section below"

TEL: "INTERVIEWER: READ OUT EACH STATEMENT AND THE ANSWER CODES. REPEAT ANSWER CODES AS REQUIRED."

GRID ROWS [only show codes selected at SuperLP]

- 1 Asda Rewards
- 2 Co-op Membership
- 3 Iceland Bonus Card
- 4 Lidl Plus
- 5 M&S Sparks
- 6 Morrisons More
- 7 Ocado – Smart Pass
- 8 Sainsbury's – Nectar Card
- 9 Tesco Clubcard
- 10 myWaitrose

GRID COLS

- 1 Within the last 12 months
- 2 1-2 years ago
- 3 More than 2 years ago

{ASK IF ANY SuperLPJoin = 1} [1.5 items]

SuperLPJoinWhy [MULTICODE: RANDOMISE 1...7]

You said that you joined the following loyalty scheme{IF SuperLP=1 FOR MORE THAN ONE CODE: "s"} within the last 12 months.

[PROGRAMMING: Bulleted list of the supermarkets where they have shopped regularly but have not joined the loyalty scheme]

What prompted you to join {IF ONE CODE = 1 AT SuperLPJoin: "this scheme", IF MORE THAN ONE CODE SuperLPJoin = 1: "those schemes"} within the last 12 months?

{WEB: "Please select all that apply"}

INTERVIEWER: READ OUT EACH OPTION AND CODE ALL THAT APPLY

- 1 I started to shop there, or shop there more frequently
- 2 I wanted to earn rewards or money back (for example, points-based rewards or events)
- 3 Free items on offer, such as hot drinks or newspapers
- 4 The lower prices for particular products offered to loyalty scheme members only
- 5 Personalised offers (for example, money-off vouchers for items I frequently buy)
- 6 I wanted to be able to use 'scan as you shop'
- 7 I was prompted by a staff member to join
- 8 Other (please specify)

{ASK IF MORE THAN ONE ANSWER SELECTED AT SuperJoinWhy} [1 item]

SuperLPJoinWhys [SINGLE CODE – KEEP ANSWER ORDER AS SHOWN AT MULTICODE]

And what would you say is the main reason you joined {IF ONE CODE = 1 AT SuperLPJoin: "this scheme", IF MORE THAN ONE CODE SuperLPJoin = 1: "those schemes"}?

WEB: ""

TEL: "INTERVIEWER: READ OUT"

NOTE TO PROGRAMMER: ONLY DISPLAY ANSWERS SELECTED AT [SuperJoinLPWhy]

- 1 I started to shop there, or shop there more frequently
-

-
- 2 I wanted to earn rewards or money back (for example, points-based rewards or events)
 - 3 Free items on offer, such as hot drinks or newspapers
 - 4 The lower prices for particular products offered to loyalty scheme members only
 - 5 Personalised offers (for example, money-off vouchers for items I frequently buy)
 - 6 I wanted to be able to use 'scan as you shop'
 - 7 I was prompted by a staff member to join
 - 8 Other (please specify)

{ASK IF SuperLP = 1...10} [2 items]

SuperLPFreq [COLLAPSIBLE GRID: FLIP SCALE]

For each of the following loyalty schemes, when you {if GroShop = 2: "do your big"} shop for groceries at the relevant supermarket, how often do you use your loyalty card or app?

WEB: "Please select one answer in each section below"

TEL: "INTERVIEWER: READ OUT EACH STATEMENT AND THE ANSWER CODES. REPEAT ANSWER CODES AS REQUIRED."

{IF GroShop = 2: "A question about supermarkets used for your top up shops will follow this question."}

GRID ROWS [only show codes selected at SuperLP and where SuperUsed = 1]

- 1 Asda Rewards
- 2 Co-op Membership
- 3 Iceland Bonus Card
- 4 Lidl Plus
- 5 M&S Sparks
- 6 Morrisons More
- 7 Ocado – Smart Pass
- 8 Sainsbury's – Nectar Card
- 9 Tesco Clubcard
- 10 myWaitrose

GRID COLS

1. Always, or almost always
2. More than half of the time
3. Around half of the time
4. Less than half of the time
5. Never, or hardly ever

{ASK IF GroShop = 2 and SuperLP = 1...10} [2 items]

SuperLPFreqTop [COLLAPSIBLE GRID: FLIP SCALE]

And for each of the following loyalty schemes, when you do top-up shops for groceries at the relevant supermarket, how often do you use your loyalty card or app?

WEB: "Please select one answer in each section below"

TEL: "INTERVIEWER: READ OUT EACH STATEMENT AND THE ANSWER CODES. REPEAT ANSWER CODES AS REQUIRED."

GRID ROWS [only show codes selected at SuperLP and where SuperUsedTop = 1]

- 1 Asda Rewards
- 2 Co-op Membership
- 3 Iceland Bonus Card
- 4 Lidl Plus
- 5 M&S Sparks
- 6 Morrisons More
- 7 Ocado – Smart Pass
- 8 Sainsbury's – Nectar Card
- 9 Tesco Clubcard
- 10 myWaitrose

GRID COLS

1. Always, or almost always
2. More than half of the time
3. Around half of the time
4. Less than half of the time
5. Never, or hardly ever

{ASK IF ANY SuperLPFreq = 4...5 OR SuperLPFreqTop = 4...5} **[1.5 items]**

SuperLPFreqWhy [MULTICODE: RANDOMISE 1...5]

You said that you use {IF MORE THAN ONE CODE at SuperLP: "one or more of"} your loyalty card or app {IF MORE THAN ONE CODE at SuperLP "s"} less than half of the time, hardly ever or never when shopping for groceries.

What are the reasons for this?

{WEB: "Please select all that apply"}

INTERVIEWER: READ OUT EACH OPTION AND CODE ALL THAT APPLY

- 1 I don't bother if I'm not spending much
- 2 I only use it when a particular loyalty promotion applies to my purchase(s)
- 3 I don't always have the card with me / don't always use the app
- 4 I don't think the rewards are worth the effort
- 5 I don't want to share my personal and / or shopping information with the supermarket
- 6 Other (please specify)

{ASK IF SuperLPJoin = 2,3 FOR ANY} **[2 items]**

LPUse [COLLAPSIBLE GRID: FLIP SCALE]

Do you use your loyalty card or app for each of the following schemes more than, less than or about the same compared to 12 months ago?

WEB: "Please select one answer in each section below"

TEL: "INTERVIEWER: READ OUT EACH STATEMENT AND THE ANSWER CODES. REPEAT ANSWER CODES AS REQUIRED."

GRID ROWS [only show codes selected at SuperLPJoin = 2,3]

- 1 Asda Rewards
- 2 Co-op Membership
- 3 Iceland Bonus Card
- 4 Lidl Plus
- 5 M&S Sparks
- 6 Morrisons More
- 7 Ocado – Smart Pass
- 8 Sainsbury's – Nectar Card
- 9 Tesco Clubcard
- 10 myWaitrose

GRID COLS

- 1 Less than 12 months ago
- 2 About the same as 12 months ago
- 3 More than 12 months ago

{ASK IF ONE OR MORE ANSWERS SELECTED AT LPUse = 3} **[2 items]**

LPUseWhy [MULTICODE: RANDOMISE 1...8]

You said that you use {IF MORE THAN ONE ANSWER SELECTED AT [LPUse] = 3: "one or more of"} your loyalty card or app {IF MORE THAN ONE ANSWER SELECTED AT [LPUse] = 3: "s"} **more** than 12 months ago.

What are the reasons for this?

{WEB: "Please select up to three"}

INTERVIEWER: READ OUT EACH OPTION AND CODE UP TO THREE

-
- 1 I have been shopping there more frequently
 - 2 I am more interested in earning rewards or money back than before
 - 3 I wanted to access free items on offer, such as hot drinks or newspapers
 - 4 Loyalty schemes have become more user-friendly / easily accessible
 - 5 The lower prices for particular products offered to loyalty scheme members only
 - 6 I wanted to be able to use 'scan as you shop'
 - 7 The personalised offers
 - 8 It's automatically applied to my online account
 - 9 Other (please specify)

{ASK IF MORE THAN ONE ANSWER SELECTED AT LPUseWhy} [1 item]

LPUseWhyS [SINGLE CODE – KEEP ANSWER ORDER AS SHOWN AT MULTICODE]

And what would you say is the main reason you use {IF MORE THAN ONE ANSWER SELECTED AT [LPUse] = 3: "one or more of"} your loyalty card or app {IF MORE THAN ONE ANSWER SELECTED AT [LPUse] = 3: "s"} more than 12 months ago?

WEB: ""

TEL: "INTERVIEWER: READ OUT"

NOTE TO PROGRAMMER: ONLY DISPLAY ANSWERS SELECTED AT [LPUseWhy]

- 1 I have been shopping there more frequently
- 2 I am more interested in earning rewards or money back than before
- 3 I wanted to access free items on offer, such as hot drinks or newspapers
- 4 Loyalty schemes have become more user-friendly / easily accessible
- 5 The lower prices for particular products offered to loyalty scheme members only
- 6 I wanted to be able to use 'scan as you shop'
- 7 The personalised offers
- 8 It's automatically applied to my online account
- 9 Other (please specify)

Loyalty Schemes data usage

{ASK IF SuperLP = 1...10} [1 item]

LPDataAware

Thinking back to when you most recently signed up for a supermarket loyalty scheme, were you aware that the supermarket would be collecting your personal data each time you shopped?

This includes information about you, as well as your shopping habits.

WEB: ""

TEL: "INTERVIEWER: READ OUT"

- 1 Yes, I had read the available information and was aware about what data is collected and how it is used for this scheme
- 2 Yes, I was aware that schemes typically do this but I didn't look at the details for this scheme
- 3 I was not aware
- 4 I didn't really think about it

{ASK IF SuperLP = 1...10} [1.5 item]

LPDataComfSup [COLLAPSIBLE GRID: FLIP SCALE]

The supermarkets collect personal data every time you use your loyalty card or app. This information can include what you buy and how often you shop.

How comfortable or uncomfortable do you feel about supermarkets using this information to...?

WEB: "Please select one answer in each section below"

TEL: "INTERVIEWER: READ OUT EACH STATEMENT AND THE ANSWER CODES. REPEAT ANSWER CODES AS REQUIRED."

GRID ROWS

1. Understand your shopping habits
2. Understand general shopping habits, by combining it with data from other customers
3. Decide which advertisements to show you
4. Send you personalised offers

GRID COLS

- 1 Very comfortable
- 2 Somewhat comfortable
- 3 Neither comfortable nor uncomfortable
- 4 Somewhat uncomfortable
- 5 Very uncomfortable

{ASK IF SuperLP = 1...10} [1.5 item]

LPDataComfOth [COLLAPSIBLE GRID: FLIP SCALE]

And how comfortable or uncomfortable do you feel about supermarkets sharing your data with other companies for the following purposes?

WEB: "Please select one answer in each section below"

TEL: "INTERVIEWER: READ OUT EACH STATEMENT AND THE ANSWER CODES. REPEAT ANSWER CODES AS REQUIRED."

GRID ROWS

1. Sharing anonymised data with other companies so they can understand shopping habits of people in general
2. Sharing your individual data with other companies so they can show you targeted advertising
3. Sharing your individual data with other companies so they can offer you personalised promotions

GRID COLS

- 1 Very comfortable
- 2 Somewhat comfortable
- 3 Neither comfortable nor uncomfortable
- 4 Somewhat uncomfortable
- 5 Very uncomfortable

END FILTER [IF SuperUsed = 1...11 OR SuperUsedTop = 1...11]

Loyalty Schemes prices logic

{ASK ALL} [2 items]

LoyalPrices [COLLAPSIBLE GRID: RANDOMISE ROWS: FLIP SCALE]

Some supermarkets operate loyalty schemes that offer grocery products at lower prices for members and a higher price for non-members. These lower prices for members of loyalty schemes are called 'loyalty prices'.

To what extent do you agree or disagree with the following statements...?

WEB: "Please select one answer in each section below"

TEL: "INTERVIEWER: READ OUT EACH STATEMENT AND THE ANSWER CODES. REPEAT ANSWER CODES AS REQUIRED."

GRID ROWS

- 1 Supermarket loyalty prices provide good savings for members
- 2 Loyalty prices make me (or would make me) feel like a valued customer
- 3 It's unfair that lower prices are only available to members of loyalty schemes
- 4 Lower loyalty prices make me feel like I have to join supermarket loyalty schemes to save money

GRID COLS

-
- 1 Strongly agree
 - 2 Agree
 - 3 Neither agree nor disagree
 - 4 Disagree
 - 5 Strongly disagree

{ASK ALL} [1 item]

LoyalPricesSavMem [FLIP SCALE]

Thinking about a supermarket that is offering groceries at a lower 'loyalty price' for members and a higher price for non-members...

How much do you trust that the loyalty price for members is a genuine saving on the usual price?

WEB: ""

TEL: "INTERVIEWER: READ OUT"

1. Very much so
2. To some extent
3. Not very much
4. Not at all

{ASK ALL} [1 item]

LoyalPricesSavNon [FLIP SCALE 1..2]

Thinking again about a supermarket that is offering groceries at a lower 'loyalty price' for members and a higher price for non-members...

Which of the following statements comes closest to your view on the price for non-members?

WEB: ""

TEL: "INTERVIEWER: READ OUT"

1. The price for non-members is generally just the usual price
2. The price for non-members is generally higher than the usual price
3. I'm not sure

{ASK IF LoyalPricesSavNon=3} [0 item]

LoyalPricesSavNon2 [FLIP SCALE 1..2]

Your opinion is really important to us, and there are no right or wrong answers.

If you had to choose, which of the following statements comes closest to your view for the price for non-members?

WEB: ""

TEL: "INTERVIEWER: READ OUT"

1. The price for non-members is generally just the usual price
2. The price for non-members is generally higher than the usual price

{ASK ALL} [1 item]

LoyalPricesCompA [FLIP SCALE]

When a supermarket offers groceries at a lower 'loyalty price' for members, how do you think this loyalty price compares to the prices at other grocery retailers for the same product?

The loyalty price is likely to be...

WEB: ""

TEL: "INTERVIEWER: READ OUT"

-
1. The best price I can get
 2. Similar to the price available at another retailer where that product is on promotion
 3. Similar to the usual price available at another retailer where that product is not on promotion
 4. Not the best price, as there could be a lower price available at another retailer where the product is on promotion
 5. Not the best price, as there could be a lower price available at another retailer where the product is not on promotion

Loyalty Schemes impact on shopping habits

{ASK ALL} [1 item]

ShopHabitWhere [FLIP SCALE 1...2]

In the past 12 months, have you changed **where** you shop as a result of some supermarkets having loyalty prices?

Please consider both online and in store grocery shopping.

WEB: ""

TEL: "INTERVIEWER: READ OUT"

1. Yes, I now shop **more** at certain supermarkets because of their loyalty pricing schemes
2. Yes, I now shop **less** at certain supermarkets because of their loyalty pricing schemes
3. No, I have not changed where I shop as a result of loyalty pricing schemes

{ASK ALL} [1 item]

ShopHabitPrice [FLIP SCALE 1...2]

And thinking about now compared to 12 months ago, which of the following most applies to you?

WEB: ""

TEL: "INTERVIEWER: READ OUT"

1. Because of loyalty pricing I am comparing prices across different supermarkets **more**
2. Because of loyalty pricing I am comparing prices across different supermarkets **less**
3. Loyalty pricing has not changed the extent to which I compare prices across different supermarkets

END FILTER: IF WhoShop = 1, 2, 5

