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Affordable food for all: how supermarkets can help in the cost of food crisis

Contents

Introduction

Rising prices are affecting consumers across the economy, but food prices are increasing particularly sharply. Food price inflation was 14.6 per cent in September 2022, a 42 year high.[1] This means that while energy prices are the leading source of pressure on household budgets in this cost of living crisis, food prices are following closely behind.

This is worst for the poorest consumers as the 20% of the population with the lowest incomes spend on average 18.3% of their disposable income on food and non-alcoholic drinks, compared with 11.8% for the twenty per cent with the highest incomes.[2] The effect of this can be seen in statistics on food bank usage. Our research has shown that 3% of the population are having to resort to using food banks, but this increases to 11% for universal credit claimants.[3]

New consumer research from Which? shows that people are already changing their behaviour, with consumers trading down and many buying cheaper products or shopping around. Some are taking more drastic steps such as missing meals and the impact is especially high on those who are struggling financially. One consequence is that it is becoming much more difficult for people to eat healthily.

With food prices continuing to increase it is crucial that people get the support they need to manage through this crisis. While the government undoubtedly has an important role, supermarkets can also do a lot more to support people in making affordable, healthy choices – and our research shows that people expect this. In particular the reach of supermarkets into so many local areas means they have huge potential to make a difference, particularly for those who are hardest hit.

Which? has chosen supermarkets as one of the key sectors we will be targeting as part of our campaign for businesses to step up for the consumer during this cost of living crisis because we believe they have the power to make a difference to people's lives.[4] While supermarkets face their own inflationary pressures, we believe they can support consumers by ensuring pricing is more clear and transparent, providing access to affordable choices, particularly for those that need them most, and investing in targeted promotions to customers who need more help.

The ten-point plan we set out in this report lists specific steps that supermarkets can take to help consumers. Some of these, such as the actions to ensure that pricing is clear, fair and transparent, are relevant for consumers throughout the UK. However, others such as the adequate provision of budget lines, tailoring marketing budgets and promotions, promoting Healthy Start and Best Start Foods and improving the accessibility of online shopping will be more impactful in certain areas of the country.

To assist with the targeting of interventions, Which? has collaborated with the Consumer Data Research Centre at the University of Leeds to develop the new Priority Places for Food Index. Using data from a wide variety of sources, the index allows us to identify 'priority places' where people are most likely to have difficulties accessing affordable food. The reasons for this vary, including levels of financial vulnerability but also limited access to supermarkets or other food outlets.

1 Office for National Statistics (2022) *Consumer Price Inflation, UK: September 2022*
2 Office for National Statistics (2022) *Family spending workbook*
3 Which? (2022) *The impact of the cost of living crisis on consumers*
4 Which? (2022), *An agenda for business to support consumers through the cost of living crisis*

The analysis of the index that we present in this report shows that while the priority places are spread around the country, in both urban and rural areas, there are some parts of the country in which they are particularly concentrated. For example, 45% of places in the north-east of England are identified as priority places.

The report is structured in three parts. In the first, we present our recent survey evidence that shows the struggles consumers are facing as a result of rising food prices. In the second, we set out our ten-point plan for the actions supermarkets could take to support consumers through the cost of living crisis. In the third and final section we introduce the Priority Places for Food Index and show how this can be used to target interventions at the communities who need them most and deal with the immediate cost of living crisis in a way that also has longer-term benefits.

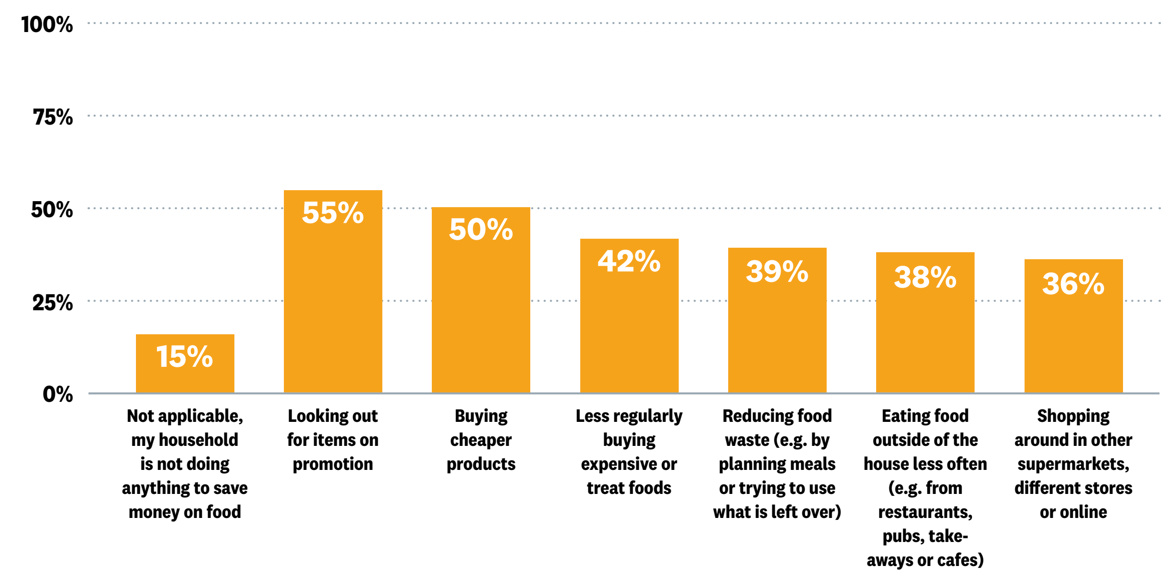
The impact of higher food prices

Our research with a representative survey of around 2,800 UK adults shows that rising prices are having a widespread impact on consumers' food shopping habits.[5] The vast majority of people (85%) are doing something to save money on food as a result of the cost of living crisis. Most commonly people are (see figure 1):

- Looking out for items on promotion – 55% of consumers said they are doing this.
- Trading down to cheaper products – 50%
- Less regularly buying expensive or treat foods – 42%

For people who report being in a difficult financial position, rising food prices are particularly challenging. Almost all (99%) of these people reported doing something to save money on food, they are more likely to be doing all of the behaviours we asked them about. For example, 18% of the public are buying more frozen food, increasing to 34% of those struggling the most; 15% are buying less meat or dairy, rising to 30% of those finding their finances 'very difficult'; and 5% reported buying more ready or microwave meals to save money, but rising to 11% of those finding their finances 'very difficult'. Those struggling are particularly more likely to be taking drastic actions. Overall, 12% of the public are skipping meals to save money on food, but this rises to 50% of those who are struggling financially.[6]

Figure 1: Most common actions taken by consumers to save money on food



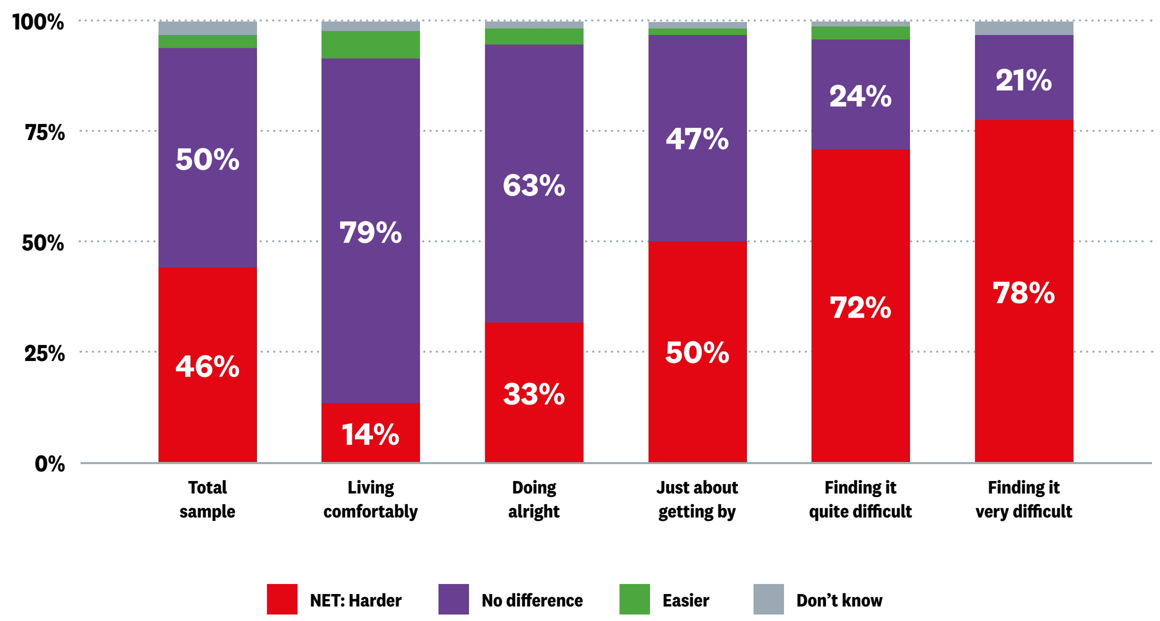
Base: All respondents (n=2791). Survey conducted 8–9 August 2022

Response to question: "As a result of the cost of living crisis, which, if any, of the following is your household doing to save money on food?". Other answers included "buying more frozen food" 18% ; "Buying less meat or dairy" – 15% ; "Skipping meals" – 12% ; "'Buying less ready meals or microwave meals" – 11%; "'Buying more ready meals or microwave meals" – 5% ; "'Eating food outside of the house more often (e.g. from restaurants, pubs, take-aways, or cafes)" – 1%.

5 Online survey conducted by Yonder Consulting on behalf of Which?. The survey was conducted 8–9 August 2022 with a panel of 2,791 UK adults and the results were weighted to be nationally representative.
6 Base: All respondents (n=2791). Survey conducted 8–9 August 2022. For more detail on these results see recent Consumer Insights article here

Squeezed household food budgets are having an effect on people's self-reported ability to eat healthily. 46% of consumers say they are finding eating healthier more difficult due to the cost of living crisis, but almost 80% of those who say they are struggling the most financially say they are finding it harder to eat healthily now, see figure 2.

Figure 2: Percentage of consumers finding it harder to eat healthily by financial position



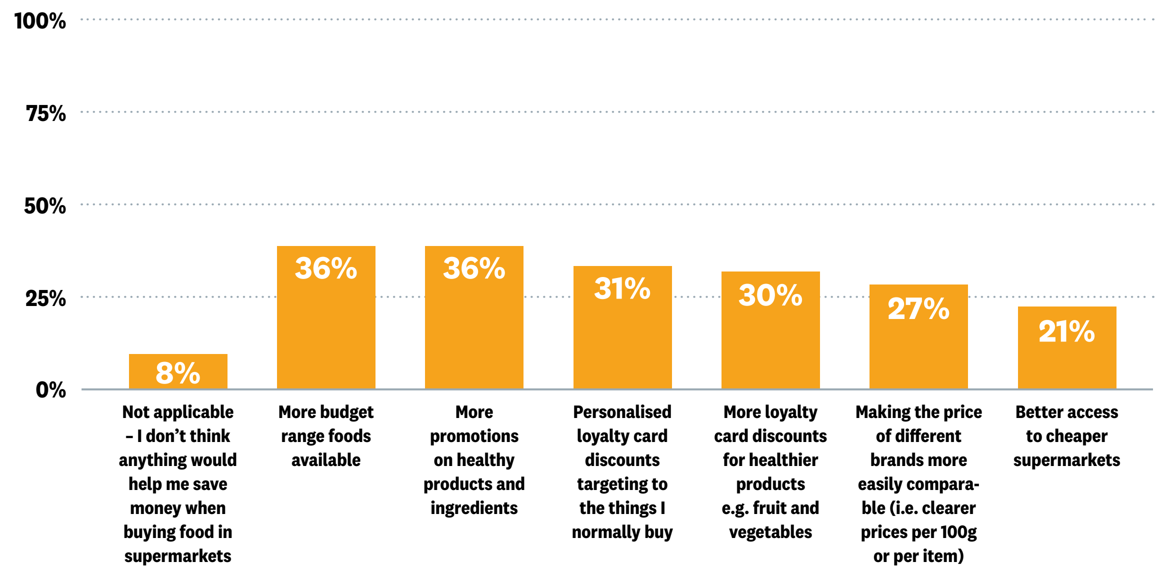
Base: All respondents (n=2791). Survey conducted 8–9 August 2022

The role for supermarkets

There are no easy solutions to this crisis and with high food price inflation likely to persist for some time, many people will increasingly struggle to buy affordable food. They will look for support from a range of sources, including the government, charities and local community groups. However, the fundamental role of the largest supermarkets in the UK's grocery market means that these businesses have a key role to play in supporting consumers.

Supermarkets have responded in a range of ways to the cost of living crisis, including making commitments to keep essential products at lower prices or price match discounters, offering help with meal planning and cooking on a budget and even offering interest free loans. When we asked consumers to pick three options that would help them save the most money on food in supermarkets, from a range of possible actions that supermarkets already are or could be taking, we found that people want more affordable choices, but they also want support so that they can eat healthily. The most popular choices were 'more budget range foods available' and 'more promotions on healthy products and ingredients', which were both chosen by 36% of people, see figure 3.

Figure 3: What consumers think would save them the most money on food in supermarkets



Base: All respondents (n=2791). Survey conducted 8–9 August 2022

Answers to the question: "Thinking about the current cost of living crisis... Which, THREE, if any, of the following do you think would help you save the most money on food in supermarkets?"

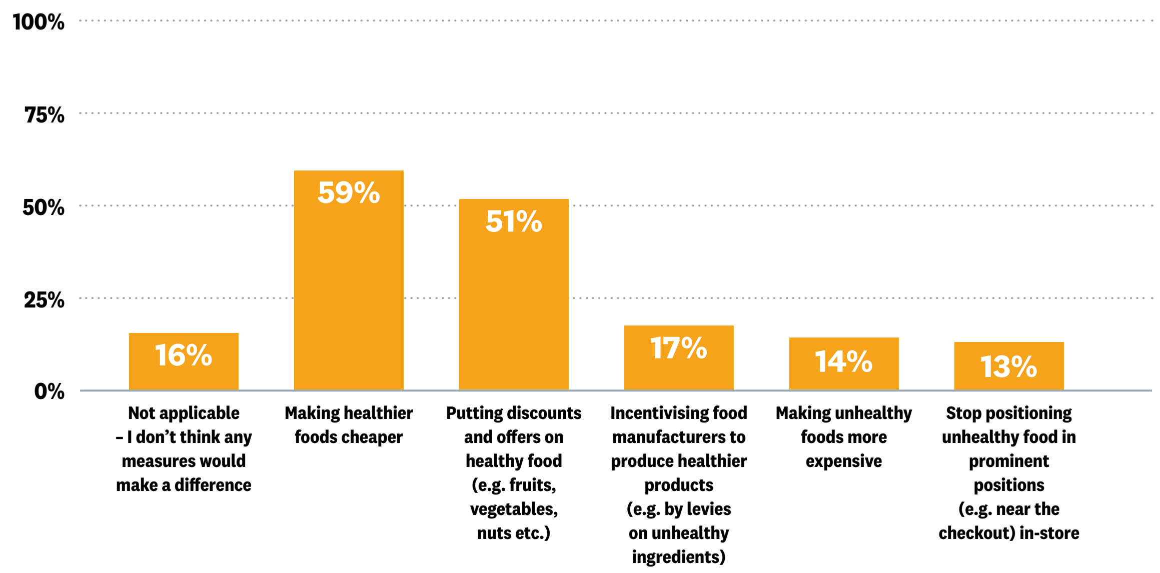
Other option answers included: "More prominent displaying or positioning of products that are better value"– 18% ; "Cheaper home delivery for online shopping"– 14% ; "Advice on recipes for cheap, convenient, and healthy home-cooked meals" – 14% ; "Offers on ready-made meal plans (i.e. an offer on all the ingredients for a cheap, healthy meal)" – 10% ; "Other" – 1% ; "Don't know" – 4%.

Those who feel they are struggling with their finances the most are more likely to say they would see the most benefit from having more budget range foods available. More than half (56%) of those finding their finances 'very difficult' said that they would benefit from more budget ranges being available, compared to just 22% of those 'living comfortably'.

Around 3 in 10 (31%) of people thought that personalised loyalty card discounts would help them save the most money, and 30% said having more loyalty card discounts for healthier products, such as fruit and vegetables would help them to save money.

In terms of the help they want to support eating healthily, people have an unsurprisingly strong preference for making healthy food cheaper. Nearly 6 in 10 (59%) consumers say that they think making healthier food cheaper would help them buy healthier food in-store, while 51% said putting discounts on healthy food would help them, see figure 4.

Figure 4: What consumers think would help them buy healthier foods



Base: All respondents (n=2791). Survey conducted 8–9 August 2022

Response to question: "Which three, if any, of the following measures do you think would most help your household buy healthier foods in-store?"

Which? believes that supermarkets can go further to to support consumers as food prices rise and we have developed a ten point action plan for how supermarkets can help.

Government's role

Supermarkets alone aren't going to address the challenges people are facing. There is an important role for government in supporting people through this crisis – at central, national and local level. This includes ongoing support for energy bills, but also providing a more effective nutritional 'safety net' for families who are most vulnerable through expanding eligibility across all of the UK for free school meals and the Healthy Start and Best Start Foods schemes, for example.

As well as a nutritional safety net, the UK government should support people in making healthy, sustainable and safe choices and ensuring that at whatever price point they are having to buy at, they will be protected by baseline food standards. It is essential that the Government ensures these standards are also applied to both domestic and imported products so that as people are forced to trade down – which our research shows they are already doing – they know that they will still be protected.

Measures to support healthier choices and tackle obesity, including stronger controls over how foods are marketed to children and ensuring that promotions such as multi-buys don't incentivise unhealthy over healthier choices are also important and need to be implemented. Mandatory front of pack traffic light nutrition labelling would also help people more easily identify healthy and less healthy options.

Overall, a much more ambitious cross-governmental joined up food strategy, that builds on the national food strategy published by the Department for the Environment, Food and Rural Affairs in June, as well as devolved nation food policies and strategies, is needed to ensure a more resilient and sustainable food system that can better withstand shocks and support people in making affordable and healthy choices.

Ten point action plan for supermarkets

Clear, fair and transparent pricing so that it is easy to compare best value

1. Make unit pricing prominent, legible and consistent in-store and online so price comparisons are easy across different brands and sizes of packaging.
2. Provide clear unit pricing for promotional offers in-store and online so that people can work out whether they really are the best deal.

The right products available in the right place so consumers who most need them have access to affordable ranges

3. Provide a basic range of essential budget lines for affordable, healthy everyday choices that are available across stores, but particularly in locations where people most need support.
4. Consider adapting minimum spend requirements and other ways that online deliveries can be more cost-effective to increase options for households in areas with poor supermarket access.

Marketing budgets and promotions tailored to support those who are most in need

5. Tailor marketing budgets and promotions, including through loyalty cards, vouchers and other offers, to support people where they are most likely to be struggling.
6. Provide additional support or 'top ups' where people are able to be identified as in particular need – for example linking them to the Healthy Start or Best Start Foods schemes and other targeted promotions.
7. Promote the uptake of the Healthy Start and Best Start Foods scheme, with a particular focus on the priority local areas where there is a low level of uptake.
8. Offer straightforward price reductions rather than multi-buy offers that require a bigger initial spend, may lead to more food waste and can make it more difficult to eat healthily.
9. Make more promotions available on healthy and sustainable foods, including fruit and vegetables, building on evidence of where promotions drive effective outcomes (eg. 60p fruit and vegetables).

Make eating on a budget more appealing and easier

10. Underpin these actions by promotions, recipes and advice that make lower priced, healthy and sustainable foods tasty and appealing to the breadth of communities that are served.

Ten point action plan for supermarkets

Clear, fair and transparent pricing so that it is easy to compare best value

1. Make unit pricing prominent, legible and consistent in-store and online so price comparisons are easy across different brands and sizes of packaging.

With such significant changes in food prices, it is essential that consumers can easily compare prices and make sure they are able to choose the best value products for their needs. Clear and transparent pricing is therefore crucial, including clear and easy to use unit pricing. Unit prices show how much different products would cost if they were sold in packs of the same weight or volume. This enables people to work out which is the best value option when products are sold in different sized packets or containers. It is also important for consumers to assess which products are the best value if manufacturers decide to reduce the product or pack size instead of increasing the price, known as 'shrinkflation'.

Which? research monitoring how unit pricing is displayed in store as well as online has found that there can be a lot of savings to be made if consumers can work out which is best value, but a recent investigation published in Which? magazine in September found that supermarket unit pricing is often unclear, inconsistent or absent.[7] Which? visited nine supermarket stores and found a range of unit pricing issues including unit pricing that was very hard to read, different units used for the same or similar products and missing information, including on promotional offers and loyalty card discounts. We also found issues with the stores' websites, mainly relating to how unit pricing was displayed on special offers. But some supermarkets are able to do this well and do include unit pricing on offers.

2. Provide clear unit pricing for promotional offers in-store and online so that people can work out whether they really are the best deal.

Our latest survey reinforced the importance of supermarkets including unit pricing on their promotional offers so that people can see whether they really are the best deal or not. Over half of people in our survey (52%) said that unit prices are not as clear on special offers so they find it difficult to compare them to similar items. This was also reflected by more general scepticism of special offers, with 6 in 10 (63%) saying that they do not always trust that special offers are better value.[8] Tesco, the supermarket with the biggest market share, does not show unit pricing for its Clubcard special offers, for example.

The right products available in the right place so consumers who most need them have access to affordable ranges

3. Provide a basic range of essential budget lines for affordable as well as healthy everyday choices that are available across stores, but particularly in locations where people most need support.

Making more budget ranges available was the most popular action that people thought supermarkets could take to help their households through the cost of living crisis. Budget ranges come in many forms, with some supermarkets launching their own discount brands, while others ie. Asda have recently launched a new range of budget essential products across stores called Just Essentials. The size of the store will place some limitations on the range that can be provided, but supermarkets should be able to provide details of a basic range of essential budget products that are stocked across their stores, that support people making healthier choices and crucially that

7 Which? (2022) *The big savings you could easily miss*
8 Base: All respondents (n=2791). Survey conducted 8–9 August 2022

are actually available to buy. Recent data from market analysts Kantar highlighted how supermarket own label lines are continuing to increase in sales as consumers move away from branded products – and that sales of cheaper imperfect fruit and vegetables were up collectively by 38% in August 2022.[9]

4. Consider adapting minimum spend requirements and other ways that online deliveries can be more cost-effective to increase options for households in areas with poor supermarket access.

Some communities that have a limited range of local food retailers may benefit from having easier access to supermarket deliveries, provided that the cost of the deliveries is not a barrier. Some, such as Morrisons, have already taken steps to offer some cheaper priced delivery slots. Supermarkets should therefore consider whether there is more that can be done to support people through online deliveries. This includes reviewing their minimum spend policy so that people do not have to do a relatively large shop they may struggle to afford in order to secure a delivery and considering how delivery slots to priority places can be coordinated and made more cost-effective.

Marketing budgets and promotions tailored to support those who are most in need

5. Tailor marketing budgets and promotions, including through loyalty cards, vouchers and other offers, to support people where they are most likely to be struggling.

Supermarkets can play an important role supporting people who are most vulnerable through the way that they target their promotions. By shifting their marketing spend in order to invest disproportionately in those specific communities and households who are in greatest need, retailers may be able maximise the number of households they help to be able to afford to eat – and to eat healthily.

The way that supermarkets deliver targeted support and promotions will depend on their business model and capability, including for example whether they offer a loyalty card scheme and any criteria that are applied for joining this, or whether they can offer vouchers or coupons to people when they are at the checkout.

6. Provide additional support or 'top ups' where people are able to be identified as in particular need – for example linking them to the Healthy Start or Best Start Foods schemes and other targeted promotions.

Supermarkets should also give additional support to people who are on lower incomes and therefore receive government support eg. are eligible for the Healthy Start scheme or Best Start Foods scheme (available in Scotland). The schemes are designed to help pregnant women, babies and young children under the age of four from low-income households have access to healthy food. Sainsbury's has recently announced for example that it will be providing an additional £2 top up per week for people who are eligible for the Healthy Start scheme in England. Research by the Institute of Grocery Distribution (IGD) and University of Leeds found that this top up in 2021 had a valuable impact as shopping habits became more in line with healthy eating advice and that healthier habits continued when people weren't using the vouchers and after the trial had finished.[10]

7. Promote the uptake of the Healthy Start and Best Start Foods scheme, with a particular focus on the priority local areas where there is a low level of uptake.

Supermarkets can also have an important role helping to encourage awareness and uptake of the Healthy Start scheme and Best Start Foods scheme. People who are entitled to this support do not

9 Kantar (2022) Grocery price inflation up again as shoppers turn to wonky fruit and veg to cut costs
10 Healthy Sustainable Diets: Driving Change, Institute for Grocery Distribution/ University of Leeds, October 2022

always take it up. A recent survey by Which? found that of people likely to be eligible for Healthy Start only about half (50%) were aware of the scheme and were using it. Thirty percent were aware but hadn't been using it and 21% were not aware of the scheme before the survey.[11]

8. Offer straightforward price reductions rather than multi-buy offers that require a bigger initial spend, may lead to more food waste and can make it more difficult to eat healthily.

Some supermarkets, such as Tesco, have moved away from offering multi-buys on unhealthy foods (foods high in fat, sugar and salt or HFSS), ahead of government restrictions. Others, such as Sainsbury's, have stopped multi-buys altogether. This not only helps people by offering straightforward discounts, rather than encouraging them to buy more and make a larger outlay in order to save, it can also help reduce food waste. It is also a way to support people making healthier choices, where multi-buys encourage bulk buying and potentially extra consumption of HFSS foods.

9. Make more promotions available on healthy and sustainable foods, including fruit and vegetables, building on evidence of where promotions drive effective outcomes (eg. 60p fruit and vegetables).

Our research showed that more generally, people are supportive of supermarkets putting discounts and offers on healthy foods, as a way to help their households buy healthier food. There is also evidence that selling healthier products, such as fruit and vegetables at a reduced price, such as 60p in one trial, leads to a significant sales uplift.[12]

Make eating on a budget appealing and easier

10. Underpin these actions by promotions, recipes and advice that make lower priced, healthy and sustainable foods tasty and appealing to the breadth of communities that are served.

There's also an opportunity for supermarkets to help people make the best of eating on a budget and support people in making healthier and sustainable choices. Several supermarkets have for example linked up with celebrity chefs to provide recipe ideas or support with meal planning – and this is probably one of the simplest areas where they can be taking action and compliment the other actions that are set out in this action plan. Our research showed that while people valued these initiatives, support was much lower than for other actions that were seen as more meaningful (e.g. offering more budget lines or including more promotions on healthy products and ingredients).

Share best practice and impact

It is also crucial that supermarkets share evidence of how effective the actions they take are in supporting consumers during this crisis so that wider lessons can be learned and positive initiatives replicated or scaled up. This includes openly reporting on how they are using the Priority Places for Food Index described in the following section, or other approaches, to support households who are most in need and how they are responding to the clear call for actions in areas such as greater availability of budget ranges.

11 Based on a sample of 281 people in receipt of one of nine common benefit payments and with a child under 4 or they or their partner being pregnant.

12 Healthy Sustainable Diets: Driving Change, Institute for Grocery Distribution/ University of Leeds, November 2021

Identifying those most in need and targeting support

Many of the actions that supermarkets can take to support consumers are equally applicable anywhere in the UK. Ensuring clear, fair and transparent pricing and making eating on a budget appealing and easier are important to consumers everywhere. However, other actions would be most beneficial if targeted at communities in places with particular needs. For example, the importance of providing budget lines that support healthy eating, tailoring marketing budgets and promotions, promoting the Healthy Start and Best Start Foods schemes and improving the accessibility of online shopping will all vary from place to place, and to be most effective retailers may want to focus their efforts on particular places.

In recognition of this, we have worked with the Consumer Data Research Centre at the University of Leeds to develop the Priority Places for Food Index. This novel index that draws together a range of relevant data, allows us to identify the places in the UK where people are most likely to need support in accessing affordable food.

There are many reasons why people may find it difficult to buy affordable food. Some relate to individual circumstances. For example, people with low incomes, relatively high levels of essential spending (such as families or those with health problems), or limited ability to travel will, all else equal, be more likely to find it difficult. Other reasons relate to the place that someone lives, such as the level of retail provision in their area or the quality of public transport. In the case of accessing affordable food online, barriers may be both place-based (limited or no online deliveries) or related to the individual (limited capability to shop online). By drawing together data that captures all of these elements it is possible to identify priority places where interventions will be most valuable.

Priority Places for Food Index

The Priority Places for Food Index is a composite index that is constructed using data from seven different domains and each contains underlying metrics. Three of these domains focus on the likely need of individuals in a local area for affordable food and their ability to access it. The domains cover socio-economic barriers (income deprivation and car access), the likely need for family food support (for example, eligibility for free school meals) and measures of fuel poverty.

The final four domains relate to the level of opportunity to access food retailers in different local areas. These domains are the proximity of supermarket retail facilities, the accessibility of supermarket retail facilities, access to online deliveries and proximity to non-supermarket food provision.

The index has been developed using data for very low level geographies and refers to small areas of similar population size. It is constructed individually for each of the nations of the UK as not all of the same data is available for each nation, so direct comparisons cannot be made between places in different nations.

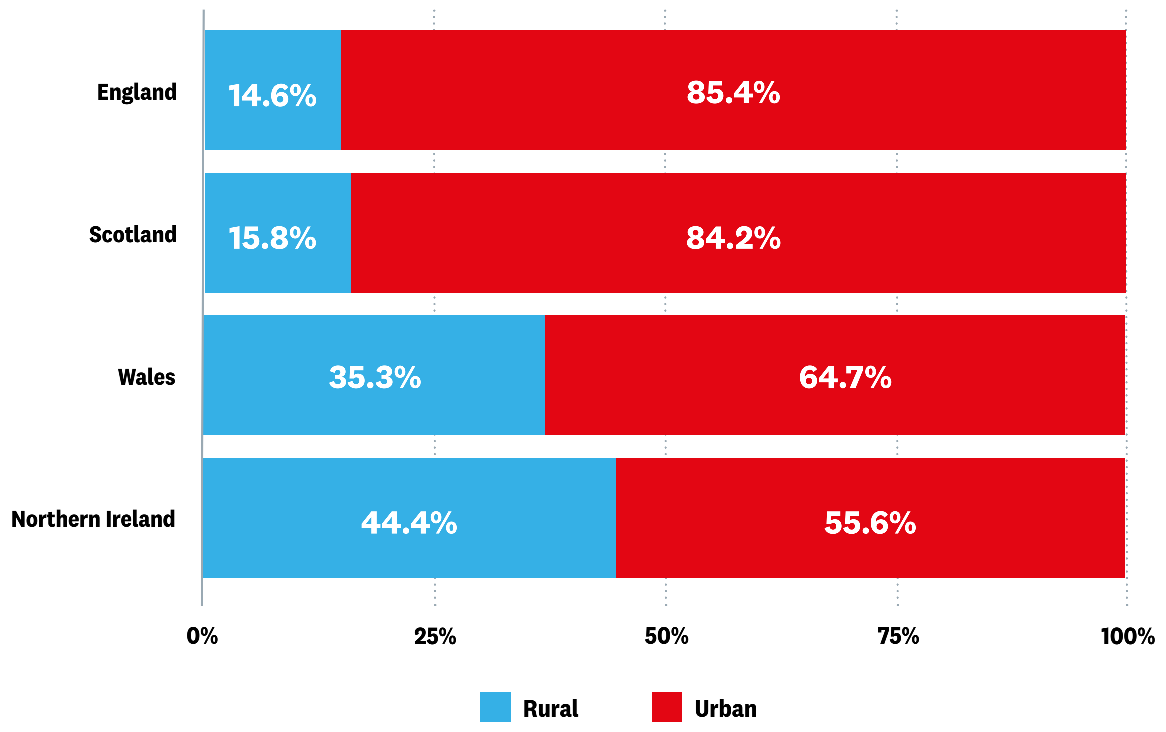
More detail about the methodology and further analysis of the local areas identified as priority places can be found in Annex A.

Priority places by nation and region

We have defined a priority place as a local area in the lowest 20% of places in the Priority Places for Food Index. These are the places based on our index that face the most serious challenges and where action is likely to be most urgent. These priority places have a wide geographical spread, but are more common in some parts of each nation of the UK. The distribution across English regions is explored below, but across Scotland, Wales and Northern Ireland we find that:

- In Scotland, they are most commonly found in the Central Belt, but there is also a notable concentration in and around Dundee.
- In Wales, the highest concentration of priority places is in the Valleys. There are few priority places in Cardiff, Swansea or Newport, while overall Wales has a higher proportion of priority places that are rural than England and Scotland, see figure 5.
- Northern Ireland has the most even geographical spread of priority places and the greatest proportion of rural areas that are priority places. However, there is a noticeably greater concentration in the south-west suburbs of Belfast and in and around Derry/Londonderry.

Figure 5: Proportion of priority places that are urban and rural



Note: Which? analysis of the Priority Places for Food Index and rural-urban classifications. England and Wales is based on the ONS rural urban classification of 2011 small area geographies. Scotland is based on the Scottish government urban rural classification 2011 Data Zone lookup. Northern Ireland is based on the Northern Ireland Statistics and Research Agency (NISRA) classification of 2011 census output areas. We have aggregated the Northern Ireland 'mixed urban/rural' category with the urban areas to make them more comparable with the Scottish urban classification which includes small towns.

Within England there is a large variation in where priority places are located across regions. The region with the greatest frequency of priority places is the North East, although because this is a small region then there are more priority places in Yorkshire and the Humber, the West Midlands and the North West in absolute terms. There are relatively few priority places in London, the South East and the South West, although in the latter there is a concentration in Cornwall. The regions are explored in more detail in table 1.

Table 1: Priority places in English regions

Region	Total number of local areas	Proportion that are priority places	Why are places in this group classed as priority places?
North East	1,657	45%	Overall, local areas in the North East tend to have a higher need for family food support and relatively poor online delivery access. The priority places are particularly characterised by poorer than average proximity to supermarkets.
Yorkshire and The Humber	3,317	37%	Online delivery access is relatively poor in Yorkshire and the Humber. Local areas that are priority places tend to have higher socio-economic barriers, higher need for family food and higher fuel poverty. The priority places are particularly concentrated in the West and South of Yorkshire.
West Midlands	3,487	36%	The West Midlands has a disproportionately high number of priority places and this is driven by local areas that have relatively high fuel poverty and a high need for family food support. Many parts of Birmingham have large proportions of priority places.
North West	4,497	32%	Overall, the North West is around the national average across all 7 domains of the index, but its priority places tend to have more socio-economic barriers and higher levels of fuel poverty.
East Midlands	2,774	19%	Areas within the East Midlands tend to have around the national average across all 7 domains.Those areas identified as priority places tend to have poor online delivery access and more socio-economic barriers.
East	3,614	13%	Local areas in the East of England have higher than average measures for family food support and lower socio-economic barriers. Those local areas that are priority places tend to have poor online delivery access. The priority places in the south of the region tend to be clustered in towns such as Basildon, Harlow and Stevenage, while there is a relatively high incidence in Norfolk, both near the border with Cambridgeshire and along the coast.
South West	3,280	10%	South West areas tend to have relatively good access to supermarkets and lower socio-economic barriers. Priority places in the South West have poor online delivery access and poor non-supermarket food provision. Cornwall has a very high proportion of priority places.
South East	5,382	7%	South East areas tend to have relatively very good family food support and low fuel poverty. Overall access to supermarkets and non-supermarket food provision is middling. Priority places in the South East tend to have more socio-economic barriers and poorer online delivery access. The priority places are often located on the coast.
London	4,835	4%	London areas tend to perform higher than the national average across most domains. However, levels of fuel poverty are in line with the national average and there are more socio-economic barriers. Priority places in London have higher levels of fuel poverty and worse access to online delivery.

Priority Places in Westminster Parliamentary Constituencies

To further explore how priority places are distributed around the UK we have aggregated local areas up to the level of Westminster constituency. 74% of Westminster constituencies have at least one priority place, but there are 95 constituencies across the UK for which at least half of the constituency is a priority place.[13] In 16 constituencies at least three-quarters of the local areas are priority places and all of the local areas in Birmingham Hodge Hill are. A list of the highest ranking constituencies in each nation can be found in Annex A.

The following case studies identify different types of constituencies that are priority places. The rankings refer to the ranking within each nation, where 1 is the constituency that has the greatest proportion of local areas that are priority places.

Case Study: Knowsley (ranked 2 of 533 English constituencies)

Knowsley has high levels of deprivation – almost all of the constituency has high socio-economic barriers, high need for family food support and high levels of fuel poverty. It also has relatively low levels of supermarket proximity with half the number of large or very large supermarkets compared to the national average. Accessibility in some parts of the constituency and e-commerce access is also low. As a result 96% of local areas are priority places and 16 are in the top 100 priority places in England.

Similar constituencies: Liverpool West Derby (16), Walsall North (40), Liverpool Walton (44), West Dunbartonshire (2 of 59 Scottish constituencies), Glasgow North East (4 of 59)

Case Study: Bradford West (ranked 15 of 533 English constituencies)

Many of the priority places in this local area have retail provision that is close to the national average, but access to online deliveries is mostly rated as very poor. Socio-economic barriers and fuel poverty are relatively high. 75% of local areas are priority places.

Similar constituencies: Birmingham Yardley (11), Birmingham Hall Green (13), Bradford East (=17)

Case Study: North West Durham (ranked 8 of 533 English constituencies)

An area with the population spread across, often former industrial, towns and villages. Proximity to supermarkets is relatively low, especially outside of the major towns, although accessibility tends to be higher. Relatively high levels of need for family food support. 80% of local areas are priority places.

Similar constituencies: Blaydon (9), Bishop Auckland (10), Bolsover (12), Rhondda (1 of 40 Welsh constituencies), Blaenau Gwent (2 of 40)

Case Study: South West Norfolk (ranked 20 of 533 English constituencies)

An example of a rural constituency with a high proportion of priority places. The constituency has limited supermarket and non-supermarket retail provision. Access to online deliveries is also relatively poor and the measures of fuel poverty indicate this is above average. 70% of local areas are priority places.

Similar constituencies: Louth and Horncastle (=24), St Ives (27), South East Cornwall (46), Berwick-upon-Tweed (54)

Providing the support that is needed

One advantage of the Priority Places for Food Index is that because it allows analysis at small geographical areas we are able to explore local retail provision. This allows us to identify not just which actions are most needed across the different priority places, but also which supermarkets are best placed to act to support consumers in those places.

13 In the relatively small number of cases in which a local area falls into multiple Westminster constituencies, these have been matched using a best-fit approach. Local areas are matched to the constituency where the highest proportion of the local area's population falls into. The population estimates are based on the city and town classification analysis.

To give a sense of this we briefly consider the location of stores owned by the largest grocery retailers in the UK. Overall, there is an average of 8.6 medium-sized, 1.9 large and 2.1 very large supermarkets per Westminster constituency. Table 2 presents the average number of stores by size for each of the nine largest supermarkets.[14] In each case it shows the breakdown for all UK constituencies and for the 95 constituencies for which at least half of the constituency is a priority place. The actual number of stores can be found in Annex B.

The table shows that some businesses are over-represented in constituencies with more priority places. Aldi, Asda, Iceland, Morrisons are more likely to have stores in the constituencies with more priority places than in the country as a whole. By contrast, the Co-op, Sainsbury's, Tesco and Waitrose are less likely to have stores in these constituencies.

Table 2: The average number of stores per constituency by retailer and store size

Retailer	Constituencies	Store size: Small	Mid	Large	Very Large	Average of all sizes
Aldi	All constituencies	0	1.46	0.02	0	1.48
	Constituencies with most priority places	0	1.71	0.01	0	1.72
Asda	All constituencies	0.04	0.24	0.14	0.52	0.93
	Constituencies with most priority places	0.04	0.39	0.12	0.67	1.22
Co-op	All constituencies	4.47	1.43	0.06	0	5.96
	Constituencies with most priority places	3.27	1.15	0.07	0	4.49
Iceland	All constituencies	0.05	1.5	0	0	1.55
	Constituencies with most priority places	0.06	1.74	0.01	0	1.81
Lidl	All constituencies	0	1.25	0.21	0	1.46
	Constituencies with most priority places	0	1.24	0.15	0	1.39
Morrisons	All constituencies	0.59	0.06	0.34	0.36	1.35
	Constituencies with most priority places	0.66	0.07	0.31	0.53	1.57
Sainsburys	All constituencies	1.07	0.24	0.27	0.5	2.08
	Constituencies with most priority places	0.54	0.18	0.15	0.36	1.22
Tesco	All constituencies	2.84	0.32	0.45	0.66	4.27
	Constituencies with most priority places	1.77	0.17	0.47	0.57	2.98
Waitrose	All constituencies	0.03	0.15	0.29	0.03	0.5
	Constituencies with most priority places	0	0.01	0.07	0	0.01

Source: Which? analysis of Geolytix store location data as-at June 2022. Stores located at motorway services, train stations and airports were removed. Small stores are less than 280m squared, Mid-sized stores are between 280 to 1400m squared, large stores are between 1400 to 2800m squared and very large stores are over 2800m squared.

14 Market share based on Kantar (2022). Ocado is the tenth largest, but has no physical retail presence.

Conclusions

The reasons why food prices are rising are complex and are not likely to be addressed in the short to medium term, but they are causing widespread hardship now. The findings from our research show that across the board people are concerned about rising food prices and are changing their behaviour, with many people engaging in potentially harmful behaviour such as skipping meals. It is therefore crucial that people are given the support that they need to navigate the current crisis and access healthy, affordable food.

This support needs to come from many quarters. People will be supported by friends, family, and local and national charities. There are also a wide range of actions that the government needs to take to support households. However, we believe that businesses also have a role to play and that supermarkets in particular could do more to support their customers.

Some of the actions that supermarkets can take will be more impactful in certain areas of the country and so will benefit from careful targeting. The Priority Places for Food Index identifies the places in the UK where people are most likely to need support in accessing affordable food and we expect this to be a valuable tool for retailers and others trying to support consumers through the cost of living crisis.

Annex A: The Priority Places for Food Index

The Priority Places for Food Index has been developed by the ESRC-funded Consumer Data Research Centre at the University of Leeds in collaboration with Which?. It uses data across a range of relevant domains to rank local areas by the likelihood of the people living there needing support to access affordable food.

Crucially, the Priority Places for Food Index makes it possible to identify places in need and also to understand why they have been identified, whether because of a lack of retail provision, poor access to online supermarket deliveries, or high levels of deprivation and need. The index has been mapped and can be found here, while the technical documentation supporting the index can be found at https://data.cdrc.ac.uk/dataset/priority-places-food-index.

The Priority Places for Food Index is a composite index that is constructed using data from seven different domains and each contains underlying metrics (see Annex table 1). Three of these domains focus on the likely need of individuals in a local area for affordable food and their ability to access it. The domains cover socio-economic barriers (income deprivation and car access), the likely need for family food support (for example, eligibility for free school meals) and measures of fuel poverty. These three domains are equally weighted in the composite index and together account for 50% of the total.

The final four domains relate to the level of access to food retailers in different local areas. These domains are the proximity of supermarket retail facilities, the accessibility of supermarket retail facilities, access to online deliveries and proximity to non-supermarket food provision. These four domains account for the remaining 50% of the total index, with each being equally weighted at 12.5%.

Annex table 1: Domains and metrics used in the index and national variation

Socio-demographic barriers (16.7% of composite index)
- Proportion of population experiencing income deprivation (UK Govt Index of Multiple Deprivation 2017–2020).
- Proportion of population with no car access (UK Census 2011).

Need for family food support (16.7% of composite index)
- Free school meal eligibility.
- Healthy Start voucher usage. (England and Wales only)
- Distance to nearest food bank (Give Food, accessed 2022-08-19).

Fuel Poverty (16.7% of composite index)
- Proportion of households in fuel poverty (2017–2020). (England, Scotland and Wales only)
- Prepayment meter prevalence, 2017. (England, Scotland and Wales only)

Proximity to supermarket retail facilities (12.5% of composite index)
- Average distance to nearest large grocery store (Geolytix Retail Points v15).
- Average count of stores within 1km (Geolytix Retail Points v15).

Accessibility to supermarket retail facilities (12.5% of composite index)
- Average travel distance (based on a custom built spatial interaction model). (England, Scotland and Wales only)
- Accessibility via public transport (Govt Journey Time Statistics 2017–2020). (England, Scotland and Wales only)

Access to online deliveries (12.5% of composite index)
- Online groceries availability (Newing et. al, 2020,). (England, Scotland and Wales only)
- Propensity to shop online (CDRC Internet User Classification 2018). (England, Scotland and Wales only)

Proximity to non-supermarket food provision (12.5% of composite index)
- Distance to nearest non-supermarket retail food store (Food Standards Agency, accessed 2022-08-23).
- Count of non-supermarket retail food stores within 1km (Food Standards Agency, accessed 2022-08-23).
- Average distance to nearest market (CDRC data from National Market Traders Federation 2016–2019). (England and Wales only)
- Average count of markets within 1km (CDRC data from National Market Traders Federation 2016–2019). (England and Wales only)

Note: An indicator is used for all nations unless otherwise stated.

The Index has been developed at the geographic level of Lower Super Output Areas (LSOAs) in England and Wales, Data Zones in Scotland (2011 boundaries) and Super Output Areas in Northern Ireland. These are small areas designed to be of a similar population size.[15]

The Priority Places for Food Index is constructed individually for each of the nations of the UK as not all of the same data is available for each nation. This means direct comparison cannot be made between places in different nations.

15 In England and Wales, LSOAs have an average of approximately 1,500 residents or 650 households. Datazones in Scotland are smaller with around 800 people on average, while we estimate that Super Output Areas in Northern Ireland have an average of around 2,000 people.

Characteristics of priority places

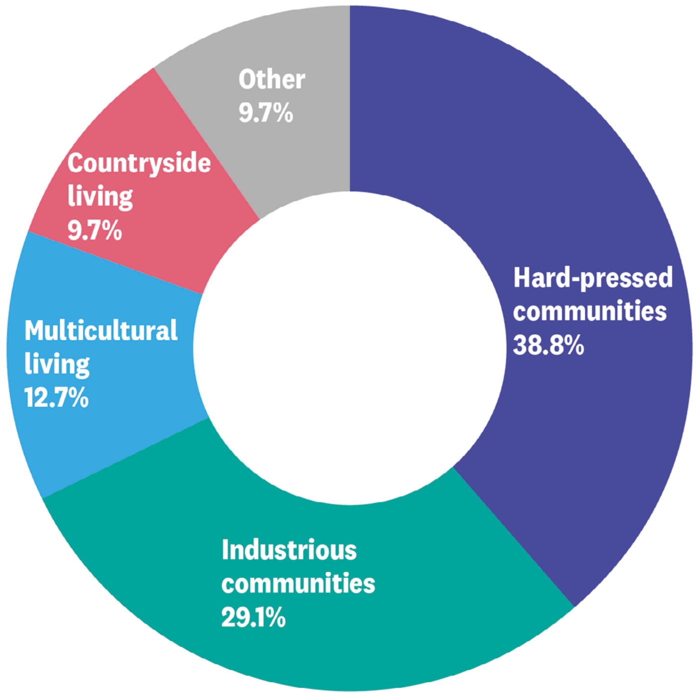
We have defined a priority place as a local area in the lowest 20% of places in the Priority Places for Food Index. These are the places based on our index that face the most serious challenges. Inevitably, many of these local areas are those with low incomes. However, income deprivation is neither a necessary nor sufficient condition for being a priority place. Due to the combination of factors that can determine the accessibility of affordable food, priority places are distributed around the country and not just in communities usually associated with high levels of deprivation.

To understand which local areas are identified as priority places it is helpful to compare the Priority Places for Food Index with other local area classifications. The ONS has previously classified all local areas as being one of eight types of places, which are: cosmopolitan student neighbourhoods, countryside living, ethnically diverse professionals, hard-pressed communities, industrious communities, inner city cosmopolitan, multicultural living, and suburban living.

This classification gives an informal view of the characteristics of different places and has been created using 60 variables taken from the 2011 Census. These variables describe the people living in those local areas and cover demographics, household composition, housing, education, transport use and employment.[16]

Comparing the ONS classification to the Priority Places for Food Index, 90% of priority places come from just four of the ONS groups, see Figure 1. These ONS groups are: hard-pressed communities, industrious communities, multicultural living, and countryside living.

Annex Figure 1: Breakdown of priority places by ONS classification of local areas



Source: Which? analysis of ONS 2011 Area Classifications for Super Output Areas and the Priority Places for Food Index. Other is a combination of the Ethnically diverse professionals, Suburban living, Inner city cosmopolitan and Cosmopolitan student neighbourhoods classifications.

16 For greater detail on this classification see ONS's pen portraits and radial plots.

Exploring the ONS groups in more detail shows that only some local areas in each group are identified as priority places, and the reasons for this explain why some places are more likely to need greater support accessing affordable food. Annex table 2 describes the characteristics of the local areas that are priority places for each of the four ONS groups that have most priority places.

Annex table 2: Types of communities most likely to be priority places

ONS classification	Total number of local areas	Proportion that are priority places	When are these places classed as priority places?
Hard-pressed communities	7,217	45.8%	These communities have relatively low levels of income and are most likely to be priority places. The priority places in this group tend to be characterised by poor online delivery access, relatively worse proximity and accessibility of supermarket retail and especially high fuel poverty and high socio-demographic barriers. low levels of proximity and accessibility of supermarket retail facilities.
Multicultural living	3,888	27.9%	Places in this group tend to have a high ethnic mix and are mostly found in larger urban areas. Although these areas tend to have better than average access to physical retailers, this is not the case for the priority places in this group. The priority places are also likely to have very high levels of need for family support, high levels of fuel poverty and poor access to online deliveries.
Industrious communities	9,134	27.2%	Incomes are higher in industrious communities than in hard-pressed communities, but the local areas in this group that are priority places tend to have below average proximity and access to supermarket facilities and higher levels of need for family food support and fuel poverty.
Countryside living	5,619	14.8%	Overall, this group tends to have poor access to physical retailers, but high levels of income. However, the local areas in this group that are priority places have levels of need for family food support and fuel poverty that are all close to the national average. They are also more likely to have low levels of access to e-commerce.

Annex B: Westminster constituencies with most priority places

Annex table B1: English Westminster constituencies

Constituency	Region	Number of local areas in constituency	Proportion of local areas that are priority places	Rank (of 533 English constituencies)
Birmingham, Hodge Hill	West Midlands	66	100.0%	1
Knowsley	North West	69	95.7%	2
Houghton and Sunderland South	North East	58	86.2%	3
Birmingham, Northfield	West Midlands	65	86.2%	4
Birmingham, Perry Barr	West Midlands	66	84.8%	5
Blackley and Broughton	North West	62	80.6%	6
Bradford South	Yorkshire and The Humber	62	80.6%	6
North West Durham	North East	56	80.4%	8
Blaydon	North East	56	78.6%	9
Bishop Auckland	North East	55	78.2%	10
Birmingham, Yardley	West Midlands	65	76.9%	11
Bolsover	East Midlands	60	76.7%	12
Birmingham, Hall Green	West Midlands	66	75.8%	13
Don Valley	Yorkshire and The Humber	64	75.0%	14
Bradford West	Yorkshire and The Humber	63	74.6%	15
Liverpool, West Derby	North West	59	74.6%	16
Wolverhampton North East	West Midlands	55	72.7%	17
Bradford East	Yorkshire and The Humber	66	72.7%	17
Easington	North East	58	70.7%	19
South West Norfolk	East	61	70.5%	20
Birmingham, Erdington	West Midlands	60	70.0%	21
Rochdale	North West	66	69.7%	22
St Helens South and Whiston	North West	68	69.1%	23
Barnsley East	Yorkshire and The Humber	57	68.4%	24
Louth and Horncastle	East Midlands	57	68.4%	24
Huddersfield	Yorkshire and The Humber	60	68.3%	26
St Ives	South West	50	68.0%	27
Sheffield, Brightside and Hillsborough	Yorkshire and The Humber	68	67.6%	28
Wolverhampton South East	West Midlands	55	67.3%	29
Doncaster North	Yorkshire and The Humber	64	67.2%	30

Annex table B2: Scottish Westminster constituencies

Constituency	Number of local areas in constituency	Proportion of local areas that are priority places	Rank (of 59 Scottish constituencies)
North Ayrshire and Arran	129	68.2%	1
West Dunbartonshire	121	64.5%	2
Kilmarnock and Loudoun	127	63.8%	3
Glasgow North East	113	60.2%	4
Glenrothes	121	59.5%	5
Inverclyde	114	58.8%	6
Glasgow South West	108	57.4%	7
Glasgow East	117	51.3%	8
Glasgow North West	106	50.0%	9
Dundee West	110	41.8%	10

Annex table B3: Welsh Westminster constituencies

Constituency	Number of local areas in constituency	Proportion of local areas that are priority places	Rank (out of 40 Welsh constituencies)
Rhondda	48	81.3%	1
Blaenau Gwent	47	76.6%	2
Merthyr Tydfil and Rhymney	47	74.5%	3
Cynon Valley	45	68.9%	4
Neath	48	56.3%	5
Aberavon	43	55.8%	6
Islwyn	45	48.9%	7
Carmarthen East and Dinefwr	44	40.9%	8
Clwyd South	45	40.0%	9
Vale of Clwyd	44	31.8%	10

Annex table B4: Northern Irish Westminster constituencies

Constituency	Number of local areas in constituency	Proportion of local areas that are priority places	Rank (out of 18 constituencies)
East Londonderry	50	54.0%	1
Foyle	54	42.6%	2
West Tyrone	42	40.5%	3
North Antrim	52	40.4%	4
Belfast West	50	36.0%	5
South Down	52	34.6%	6
East Antrim	45	24.4%	7
Mid Ulster	43	20.9%	8
Belfast East	46	13.0%	9
Belfast North	58	12.1%	10

Annex C: Numbers of stores by supermarket

Annex table C1: The total number of stores by company and retailer size

Retailer	Constituencies	Store size				Total
		Small	Mid	Large	Very Large	
Aldi	All constituencies	0	950	13	0	963
	Constituencies with most priority places	0	162	1	0	163
Asda	All constituencies	23	154	88	338	603
	Constituencies with most priority places	4	37	11	64	116
Coop	All constituencies	2,904	928	38	3	3,873
	Constituencies with most priority places	311	109	7	0	427
Iceland	All constituencies	30	974	3	0	1,007
	Constituencies with most priority places	6	165	1	0	172
Lidl	All constituencies	0	814	137	0	951
	Constituencies with most priority places	0	118	14	0	132
Morrisons	All constituencies	383	40	221	234	878
	Constituencies with most priority places	63	7	29	50	149
Sainsburys	All constituencies	695	154	175	325	1,349
	Constituencies with most priority places	51	17	14	34	116
Tesco	All constituencies	1,845	207	293	432	2,777
	Constituencies with most priority places	168	16	45	54	283
Waitrose	All constituencies	21	100	186	20	327
	Constituencies with most priority places	0	1	7	0	8

Source: Which? Analysis of Geolytix store location data as-at June 2022. Stores located at motorway services, train stations and airports were removed. Small stores are less than 280m squared, Mid-sized stores are between 280 to 1400m squared, large stores are between 1400 to 2800m squared and very large stores are over 2800m squared.

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