The Northern Ireland retailing environment and its effect on ethnic food consumption

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During the last 20-30 years, the most significant development in the food chain has been the growth of the supermarket chains (Wheelock, 1992) and by 1994, the large UK multiples had an estimated 84.3 per cent of total food sales, an increase of 34.5 per cent from 1990 (Potts, 1995). In Northern Ireland the food sector is now worth £1.6 billion per year (Hollinger, 1997) and seems likely to increase further with the relatively recent arrival of the three major UK food retailers: Tesco, Sainsbury’s and Safeway. Coleraine is one of a number of towns in Northern Ireland which have attracted all three retailers within the last few years.

Retailing presents a dynamic environment and is influenced by changes in the population and their buying behaviour (adapted from Guy, 1994). In spite of the expansion of the retail sector, however, it must be remembered that average UK household food expenditure has almost halved over the last 35 years, from 31.9 per cent in 1962, to 18.4 per cent in 1995 (Potts, 1995). Interestingly, in Northern Ireland, expenditure is slightly higher at 21.4 per cent and consumers in Northern Ireland also have different consumption patterns from consumers on the UK mainland, spending more per week on bread and cereals, meat and bacon for example, but less on fish, fruit and vegetables. This has been attributed to differences in “prices, incomes, household size and cultural/eating habits” (NIEC, February 1992) and may have significant implications for retailers in terms of product launches, subsequent sales and in getting to know the Northern Ireland consumer.

With the perception that consumer tastes, needs and expectations are continually changing and becoming more complex and adventurous, retailers aim to provide a more effective range of high quality foods as profitably as possible. This in turn exerts an influence on the type, range and quantity of goods offered and the market is becoming increasingly refined and hyper-segmented to accommodate consumers who are becoming “increasingly demanding and sophisticated” (Hogarth-Scott, 1998). The associated influences from other retailers are also significant as it then becomes essential to develop and
enhance facilities in line with competitors to maintain or indeed enhance market share.

The ethnic food sector

Retailers must therefore do more than simply fill space with merchandise; they must make the desired products available, create stimulating shopping environments and develop marketing strategies which increase store patronage (Dibb et al., 1994; Bradley, 1995). Already, a number of alterations to food shopping patterns within Northern Ireland are evident, the most significant of which is the increased range of products available. One area which has become “one of the most dynamic and lucrative sectors of the UK grocery trade” (Howitt, 1996) is the ethnic food sector, with particular emphasis on convenience ready meals and snacks. Since 1990, value has increased by 108 per cent, reaching £520 million in 1996 (Howitt, 1996). This could be due, in part, to increased mobility and foreign travel, better consumer education and an increased knowledge of food by media exposure. However, irrespective of influence, the retailers are ever willing to respond to new tastes and indeed may help foster them, as “such products usually command a premium and are therefore potentially highly profitable”. Consequently, all elements of ethnic food markets across Europe are seeing growth (O’Carroll, 1997). The niche retailing trend is towards regional cuisine and a greater authenticity and it is predicted that the ethnic sub-ranges will continue to expand to reach an estimated £650 million by the year 2000 (Howitt, 1996).

Howitt (1996) classifies ethnic foods as those which originate outside Europe. They can also be sub-divided into product lines such as ready meals, ingredients and cooking sauces, which can be further segmented into frozen, chilled and ambient and which are not normally particularly price sensitive. Retailer own brands appear to dominate the chilled ready meals sector with around an 85 per cent market share. In terms of nationality, the largest sector is Indian food (46 per cent), followed by Chinese (31.5 per cent) and Mexican (12.8 per cent). However, it must be noted that Italian dishes have firmly established themselves on the retailer shelves. It should also be noted that these figures apply to the UK as a whole. More specifically, the Northern Ireland food market is only beginning to develop its range and ethnicity and indeed, has more often than not, been characterised by its conventional and traditional habits. It will be interesting to see whether or not this trend transfers to the Northern Ireland restaurant and fast food sectors, which again often epitomise homogeneity and standardisation rather than creativity and innovation.

The view is that ethnic foods are ideally placed to satisfy consumer demand for high quality, authentic and unusual food products. The popularity of Chinese, Indian and Mexican food, for example, is supported by a high proportion of product development activity concentrating on different types of authentic and regional dishes and convenient, ready meals. Growth in other, smaller ethnic segments, including “Thai, Indonesian, Japanese, Malaysian and Middle Eastern” is also expected (O’Carroll, 1997). Caribbean foods may become more important with current interest in this area and Japanese foods could also do well, aided by continuing interest in healthy eating. However, it should be noted that many of these products usually appeal to a younger, more adventurous and more affluent audience and may not be as immediately attractive to other segments. Thus the parallel need may be one of promotion and information, particularly as the market becomes increasingly crowded and fragmented.

Clearly, in Great Britain the ethnic food sector is becoming an increasingly important area for the large multiples and, like the restaurant sector, innovation forms an important component of quality and a consumer search for novelty and excitement (Peacock, 1998). However, the Northern Ireland ethnic food market does not appear to have developed to anywhere near the same level and the underdeveloped Mexican sector for example, could offer an indication of a similar slow rate of growth in other, smaller niche sectors here. Indeed, until the recent establishment of the large UK retailers in Northern Ireland with the notable exception of Marks & Spencer, ethnic food choice was somewhat limited.

Methodology

This study sought to gain a preliminary insight into consumer perceptions of ethnic
foods in Northern Ireland, particularly given the relatively recent entry of the UK multiples. Initially however, a restaurant/takeaway survey of the area was also undertaken, to ascertain the existing ethnic market and likely potential influences coming from this sector, which would reflect the eating choices of the residents in the area. Also, many ideas for new products arise from restaurant trends and the consumer may sample an ethnic dish in a restaurant or from a takeaway which could in turn encourage him/her to prepare a similar dish at home, or to incorporate it into the shopping on a more regular basis. A questionnaire was also directed to a random sample of shoppers in the area, to gain an insight into their ethnic food consumption and shopping habits. This was supplemented through a follow-up focus group. It must be recognised that this was a small scale pilot study within a specific area. It is, however, reasonably representative of the current environment within Northern Ireland.

Results

(1) Restaurant/takeaway survey
This covered the area encompassing the towns of Coleraine, Portrush and Portstewart, with Coleraine being popular for shopping and the other two for evening entertainment and tourism. The survey covered ethnic foods, along with the Italian sector and the results are presented in Figure 1. Pubs which served food were not included. In Northern Ireland, Italian and American based outlets still represent growth areas, with Indian food less popular and indeed, many of the newly developing sectors in GB are not yet evident in Northern Ireland. It should also be noted that the ethnic establishments recorded here were almost exclusively serving ethnic cuisine.

Alternatively, some of the more traditional establishments were attempting to cater for a wider range of tastes by introducing some “ethnic style” dishes onto their menu, although the authenticity of such dishes was very varied.

(2) Store analysis
Those ethnic foods classified as ready meals, snacks and cooking sauces, were included in the survey and each flavour and pack size was accounted for separately. Italian foods were again included as they form a substantial segment. They were, however, classified separately as ethnic is normally defined as those foods which originate from outside Europe.

In terms of the ethnic lines available, the breakdown is illustrated in Figure 2. Indian products appeared to be the most prevalent within the retailers surveyed, in contrast to the results gained from the restaurant/takeaway survey, where the Indian sector was relatively underdeveloped in Northern Ireland in comparison to the Chinese and other sectors. This contrasts with the UK as a whole, where Indian is the most popular ethnic cuisine. Mexican and other smaller sectors have also been much slower to establish themselves within Northern Ireland and do not appear to have penetrated the restaurant sector to any notable extent. Also, although Thai, Greek and Turkish dishes are emerging to a limited degree, Japanese cuisine does not appear to have entered the NI.

![Figure 1](image1)
![Figure 2](image2)
market at all, even though sushi bars are becoming very popular in Great Britain.

When analysing product choice, convenience appears to be just as important to NI consumers as to their GB counterparts and ready meals formed a significant section in all supermarkets. Further emphasising the importance of convenience, the tins/jars of sauces were also extensive, possibly as they are a quick and easy to prepare option, with the added advantage of permitting the addition or omission of extra ingredients according to individual preference. It is also interesting to note the more recent developments in these ranges, increasing perceived “authenticity” by separating the spices and/or added vegetables from the base sauce, allowing consumers to “complete” the cooking process themselves. The strength of retailer own labels was very evident as was the dynamic state of the environment. These ranges are continually changing, as retailers try to become more familiar with what the Northern Ireland consumers are likely to purchase on a regular basis.

(3) Consumer questionnaires
The respondents surveyed were 72 per cent female and 28 per cent male, with an age profile as illustrated in Table I.

The majority (94 per cent) of the sample shopped in one of the three stores. Tesco appeared to be the most popular as 48 per cent of respondents shopped there once per week or more, compared with 12 per cent in Sainsbury’s and 6 per cent in Safeway. The two main factors influencing their choice of store were cited as “a good range of foods” (66 per cent) and “good value” (46 per cent). Other factors and their respective weightings were “close to home” (24 per cent), “attractive/clean store” (24 per cent), “good car parking” (18 per cent), “additional facilities” (8 per cent), “spacious” (4 per cent), “familiarity” (2 per cent) and “price” (2 per cent). These factors may not necessarily differentiate between the stores but the aspect of good value did appear to be most important to the 31-40 age group and least important to the 25-30 age group, who were more concerned with product range and this would tend to support the prevalence of ethnic food consumption among younger and more affluent segments.

In addition to the effect of age, the results indicated that ethnic food popularity tends to be more dominant in terms of supermarket purchases than to choice of establishment when eating out. A total of 94 per cent of respondents purchased ethnic food from retailers, compared to only 66 per cent from restaurants/takeaways (34 per cent of whom only purchased such foods occasionally). This is perhaps linked to relative cost and to the perceived risk of choosing something new or different when eating out but it may also be linked to the attractive and continually changing range which the retailer offers the consumer. There did appear, however, to be a significant variation in frequency of purchase with the majority of consumers split between either purchasing occasionally (40 per cent) or at least once per week (30 per cent).

However, in considering both restaurant/takeaway and retailer frequencies, it would appear that ethnic food purchase and consumption is still more of an occasional event in Northern Ireland, although it is affected by other factors, such as age. By relating ethnic food purchases to age group, it becomes evident that differences exist. All respondents surveyed in the <25 and 25-30 age groups purchased ethnic food. This was emphasised further when considering restaurant/takeaway purchases, where both groups were more inclined to select ethnic establishments, and did so at least once per week (p = 0.05). In contrast, the respondents purchasing least frequently (occasionally) were in the 41 and over age groups and might generally be expected to be more conservative in their food choices.

Interestingly, 60 per cent of respondents believed that they now purchased more ethnic food following the introduction of the three UK retailers into NI. This was also supported when analysing the selection of retailer own label ethnic products. Here, 60 per cent of respondents said they purchased Tesco own label, 50 per cent chose Sainsbury’s own label and 22 per cent selected Safeway branded products. Concentrating further on specific dishes, the most popular dish was curry (cited by 62 per cent of respondents). Stir fry and

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chilli were also relatively popular, mentioned by 28 per cent in each instance. Sweet and sour chicken (16 per cent) and pasta dishes (14 per cent) followed and other selections included chow mein, rice dishes and pizza with some mention of won-tons, prawn crackers, tandoori chicken, black bean sauce, cous cous, humous and spaghetti bolognese. The sector with the largest number of dishes identified by respondents was Chinese and the Italian range was also included by many of the respondents. Indian and Mexican selections were much smaller, which is perhaps surprising as the supermarket survey highlighted Indian as the most extensive sector. This could indicate a lack of awareness but it must also be remembered that the majority of dishes in the Indian sector could be grouped under the general term “curry”, which was of course the most frequently stated dish. Thus, whilst consumers may not necessarily know the names, origin and authenticity of the products selected, they are still consuming them.

The final part of the survey considered the factors that might encourage consumers to select ethnic dishes more frequently. The major influence for many respondents was price (42 per cent) followed by promotions and special offers (40 and 28 per cent respectively) and a desire for more information (26 per cent). Smaller portions were also added to the list by 2 per cent, which could perhaps indicate an opportunity for the introduction of trial lines at a lower price, to encourage an initial purchase.

(4) Focus group
A small scale focus group included ten participants aged between 18 and 30, as the results from the questionnaire showed that all respondents within this age group consumed ethnic foods. All participants began by stating their preference for products and cooking methods which were convenient, quick and hassle free. Oven bake and microwaveable options were popular and it would appear that health is not a major influential factor; rather ease of preparation is more important; hence the large number of ready meals and prepared sauces available.

Regarding ethnic food, Chinese appeared to be preferred by all but one of the participants. Indian was the next popular choice and Mexican had limited popularity. Ready meals were popular with all participants purchasing them to some extent. Half of the group prepared ethnic dishes themselves, although not as frequently as relying on prepared dishes or sauces. Stir-frying was also popular with one third using this method at least once per fortnight.

On average, two thirds of participants purchased three or four ethnic ready meals per month. The others relied on sauces as opposed to ready meals as they preferred to add their own ingredients. At this point, a representative list of the chilled ethnic ready meals stocked in one of the retailers was shown to the group, who were asked to indicate the number of dishes (or similar) which they had consumed. The list included a total of 17 Indian dishes, 11 Chinese and one Mexican dish. Fifteen Italian dishes were also included for comparison purposes. However, the results displayed a lack of familiarity with a large number of the dishes. Of the ethnic dishes, Chinese was most familiar, although the products which had been consumed only accounted for a tiny proportion of the dishes on the list, with participants stating they had not realised the full range available and many dishes on the list were not recognised. This would suggest a need for more information and awareness, to support the extensive range being offered by the retailers and particularly, in an environment where ethnic food consumption is not being supported by the restaurant/takeaway sectors.

In terms of eating out (including takeaways) the group was split, with two thirds eating out at least five or six times a month and the remaining one third only once or twice per month. From this, 50 per cent of participants confirmed that they selected ethnic dishes half of the time, with the remainder citing that they chose ethnic dishes more frequently. A large proportion of the total consumption consisted of takeaway purchases late in the evening after socialising. This could explain the popularity of Chinese as opposed to the other ethnic sectors, as there are many more Chinese establishments. It also tends to be common practice within this particular age group. Finally, half of the group believed that retailers offered a good selection of ethnic foods. Others considered it to be getting better, and further suggestions were made, including:

- the need for a longer shelf life for ready meals (although it was recognised that many could be frozen);
• a better indication of the strength of dishes (hot and mild were considered to be too vague and were not always comparable across brands or retailers);
• more advice on what could complement each dish in terms of accompaniments and serving suggestions;
• more promotional activity, including in-store tastings.

It would appear that this age group did consume a significant quantity of ethnic foods but the actual range selected was still relatively limited. Takeaways appeared to be popular, especially in relation to the Chinese sector but convenience was a dominant factor, which retailers seem to have considered when developing the range of ready prepared meals and sauces.

The role of the retailers in increasing ethnic food consumption is evident through the results gained in this study, although more substantial work is to be undertaken. At present the retailers do offer an extensive range of products although consumers may need to be made more aware of the variations through increased promotional and/or educational efforts. Some common trends were evident although, on the whole, consumers appear to be more adventurous in their retail purchases than in their fast food and restaurant menu selections.

**Conclusion**

Ethnic food is increasing in popularity with the NI consumer, albeit at a slower rate than in other areas of the UK, and this can be attributed in part to the entrance of the larger retailers into the province. The growth of the large multiples has also had an effect on the smaller, independent firms, some of whom are now attempting to offer more variety at an attractive price, but it is difficult to compete in the current climate. Although ethnic cuisine has emerged in the restaurant/takeaway sector, traditional establishments still dominate. Chinese food is the most popular here, in contrast to Great Britain where Indian food dominates. Clearly, traditional habits are hard to break – further emphasised by the evolution and incorporation of “adapted” ethnic dishes onto some of the more traditional menus (the “curry and chips” syndrome!).

From this, the retailer currently appears to play a more significant role in promoting ethnic food popularity and authenticity. All stores stocked an extensive range with a large proportion of own label products and convenience products. The retailers claim this to be in response to consumer needs and wants, particularly in relation to convenience and variety and yet the findings also highlighted the fact that many consumers are not aware of a large number of the products being stocked by retailers and indeed have a limited knowledge of ethnic foods in general. Interestingly, in Northern Ireland, the Italian sector has actually experienced the greatest growth and consumers appear to be more familiar with the full range of products.

Product awareness clearly needs to be developed further and the onus is on the retailer (and indeed the hospitality establishments), to inform consumers and respond to their needs and wants effectively. Only then can a larger range of truly ethnic food products penetrate the Northern Ireland market successfully.

**References**


