Grocery Shopping & The Discounters

Report
November 2010

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INTRODUCTION

This research on grocery shopping has been conducted by Behaviour & Attitudes Limited on an annual basis since 2002, in order to track awareness, usage and perceived performance of Aldi & Lidl.

This latest stage was conducted during November 2010 and covered the following information:-

- Normal approach to grocery shopping
- Main store used for grocery shopping
- Other stores used for grocery shopping
- Estimated weekly spend on groceries nowadays
- Estimated weekly spend on groceries a year ago
- Reported trends in grocery spending versus last year
- Share of grocery spend across main stores
- Awareness of Aldi or Lidl
- Local availability of Aldi or Lidl
- Incidence of visiting Aldi or Lidl
- Incidence of shopping in Aldi or Lidl
- Frequency of shopping in Aldi or Lidl
- Aldi/Lidl ratings on range of choice
- Aldi/Lidl ratings on general product quality
- Aldi/Lidl ratings on value for money
- Aldi/Lidl ratings on prices vs the main supermarkets
- Expectations for future Aldi/Lidl usage

All stages of this research have been based on participation in B&A's bi-monthly syndicated Barometer survey. Each Barometer survey is based on a nationally representative quota sample of 1,000 adults (aged 16 years and over).

Fieldwork is conducted face-to-face in-home, using a structured questionnaire. Interviewing is carried out across 63 separate sampling points to ensure comprehensive geographical spread, and a fresh sample is used for each survey.

Selection of respondents is determined by quota controls relating to gender, age and social class within region, to ensure a microcosm of the national adult population.

Interviewing is carried out by fully trained and experienced members of B&A's interviewer panel, working under direct supervision throughout the survey. All aspects of this research are conducted in accordance with guidelines from the Market Research Society and ESOMAR (the International representative body for Marketing Research organisations).

Fieldwork for this latest stage was completed between the 10^{th} – 20^{th} November 2010.

Technical appendices comprise a list of sampling points, social class definitions and a copy of the survey questionnaire.

Behaviour and Attitudes is Ireland's largest and most experienced independently owned research company. We have 30 permanent staff members including 10 directors, the most experienced team in the Irish market. In addition, we have a team of over 150 experienced, fully trained face-to-face interviewers nationwide. Our Dublin CATI (telephone) Unit is based in our offices in Milltown and has a capacity of over 75 interviewers.

Established 25 years ago, Behaviour and Attitudes provides a full range of market research services, ranging from CAPI (Computer Aided Personal Interviewing), through to standard face-to-face interviewing surveys, CATI (Computer Aided Telephone Interviewing), central location interviewing, as well as an in-house CAWI Unit (Computer Aided Web Interviewing). The company would be well known for having pioneered the development of qualitative research in Ireland.

Despite being the second largest market research company in Ireland, Behaviour & Attitudes has a very well defined and tight company structure which is built around excellent client service delivery principles.

Behaviour & Attitudes is fully owned by its 10 Directors. These Directors are continuously involved in day-to-day research on behalf of their clients. Hence, our clients have access to the most senior team in the Irish marketplace.

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SUMMARY & CONCLUSIONS

- A majority of grocery shoppers continue to rely on one main trip weekly (58%). We had seen a gradual increase in spreading this over 2 or more days, but this saw a reversal in 2009, in favour of a more varied shopping approach, which remains steady in 2010.

- Dunnes and Tesco remain by far the two most popular choices for main shopping, with Tesco down slightly on 2009, ceding the lead to Dunnes.

- Shopper estimates of where they spend an average of €100 shows some convergence between Dunnes, Tesco and SuperValu at 22%, 20% and 17% respectively. Lidl and Aldi are not too far behind on 15% and 11% respectively.

- As in the past, Tesco and Dunnes have a stronger shopper presence in urban areas and SuperValu in rural areas. Aldi and Lidl are equally strong in urban and rural areas.

- Weekly grocery spend estimates are down 8% on 2009, from €133 to €122.

- Dunnes and Superquinn main shoppers show the highest grocery spending per household – with per capita expenditure highest for Superquinn.

- Before the current recession we saw a consistent tendency for shoppers to exaggerate increases in their grocery spend, compared with their reported spend ‘year on year’. Previously shoppers had been assuming double digit increases. In 2009 we saw that the assumed decrease was greater than the actual decrease; this has now reversed, with the actual decrease in weekly spend registering at 8%, while the assumed decrease is only at 5%.

- In line with this, just over one third of all shoppers now feel they are spending less than last year (30% a little lower and 5% a lot lower) – compared to 2009 when nearly half feel they were spending less.

- Aldi and Lidl have been established 'household names' for some time now and both have made further progress on local availability.

- However there is some sense of a plateau being reached, although this is more in evidence for Lidl than Aldi.

- Currently, 8% say they do their main grocery shopping in Lidl, and 7% in Aldi.
    - Lidl is now steady on incidence of visiting and even shopping in.

- Amongst their existing shoppers, frequency of usage for Aldi or Lidl has increased this year; up to 36% for Aldi and 38% for Lidl shopping weekly now.

- Shopper playback on the 'top ten' most popular purchases is similar for both chains and broadly in line with 2009; fresh fruit & veg the most widely purchased category – ahead of toiletries, biscuits, toilet rolls, household cleaners and cheese.

- As in previous years, typical purchases in these discounters embrace a very much broader spectrum of product categories.

- Having suffered a slippage in ratings on range and quality in 2009, both stores have recovered some ground on range (almost back to 2008 levels) and are now registering their highest ever respective scores on quality.

- Both rate highly on value for money, with rating back to 04/05 levels, having experienced some slippage in the intervening years.

- In relation to prices versus other stores, both groups are performing well, improving slightly on their 2009 ratings.

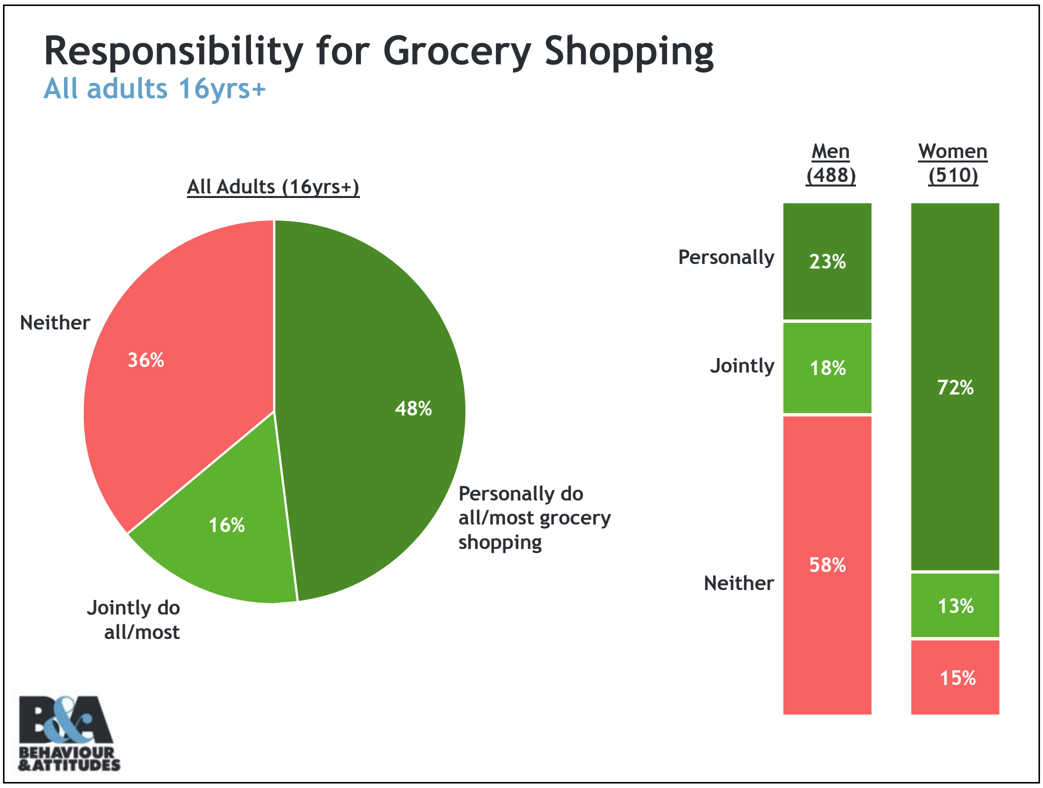
- In 2009 just under 1 in 5 claimed they would be using these stores more often in the coming year, and this remained steady for 2010. 2 in 3 envisage no change in their future usage.

- Thus, growth in reach and usage of these stores may be slowing down; in part due to the response from the competitive set, and in part also due to a more limited range of brands stocked.

1. RESPONSIBILITY FOR GROCERY SHOPPING

1 in 2 adults are primary grocery shoppers

Half of all adults (48%) are personally responsible for buying all or most of the groceries for their household – and a further 16% do so on a shared basis.

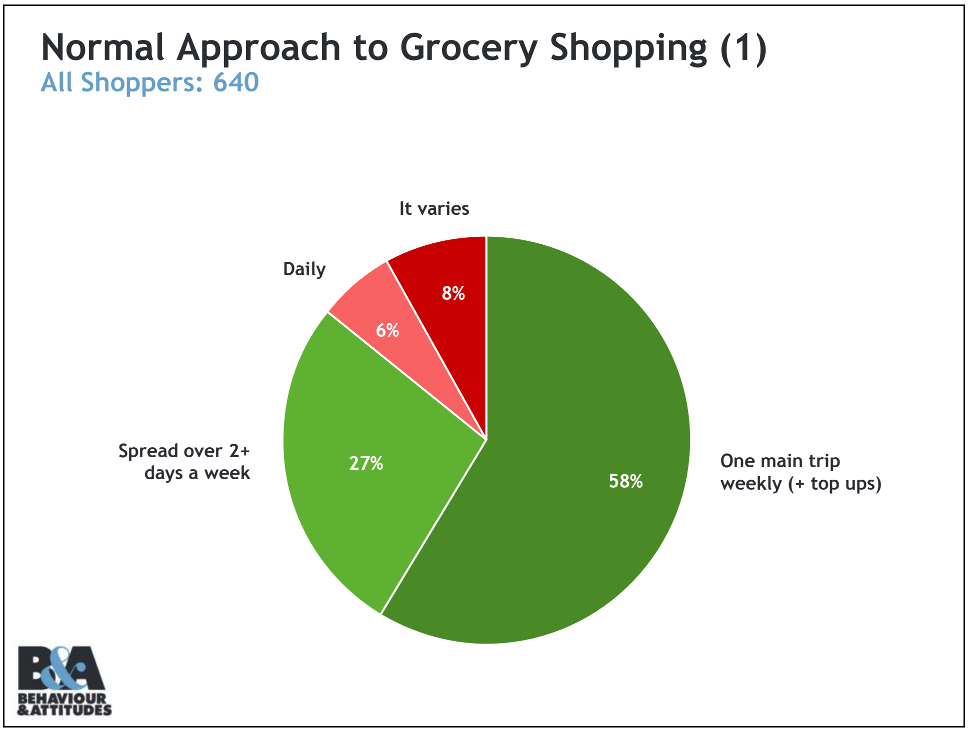


Predictably there continues to be a sharp contrast on gender – 72% of all women and just 23% of men have personal responsibility for this task.

2. GROCERY SHOPPING APPROACH

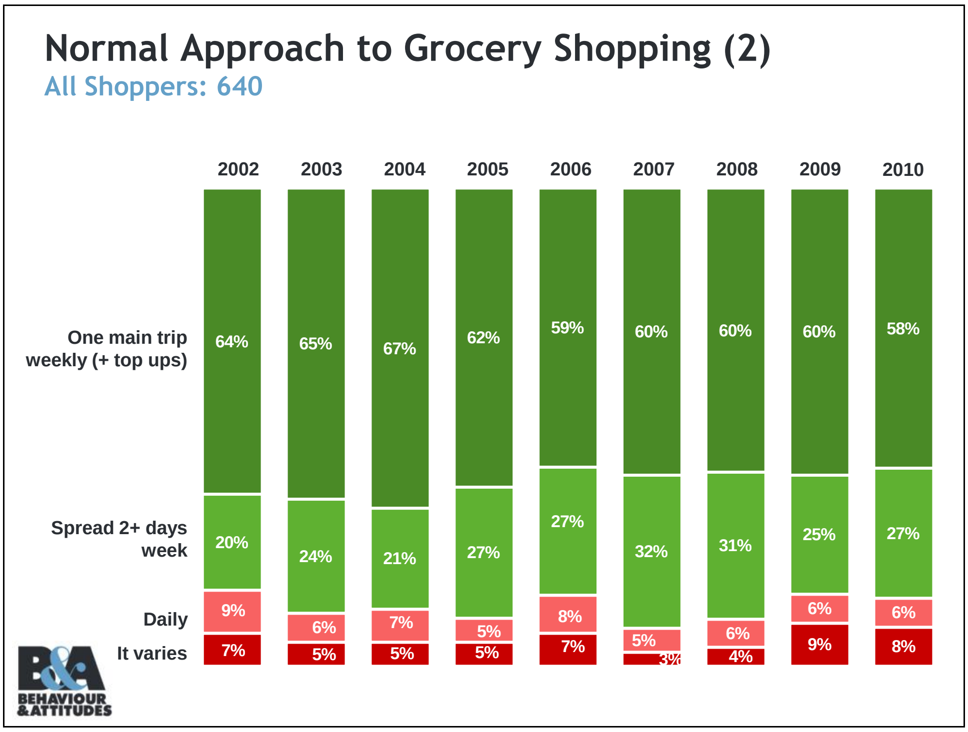
Almost 6 in 10 rely on a main weekly trip

The typical approach is one main weekly shopping trip for groceries: almost 6 in 10 shoppers buy their groceries on this basis.



Just over a quarter (27%) spread their shopping over two or more days in the week, with just 6% shopping daily and the balance of almost 8% varying their approach.

Historic trend data show that this traditional reliance on one main weekly shopping trip has reduced slightly over this 9 year span.



However, the general pattern over the past 5 years shows considerable stability in this regard.

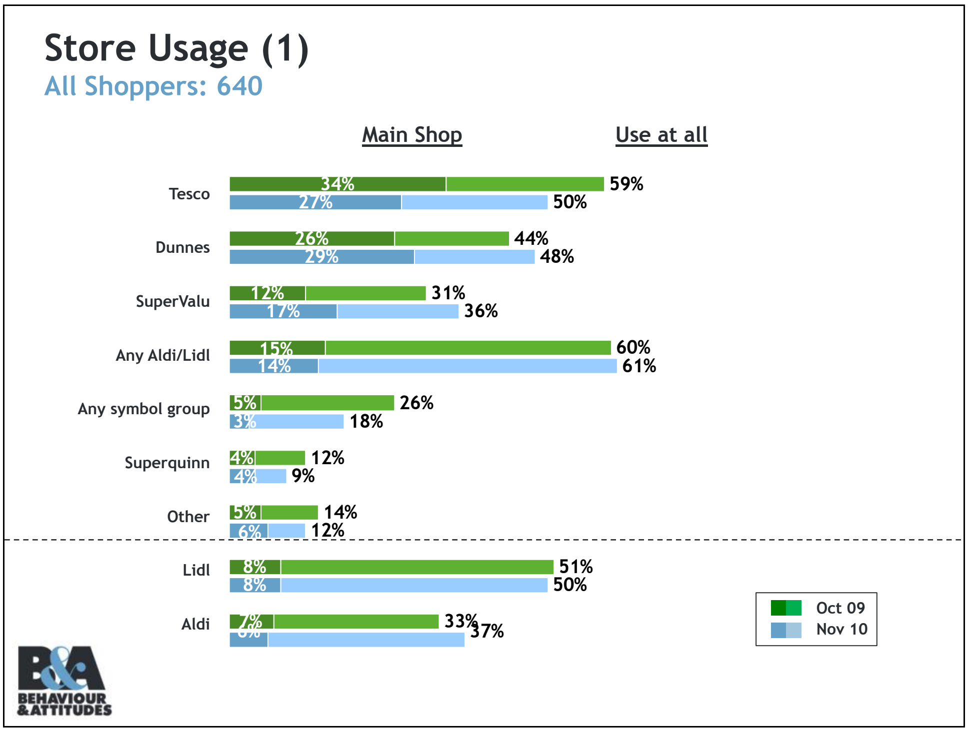
3. STORE USAGE

The Discounters have the widest franchise now

Last year Tesco and the Aldi/Lidl combination jointly enjoyed the widest reach for any usage nowadays (each at 6 in 10).

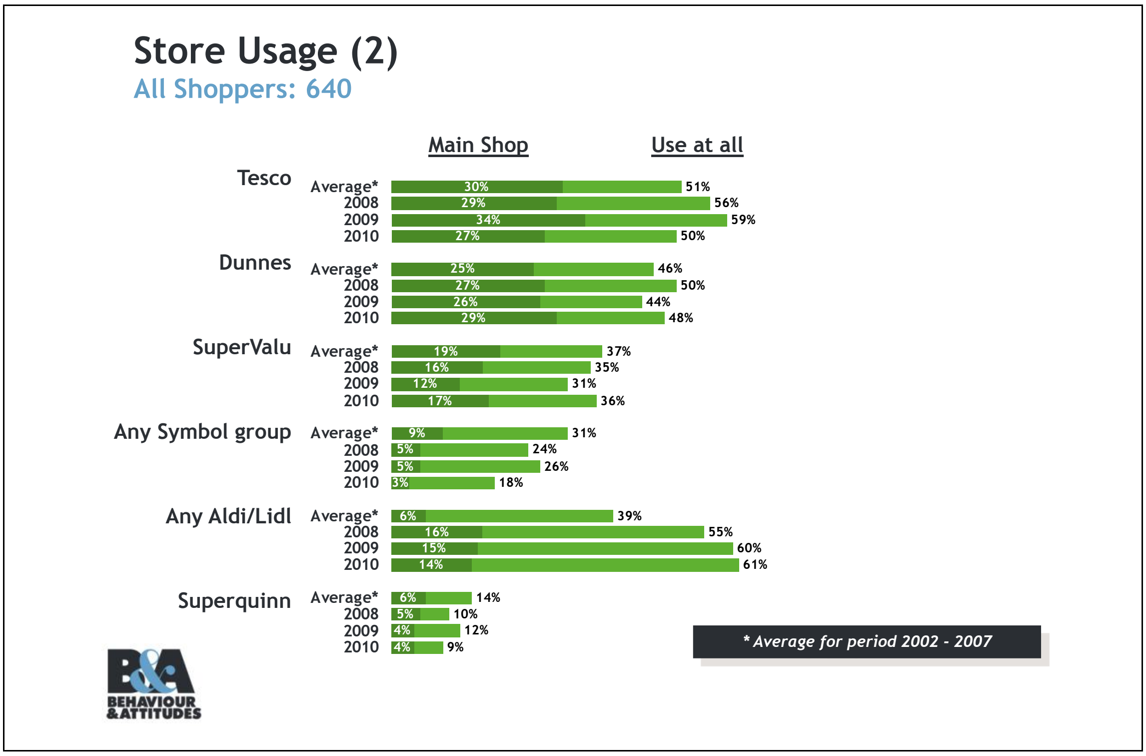
The latest results suggest the Discounters have held this overall usage level, but Tesco has dropped back to 50% with Dunnes at a similar level (48%) well ahead of SuperValu (36%). Symbol group outlets and Superquinn have both lost penetration on this basis.

It is also worth noting that Aldi has narrowed the gap with Lidl over the past 12 months.



Main shop usage levels show Dunnes (29%) just ahead of Tesco now (27%) with the two main groups representing the choice of over half of all shoppers – SuperValu (17%) and the Discounters (14%) jointly accounting for a further third.

This chart compares main shop choices and usage levels for the main supermarket groups, based on a comparison of the three most recent measures and an average for 2002 – 2007.

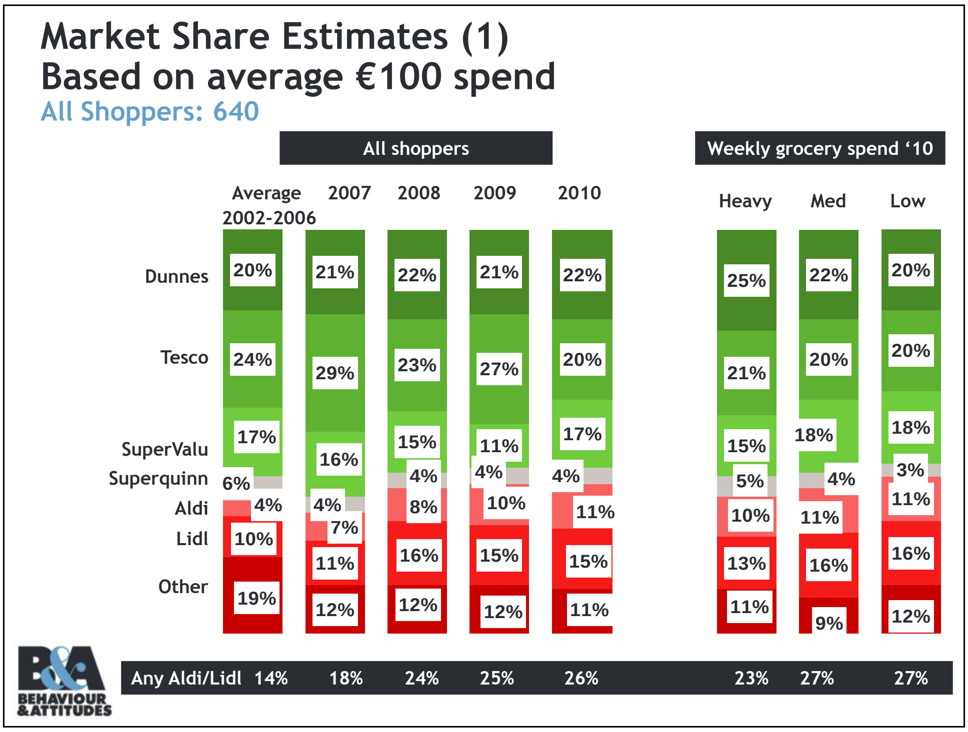


While Tesco, Dunnes and SuperValu current levels are close to their respective averages for 2002 – 2007, Aldi and Lidl have more than doubled their share of main shop choices (6% up to 14%) and significantly improved on any usage (39% up to 61%) over the period.

4. STORE SHARE ESTIMATES

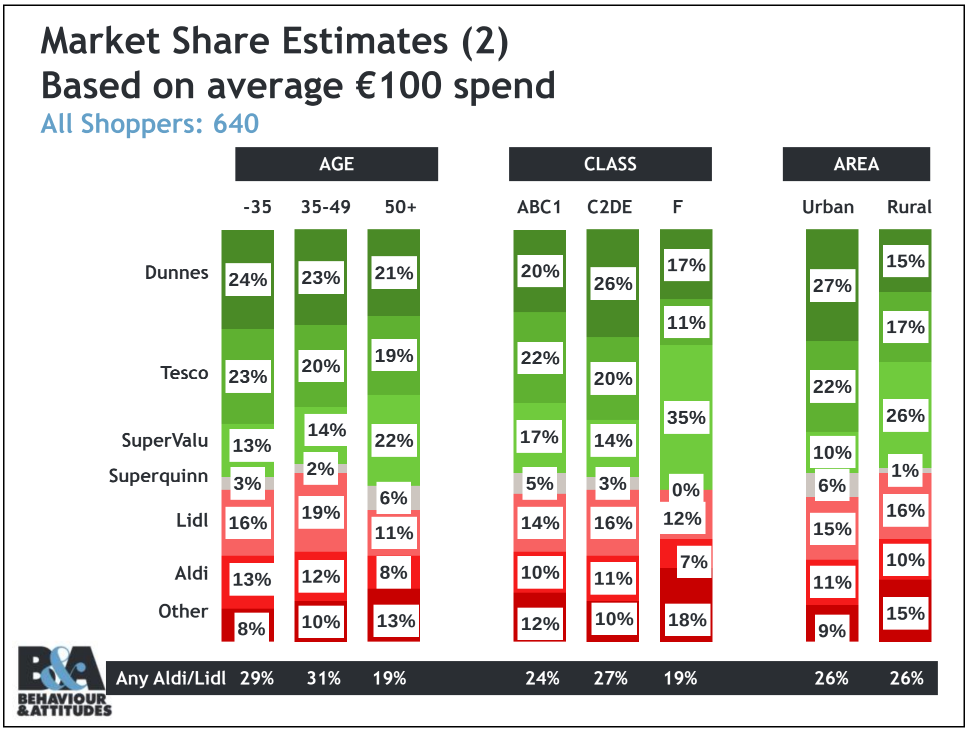
The Discounters lead for the first time

These broadly based market 'share' estimates are based on asking shoppers to describe how they distribute an average €100 expenditure on groceries, across the main retailer brands.



While Tesco enjoyed a considerable edge over Dunnes last year, the two main groups are now almost aligned – but the Aldi/Lidl combination leads the field for the first time on this measure – accounting for just over a quarter of all grocery expenditure.

The Discounters make a better showing at younger and mid-age level, whereas SuperValu fares better among more mature shoppers.

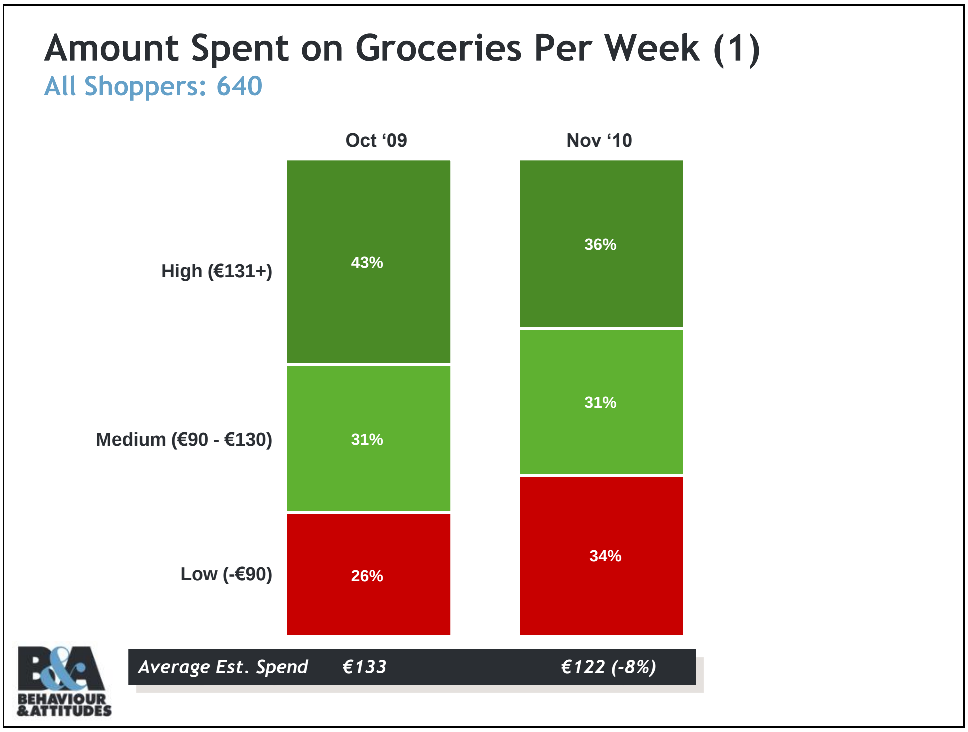


While Dunnes and Tesco do better in urban areas, SuperValu commands a higher share in rural locations. Significantly Aldi and Lidl enjoy the same level of support in both.

5. WEEKLY GROCERY SPEND

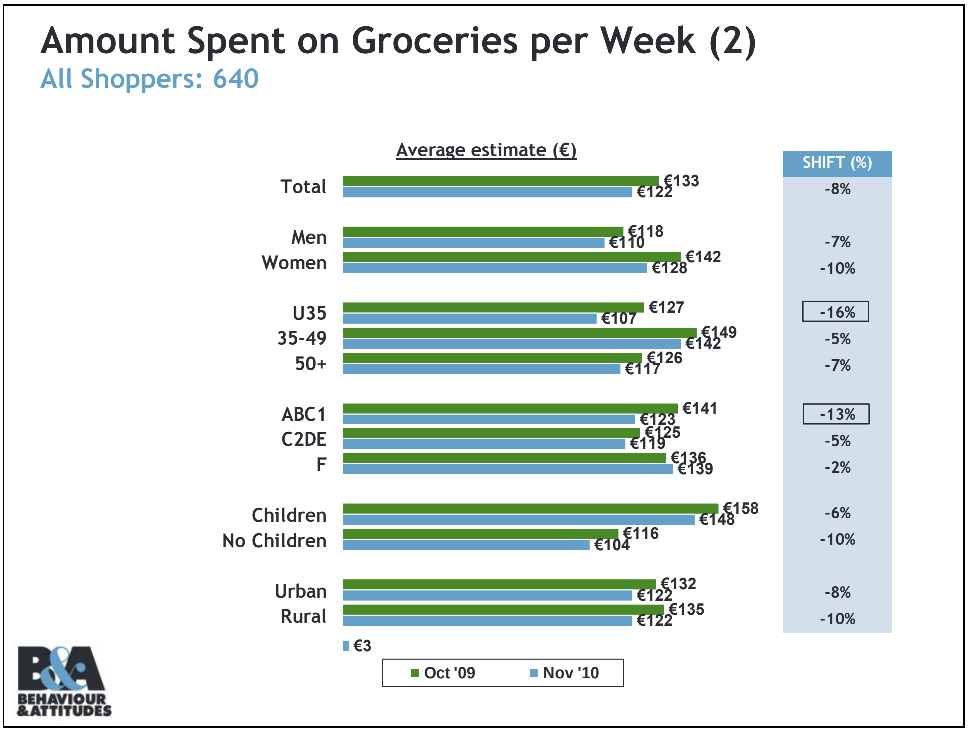
A drop of 8% since last year!

The full impact of the current recession is very evident from the comparison of estimated weekly spending on groceries, for last year and this year.



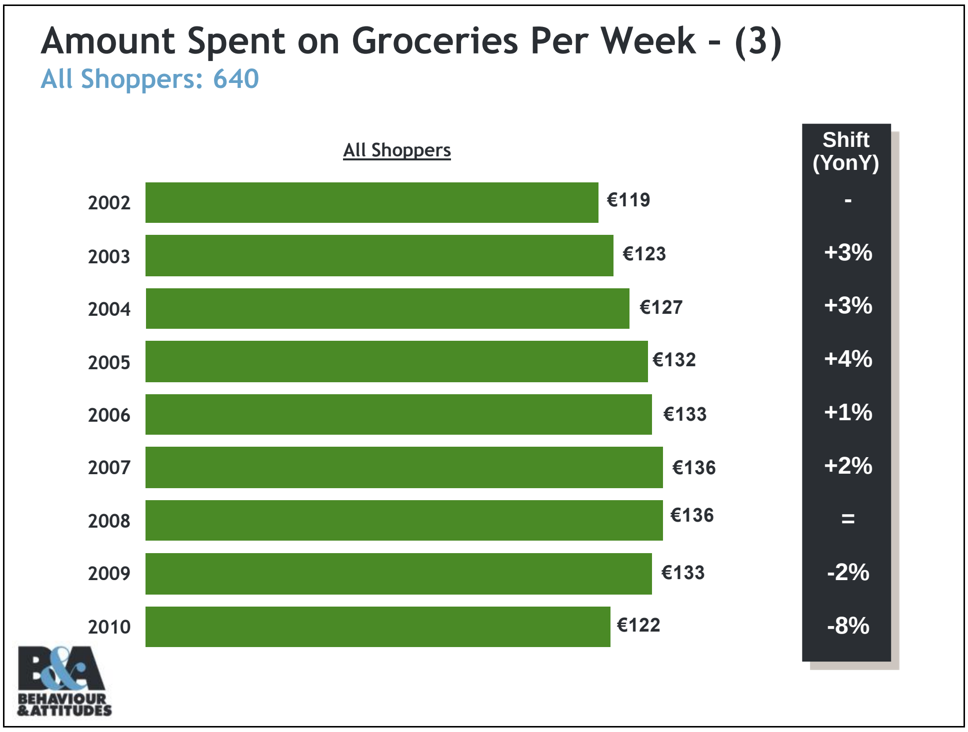
The proportion of high spenders has dropped from 43% to 36%, and low spenders have risen from 26% to 34%. As a result, estimated weekly spending has fallen by 8% within this 12 month span.

These comparisons of averages for weekly grocery expenditure in 2009 and 2010 are summarised below for the main demographic sub groups.



Clearly younger shoppers have taken a particular hit and interestingly there has been more of a proportionate decline at middle-class level.

The full extent of this reversal in grocery expenditure is underscored by this historic comparison.

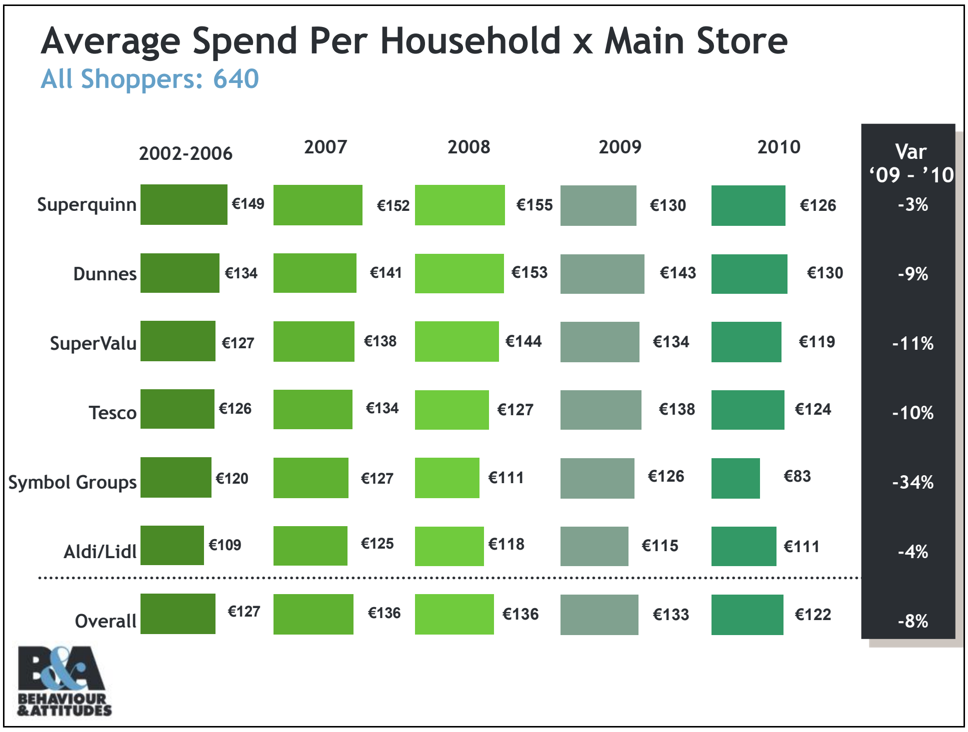


In short, from 2002 up to 2007 there had been steady incremental increases, which flattened out in 2008, declined slightly in 2009, and fell sharply in this latest measure. Grocery spend is now at roughly 2003 levels.

6. GROCERY SPEND X MAIN STORE

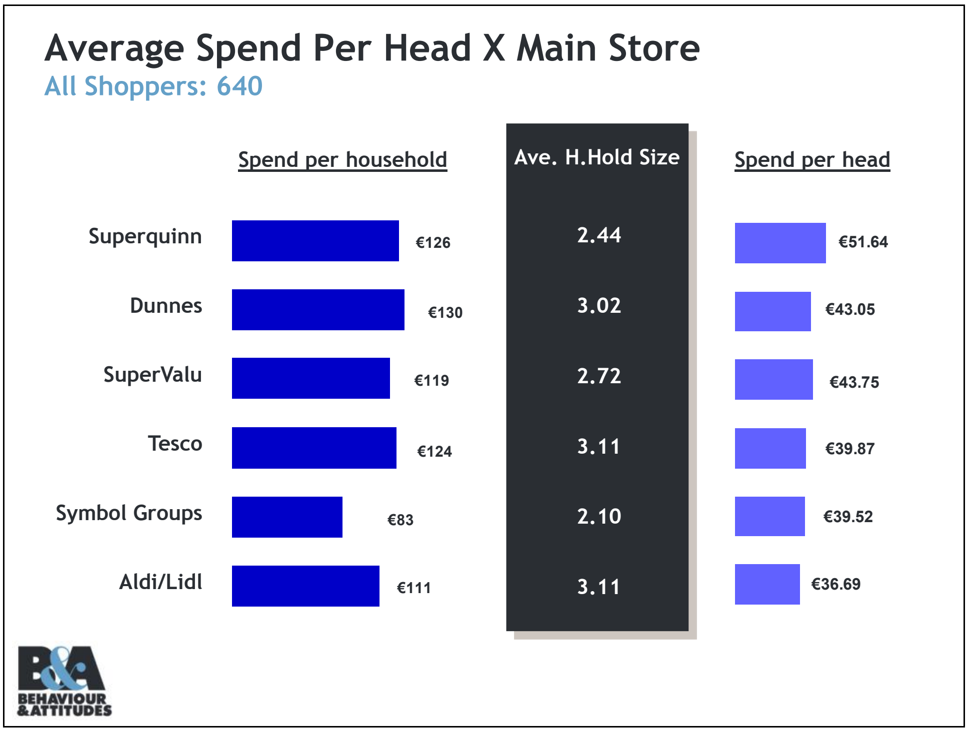
Dunnes ahead of Superquinn & Tesco

This summary compares estimates of average weekly expenditure on groceries for each of the last four years, alongside equivalent consolidated data for 2002 – 2006.



Currently Dunnes main shoppers spend most per household, ahead of Superquinn & Tesco. Dunnes, SuperValu and Tesco main shoppers spend is down substantially versus 2009 (with symbol groups showing an even more dramatic fall).

It is also useful to look at these latest estimates of grocery spending across the main retail brands by taking account of household size, to show per capita expenditure.



As there is some variation in the average household size for customers of these groups, this produces a rather different rank order in which spend per head is highest overall for Superquinn. SuperValu and Dunnes are at a slightly lower level, in 2nd and 3rd place, with Tesco and the symbol groups a reasonable distance behind, followed by Aldi and Lidl as the lowest overall.

7. SPENDING INCREASES

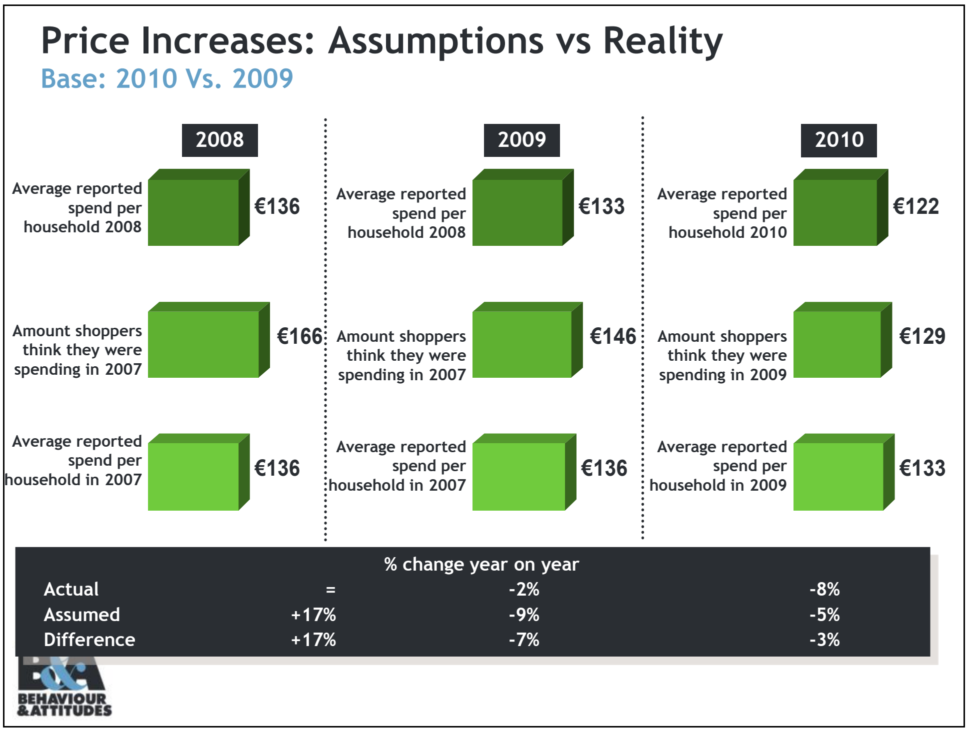
Assumptions vs Reality – Even Less of a Gap

As previous stages of this tracking survey have illustrated, grocery shoppers invariably exaggerate the extent to which they feel their grocery spending has increased from one year to the next.

This chart summarises three key measures for 2009 and 2010:

- Current estimates of weekly spending
- Estimated weekly spending a year ago
- Reported weekly spending a year ago

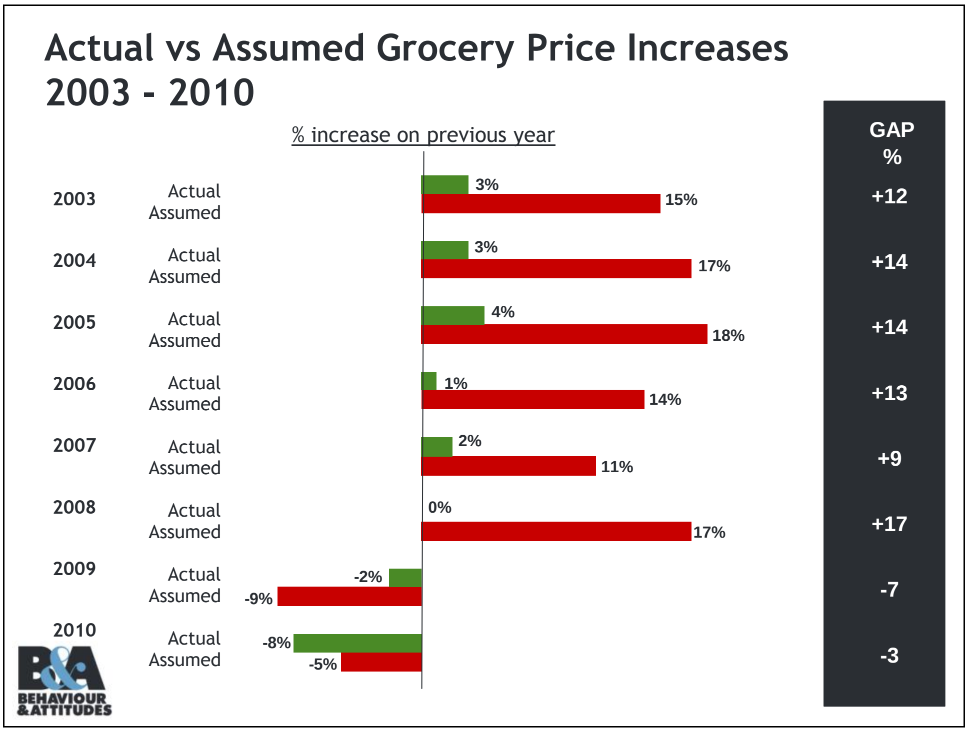
By drawing on these three measures, we can identify the gap between assumptions and actual (reported) spending.



In 2008, 'year on year' increases in grocery expenditure showed no change, although shoppers assumed that on average they were spending 17% more on groceries. In 2009 they estimated they were spending 7% less.

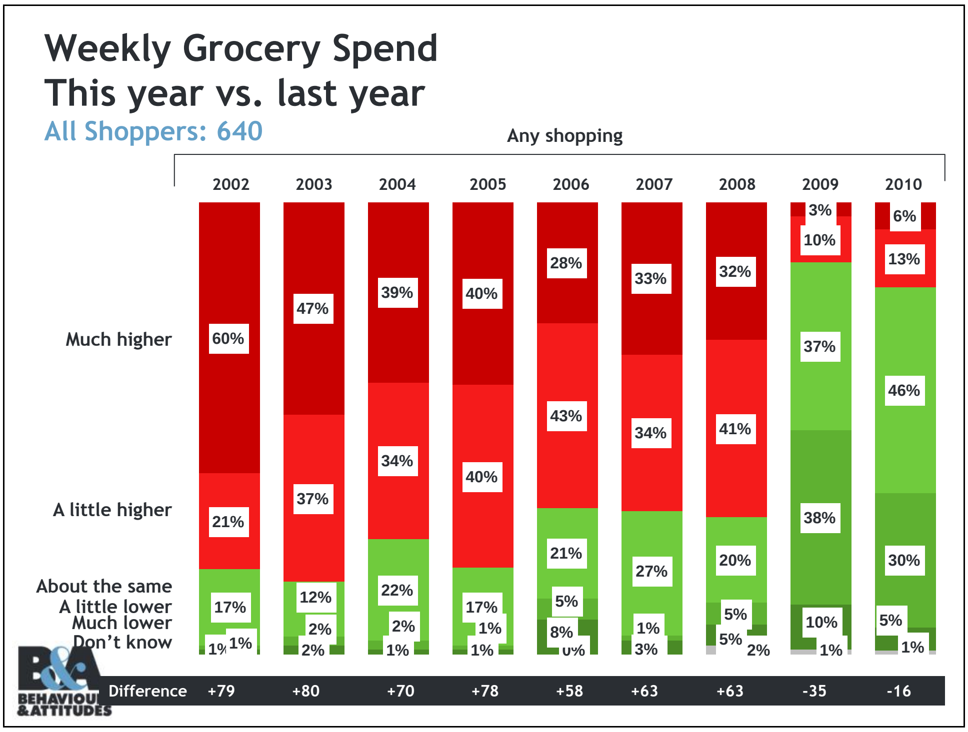
In the latest results, this gap has closed further: the actual shift recorded 'year on year' was -8% but the assumed decrease was -5% (i.e. a net difference of 3 percentage points between reported and assumed reductions in grocery expenditure over the past year).

Looking back at the historic pattern of these differences between actual (reported) and assumed changes in grocery spending levels serves to emphasise the very dramatic turnaround in the past 2 years.



Following a six year period in which assumed increases in spending ran well ahead of actual reported figures, we have seen a total reversal for 2009 and 2010.

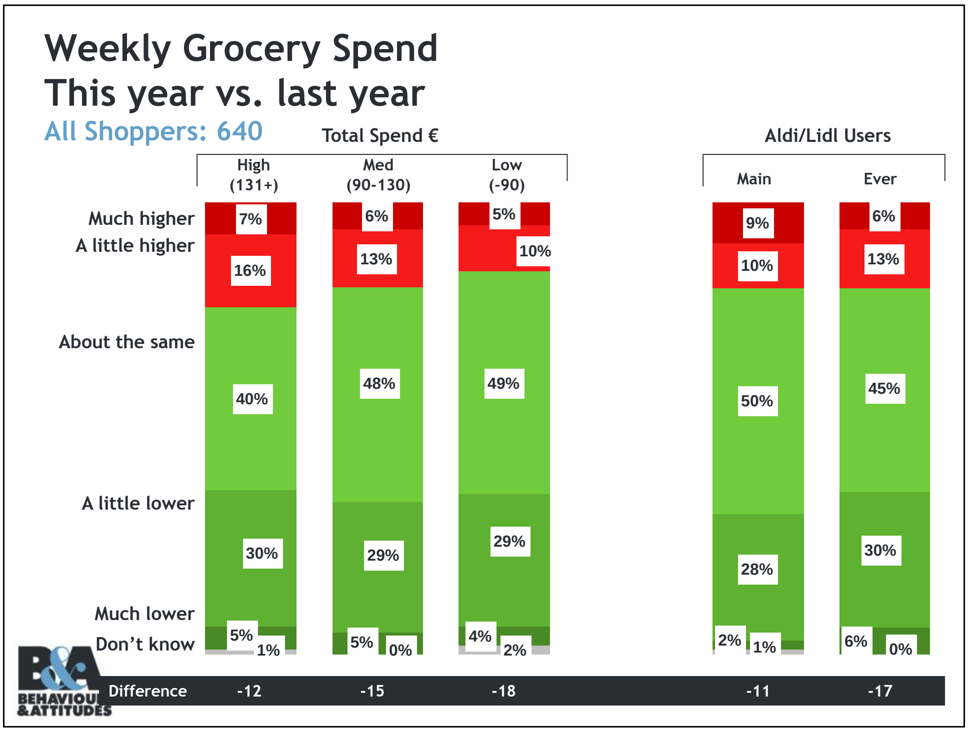
A related question asked shoppers to compare their grocery spending this year compared with last year and trends since 2002 are summarised below.



For the years 2002 – 2008, there was a very 'bullish' pattern in which a solid majority of shoppers reported spending more than the previous year.

However the 2009 results signalled a complete reversal as the current recession took hold, with half indicating they were spending less.
The latest figures confirmed this negative balance, but not as marked as in 2009 – 19% spending more, 46% the same and 35% less now.

Spending less now compared with last year is somewhat more evident among those at the lower end of grocery expenditure.

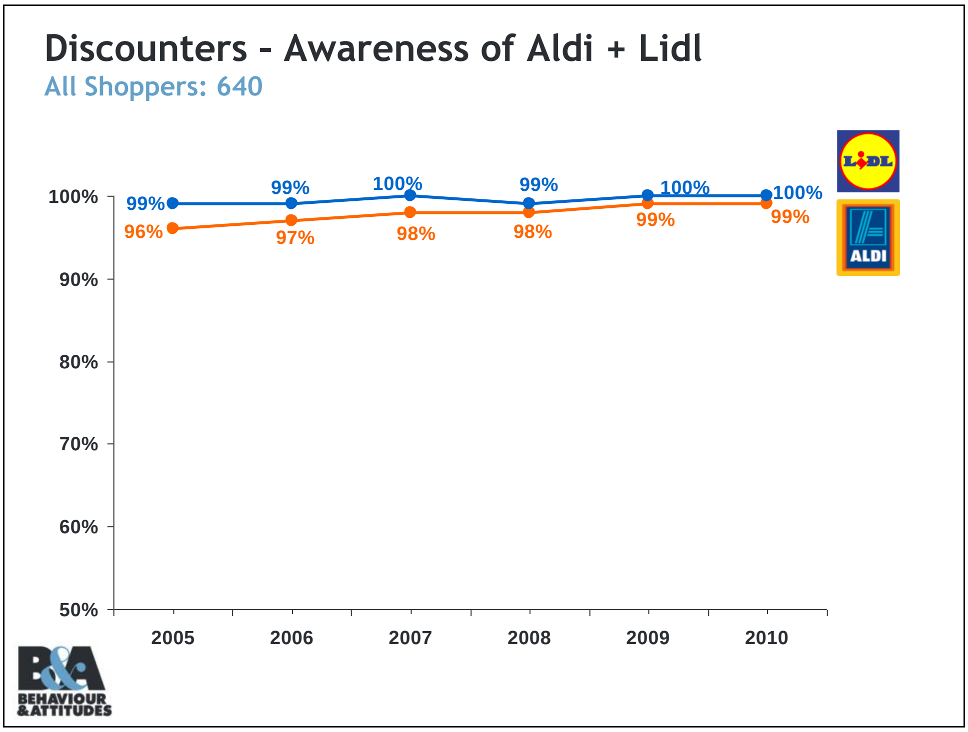


It would also appear that reduced grocery spending is more a feature for occasional rather than more committed users of the Discounters.

8. THE DISCOUNTERS

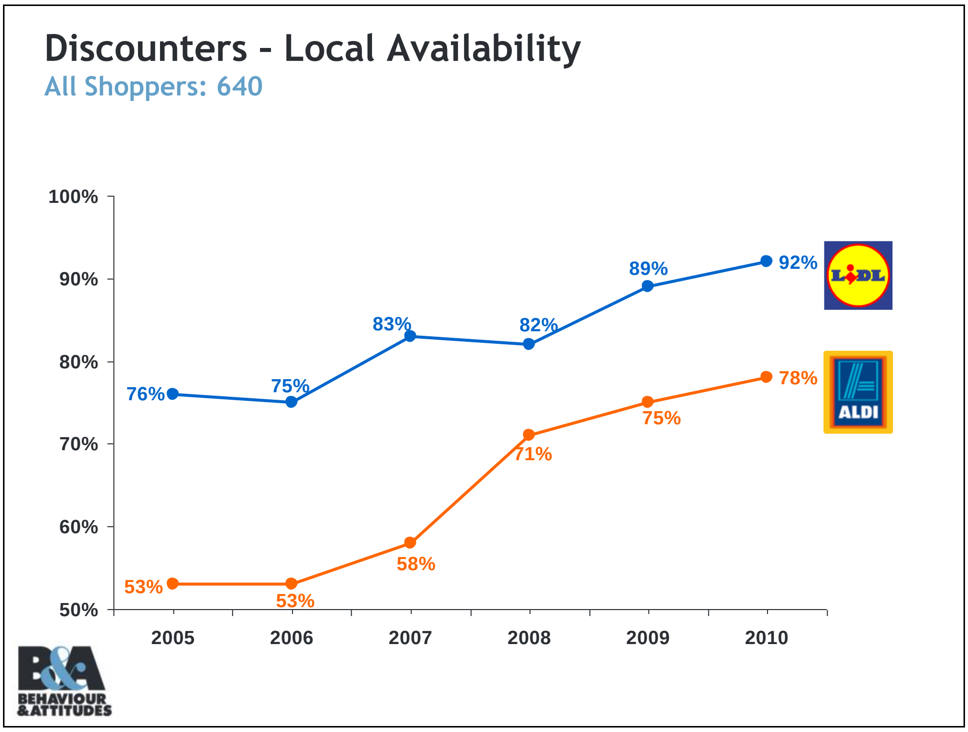
Aldi & Lidl - Universal Availability & Even Higher Usage

Both Lidl and Aldi have enjoyed universal awareness for the past 5 years.



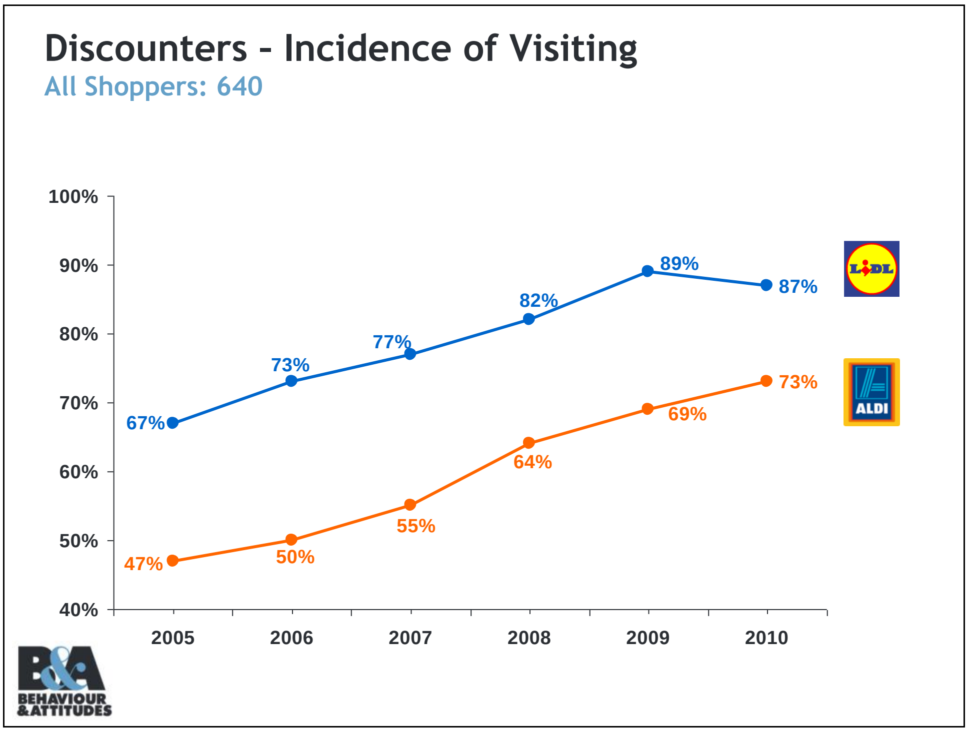
Although Lidl had a slight edge back in 2005, the two brands are clearly household names at this stage.

Both of these German retailer groups have made significant progress in recent years in terms of shopper perceptions of local availability.



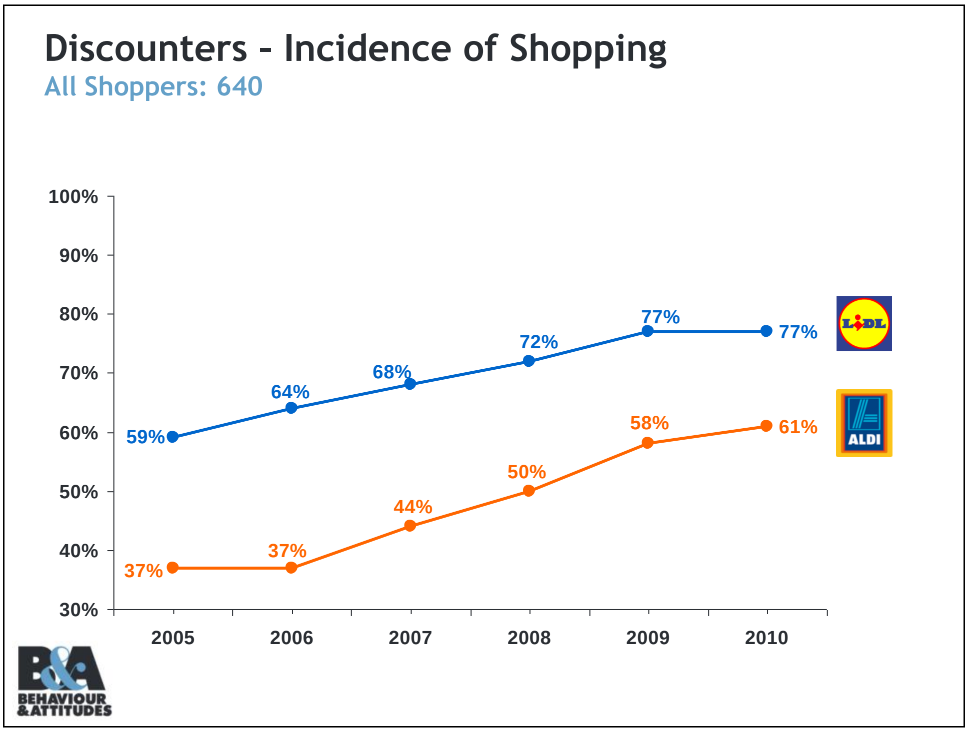
This reflects continued expansion of their respective store networks, with Aldi closing the gap with Lidl in 2008. Since then Lidl has pushed up from 82% to 92% and Aldi from 71% to 78%.

Direct experience of visiting Lidl and Aldi has also demonstrated a steady upward trend with some flattening out for Lidl in this latest measure.



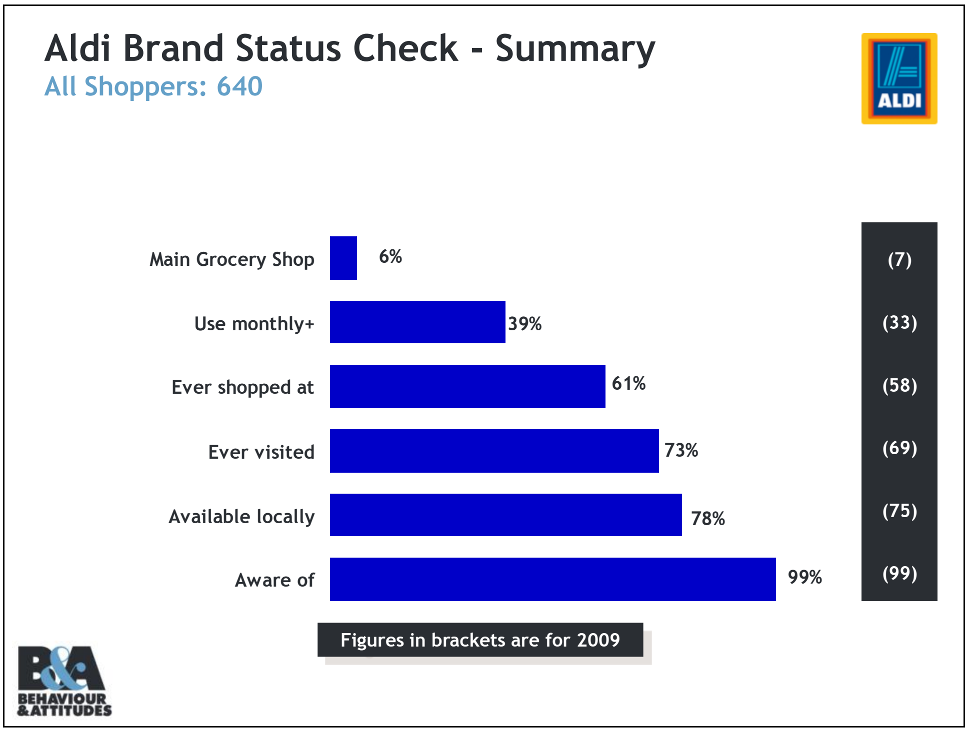
Currently almost 9 in 10 shoppers have been to Lidl, and 3 in 4 to Aldi.

A very similar picture has unfolded for shopping in these Discounters – again with some levelling off in this most recent update.



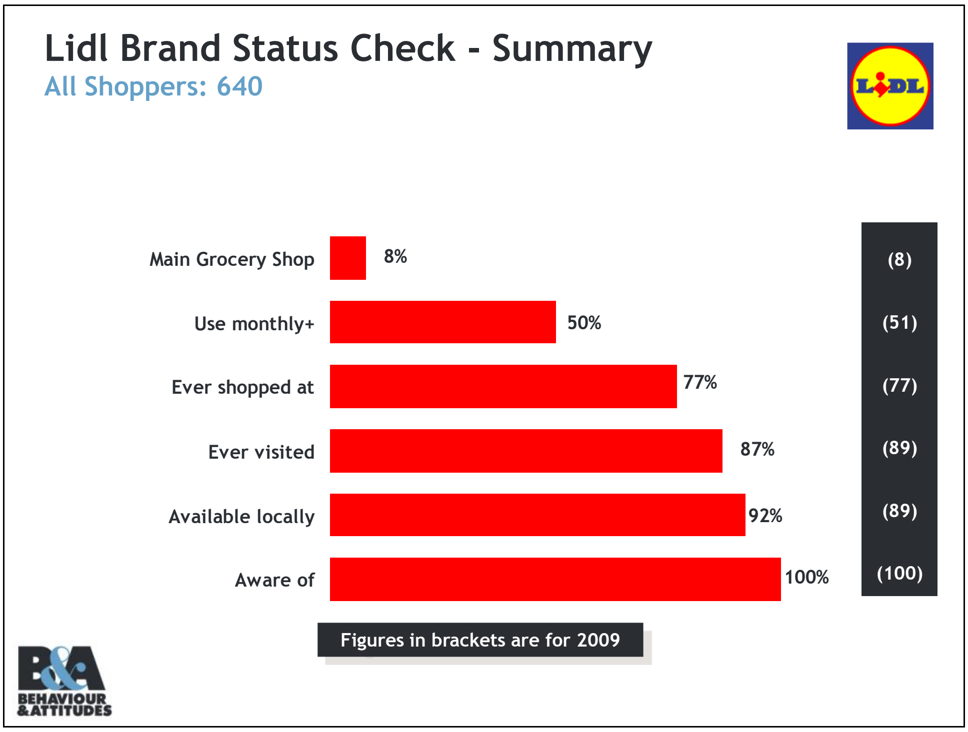
Although Lidl remains more widely used (3 in 4 shoppers), Aldi has been catching up gradually but consistently (now at 6 in 10).

The current brand status for Aldi on these key measures is summarised below.



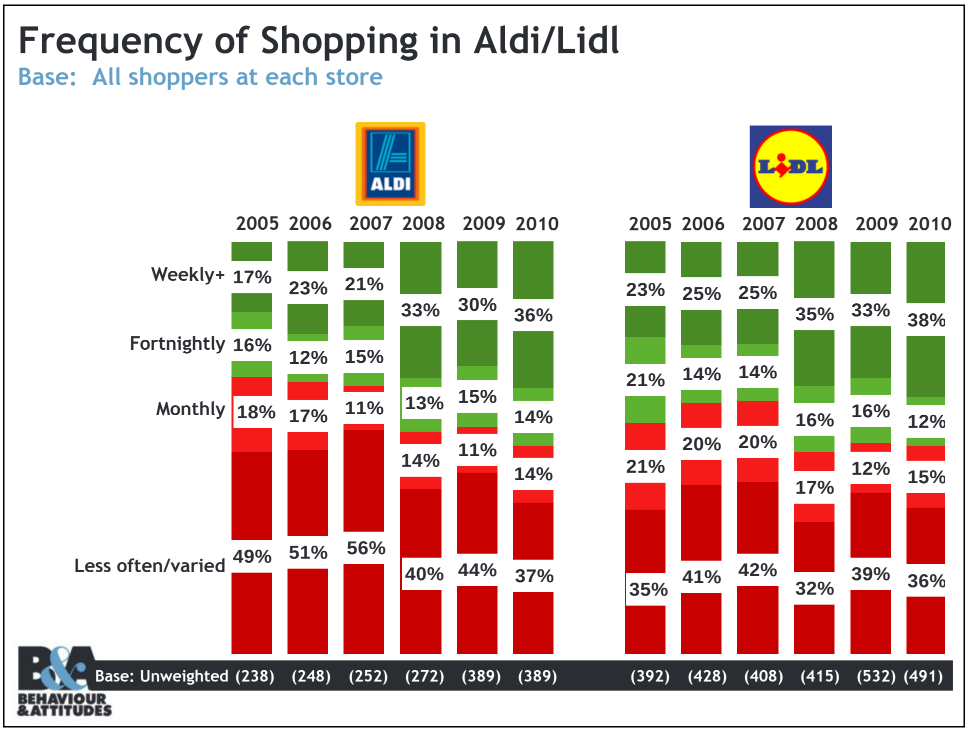
With universal awareness, shopping penetration at almost 6 in 10, and monthly usage at 1 in 3, Aldi is firmly established as a key player in the Irish retail grocery landscape at this stage.

The equivalent brand status summary for Lidl is even more impressive.



As many as 3 in 4 shoppers have used Lidl stores, and half are monthly shoppers there; a very strong customer base which has been consolidated over time.

Reflecting the continuing rise of availability and usage of both stores, Aldi and Lidl have recorded their highest ever shopping frequency results in this tracker.

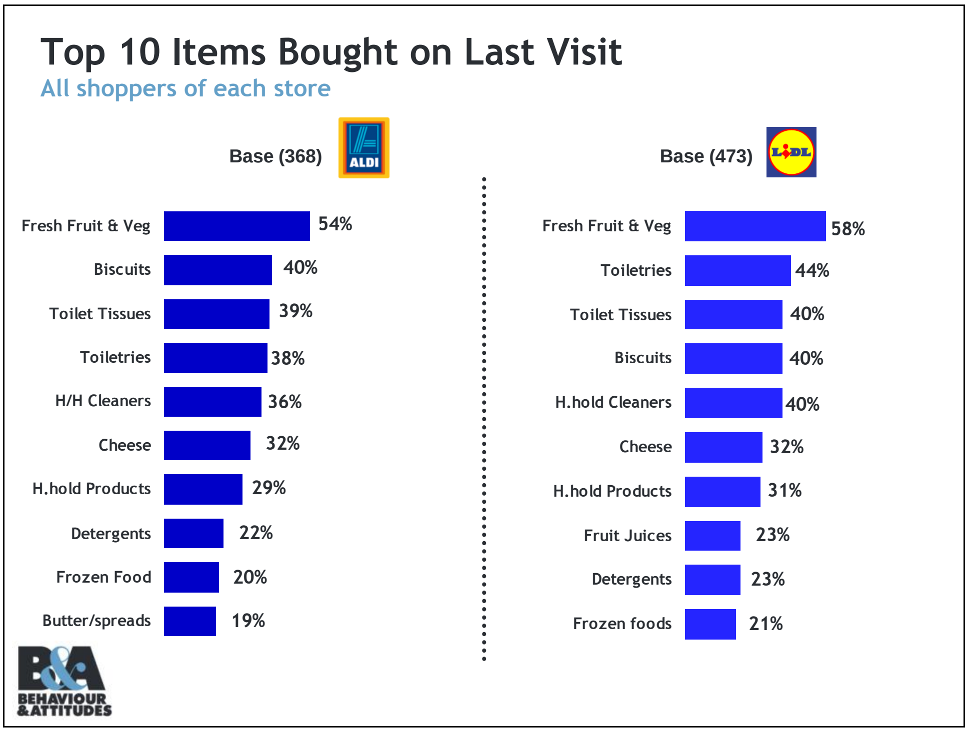


Among Aldi shoppers, 36% now claim to use the store weekly or more often, with the equivalent figure for Lidl at 38%.

9. ALDI & LIDL – TOP LINES

Broadly Similar Product Profiles

The 'top ten' most popular product categories for recent purchases in Aldi and Lidl are summarised below, and show broadly similar product profiles.



Clearly the emphasis is very much on mainstream grocery staples and reflects increasing confidence in the Discounters' offers.

A more detailed breakdown of product lines purchased on recent visits to Aldi or Lidl is summarised in the table below and its continuation over the page.

Aldi/Lidl - Items Bought on Last Visit (1)

All shoppers: 640

	ALDI	LIDL
Base	368	473
	%	%
Fresh fruit & veg	54	58
Biscuits	40	40
Toilet tissues/rolls	39	40
Toiletries	39	44
Household cleaners	36	40
Cheese	32	32
Household products	29	31
Detergents/washing powder	22	23
Frozen foods	20	21
Butter/butter spreads	19	21
Soft drinks	19	20
Juices/fruit juices	19	23
Fresh meat	17	18
Pasta/noodles	17	16
Pre-packed bread	16	15
Bacon/Rashers	16	18
Cereals	15	17
Ice cream	15	14
Confectionery	15	14
Crisps	14	11
DIY items	14	15
Electrical appliances	14	13
Sauces/ketchup	13	14
Chips	13	13
Frozen fish	13	12
Wine	12	16
Pizzas	11	15

BEHAVIOUR & ATTITUDES

As earlier stages of this tracker have indicated, both stores provide a very wide spectrum of choice at this stage.

Although there are some differences in product emphasis for the two claims, the overall pattern is quite similar.

Aldi/Lidl - Items Bought on Last Visit (2)

All shoppers: 640

	ALDI	LIDL
Base	368	473
	%	%
Tinned fruit	11	11
Hardware	11	9
Cakes	10	10
Tinned food (other)	9	10
Frozen chicken	9	9
Beer	9	11
Squash/fruit squash/cordials	8	10
Tinned beans/spaghetti	8	10
Flour	8	7
Desserts/chilled desserts	8	9
Pet food	8	10
Tools	8	8
Nuts	7	7
Rice/cous cous	7	8
Clothing	6	7
Baby wipes	5	5
Spirits	5	8
Nappies	5	4
Footwear	5	5
Vitamins/health supplements	4	4
Bake at home bread	4	3
Ethnic dry meals (salami, etc)	4	3
Pickles/chutney/relish	4	4
Furniture	4	4
Christmas cakes	2	3
Baby food	1	1
Baby Formula	-	0
Other	7	7

BEHAVIOUR & ATTITUDES

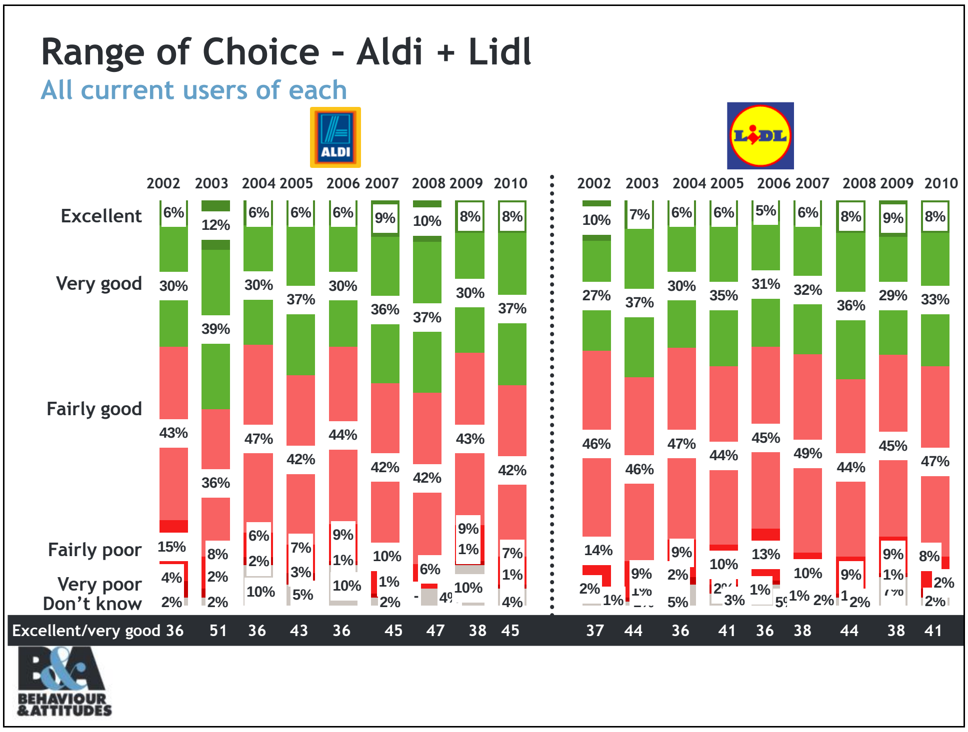
In effect they both encompass a very comprehensive set of product lines which now extend into a number of more specialist areas.

10. ALDI & LIDL - PERFORMANCE

Strong ratings re-iterated

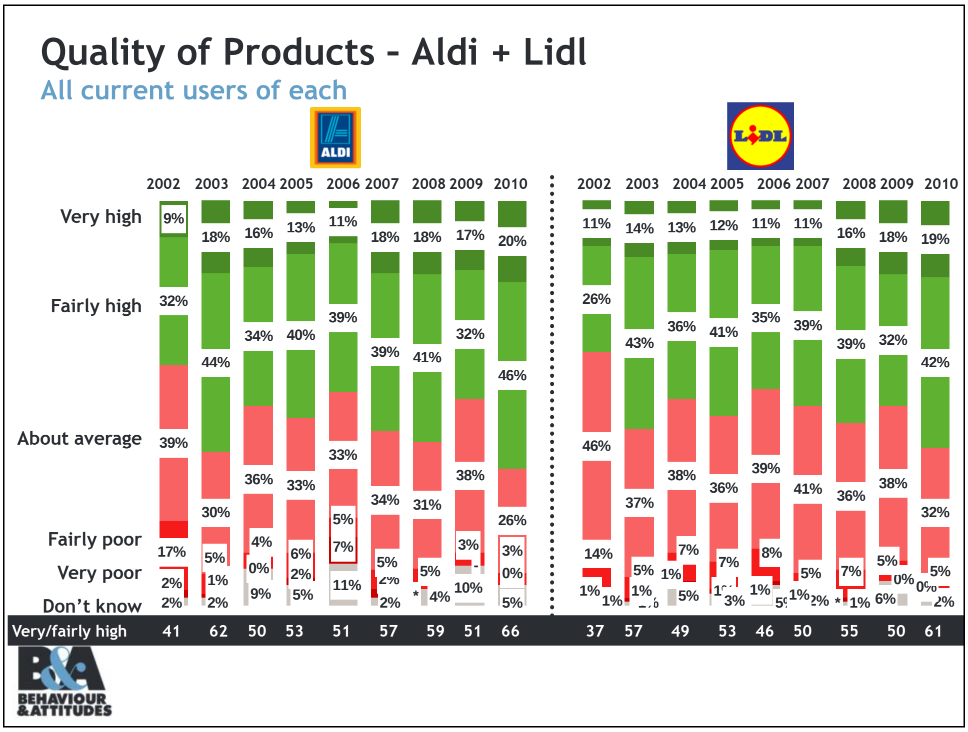
As part of this tracker, Aldi and Lidl are each rated by their respective shoppers on four key performance criteria – range of choice, general product quality, value for money and prices versus the main supermarkets.

Both groups enjoyed a strong and improving position on range of choice between 2006 and 2008, but fell back a bit in 2009.



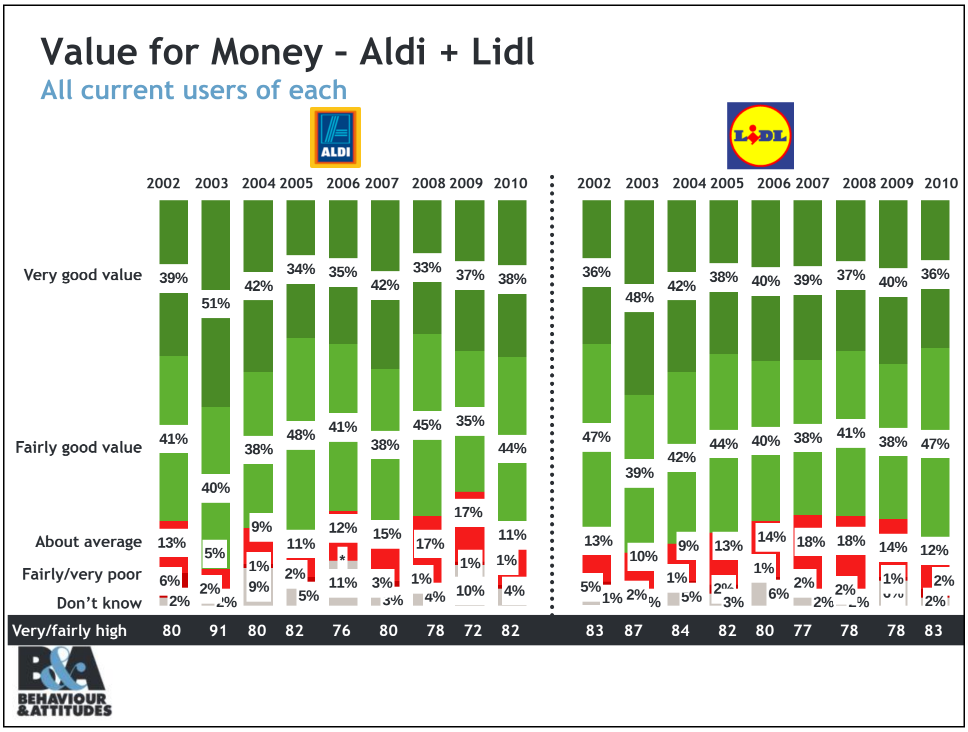
However, both have recovered in these latest figures, indicating that they have reaffirmed their strong position on range (Aldi now just ahead of Lidl).

A similar pattern was evident in these latest measures on perceptions of general product quality from the two German chains.



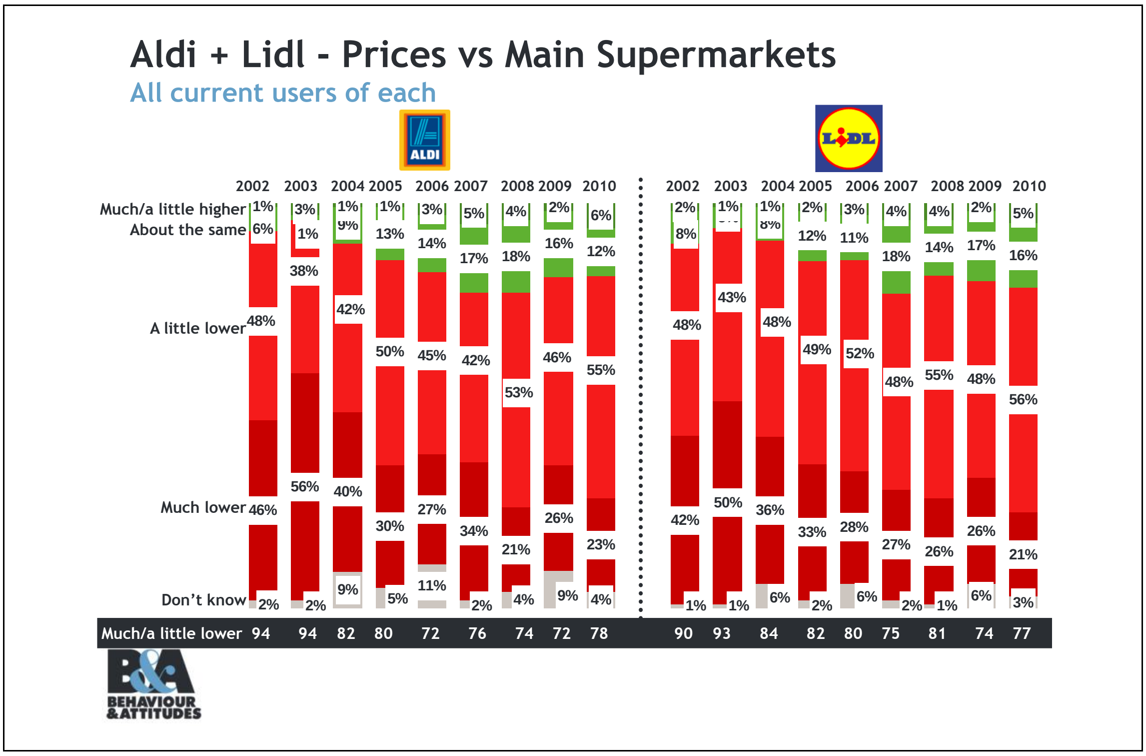
For Aldi and Lidl, a dip in the 2009 measures has been reversed and both have now recorded their highest ever rating on perceptions of general product quality (Aldi again slightly ahead).

While Aldi and Lidl have enjoyed strong ratings on value for money over recent years, Aldi showed slight slippage last year, whereas Lidl held steady.



These latest ratings indicate that Aldi has bounced back and Lidl has edged up (with the net result that they are now on a par).

Comparisons between Aldi/Lidl and the main supermarkets on prices had indicated a very decisive advantage for the Discounters in the early year of this decade, with some moderation over more recent years.



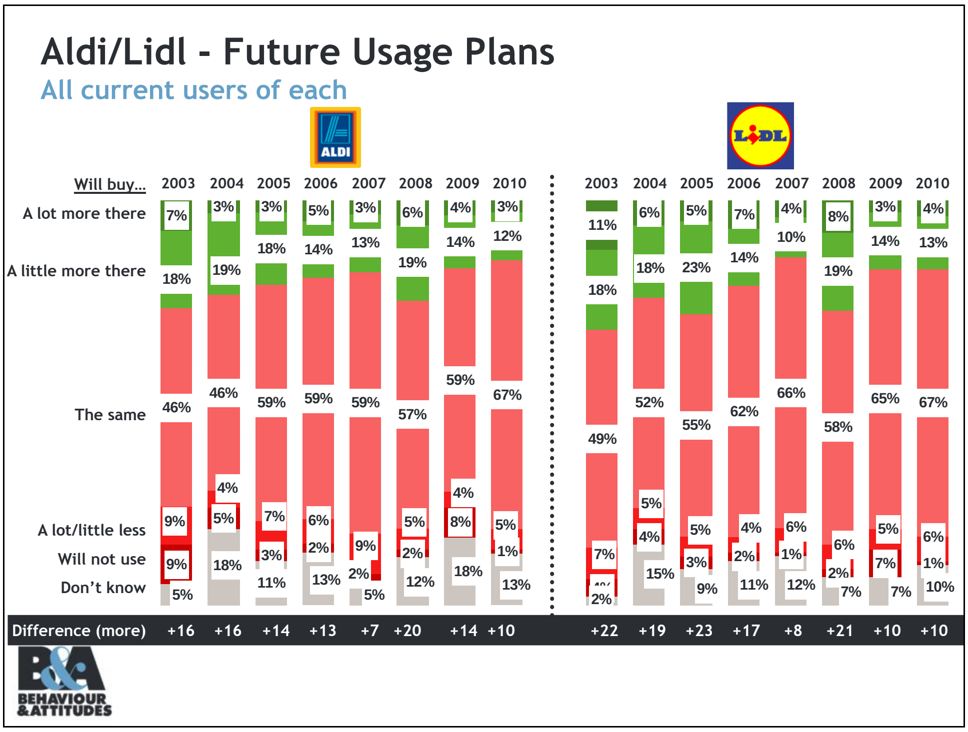
Although this pattern has not been entirely consistent, it is clear that Aldi and Lidl continue to enjoy a significant advantage on lower prices, and this has been reaffirmed in this update (moreso for Aldi).

11. ALDI & LIDL - FUTURE USAGE

On balance - further growth

When shoppers in Aldi and Lidl were asked what changes in their usage of these stores (if any) they anticipated over the coming year, a majority of 2 in 3 in each case expected to maintain their current approach.

Among the balance, there was a net expectation of further growth (Aldi +10 and Lidl +10).



While these expectations of using the Discounters for more grocery shopping in future were not at the same pitch as in earlier years, they do suggest that some further incremented growth is in prospect (and this is likely to be reinforced by a renewed search for even lower prices and better value in the New Year).

APPENDICES

SAMPLING POINTS

November No.2 - 2010

Field Dates 10th - 20th November 2010

DUBLIN	***LEINSTER RURAL***	***MUNSTER RURAL***
Ballymun	Tinnahinch Carlow	Muckanagh – Clare
Clontarf	Kilkenny Rural	Mallow R/D
Grange	Athlone R/D	Kildinan – Cork
Priorswood	Jenkinstown – Louth	Molahiffe – Kerry
Crumlin	Oldcastle R/D	Tralee R/D
Drimnagh	Ratheston – Offaly	Limerick R/D
Lucan	Enniscorthy R/D	Sth Tipp – Slieve Ardagh
Ballybrack	Kiltealy – Wexford	Waterford R/D
Sallynoggin		
Glencullen	***MUNSTER C/B***	***CONN/UISTER URBAN***
Baldoyle	Cork	Galway
Blanchardstown	Limerick	Ballina
Malahide	Roscrea	Cavan
Swords		Monaghan
Clondalkin	***MUNSTER URBAN***	
Tallaght	Ballincollig	***CONN/ULSTER RURAL***
Shankill	Cobh	Galway R/D
Palmerstown	Tralee Town	Ballinamore
LEINSTER URBAN	Ballyvarra	Swinford
Leixlip	Dungarvan	Frenchpark
Celbridge		Crossdoney
Mountmellick		Glenties R/D
Duleek		Lissidill R/D
Julianstown		
Athlone		
Navan		
Kilkenny		

OCCUPATIONAL GROUPS

WHITE COLLAR	MANUAL	FARMING
AB - Upper/middle category C1 - Lower/middle category	C2 - Skilled workers D - Unskilled E - State pensioners/long-term social welfare recipients	F1 - Farmers/Farm managers with 50 acres or more F2 - Farmers/Farm managers with less than 50 acres and farm workers

OCCUPATIONS IN EACH CATEGORY

"A" HOUSEHOLDS UPPER MIDDLE CLASS **A**ccountant (chartered) - own practice or partner/principal with 12+ employees Actor Advertising Executive - Director/Partner/principal in Agency with 12+ employees Architect - own practice or Partner/Principal in practice with 12+ employees Auctioneer own business or Director/Principal in business with 12+ employees **B**ank Manager (large branch with 12+ employees) Barrister - own practice or Partner/Principal in practice with 12+ employees Botanist Business Proprietor (with 12+ employees) Buyer (Senior) in leading wholesale/retail establishment **C**aptain - Irish Naval Service/large merchant vessel Church Dignitaries (Bishop and above - any denomination) Civil Servant (Secretary/Assistant Secretary) Colonel - Army Commander/Irish Naval Service Company Director (in firm with 12+ employees)	Company Secretary (in firm with 12+ employees) Country Planning Officer (Principal/Senior Official; Local Government) **D**entist - own practice or Partner/Principal in practice Doctor - own practice or Partner/Principal in practice **E**ditor - national newspaper or magazine Engineer (Senior) - own practice or Partner/Principal in practice with 12+ employees **F**ire Officer (Chief) **G**arda (Chief Superintendent) General - lieutenant or Major - Army **H**eadmaster/Mistress - large secondary school **I**nsurance Underwriter **J**ournalist (Senior) - own column in national newspaper/magazine **L**ibrarian - qualified in charge of large library Lieutenant Colonel - Army/Air Corps	**M**anager of large factory/ business/hotel/department, etc. responsible for 12+ employees Matron - large teaching hospital **P**eople living in comfort on investments or private income People (retired) where H/H would have been Grade 'A' before retirement Physician Physicist Pilot (Commercial Airline) Professor - University Public Relations Executive - Director/Principal/Partner in agency with 12+ employees **R**esearch - Director/Principal in Agency with 12+ employees **S**cientist - Senior Industrial Solicitor - own practice or Partner/Principal in practice with 12+ employees Specialist - Medial profession Stockbroker Surgeon Surveyor (Chartered) - own practice or Partner/Principal with 12+ employees **T**own Clerk (City Manager, other senior principal officer, Local Government) Treasurer (Senior Principal Officer, Local Government) **V**eterinary Surgeon own practice or Partner/Principal in practice

"B" HOUSEHOLDS

MIDDLE CLASS

Accountant - qualified, no practice employed as executive
Architect - qualified, no practice employed as executive

Bank Manager (small branch office - up to 12 employees)
Business Proprietor (with 3-12 employees)

Captain - Army/Air Corps
Civil Servant (Principal Officer/ Assistant Principal Officer)
Commandant - Army/Air Corps

Engineer (qualified - university degree) no practice; employed as executive; not Grade 'A'
Ensign - Irish Naval Service

Fire Officer - Assistant Chief

Garda - Superintendent/ Inspector

Headmaster/Mistress in Primary or Secondary smaller school

Insurance Company Manager (small branch office - up to 12 employees)

Journalist - not senior enough for Grade 'A'

Lecturer - University or Technical College
Librarian - Senior, qualified in charge of small branch library
Lieutenant, First - Army
Lieutenant - Commander - Irish Naval Service
Local Government Officer - Senior

Manager of factory/business/ hotel/department responsible for 6-12 persons
Matron - non-teaching hospital

Parish Priest (or equivalent in any denomination)
People with smaller private incomes than Grade 'A'
People (retired) - before retirement would have been Grade 'B'
Pharmacists - qualified; own business with 3-12 employees
Professional people - not yet established; qualified less than 3 years

Sales Manager (Area) responsible for 6-12 persons
Sister/Tutor in large hospital
Solicitor - qualified, no practice employed as executive, not Grade 'A'
Surveyor - qualified, no practice employed as executive, not Grade 'A'

Teacher - Senior Secondary, in charge of department
Technician - with degree in electronics/computers/aircraft/ chemicals/nuclear energy

"C1" HOUSEHOLDS
LOWER MIDDLE CLASS

Bank Clerk
Buyer (except senior buyer)

Civil Servant - (HEO/Junior Executive Officer/Staff Officer/ Clerical Officer/Clerical Asst.)
Clerical employees - supervisory grades; non-manual workers
Clerk (articled)
Clerk (dispatch)
Clerk (receptionist)
Clerk (typist)
Clerk (National/Local Govrnt.)
Clerk (insurance)
Commercial Traveller/Co. Rep.
Curate (or equivalent in any denomination)

Draughtsman
Driving Instructor

Entertainer (actor, musician, etc. main occupation but not well know/established)

Garda Sergeant

Insurance Agent (door to door)

Laboratory Assistant
Leading Seaman -I.N.S.
Lecturer - Junior University
Library Assistant - not fully qualified Librarian
Lieutenant - Second/Cadet - Army
Lieutenant - Sub - I.N.S.

Machine Operator (office) - punch card, calculating, acct.
Manager of factory/business/ hotel/office/department - responsible for 1-5 persons
Midwife

Nun (any denomination) - not those with special responsibilities
Nurse - student/staff/sister - all state registered

People (retired) - before retirement would have been Grade 'C'; who have pensions other than State or very modest private means
Petty Officer - I.N.S.
Physiotherapist
Proprietor - shop or business with 1-2 paid employees

Radiographer
Receptionist

Secretary
Sergeant - Army
Student at any third level inst.

Teacher - Primary, Secondary, Vocational - without special responsibilities
Technician/Engineer - no degree but tech./Prof. qualification
Telegraphist
Telephonist
Telex Operator
Typist
Warrant Officer - Irish Naval Service

Tailor - cutter and fitter
Technician - no qualifications

"C2" HOUSEHOLDS SKILLED WORKING CLASS

AA Patrolman
Ambulance Driver

Baker
Barber
Barman Head (in charge of others)
Blacksmith
Brewer
Bricklayer

Cabinet Maker
Carpenter
Chargehand
Chef
Coachbuilder
Cobbler (shoemaker)
Compositor
Coppersmith
Corporal - Army

Dental mechanic/technician
Driver - bus
Driver - long distance heavy lorry
Driver and shunter (engine)
Driver - taxi (owns his own taxi)
Dressmaker

Electrician
Electrotyper
Engraver (process)
Excavator (crane driver)

Filler
Finisher - paper & board manuf.
Fireman - not leading
Fitter - electrical
Fitter - mechanical
Foreman
Furnaceman

Ganger
Garda - ordinary
Gardener/Groundsman - head in charge of other employees
Glazier
Grinder
Guard - goods & passenger

Hewer

Joiner

Knitter - skilled in hosiery/ knitted goods

Linesman (ESB)
Linotype Operator

Machine man
Malster
Manager - small shop (not in charge of anyone)
Mason
Millwright
Miner
Motor Mechanic
Moulder

Nylon (skilled in production)

Overlooker
Overseer (mainly manual work)

Panel Beater
Painter
Pastry Cook
People (retired) - before retirement would have been Grade 'C2' - small pension other than State
Plasterer
Plater
Plumber
Prison Officer
Proprietor - small shop; no paid employees
Putter

Riveter

Seaman - Able (INS)
Security Officer (e.g. Securicor, etc.)
Self-employed (skilled - no paid employees)
Self-employed (unskilled - 1-4 employees)
Setter
Shipwright
Shop Assistant (head) in charge of others
Signalman
Sorter - Post Office
Smelter
Sprayer

Telephone Installer
Toolmaker
Turner
Typesetter

Upholsterer

Vehicle Builder

Waiter - head in charge of others
Weaver
Welder

"D" HOUSEHOLDS OTHER WORKING CLASS

Apprentices (those apprenticed to skilled trades)
Assembler
Attendant in hospital

Barman (no special training/ responsibilities)
Blender
Boilerman
Bottler
Breadman

Carder
Caretaker
Chimney Sweep
Cleaner
Comber
Conductor (bus)
Cook

Docker
Domestic Servant
Dough Mixer
Doubler
Drawer
Dustbin man/refuse collector
Dyer

Forestry Worker

Gardener/Groundsman (not in charge of others)
Gardener (market) - no employees

Housekeeper (not in charge of others)

Housekeeper - in charge of others **L**abourer Laundry worker Lorry Driver (local) **M**achinist (tailoring) Mate to those of C2 occupation Meter Reader Milkman **O**pener Ovenman **P**ark-keeper People (retired) who before retirement would have been Grade ‘D’; have small pension other than State; very modest private means Porter - railway/hospital Postman Presser Processor Private or equivalent (Army) **R**oundsman **S**eaman - ordinary Shop Assistant - no special training/responsibilities Spinner Storeman/Storekeeper - no special training/ responsibilities **T**axi Driver (who does not own cab) Textile Printer Ticket Collector Tractor Driver Twister **U**nderground worker (unskilled) **V**an Driver/salesman **W**aitress/Waiter (unless Head Waiter) Warehouseman Watchman Window-cleaner Wool-sorter Workers in general who are unskilled or semi-skilled	Stereotyper Stevedore **“E” HOUSEHOLDS LOWEST LEVEL OF SUBSISTENCE** **C**asual/part-time lower grade workers **P**ensioners/Old Age/Disability/ Widows Pension/those who are dependent on state aid or pensions only, with no other source of income. People who owing to sickness/ unemployment/lack of opportunity are dependent on social security payments. **R**espondents will only be graded ‘E’ if the head of household is ‘E’ and no other member of the family is the chief wage earner. **“F50+” HOUSEHOLDS LARGE FARMERS** **F**armers or farm managers of holdings of 50 acres or more or their widows. **“F50-” HOUSEHOLDS SMALL FARMERS** **F**armers or farm managers with up to 49 acres and their widows. Farm workers/labourers	

QUESTIONNAIRE

SECTION 'B' - SHOPPING

ASK ALL RESPONDENTS 16+

Now I would like to ask you about grocery shopping….

Q.1 Are you personally or jointly responsible for all or most of the grocery shopping in your household?

Personally – do all/most	1	**CONTINUE**
Jointly – do all/most	2	**CONTINUE**
Neither	3 -	**GO TO NEXT SECTION**

SHOW CARD 'B'

ASK ALL PERSONALLY/JOINTLY RESPONSIBLE

Q.2a Which one of these shops do you use for most of your grocery shopping nowadays? **SINGLE CODE**

Q.2b And which other shops do you also use for grocery shopping nowadays? Any others?

	Q.2a Main	**Q.2b Other**
Aldi	1	1
Buy Lo	13	13
Centra	2	2
Dunnes	3	3
Iceland	4	4
Lidl	5	5
Londis	6	6
Mace	7	7
Marks & Spencer	14	14
Spar	8	8
Superquinn	9	9
SuperValu	10	10
Tesco	11	11
Other (state & code) ______________________	12	12

Q.3 Which statement best describes your normal approach to grocery shopping nowadays?

READ OUT

One main trip weekly (and topping up)	1
Spread main shopping over 2+ days weekly	2
Daily shopping	3
It varies	4

Q.4a In a normal week nowadays how much do you spend on your grocery shopping each week – even a rough estimate will do? **WRITE IN** €

Q.4b And if you think back to a year ago. How much do you think you were paying for your groceries each week then? **WRITE IN** €

Q.5 How would you describe your current spending on grocery shopping, compared with this time last year? **PROBE TO PRECODES**

Much higher now	1
A little higher now	2
About the same	3
A little lower now	4
Much lower now	5

ASK ALL

Now I would like to ask you about two shops in more detail.

Q.6 Have you ever heard of either of these shops before?

Read Out →	**Aldi**	**Lidl**
Yes – heard	1	1
No – not heard	2	2

ASK ALL WHO HAVE HEARD OF EITHER ALDI OR LIDL - OTHERS GO TO Q.11

Q.7 Is there an Aldi or Lidl store within shopping distance of your home? **IF YES ASK** – How close to home?

	Aldi	**Lidl**
No – not in area	1	1
Yes – in area	2	2
Within 1 – 2 miles	3	3
Within 3 – 5 miles	4	4
Within 6 – 10 miles	5	5
Over 10 miles	6	6

Q.8a Have you ever visited either of these shops before?

Read Out →	**Aldi**	**Lidl**
Yes – visited	1	1
No – not visited	2	2

Q.8b Have you ever shopped in either of these shops before?

Read Out →	**Aldi**	**Lidl**
Yes – shopped	1	1
No – not shopped	2	2

<u>ASK Q.8c-Q.9d FOR MAIN STORE (Q.2a) AND IF EVER SHOPPED IN ALDI/LIDL (O.8b)</u>

Q.8c How often on average do you shop in…….(SHOP) nowadays?

	Main store	**Aldi**	**Lidl**
Daily	1	1	1
Every 2 – 3 days	2	2	2
Every 4 – 6 days	3	3	3
Weekly	4	4	4
Fortnightly	5	5	5
Monthly	6	6	6
Less often	7	7	7
It varies	8	8	8
Never	9	9	9

5.

ASK ABOUT EACH SHOP USED NOWADAYS

Q.9a How would you rate……..(SHOP) on range of choice? **PROBE TO PRECODES**

	Main store	Aldi	Lidl
Excellent	1	1	1
Very good	2	2	2
Fairly good	3	3	3
Fairly poor	4	4	4
Very poor	5	5	5

Q.9b How would you rate ………… (SHOP) on the general quality of the products on offer?

PROBE TO PRECODES

	Main store	Aldi	Lidl
Very high quality	1	1	1
Fairly high quality	2	2	2
About average	3	3	3
Fairly poor quality	4	4	4
Very poor quality	5	5	5

Q.9c And how would you rate ……… (SHOP) on value for money? **PROBE TO PRECODES**

	Main store	Aldi	Lidl
Very good value	1	1	1
Fairly good value	2	2	2
About average	3	3	3
Fairly poor value	4	4	4
Very poor value	5	5	5

Q.9d And in general terms, how would you rate the prices in ……. (SHOP) compared with the main supermarkets? **PROBE TO PRECODES**

	Main store	Aldi	Lidl
Much higher	1	1	1
A little higher	2	2	2
About the same	3	3	3
A little lower	4	4	4
Much lower	5	5	5

6.

ASK ALL USERS OF ALDI OR LIDL NOWADAYS – FOR EACH SHOP
SHOW CARD 'C'

Q.10 Thinking about the last time you shopped in ……… (SHOP) can you list all of the items you bought on that occasion. Anything else?

	ALDI	LIDL
Baby Formula	43	43
Baby Foods	44	44
Baby Wipes	50	50
Bacon/Rashers	1	1
Bake at home bread	45	45
Pre-packed bread	46	46
Beer	2	2
Biscuits	3	3
Butter/butter spreads	47	47
Cakes (pre-packed)	4	4
Christmas Cakes	48	48
Cereals/Porridge/Muesli	5	5
Cheese	6	6
Clothing	51	51
Confectionery	7	7
Chips (frozen)	8	8
Crisps	52	52
Desserts/chilled desserts	9	9
Detergents/washing powder	10	10
DIY items	11	11
Electrical appliances	12	12
Ethnic dry meats (salami, etc.)	49	49
Flour	13	13
Fresh fruit & veg	14	14
Fresh meat	15	15
Frozen chickens	16	16
Frozen fish	53	53
Frozen foods	17	17
Footwear (shoes/boots)	18	18
Furniture	19	19
Hardware	20	20
Household cleaners	21	21
Household products	22	22
Ice cream	23	23
Juices/Fruit juices	24	24
Nappies	25	25
Nuts	26	26
Pasta/noodles	27	27
Pet food	28	28
Pickles/chutney/relish	29	29
Pizzas	30	30
Rice/Cous Cous	31	31
Sauces/ketchup	32	32
Sliced cooked meat	54	54
Soft drinks	33	33
Spirits	34	34
Squash/Fruit squash/cordials	35	35
Tinned fruit	36	36
Tinned beans/spaghetti	55	55
Tinned food (other)	37	37
Toiletries	38	38
Toilet tissue/rolls	39	39
Tools	40	40
Vitamins/health supplements	56	56
Wine	41	41
Other (state & code) ____________________	42	42

7.

ASK ALL SHOPPING NOWADAYS IN ALDI / LIDL – FOR EACH SHOP – OTHERS GO TO Q.12

Q.11 And thinking about the next year or so, what changes (if any) do you expect in your grocery shopping in ………… **(SHOP)** ?

PROBE TO PRECODES

	Aldi	Lidl
Will buy a lot more there	1	1
Will buy a little more there	2	2
Will buy the same amount	3	3
Will buy a little less there	4	4
Will buy a lot less there	5	5
Don't know	6	6
Will not use	7	7

ASK ALL

SHOW CARD 'D'

Q.12 Thinking about every €100s you spend on groceries (i.e. all food and household items) how would this usually breakdown between the different shops you use nowadays?

INTERVIEWER: CHECK THAT TOTAL FOR SHOPS USED = 100 EURO

Aldi	
Buy Lo	
Centra	
Dunnes	
Iceland	
Lidl	
Londis	
Mace	
Marks & Spencer	
Spar	
Superquinn	
SuperValu	
Tesco	
Other (state & code) ______________________	
TOTAL	**€100**

8.