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Austerity in 21st. Century Dublin:has Recession Altered our Relationship with Food Purchasing and Preparation?

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AUSTERITY IN 21ST CENTURY DUBLIN:

HAS RECESSION ALTERED OUR RELATIONSHIP WITH FOOD PURCHASING AND PREPARATION?

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Submitted to:
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Declaration

I hereby certify that the material which is submitted in this thesis towards the award of the MSc in Culinary Innovation and Food Product Development is entirely my own work and all sources have been acknowledged. This work has not been submitted for any academic assessment other than part-fulfilment of the award named above.

Signed: ________________________

Date: _________________________

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Abstract

The current global recession has affected almost all countries whose economies adhere to free-market principles and are involved in international money markets. Ireland, along with the majority of its European trading partners both inside and outside the eurozone has seen a sharp fall in the standard of living of its citizens in the years since the financial crisis emerged (2007 to present). In common with the almost universal international paradigm, Irish citizens have had drastic austerity measures imposed upon them. In Ireland's case, the underwriting of private banking debt and its subsequent conversion to sovereign debt served to contract the economy and to send the country into recession. This has left many households to manage on a severely reduced budget. As food is one of the pre-requisites for life, its nutritional value cannot be reduced by much or for long without affecting the health of the household so this means that when prioritising the household budget, decisions regarding food are fundamental to the process.

This study examines how the current recession has affected the domestic food purchasing and cooking habits of people living in Dublin.

The main research question is:

Austerity in 21st century Dublin: has recession altered our relationship with food purchasing and preparation?

The study collected data from 157 valid questionnaires and ten interviews drawn from a cross-section of the community and measured behavioural patterns and attitudes in order to formulate the conclusions. The findings are that, in short, the recession has had an impact on everyday food purchasing and preparation and this is not only restricted to those trying to provision the household on a reduced budget.

The research shows that price has become the number one consideration when choosing a retail outlet but not to the detriment of the nutritional value of the household shopping. There has been a return to traditional multi-outlet shopping. Home-cooking from scratch has shown an increase and this motif is underpinned by an increased purchase of base ingredients. The resurgence of home-cooking is replacing take-away food and eating out as a meal solution with the take-away now being used primarily as a luxury or treat.

In conclusion, people have developed a strategic approach to purchasing aimed at maintaining the nutritional value of the domestic grocery trolley with the most influential factor being a desire for good quality food at an affordable price.

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Chapter One: Introduction

1.0 Introduction

This thesis is an investigation into the changes in food purchasing and preparation habits, if any, forced on the urban population of Dublin since the beginning of the current recession focusing primarily on the domestic household.

This study has been carried out according to the Dublin Institute of Technology code of ethics. The findings will be of interest to students and professionals of gastronomy and the social sciences and consumer behaviour analysts.

Chapter one will provide:

- The background to research.
- The justification for research.
- The initial research question.
- The aims and objectives.
- An overview of each section of the thesis.

1.1 Background to Research

The global economic crisis has left many in Ireland living on severely curtailed domestic budgets. This naturally affects all expenditures, including domestic food shopping which is an essential purchase. The changes in purchasing and cooking in the Dublin area due to the recession form the basis of this research.

1.2 Justification for Research

This thesis forms part of the requirements for the MSc in Culinary Innovation and Food Product Development at Dublin Institute of Technology and the focus of this research has its basis in consumer behaviour and food habits as central themes. There may also be underlying cultural aspects to the study which could inform the final conclusions. The search for a suitable food-based project that examines consumer behaviour and is also topical led the author to believe that this would be a worthwhile undertaking.

There exists already a large number of reports dealing with the purchasing aspect of this research topic. These have been conducted by well-respected agencies such as Bord Bia, Mintel and Kantar Worldpanel and provide excellent secondary research resources. However whilst excellent data exists regarding the food preparation process, none of these sources deal explicitly with recessionary cooking and there are fewer available than studies regarding purchasing. This will be the focus of much of the primary research where this study will endeavour to establish what the public are doing with the food they buy. How are they preparing it and what is it replacing? In short, is a homemade dinner for two replacing a restaurant visit? Is a homemade stir-fry replacing a Chinese take-away? Is a cheap cut of offal replacing steak? Or are cheap frozen pizzas substituting a more expensive option? It is hoped that this research will provide valuable behavioural insights into the habits of the consumer in Dublin and will be of benefit to social researchers, policy makers and the wider food industry stakeholders, such as growers, retailers and marketers.

This study will have certain limits which are dictated by:

- The difficulty that research projects may encounter when investigating household budgets as many people are likely to be circumspect in their dealings with the researcher.
- A lack of recall amongst participants given the longevity of the timeframe being studied.
- Many households will have materially altered due to emigration which can cause a skewing of the results.
- The nature of the economic landscape is one of change, and when it changes, it changes rapidly. This can cause data to be rendered obsolete very quickly.

1.3 Initial Research Questions

- Research the monetary system;
- Research the recent history of the financial sector;
- Examine the history of Irish food and cooking;
- Examine pre and post-recession purchasing trends;
- Examine pre and post-recession cooking trends;
- Examine if the recession has altered our relationship with food purchasing and preparation.

1.4 Research Aim

This study looks to examine how austerity has affected the food purchasing and cooking habits of people living in Dublin.

The aims of the study are:

- To investigate the purchase of foodstuffs for domestic consumption;
- To identify changes in purchasing habits for household food shopping;
- To investigate the possible increase in use of cheaper ingredients;
- To investigate changes in cooking habits of household food;
- To identify any upsurge in cooking from scratch and establish if it is a fiscally-led decision;
- To answer the substantive question:

Austerity in 21st century Dublin: has recession altered our relationship with food purchasing and preparation?

1.5 Research Objectives

The objectives of this research are to:

1. Conduct an extensive literature review to contextualise the issues;
2. Conduct quantitative research by means of questionnaire designed to chart current consumer habits;
3. Conduct qualitative research by means of interviews to measure current consumer behaviours and attitudes;
4. Examine the trends in purchasing choices for household foods;
5. Examine the trends in preparation choices for household foods.

1.6 Chapter Outlines

1.6.1 Chapter One – Introduction

Chapter one introduces the thesis and profiles each of the five chapters of the work. Chapter one also outlines the research background and the justification for the research, the initial research questions and aims and objectives.

1.6.2 Chapter Two – Literature Review

Chapter two reviews existing literature and published findings of academic works that pertain to the study. These include publications and websites dealing with Economics, social theory, social history and the history and development of Irish cuisine. In addition, recent works detailing the retail landscape in Ireland and the current recession are also used. These resources play an important part in relating the information required to answer the questions the thesis is attempting to address.

1.6.3 Chapter Three – Research Methodology

This chapter details the primary and secondary research methodologies used to conduct the study and outlines the qualitative and quantitative research techniques used.

An outline of the secondary research is discussed and the style of research that suits the subject is profiled. The chosen methods to complete the empirical work are highlighted here.

A justification of the research methodologies used is provided.

1.6.4 Chapter Four – Presentation and Analysis of Results

This chapter deals with the presentation of the findings of all the primary research. The detailed analysis and interpretation of findings of both questionnaires and interviews is shown here.

A sequence of graphs and charts are used as a visual interpretation.

1.6.5 Chapter Five – Discussion and Conclusions

Chapter five examines the findings and compares and contrasts both secondary and primary research findings with established theory and highlights the results.

This chapter discusses the aims and objectives of the original questions and initial research queries. This concludes with any further recommendations for research and final conclusions.

Chapter Two: Literature Review

2.0 Introduction

The purpose of this chapter is to conduct a review of the literature and other resources that can illuminate this subject and to conduct secondary research to gain an insight into the current food purchasing and preparation trends in Dublin within a financially challenging environment. Recession and austerity bring many challenges both for society and for families and individuals and it is intended that this secondary research will inform the study regarding the landscape and backdrop to the current recession and austerity and contextualise the way we engage with food purchasing and preparation.

2.1 Background

Austerity: "*Difficult economic conditions created by government measures to reduce a budget deficit, especially by reducing public expenditure*" (Pearsall, 2001, p.112).

Recession: "*A period of temporary economic decline during which trade and industrial activity are reduced, generally identified by a fall in GDP in two successive quarters*" (Pearsall, 2001, p.1548).

The current period of global fiscal crisis started in 2007 with the collapse in the U.S.A of a number of important financial institutions, namely FNMA (Fanny Mae), Lehman Brothers, and Bear Stearns, and led to a worldwide downturn in money markets and a liquidity crisis in global banking (National Bureau of Economic Research, 2013). In Ireland, the knock-on effect was compounded in September 2008 by the introduction of the Credit Institutions (Financial Support) Act 2008 which in effect socialised private bank debts by making them sovereign liabilities instead of private institutional liabilities. This had the immediate consequence of the national treasury becoming responsible overnight for the discharge of these debts and has led to much of Irish daily life being subject to cutbacks, rationalisation and negative or neutral growth in the annual national budgets.

This effectively means almost every section of Irish society, be it a private household or a public institution has to face the day to day reality of trying to achieve the same results as in previous years with a constrained budget. In a public entity such as a for example a third-level institute, it means that the budgets are reduced and that savings are being forced upon the faculty members at every turn. In a domestic setting it means that the household budget is stretched and often very hard choices have to be made in order to make ends meet. In practical terms, Irish people have reacted in a number of ways, one being that the age-old safety valve of emigration is once again open as shown by the 493,400 who have emigrated since 2007 (Central Statistics Office, 2013).

The broad international thrust of the fiscal situation has ramifications at an everyday micro level, despite the global/macro outward appearance. Everyone eats every day and therefore food shopping is something that directly or indirectly affects the entire population on an ongoing basis. The economic crisis currently engulfing the world has led to heightened occurrences of food poverty in the developed world with almost 500,000 people in Ireland said to be suffering (McMahon, 2013).

The weekly grocery shop plays an important part in the household ritual and is often a shared chore for the entire family. The necessity of feeding the family means that the calorific and nutrient value of the weekly family shopping is likely to be protected even if the monetary value is not.

The statistics show that the average household expenditure on food declined by 1.9% between the periods 2004/5-2009/10 Over a longer time-frame, since 1980, the percentage of household expenditure used for food purchasing has been decreasing steadily from 27.7% (1980) to 25.2% (1987) to 20.4% (2000) and 16.2% (2009/10) (Central Statistics Office, 2010).

These statistics clearly illustrate two key points:

- The average percentage of household expenditure on food is declining continually.
- The average percentage of household expenditure on food was declining before the current global economic crisis began.

The figures can be contextualised by a comparison of inflation rates indexed to consumer prices covering the same broad period. These show that inflation over the corresponding years was at the following rates 1980-15%, 1987-5%, 2000-5%, 2005-2.5% 2010-1.39% (Triami Media, 2013).

These figures illustrate that during the period 1987-2000 inflation rates were broadly unchanged at 5% and between 2005 and 2010 dropped from 2.5% to 1.39% yet conversely during the same period average household expenditure on food declined from 25.2% to 18.1%, a drop of 7.1%. This suggests three possible reasons:

- People cannot afford to maintain levels of outgoings in absolute terms on weekly food shopping that prevailed during the Celtic Tiger years.
- Food is becoming cheaper in absolute terms.
- Consumers are purchasing more primary ingredients and less ready-to-go or processed foods.

2.2 Financial Systems

Since the end of the Cold War in 1991, with a few notable exceptions such as China, Cuba, Laos, North Korea and Vietnam, the global financial system is one of free-market principles. This is a system whereby the market will decide all prices and exchange – values and each economic entity will adhere to the value fluctuations of money (capital). The economist and social theorist Karl Marx stated in 1867 *"…money, like every other commodity, cannot express the magnitude of its value except relatively in other commodities"* (Marx, 2009, p.52).

The point of this statement is to illustrate the idea that money does not have a value except in relation to its purchase power, and further that money is inanimate and does not do anything other than measure trade and commercial exchanges.

The global financial exchange system has constantly evolved and the language of international finance is English, making London and New York the two most important centres for financial trading (Long Finance, 2013).

The nature of free markets and movement of capital was made easier by the de-regulation of financial markets in the early 1980's by President Reagan of the U.S.A and Prime Minister Thatcher of the U.K. Both were avowed monetarists, who believed that money-markets affected all economic activity and needed to be controlled but with as little regulation as possible.

Lipsey & Chrystal (2007, p.645) defines monetarism as *"the doctrine that monetary magnitudes exert powerful influences in the economy and that control of these magnitudes is a potent means of affecting the economy's macroeconomic behaviour."*

This monetarist viewpoint is the current paradigm in global economics notwithstanding the cycle of recessions that inevitably occur when markets are not sufficiently regulated. As far back as 1848, it had been noted *"…the commercial crises that by their periodical return put on trial, each time more threateningly, the existence of the entire bourgeois society"* (Marx & Engels, 2012, p.41).

2.2.1 Financial Systems - Global Context

One of the constituent parts of globalisation is increased trade and transnational economic activity (Eriksen, 2007, p.4).

The globalisation of international commerce has been growing since the mid 1970's when many countries began to open their economies to outside influence and make them accessible to foreign finance. Since the mid-1970's international finance has powered globalisation (Reynolds, 2000).

The move towards a more globalised economy brought many new initiatives as Reynolds further states *"…complexity is created by multinational actors-giant corporations that produce in several states, and banks and other investors who move vast sums of capital across national exchanges"* (ibid, p.697).

This in effect was the birth of the global corporation; a situation created by the need for enterprises to be able to access newer markets and in some cases, driven by a cheaper labour force, cheaper property and operating costs and often favourable exchange rates.

In the face of creeping globalisation, small and large economies have formed trade groupings in order to facilitate easier commerce between members, often with geographical location in common, such as

- EFTA - European Free Trade Association – 1960;
- NAFTA- North American Free Trade Association – 1994;
- OECD- Organisation for Economic Co-Operation and Development – 1961;
- EU- European Union – 1952.

The aim of these groupings was to facilitate easier movement of goods, services, capital and people. In the developed world the largest of these trade blocs are NAFTA and the EU, and in terms of global finance these two are the most important. Ireland joined the EU in 1973.

2.2.2 Financial Systems - European Context

The EU originated as a trading bloc between West Germany, France, Belgium, Italy, Luxembourg and The Netherlands in 1952. This was known as the European Coal and Steel Community and was formed not only for trade but as a buffer against armed conflict.

"These were all countries which saw in the creation of the ECSC (EU) the possibility of linking their own economies to those of Western Europe's two largest nations, while at the same time helping to avoid yet another war" (Thody, 1997, p.1).

In the interim, it has grown into a huge 28 state grouping that has a single market and currently affords monetary union to 17 of the member states and has a parliament, court and executive that fulfill *de facto* government roles. The EU is ostensibly a group of equal partners, with a rotating presidency and each individual country has a voice in the Council of Ministers. The unification of European markets now includes the bulk of the Western European continent with only Switzerland and Norway remaining outside.

The EU has become far more than a trade pact; nonetheless some of its most important legal decisions are based around inter-European trade. The Single

European Act (1992) was the initial framework for the Union becoming a closer more unified entity, yet it was also a mechanism for cross border trade to be made simpler (within the EU).*"The Single European Act…an elaborate programme for the total abolition of barriers to trade and mobility within the EEC (EU)"* (Davies, 1996, p.1118). This closer fiscal relationship had been foreshadowed by the early legislation that laid the basis for monetary union. In 1988 a directive approved by the Council of Ministers established the principle of the free movement of capital (Thody, 1997, p.48).

2.2.3 Financial Systems - Irish Context

Ireland became a member of the EU (EEC at the time) on January 1st 1973 along with its largest overseas trading partner the U.K. Since joining the EU, Ireland has benefited hugely from the EU's cohesion fund which brings the infrastructures of the 'peripheral economies' up to the standards of the leading European nations. In addition, Ireland has received huge amounts of funding for a variety of regional projects throughout the country.

According to the Department of Foreign Affairs and Trade, for the most part the Irish experience of the EU is a largely positive one with approval rates towards the EU among Irish population usually greater than 70% (Department of Foreign Affairs, 2008).

Ireland's current fiscal woes are part of a wider economic malaise that is affecting the entire EU to a greater or lesser degree. The countries suffering the worst effects of austerity are collectively known as the PIGS (Portugal, Ireland, Greece, and Spain). These economies have all at some stage been in in receipt of a European Central Bank (ECB), International Monetary Fund (IMF), and European Commission (EC) bailout intended to underpin the banking systems in those countries, all of which experienced an unprecedented boom from the mid-1990's to 2007. In Ireland the local version of this fiscal phenomenon was known as the 'Celtic Tiger'.

Ireland has suffered from poor domestic planning and over-reliance on non-traditional industries such as construction and its allied service industries. The global crash has left an economy like Ireland's which was vulnerable to market shocks in a parlous state. *"Countries experiencing the largest increases in household leverage before the crisis tended to experience the most severe recessions"* (Lynch, 2010, p.203). The Irish context will continue for the foreseeable future as the current financial crisis shows little sign of abating. *"This crisis is far more serious than the Great Depression. All major sectors of the global economy are affected"* (Chossudovsky & Marshall, 2010, p.382). The current thinking regarding the financial future is pessimistic with some commentators predicting a 20-year slump (Paul, 2013) and that long-term recession might be the new normal (Krugman, 2013).

2.2.3.1 Key Domestic Statistics

The Central Statistics Office's (2014a) most recently available figures for the year 2010 show that in addition to 385,307 people receiving jobseeker supports such as unemployment benefit, a further section of society were receiving State supplementary income supports such as:

1. 28,223 Family Income Supplement (F.I.S.)
2. 10,714 Supplemental Farm Assistance.
3. 161 Part-Time Job Incentive Scheme
4. 21,147 Back to Education Allowance
5. 7,958 Back to Work Enterprise
6. 851 Back to Work Allowance

These add up to 69,054 households receiving supplementary benefits of some description. These represent the new phenomenon in post-boom Ireland. They are the working poor and these are the people who are both cash-poor and time-poor and represent a tranche of society that are struggling with food budgets but not going hungry.

The OECD shows the following data:

1. The percentage of adults living in workless households in Ireland is 3% higher than the EU average and 5% higher than the OECD average (OECD, 2014a).

2. Emigration from Ireland is the third highest within the EU (after Greece and Spain) (OECD, 2014a).
3. 9% of people in Ireland report that they do not have enough money for food (OECD, 2014a).
4. The bottom 10% of Irish citizens by income, survive on €8,400 per annum. (OECD, 2014b).

2.3 Recession and Food

The modern Irish societal construct has led to a situation where the majority of people no longer cultivate food and are most certainly not hunter-gatherers; rather society is largely occupied by people who earn money and buy the requisite foods. This is a norm in the first world and all modern developed societies.

The vulnerability of the individual or family unit to fiscal shocks within a society such as this is acute, and can be fraught with pitfalls for the diet. When the domestic budget is reduced by even a small amount it can have a ripple effect throughout the household budget that will inevitably lead to hard choices.

The theory of Maslow's Hierarchy of Needs (fig. 1) states that the human being requires as the most basic level, the following: food, water, shelter and warmth. These are the s*ine qua non* of human existence and cannot be dispensed with, therefore when the household budget is reduced the natural reaction is to protect the food budget or if that is not possible then protecting the calorific value of the foodstuffs actually purchased.

Figure 1*:* Maslow's Hierarchy of Needs

UK research carried out in 2013 by the Institute of Fiscal Studies found that people there were adapting to the recession by searching for alternative food solutions, usually cheaper, lower quality, processed and nutrient-dense (Griffith, O'Connell & Smith, 2013).

The world's largest economic driver, the U.S.A., has been in recession officially since 2008 and statistics from August 2014 reveal 46 million people (14.46% of the population) there are in receipt of SNAP (Supplemental Nutrition Assistance Program) (McMillan, 2014). This is a visible, measurable sign of food poverty and its very existence in a country as wealthy as the US shows that despite outward signs of prosperity, many are suffering food poverty during the economic downturn. For many in America, obesity is an unintended corollary of hunger due to food poverty because people are "*making trade-offs between food that's filling but not nutritious and may actually contribute to obesity*" (ibid)

This is further echoed in the US by Miller and Branscum who said:

"Research found that food choices and diet quality were influenced by food costs. Families faced with diminishing incomes consumed less expensive foods to maintain energy intakes at a lower cost" (Miller & Branscum, 2012, p.1).

The financial realities of the current recessionary landscape would appear demanding, yet this recent development of boom and bust and attendant fiscal rectitude is not simply a recent product of contemporaneously overheated housing markets and the sudden end of the flow of cheap capital throughout global money markets. Fiscal rectitude and food choices affected by it have often been a feature of the Irish everyday experience.

2.4 Food and Cooking in Ireland - Historical to Post-modern

2.4.1 Food and Cooking in Ireland – Historical

From the 4^{th} century BCE until the arrival of the potato, Irish cuisine has traditionally been rooted in a strong peasant tradition (Robuchon, 2007) and historically has been largely based on staples such as seafood including scallops, oysters, Dublin Bay prawns and salmon. Away from the coastal counties, pigs, sheep, cows, game birds, and fresh-water fish were all available although the peasantry rarely ate meat (Hughes, 2000). Pork, beef venison, mutton and lamb were usually only available to the affluent classes (Canny, 1989).

The peasantry for the most part subsisted on a mixture of other proteins such as cheeses and eggs. In addition, grains were widely consumed as the main carbohydrate/starch element of the national diet. The most important grains were *inter alia* wheat, oats, barley and rye. Carrots, leeks and cabbage were also important vegetables in the national diet. The most widely consumed foodstuff was *banbídh* or white foods otherwise known as dairy produce (Brittin, 2011; Mac Con Iomaire, 2011).

A huge influence on the national cuisine of Ireland has been the sequence of invasions the country suffered starting with Vikings in the 6^{th} - 8^{th} centuries to the Anglo-Norman conquest of the early 12^{th} century. The Anglo-Norman conquest morphed into eight hundred years of British rule and the effect has been marked on Irish culinary habits. While each group of invaders brought national culinary traits, the British, in an attempt to penalise the peasantry for retaining the Roman Catholicism prevalent in Ireland since the mid-5^{th} century also enacted many punitive laws regarding the native Irish and land ownership, The British Crown confiscated much native land and granted it to loyal British subjects of the Protestant faith and this led to much of the peasantry becoming tenant farmers paying rent to absentee landlords at such high rates that starvation was never far away. The main crops cultivated were for export and were wheat barley, oats and rye. The native tenant farmers were left with only a small amount of land to grow food for their own needs. The absolutely most essential crop for the peasantry was the potato (Kee, 1976).

Cooking methods in the middle ages were often simplistic with open fires being common for grilling fish (Sexton, 1998) and the collective use of a *Fulachta Fiáda* (Fitzgibbon, 1991) which was essentially a large pit filled with water into which heated stones were placed to bring the water to boiling point (Andrews, 2009). In addition to the boiling pit, Mahon (1991) asserts that roasting pits were also used and that both roasting and boiling pits were usually situated near a water source.

2.4.2 Food and Cooking in Ireland - The Potato

The potato had arrived in Ireland in the late sixteenth century when it is claimed that Sir Walter Raleigh brought it from one of his voyages to the new world.

The potato found a perfect climate in Ireland and the peasantry adopted it because it was nutritious, easily cultivated and easily prepared (Hughes, 2000). The potato soon became the staple of all Irish peasants although usually as a subsistence crop and rarely as a cash crop. The different varieties of potato were all popular in Ireland at various stages however the wholesale adoption by the peasantry of the variety known as the ‘lumper’ between 1810 and 1845 was due to its excellent yields (Mac Con Iomaire, 2011).

Potatoes at this time were usually cooked in a very plain manner and were normally boiled in water and served with milk and/or butter if available (Mahon, 1991). Although unimaginative, this was the only option for the majority of Irish people at the time. Mac Con Iomaire (2011) claims that the average person in Ireland consumed five kilogrammes of potatoes per day during this period.

The potatoes were usually cooked in an iron pot over an open fire (Andrews, 2009; Luard, 2004). In addition to cooking potatoes, the iron pot was used for almost every other culinary purpose (Fitzgibbon, 1991). This was due to lack of other utensils and indeed ovens or ranges as we know them today but also due to the scarcity of solid fuel (Luard, 2004).

The potato proliferated in Ireland and the over-reliance of the poor on this one crop was to have devastating consequences in the mid-19th century.

2.4.3 Food and Cooking in Ireland - An Gorta Mór

The Great Famine known 'as gaeilge' as *An Gorta Mór* (The Great Hunger) is also known as The Potato Famine. This cataclysmic event occurred in the mid-19th century (1845-1847) and was in the main part due to the failure of the 'lumper' potato which, although a high-yield crop, was not genetically immune from the rot that other lower-yield varieties were. This led to death by starvation of an estimated one million Irish peasants and the emigration of millions more. Hughes (2000) claims one million emigrated, however Kiple & Ornelas (2000) claim about five million left during the famine or directly after and as a result of it. No final figure has been produced for actual deaths and emigration for this period but it is generally agreed that the numbers were huge and in the many millions. The experience of *An Gorta Mór* is one that has left many deep psychological scars on the Irish nation and the way it relates to food.

The widely-held belief that the famine was a natural disaster that was exacerbated by a malevolent and uncaring British administration is one that persists to this day and no amount of revisionist interpretations will shake this core belief. In 1997, the then Prime Minister of Britain (Tony Blair) issued a belated apology to Ireland for Britain's behaviour during the famine saying:

"The famine was a defining event in the history of Ireland and Britain. It has left deep scars. That one million people should have died in what was then part of the richest and most powerful nation in the world is something that still causes pain as we reflect on it today. Those who governed in London failed their people" (Coogan, 2012, p.8).

2.4.4 Food and Cooking in Ireland - Post-Famine

Post-famine Ireland was a country that had been denuded of much of its people and many natural food traditions were lost forever. Those that survived the famine and remained in Ireland struggled to deal with the grinding poverty that was the norm for many and struggled to flourish in a setting where the colonial power (Britain) was ill-disposed to most of the population.

At this time however there were two things which helped the development of

Ireland's national cuisine; the first was the coming of the era of the 'big house' where the Anglo-ascendancy overlords were entertaining in a style commensurate with their peers in London and the rest of Britain and indeed often with the intention of outshining them (Mac Con Iomaire & Kellaghan, 2011; Sexton, 1998). The second was a gradual emergence of an Irish Catholic middle-class, which had been impossible before Catholic Emancipation in 1828. The new middle-class was of either a suburban merchant class, equivalent to the modern European *bourgeoisie* or a rural 'strong farmer class' who had acquired landholdings after Catholic Emancipation and built them up after the famine. The cuisine of this latter group was largely one of meat, dairy and locally produced grains, fruit and vegetables. The poor, however, maintained the pre-famine diet of potatoes (Hughes, 2000).

2.4.5 Food and Cooking in Ireland - Post-Modern 1950 onwards.

By 1950, most people in Ireland were no longer gathering or cultivating food but buying it with cash earned from jobs in industry or commerce and this replaced the previous more direct routes of provisioning (Clarkson & Crawford, 2001).

An illustration of the progressive changes through the decades can be seen by the differing descriptions of the average domestic kitchens in two hugely influential Irish cookbooks, both aimed at the middle-classes and those aspiring to join them. The first of these books, *Full and Plenty* (1960) by Maura Laverty refers only to a cooker and refrigerator, whereas seventeen years later Myrtle Allen's seminal cookbook *The Ballymaloe Cookbook* (1977) works off the assumption that the domestic kitchen has all the mod cons of the age (Cashman, 2009).

The late 1980's saw a huge change in the provisioning habits of urban households with most families using supermarkets for the bulk of the weekly domestic shopping, and subsequently topping up their provisions as and when needed by visiting local shops for daily items such as bread milk sugar & fruit. In addition to a changing pattern of purchase and consumption, by 1989, 98% of urban households owned a fridge (Farmar, 2010).

The modern reality for most urban dwellers has become one where almost everybody is accustomed to a domestic kitchen that will have at least the following:

- An oven and hob (gas or electric or a range (Aga/Rayburn)
- A refrigerator
- A microwave
- Storage cupboards
- Pots & pans
- A variety of small kitchen equipment (spoons, ladles knives and so on.).

2.5 Food and Cooking in Ireland – Current Context

Bord Bia has commissioned extensive research on the food habits of the Irish consumer and the findings are readily available. Bord Bia is the Irish semi-state company charged with promoting Irish food and horticulture.

Along with other sources, key findings from a number of Bord Bia and Mintel reports are referred to extensively throughout the following sections of this literature review. Together, these reports give us a comprehensive overview of the current purchasing and food habits of the Irish consumer.

The current state of cooking and food in Ireland is a much changed one. Due to economic growth in the 1990's and the overseas experience of the returning diaspora, Ireland has now become a country with a more sophisticated national palate and this is reflected in the huge array of ethnic cuisines available in towns and cities all over the country. It has reached a stage where some of the smallest villages and towns have at least one Chinese take-away, and it is a development that has been accepted eagerly by much of the populace. In its report *"What Ireland ate last night"* which provided a snapshot of eating habits in Ireland taken in November 2011, Bord Bia reports 27% of respondents ate a Chinese/oriental meal at least once in the previous week, with 34% eating Italian in the previous week (Bord Bia, 2011). This clearly indicates a shift in Irish table habits which could be attributed to the broader world experience offered by travel and in no small part to the continuing globalisation of the world's (Ireland included) economic and social norms.

"As people travelled more, they became aware of ethnic cuisines and adopted foreign

staples to replace traditional fare. Most people in Irish cities are as likely to use pasta or rice for their carbs as they will spuds" (Hughes, 2000, p.27).

The situation has progressed to the stage where food tourism is being spoken of in Ireland as a real opportunity to showcase Irish ingredients to a wider audience, and to finally become a country that not only produces good ingredients but also uses them well. The first steps in this direction were taken by pioneers like the Allens at Ballymaloe House and has continued to spread throughout the country albeit slowly and without mass support of the wider population whom for the most part still prefer 'meat and two veg' (Bord Bia, 2011). Food writers have often commented that Ireland has a food culture that is more based around production than with cooking, however despite the plain 'meat and two veg' option being the preference of one in six Irish people, there is a huge cohort willing to eat the more exotic offerings both foreign and native, with one commentator opining:

"The much vaunted Irish food revolution… has changed the beige boiled and boring food of yore into a bounty of gourmet delights" (Healy, 2013).

This has created a situation whereby many Irish people are as comfortable cooking and eating ethnic dishes as they are in cooking and eating native dishes and no doubt for many it is preferable to the traditional Irish offerings that many will have grown up with. This emerging trend is further commented on by Mac Con Iomaire (2011) when he says:

"Ireland is now a truly multicultural country where dishes such as lasagne, chicken tikka massala, fajitas or Thai green curry are as much part of the Irish culinary canon as bacon and cabbage, Irish stew, or shepherd's pie" (Mac Con Iomaire, 2011, p197). Indeed, consumption of ethnic foods and take-away foods became so common during the 'Celtic Tiger' era that in 1999 to some it seemed that the fiscally-sensible home cooking option as opposed to the purchase of comparatively high cost take-away option might appear as an outward sign of poverty (Mac Con Iomaire & Lydon, 2011).

Ireland as an island nation has a disadvantage to continental European nations as the island status means that the cost of importing food carries a naturally higher tariff. The population of the island of Ireland is around six million. The island produces enough food to feed thirty six million people per annum and this figure is projected to grow to fifty million per annum by 2020 (Mac Connell, 2011). Much of this food is exported in commodity form and this further underpins the status of Ireland as an ingredient producer but less so of a finished food product producer.

2.5.1 Food and Cooking in Ireland - Current Recession

The modern Irish household has arrived at a situation where since the late 1990's, the traditional ingredients associated with Ireland have been augmented by a wide variety of foodstuffs available from a vast array of ethnicities. Most of the 'new' cuisines available to the modern Irish household were available in take-away form or in home-cooking formats and in many cases these cuisines were also found in restaurant settings, either in their own ethnic backgrounds such as Indian, Chinese, Thai, Italian and so on, or in what has become known as 'fusion' cuisine, which typically offers a mixture of occidental and oriental ingredients and techniques (Robuchon, 2007) but in reality in modern Ireland has more often come to represent a catch-all menu with a huge variety of contrasting cuisines designed to attract customers of all tastes.

This paradigm informs the backdrop to the investigation of food purchasing in modern Ireland and Dublin in particular as it covers not only traditional and emerging tastes but also the purchasing solutions prevalent at the beginning of the current recession. In this respect many households are adapting to a new situation whereby the household budget is experiencing downward pressure due to the current recession.

A report carried out by the Institute for Fiscal Studies into food expenditure and nutritional quality in 2013 found that a number of motifs were present in the UK in the current recessionary climate:

- Household budgets have been squeezed since the beginning of the recession due to, amongst other things, a reduction in wages in real terms.
- The cost of food in relation to non-consumable goods has risen 'substantially'.
- Food purchasing accounts for 17.5% of total household budget on average.
- Cheaper food is being purchased and substituted for more expensive foods.

- Expenditure on food in real terms has been reduced as has calorific intake, however the drop in calorific intake is not as substantial as the drop in food expenditure in real terms (Griffith, O’Connell & Smith, 2013).

2.6 Food Purchasing

2.6.1 Irish Food Retailing Landscape

Ireland has a wide range of food retail formats encompassing:

- Supermarkets (Multiples)
- Convenience Stores and Newsagents (Symbol Groups)
- Non-affiliated Independents
- Forecourt Convenience Stores
- Street Traders (Moore Street, for example.)
- Ethnic markets (Asian, Polish and so on)
- Farmers markets
- Online portals

The supermarket and convenience chains include the following retail brands:

- Tesco
- Dunnes Stores
- Marks & Spencer
- Supervalu
- Spar
- Londis
- Centra
- Aldi
- Lidl
- Mace
- Costcutter
- Dealz
- Iceland

The grocery market within Ireland is increasingly being dominated by UK food multiples and European food discounters (Mintel, 2012).

The trend since the late 1980's in grocery retail has become one of 'concentration'. In food retail, there has long since been a trend towards supermarket shopping at the expense of the independent retailers, whose numbers have been falling and will continue to fall (Forfás, 2000). This has been shown by the opening of numerous shopping centres which offer shoppers almost every kind of retail activity usually under one roof. The Stephens Green Shopping Centre opened in 1988 and was followed by others such as The Square in Tallaght in 1990 and Blanchardstown Shopping Centre in 1996. There are many other similar shopping centres in Dublin such as Liffey Valley Shopping Centre, The Pavillions in Swords, Omni Park in Santry, Dundrum Town Centre, The Northside Shopping Centre in Coolock and the ILAC and Jervis Shopping Centres (both in central Dublin).

Mintel (2012) also refers to this phenomenon.

"In addition to this, changes to the planning guidelines regarding the cap on the size of supermarkets within RoI have increased, putting even more pressure on convenience and independent stores due to larger store formats now being a viable option for supermarket retailers, which can thus offering a wider variety of products."

This contrasts hugely with the situation in the early sixties in Ireland when there were over 26,000 retail establishments of which by far the largest type were grocery shops (Farmar 2010).

In Dublin, this is more accentuated as the Dublin region has traditionally had less independent retailers by percentage than the rest of the country. This is a phenomenon in most urban areas and is supported by statistical analysis. Dublin accounts for 31% of grocery shopping yet has only 16% of grocery shops. The lesser role for independent retailers in Dublin is mentioned as far back as 1998 by O'Callaghan & Wilcox (1998) and according to Forfás (2000), is due to retail areas being far more concentrated in the capital.

There is however some emerging evidence in the most recent research that the recession has seen shoppers return to the independent retailer as part of an overall shopping mix, with bargain hunters visiting many different retailers in pursuit of the best deals (Bord Bia, 2012). This finding is replicated in other research with similar claims that people are making "*less use of hypermarkets in order to use smaller retail outlets*" (Connery, 2013).

Linked to this is the very latest trend from the U.K. whereby the multiples themselves will open smaller stores (small formats). This move is designed to offer the geographical convenience to work or home bound customers at the same price as the hyper/supermarket format (Bord Bia, 2013a).

A huge factor in shaping the modern Irish retail landscape was the introduction in 1987 of the Restrictive Practices (Groceries) Order which prohibited below-cost selling of certain core grocery products (and alcohol). This was introduced to protect small local retailers from the perceived predatory habits of the large retail multiples. The fear was that the multiples would indulge in below-cost selling and drive the smaller competitors out of business and then once the market-place was free of competition, the multiples could monopolise the food market and effectively charge any price they wished. This was legislated for by the Restrictive Practices (Groceries) Order 1987 which in common parlance became known as the 'Groceries Order'. The legislation provoked much debate from a variety of stakeholders regarding the efficacy of the act and a continuing debate regarding the inclusion or exclusion within the act of alcohol. The act was finally rescinded on the 20th March 2006.

2.6.2 Irish Food Purchasing Habits

Total Irish food retail sales have been in decline from €11,398 million in 2007 to €10,370 million in 2010, with sales projections forecasting a return to growth of 3.91% in 2014 (SCB Partners for Bord Bia, 2011). Recent research reports that the market is now seeing positive growth of 1.2% to September 2013 (Kantar Worldpanel, 2013).

2.6.2.1 Value

With the onset of recession, Irish consumers have had to re-assess their perception of 'value' by either drastically reducing their shopping spend through seeking out the lowest possible prices for food and drink, or by controlling spending through foregoing treats and luxury items in food and drink. As a result, the Irish consumer is now a savvy shopper who has come to look for and expect deals even in premium ranges (SCB Partners for Bord Bia, 2011, p.9).

These findings are mirrored by Mintel in their August 2013 report, *Attitudes to Food – Ireland*, which tells us the current economic climate is affecting buying behaviour with consumers switching to discount retailers and own-brands. Food prices in Ireland are some of the highest in the EU (18% higher than an average taken from the other 27 EU member states) but the trend is slowing and food prices are now rising more slowly than in other EU countries.

Despite a continued incremental inflation, shoppers continue to restrict their spending and the annual average grocery spend per household stands at €5,400 in 2013 from a high of €6,134 in 2008 (Berry, 2013). To achieve this, they buy less, trade down, or buy cheaper. The recession has meant that the majority of food grocery shoppers (66%) choose the store where they do their main grocery shop based on price and offers (National Consumer Agency, 2013). This price conscious attitude is prevalent across all reports.

Of the retail brands listed in 2.6.1 above, the German retailers (Aldi and Lidl) are enjoying an increase in market share to a combined 13.8% by February 2014 (Kantar Worldpanel, 2014) and for the 12 weeks ending July 20th 2014 continued to make gains.

The following are the latest percentages of market share for the main retailers:

- Tesco 25.6%
- Supervalu 24.7%
- Dunnes Stores 21.2%
- Lidl 8.4%
- Aldi 8.3%

(Burgess, 2014)

The continuing focus of consumers/customers would clearly indicate price consciousness as a key driver toward purchase choice. This is reflected in the emerging patterns of purchase choice and purchase decision making, and is also shown in the techniques adopted by many of the retailers in the Irish market. The multiples in particular are responding with a different marketing mix which reflects the new paradigm in Irish retailing. This includes offering group buying reductions, online savings and the 'venture brand'

2.6.2.2 Own-brand

The shift to 'own-brand' products reached a level of 43% by July 2013. Retailers have reacted to this price-motivated move away from the established brands in favour of cheaper alternatives by creating so-called 'venture brands' which are in fact own-brand products, packaged and sold as branded items but at the same price point as own-label. Other retailers, keen to retain customers in the price conscious bracket are using offers, own-labels and BOGOF (Buy One Get One Free) to retain their custom. This is another area of growth with 52% of Irish customers claiming to search for such offers. When added to the 43% that claim to have switched from premium brand labels to own-brand labels it is clear that consumer sentiment is price focused (Mintel, 2013a).

2.6.2.3 Technology and Shopping Around

Current commentators state that there is a small but discernable re-emergence of the traditional food shopping habits. Previous generations visited all the small shops such as butcher, greengrocer and baker, whereas today's generation visits the local supermarket, the U.K. multinational and the German discounters (Healy, 2013).

This can be discussed in terms of technology. Many shoppers who wish to avail of best prices in more than one retailer are beginning to use smart phones and tablets to make instant price comparisons and this informs their purchases immediately (Bord Bia, 2013b). This report from Bord Bia supports the above by going on to say that many shoppers are returning to a method of shopping largely disappeared for a generation, namely the concept of visiting a number of stores including specialist stores to get the weekly shopping done at the best price. This is in contrast to the 'one-stop-shop' model so prevalent in recent years.

2.6.2.4 Key Drivers Shaping Shoppers' Attitudes

In summary, the key drivers that are shaping attitudes amongst shoppers are:

- Economic pressures (continuing austerity)
- Convenience issues (store location and opening times)
- Technology (online purchasing, apps)
- Transparency (traceability and provenance)
  (Bord Bia, 2013b).

2.7 Food Cooking Habits

Sections 2.7.1 to 2.7.5 quotes heavily from the Bord Bia "*Periscope 2013 Irish & British Consumers & their Food*" report which is a biennial survey with figures available for 2003, 2005, 2007, 2009, 2011 and 2013. It is particularly informative as it provides both the snap shot of the situation in 2013 and gives insights into the changing patterns over time.

2.7.1 Take-aways

As a rule, the trend for eating take-away foods has been on a downward cycle since the end of the period of financial growth and the downward trend looks set to continue, with all types of take-away foods suffering a fall in sales. The incidence of people eating take-away food has fallen incrementally since 2007 from 43% in 2009 to 24% in 2013 (Bord Bia, 2013a). This clear shrinking of the market indicates downward pressure on discretionary/disposable income.

2.7.2 Convenience / ready-prepared meals

The use of ready-prepared and convenience items/foods has also seen changes in consumption patterns, with the number of people claiming to use ready-prepared or convenience items having dropped to 48% in 2013 from an historical high of 64% in 2007.

These are not isolated themes in respect of convenience items as the figures claiming that convenience meals are quick to cook, easy to cook and easy to prepare are all solidly around 80-81%. However when contrasted with the percentages claiming that convenience meals are expensive, the percentage is 59%. This seems to indicate an appreciation of the convenience and ease of these products yet an acknowledgement of the relative high cost of the items. In the Bord Bia *Periscope 2013* survey, only 30% said that these items were good value for money. The numbers saying that these convenience foods/items are a good substitute for home cooking when time is limited have been steadily dropping from a high of 53% in 2005 to a figure of 42% in 2013 (Bord Bia, 2013a).

2.7.3 Kitchen Equipment

A snapshot of Irish domestic kitchen equipment in 2013 showed the following levels of access to cooking equipment:

- Microwave – 90%
- Deep fat Fryer – 46%
- Freezer – 97%
- Food Processor – 42%
- Sandwich Maker –56%
- Grill –78%
- Wok –46%
- Kettle –94%
- Toaster –94%

2.7.4 Cooking Methods

A further set of statistics show that the preferred methods of cookery were as follows:

- Grilled –15%
- Boiled –16%
- Oven baked/roasted –17%
- On the hob –10%
- Uncooked/cold –10%
- Fried –10%
- Microwaved –6%
- Steamed –8%
- Stir fry/wok—8%

2.7.5 Cooking from Scratch

The change in emphasis on time-saving may well be a factor of usage patterns now being split between the following three categories of consumers:

- The ‘cash-rich, time-poor customer (busy lifestyles, good disposable income).
- The time-rich, cash poor customer (limited income).
- The cash-poor, time-poor customer (the new working poor, where salary cuts, and/or new taxes and charges have reduced their disposable income and longer hours have reduced free time).

Since the start of the recession, more people are choosing to cook from scratch (Bord Bia, 2013a). This figure is one that has climbed steadily during the recession with the percentage of people surveyed who said they cooked from scratch once or more a day increasing from 29% in 2007 to 48% in 2013 (Bord Bia, 2013a).

Another source claims that 67% are cooking from scratch several times a week which shows an increase of 11% since 2005 (Bohan, 2013).

One of the primary motivations for this trend is the inability to dine out as much as before the recession due to financial constraints. Furthermore, only 26% of people claimed cooking is a chore in 2011 compared to 40% in 2007 (Mintel 2013a). A different report further reinforces this trend as it refers to a re-engagement with scratch cooking - an upsurge it attributes to the economic downturn and the corresponding shrinkage of disposable income (Mintel, 2013b). A contrasting view is held by others when they claim that people may lack the time or desire to cook from scratch despite the recession and the attendant financial constraints (Mac Con Iomaire & Lydon, 2011). This figure would appear to correlate with the 9% who say that they never cook from scratch and this percentage has changed little in recent years but notably peaked at 14% just before the recession took hold in 2007.

2.8 Consumer Sentiment

Bord Bia's, '*Feeling the Pinch'* report claims that 30% of Irish people worry about having enough money to put food on the table, (Bord Bia, 2013c) and this attitude, when coupled with the average price of a shopping basket in Ireland up 12% year on year (Bord Bia, 2013b) means that consumer sentiment is likely to remain cautious over the short to medium term and remain focussed on thrift and minimal frivolity with essential purchasing at the fore.

The first weeks of August 2014 have seen a number of news stories pertaining to the national economic situation emerging into the public domain.

"AIB returns to profitability as impairment charges fall" (Irish Times, 2014).

"*BOI back in profit to the tune of €399m*" (Reddan, 2014).

"*Ulster Bank reports first profit since 2008 as loan losses fall*" (Hancock, 2014).

These stories, however are contrasted with the following prevailing indicators:

1. The net emigration of almost half a million citizens-largely young and skilled, has made the national budget easier to balance.
2. The Irish state as of 31/12/13 had an outstanding sovereign debt of 202.92 Billion Euro, this is 123.7% of GDP (NTMA, 2013).

2.9 Summary

With 30% of people worrying about having enough money to put food on the table, and between 48% and 67% of people now cooking meals from scratch, it would appear that new trends are emerging within the populace at large.

A comparison of kitchen equipment in the average kitchen shows most of the populace have reasonably equal access to similar types of equipment and an analysis of favoured cooking methods shows a large cohort opting for the more traditional methods of cookery (boiling, frying, grilling, oven-baked/roasted, on the hob) These methods represent 68% of cooking preferences.

There is also evidence to suggest that cooking habits change in recessionary times.

The emerging trends within food retailing indicate a client base that is more driven by price and prepared to shop around. In addition to this, the return to visiting a number of retailers to complete the weekly shop is instructive with regard to time spent shopping and the importance of value for money in today's economic climate.

The preceding themes have led the author to ask the question:

Austerity in 21st century Dublin: has recession altered our relationship with food purchasing and preparation?

Chapter Three: Research Methodology

3.0 Introduction

This chapter outlines the methodologies used in this research which are primary and secondary research including qualitative and quantitative methods.

Research can be defined as *"The systematic investigation into and study of materials and sources in order to establish facts and reach new conclusions"* (Pearsall 2001, p.1577).

3.1 Research Aim

This study looks to examine how austerity has affected the food purchasing and cooking habits of people living in Dublin.

The aims of the study are:

- To investigate the purchase of foodstuffs for domestic consumption;
- To identify changes in purchasing habits for household food shopping;
- To investigate the possible increase in use of cheaper ingredients ;
- To investigate changes in cooking habits of household food;
- To identify any upsurge in cooking from scratch and establish if it is a fiscally-led decision;
- To answer the substantive question:

Austerity in 21st century Dublin: has recession altered our relationship with food purchasing and preparation?

3.2 Research Objectives

The objectives of this research are to:

1. Conduct an extensive literature review to contextualise the issues;
2. Conduct quantitative research by means of questionnaire designed to chart current consumer habits;
3. Conduct qualitative research by means of interviews to measure current consumer behaviours and attitudes;
4. Examine the trends in purchasing choices for household foods;
5. Examine the trends in preparation choices for household foods.

3.3 Research Methodology

"*Natural science has traditionally concentrated on 'hard' quantitative analysis"* and further says that quantitative analysis was *"…Adopted by the human sciences until its shortcomings became evident"* He further goes on to say *"When appropriate, a mixture of quantitative and qualitative research is possible"* (Walliman, 2001, p.227).

"The methods used by qualitative researchers exemplify a common belief that they can provide a 'deeper' understanding of social phenomena" (Silverman, 2000, p.8).

It was decided to utilise qualitative and quantitative research as both disciplines lend themselves to a research project of this nature.

The secondary research was completed using a large number of published works to gain information which in turn fed into the literature review and formed the body of research outcomes found there.

Kinnear & Taylor (1996) suggest that for comparative purposes, primary data can be benchmarked against secondary data in order to contrast findings and draw conclusions.

Primary research was completed using a combination of interviews and a questionnaire.

Interviews were chosen as a research tool because *"…talking to people and seeing them behave and act within their context is a major characteristic of qualitative research"* (Creswell, 2007, p.37).

"People's incomes and the way they spend their money constitute another area in which only surveys can provide reliable data. Patterns of consumer expenditures and their expectations have proven to be important predictors of trends in the economy" (Fowler, 2009, p.2).

As the substantive question necessarily requires data pertaining to personal finance and other fiscal matters which can elicit circumspection amongst the target group, it was decided to use questionnaires/surveys.

3.3.1 Secondary Research

The secondary research is detailed in chapter two, the literature review. This review was completed using a variety of published materials that pertained directly to the subject matter either by providing:

- A background study of the current financial system;
- A review of the current context the financial system has brought forward;
- Historical and contemporary information regarding Irish culinary habits;
- An overview of the modern Irish purchasing landscape
- An overview of modern Irish purchasing habits;

The sources used were books, journals, reports and websites that specialised in this field. Using these resources it was possible to produce an in-depth historical overview of the subject and to form a critical evaluation of the secondary research, which then led to the basis for the primary research.

"Exploratory research begins with a review of secondary data such as published or syndicated data" (Iabcobucci & Churchill, 2010, p.30).

Reaves (1992) observes that "… *research is supposed to give us a better understanding of what people are like."*

Using these methods has led to an understanding of the complex and difficult subject matter.

3.3.2 Primary Research

The primary research was carried by means of questionnaire and interviews in an attempt to detect any significant themes informing the study.

3.4 Questionnaire

3.4.1 Questionnaire Design and Structure

"A questionnaire should be designed to collect information which can be used subsequently as data for analysis" (Denscombe, 2010, p.155).

The questionnaire was divided into several main areas as follows:

1. General screening question to establish validity of individual respondents
2. General questions about the respondents' demographics.
3. Questions regarding financial constraints in the household budget, real or perceived.
4. Questions regarding domestic food purchasing.
5. Questions regarding domestic food preparation and cooking
6. A question regarding further participation in the study (interview).

The questionnaire included some yes/no questions, and attitudinal questions. Likert scales were used where appropriate. Some questions included 'other – please state' options questions and several that asked the respondent to 'please state'. These methods were chosen to try to gain background data and some personal opinions. *"Each question also has a covert function: to motivate the respondent to continue to co-operate"* (Oppenheim, 1992, p.121).

The questionnaires were in both hard copy and electronic format as it was felt this would be the most effective way of reaching a number large enough to be regarded as a viable sample.

3.4.2 Pilot Questionnaires

A number of pilot questionnaires were distributed as a precursor to the main questionnaire distribution. This was done for a number of reasons:

- To assess how respondents would react to the questions, particularly the question regarding household finances;
- To assess the response rate in order to gauge how long to continue the survey;
- To assess the ease or difficulty of extracting the raw data from the finished surveys;
- To examine based on the answers to the above, whether the questionnaire needed to be re-worded or re-ordered in any way.

The pilot questionnaires were circulated between May 22rd and May 24th (2014). The responses were analysed and it was clear that the questions were in a good sequence and that they were being answered fully. The wording of the questions was focussed enough to ensure that the responses would give accurate and relevant data. When the pilot questionnaire was assessed for efficacy it appeared resoundingly to be fit for purpose and therefore it was decided to use the questionnaire in its original format and submit it for research without re-wording or re-ordering it in any way.

The data retrieved from the ten questionnaires used in the pilot survey were not subsequently used in the main survey.

3.4.3 Questionnaire Distribution

The questionnaires were distributed in the following ways:

- Via the Parents Association at Mary Help of Christians GNS, Navan Rd., Dublin 7.

- Via the Parents Association at Dublin 7 Educate Together NS, Fitzwilliam Place North, Dublin 7.
- Online via both of the above associations
- Online via an extended network of Dublin-based respondents.

The questionnaires represented the first tranche of primary research and were distributed electronically and in hard copy at a suburban school and an inner-city school.

The schools were chosen in order to obtain a socially representative sample. The two schools represent a cross-section of modern Dublin society with both schools being populated by an extensive social mix comprising all elements of accepted social classes:

social grade	social status	occupation
A	upper middle class	higher managerial, administrative or professional
B	middle class	intermediate managerial, administrative or professional
C1	lower middle class	supervisory or clerical, junior managerial, administrative or professional
C2	skilled working class	skilled manual workers
D	working class	semi and unskilled manual workers
E	those at lowest level of subsistence	state pensioners or widows (no other earner), casual or lowest grade workers

Figure 2: Social Class Source: National Readership Survey

Uncharacteristically, the inner-city school used in this study represents a larger middle-class cohort than the suburban school used. Both schools have a healthy mix of children of non-nationals attending. Furthermore, one school is a non-denominational school and the other has a Roman Catholic ethos. These two differing types of institute were chosen to offer the widest possible range of respondents. The broadly representative segment available at these two schools were chosen as exemplars of current societal dynamics in the capital city and as such to provide data that could be extrapolated to represent a larger population. This tranche of data was underpinned by a further online distribution of the questionnaire to a network of Dublin-based respondents.

The target was two hundred viable samples and the methods chosen for distribution were selected to maximise effectiveness of distribution and collection.

It was felt that these approaches would deliver the best possible mix of the community, young/old married/single, Irish/non Irish.

In total 187 surveys were collected but only 157 were deemed viable.

See Appendix 1- Copy of questionnaire.

3.5 Interviews

"*Standardised schedule interview: this is useful when the people being interviewed are homogeneous and tend to share the same characteristics and outlooks"* (Kane, 1985, p.63).

The usefulness of this kind of interview was bolstered by the further use of a semi-structured interview method which will, *"manage to address both the need for comparable responses-that is the same questions being asked of each interviewee-and the need for the interview to be developed by the conversation between interviewer and interviewee"*(Wisker, 2008, p.194-5).

The second tranche of the research is represented by semi-structured interviews. The questionnaire had included a final question regarding willingness and availability for interview and the subjects interviewed were all chosen from the group who indicated a willingness to aid the research project further. Over fifty people volunteered to be interviewed and participate further in the study which represents a very healthy percentage of the overall cohort but practicalities dictated that only ten were selected for further research. Ten was chosen as being both a manageable figure and also as it represents a little over 6% of the final survey. The data that ten interviews would yield could be extrapolated to make findings based on a much larger group.

The interviews were structured to be as relaxing for the interviewees as possible and conducted in quiet yet public places. The locations for the interviews were chosen to suit the interviewees and were for the most part in the lobby of a large Dublin hotel and in private residences.

The interview sessions were recorded using Sony IC Recorder model #ICD-PX312/PX312F.

Oppenheim (1992) observes that there are two types of interviews:

a) Exploratory interviews;

b) Standardised interviews.

He further states that the purpose of s*tandardised interviews* is essentially data collection.

Oppenheim also underlines the need for the interviewer to establish a ‘rapport’ with the respondent. He describes this as an:

“Elusive quality which *‘keeps the respondent motivated and interested in answering the questions truthfully’”* (Oppenheim, 1992, p.89).

The semi-structured interviews contained open and closed questions and where possible interviewees were allowed to speak as much as possible and freely in order that more data could be collected. This was to ensure that the interviewee made their point in answering the questions. On occasion the interviewer changed the wording of a question and the sequence in order to facilitate a natural flow of conversation. All respondents were offered confidentiality/ anonymity for the interviews. In practice most were unconcerned with anonymity however the author decided to grant anonymity. This is due to the highly personal nature of any research surrounding personal income and domestic budgets. One guideline followed was:

“Will the study involve more than a minimal invasion of privacy…?” (Wisker, 2008, p.90).

It was essential to achieve a balance of ‘good data’ and respect the privacy of the interviewees and respondents. This process is inherently fraught with difficulties and as with all ethical matters it required an honest and open approach. This was achieved by offering all contributors confidentiality guarantees

The use of the semi-structured method of interviewing allows each respondent to answer the same question, thus allowing metrics to be applied and data to be extracted and compared and contrasted to other respondents. The semi-structured method also allowed the freedom for each interviewee to get their point across to the interviewer.

3.6 Data Analysis

Quantitative and qualitative analysis methods were used in order to provide suitable results and findings for each style of research.

3.6.1 Quantitative Analysis

Data analysis was conducted using Survey Monkey and advanced Microsoft Excel functionality which provided the results for the quantitative element of the research through graphs and tables and cross-tabulation of variables within the questionnaire.

3.6.2 Qualitative Analysis

A content analysis system was used to probe the interview transcripts for detail that ordinarily might not be apparent. According to Holsti (1968), *"content analysis is any technique for making inferences by systematically and objectively identifying special characteristics of messages."*

The responses to open-ended questions from the questionnaire were analysed independently using the content analysis methods described above. Levin (2011) suggests that any student undertaking research should ask themselves the question:

"Is this theory consistent with other observations that I have already made or 'facts' that I am aware of?" (Levin, 2011, p.54).

The questionnaire had included a final question regarding willingness and availability for interview and several respondents answered in the affirmative and all interviewees were selected in this manner.

3.7 Research Administration

- The secondary research for the literature review was conducted from late October 2013 until late February 2014.
- Primary research began in late May /early June 2014
- Questionnaires were distributed in late May 2014, and subsequently collected in early to mid-June 2014.
- Interviews commenced in late May 2014 and were completed in early June 2014.
- Results were compiled, sorted and analysed from June 14th 2014 onwards.
- Emerging information regarding the economic landscape was gathered in August to supplement and re-contextualise the findings.

3.8 Research limits

The study has a number of limits which may inhibit the final conclusions, amongst which are the following:

- The study is limited to the Dublin area and thus offers a narrow geographical scope.
- The financial landscape can change quickly and research data can become obsolete rapidly.
- The inherently intrusive nature of a study that involves investigating personal finance can engender a degree of circumspection from respondents which has the capacity to skew the results.

3.9 Conclusions

The main focus of chapter three was to outline the various methodologies used in gathering the requisite data to complete the project (thesis). This covered both primary and secondary research. Questionnaires were used for quantitative research measurements with some qualitative content included also. The bulk of the qualitative research was gathered via semi-structured interviews which consisted of open-ended questions and scheduled interview questions.

The various methods used have been chosen with the reliability of the methodology taken into account, and were chosen for the suitability of the research questions.

Chapter four will consist of the results of all collected primary research data, and include a discussion of the key issues that were highlighted during the content analysis of the interviews.

Chapter Four: Presentation and Analysis of Results

4.0 Introduction

This chapter consists of the presentation of data which was gathered through primary research consisting of:

1.) Questionnaire.
2.) Semi-structured Interviews.

The questionnaire consisted of closed questions with some questions providing an 'other – please specify' option. The answers to all questions form the basis of the statistical analysis which will be represented by appropriate charts and graphs to aid interpretation. Where answers can be interpreted differently, they will be examined statistically but, the content of the answers to the these questions are also included in qualitative interpretation to show a deeper picture than statistics alone can show and shall be analysed in conjunction with the interviews by means of content analysis.

4.1 Questionnaires

Responses to the questionnaire were gathered between May 25th and June 13th 2014. In total 187 responses were received of which 157 were deemed to be valid for the purposes of the research. This represents a valid response rate of 84%. The 16% of deemed invalid for the purposes of the research fell into this category because the respondents did not live in Dublin city or Dublin County (6.4%) or they abandoned the survey (9.6%).

The 187 responses each representing a unique single household in the Dublin region equates to 0.0399% of the population by household of the Dublin region. When the viable responses were calculated (157) this reduced the percentage to 0.0335%.

At the last census in 2011, the Dublin region had 468,122 households. These were made up of the following:

- Dublin City = 208,716
- Dún Laoghaire-Rathdown = 75,953
- Fingal = 93,305
- South Dublin = 90,148

(Central Statistics Office, 2011a)

Fowler (2009, p. 43) says:

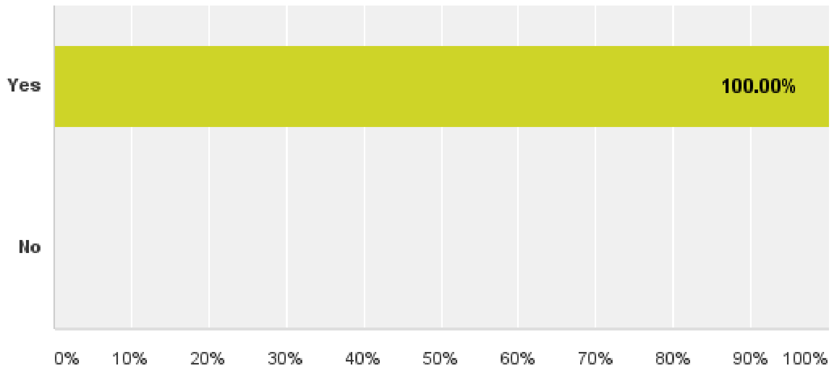
"The vast majority of survey samples, however, involve very small fractions of populations. In such instances, small increments in the fraction of the population included in a sample will have no effect on the ability of a researcher to generalize from a sample to a population"

157 valid responses is a valid response rate for this type of research.

4.1.1 Questionnaire Results

4.1.1.1 Screening Question

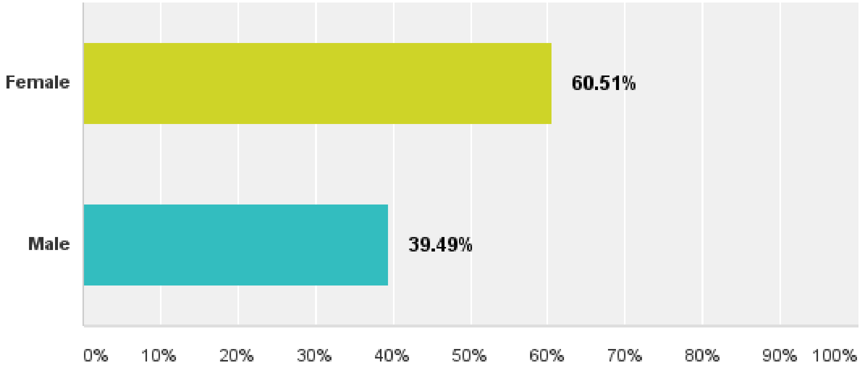
Q1: Do you live in Dublin city or County Dublin?



100% of respondents live in Dublin city or County Dublin. This is a primary screening question necessary to be counted as a valid participant.

4.1.1.2 Gender

Q2: What is your gender?

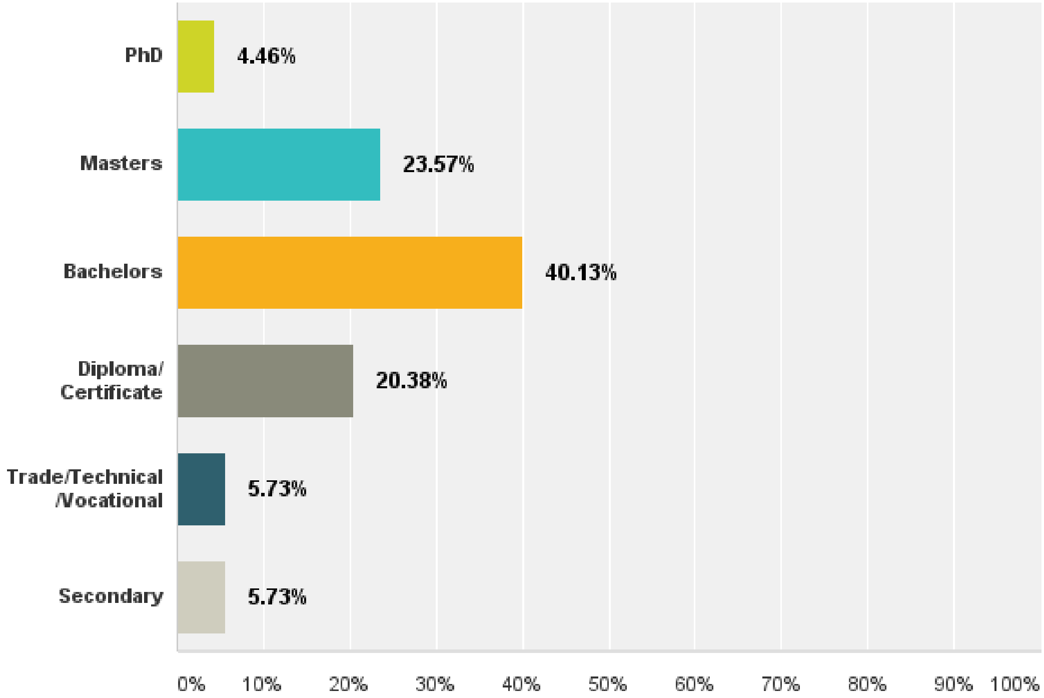


- 60.51% were female, which equates to 95 respondents.
- 39.49% were male, which equates to 62 respondents.

This is a valid breakdown for survey purposes.The split between male and female are of an acceptable level,thus requiring no weighting.

4.1.1.3 Education

Q3: What is the highest level of education you have completed?



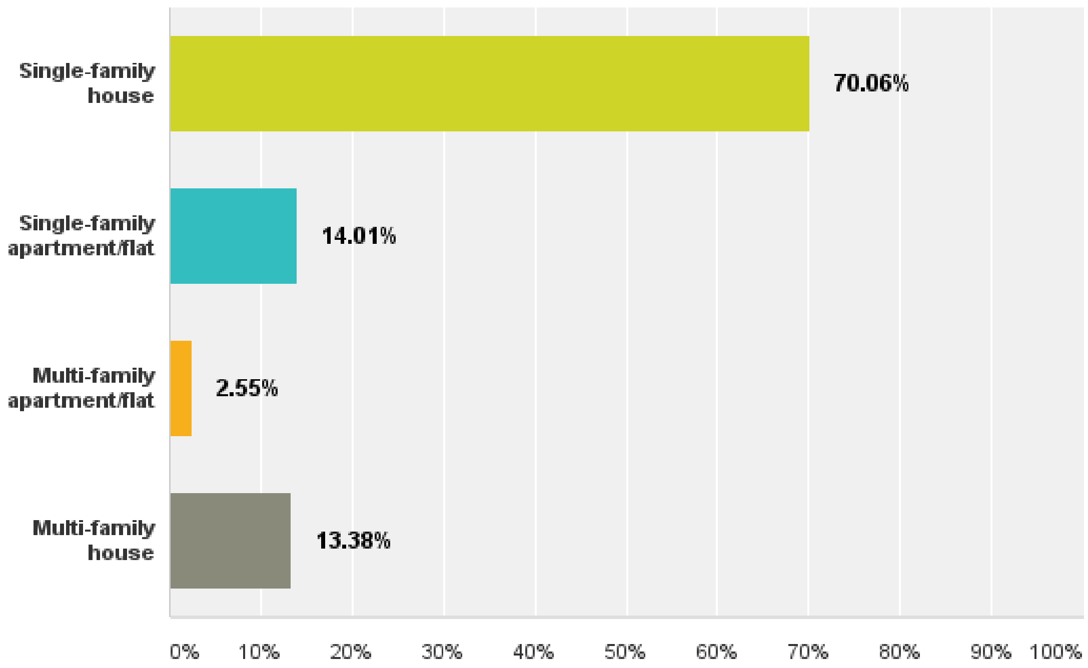
- 7 respondents were educated to PhD level (4.46%).
- 37 respondents were educated to Masters level (23.57%).
- 63 respondents were educated to Bachelors level (40.13%).
- 32 respondents were educated to Diploma/Certificate level (20.38%).
- 9 respondents were educated to Trade/Technical/vocational level (5.73%).
- 9 respondents were educated to Secondary level (5.73%).

As a group, the respondents are largely well-educated with 68.16% achieving a bachelors degree or higher. This points towards an $ABC_{1,2}$ demographic, a range which covers the three sections of the middle-classes (upper, middle, lower) and also the skilled working class.

In the wider context of the study, these findings are essential in establishing the demographic of the study subjects.

4.1.1.4 Dwelling Type

Q4: Do you live in:

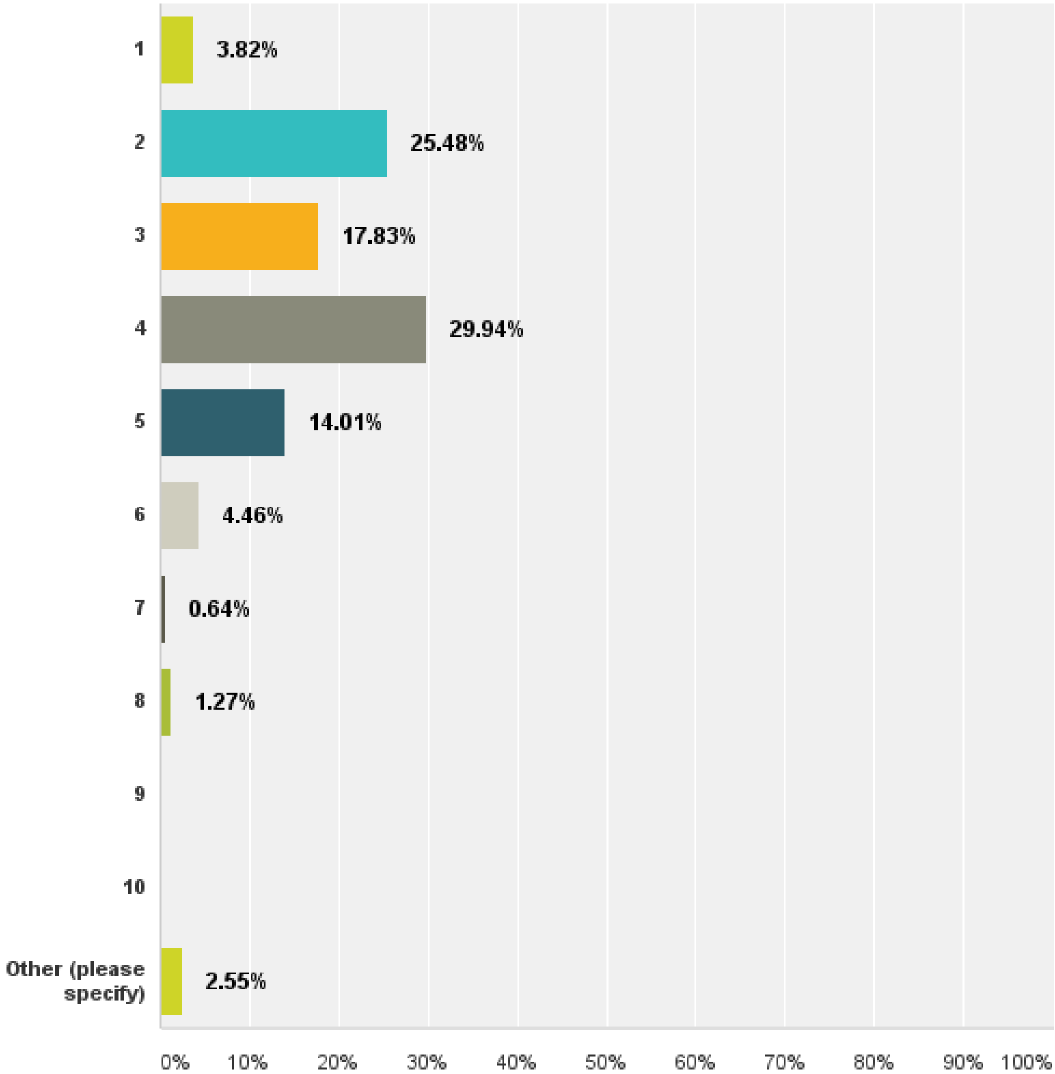


- 110 respondents live in a single family house (70.06%).
- 22 respondents live in a single family apartment/flat (14.01%).
- 4 respondents live in a multi-family apartment/flat (2.55%).
- 21 respondents live in a multi-family house (13.38%).

These findings show that 132 respondents live in single-family units (84.07%). This reflects modern Irish society which shows single-family occupancy (usually through home-ownership) as being especially important as well as being the norm in Ireland in 2014.

4.1.1.5 Number of Residents

Q5: How many people currently live in your household?



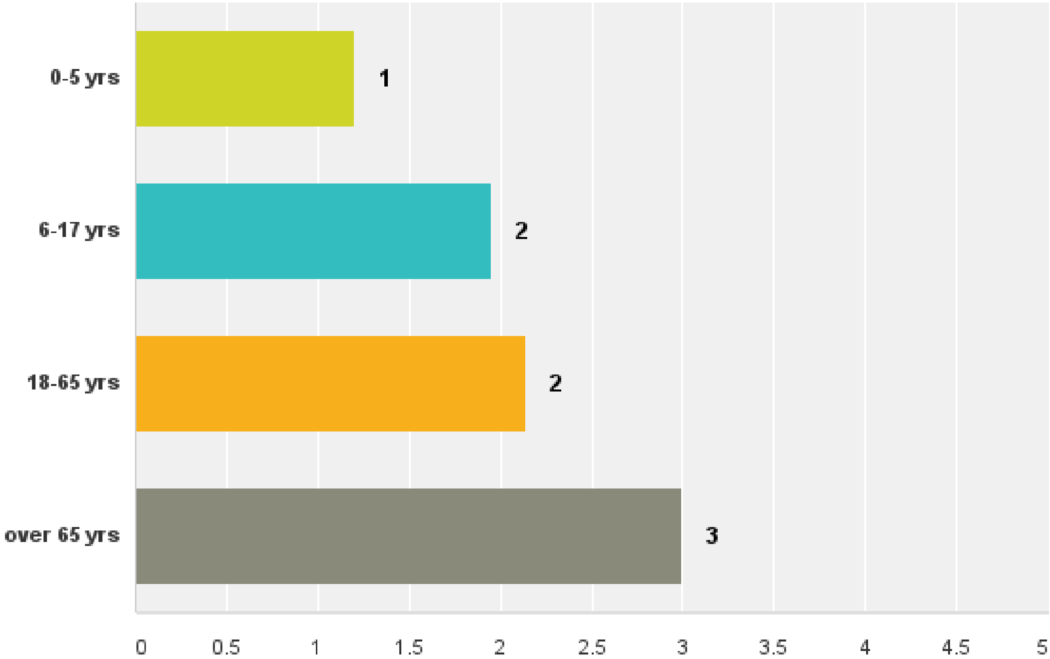
- 6 respondents live in a household containing 1 person (3.82%)
- 40 respondents live in a household containing 2 people (25.48%)
- 28 respondents live in a household containing 3 people (17.83%)
- 47 respondents live in a household containing 4 people (29.94%)
- 22 respondents live in a household containing 5 people (14.01%)
- 7 respondents live in a household containing 6 people (4.46%)
- 1 respondent lives in a household containing 7 people (0.64%)
- 2 respondents live in a household containing 8 people (1.27 %)

These findings are indicative of traditional family units. The typical family unit in modern Ireland with two adult partners and between 1-3 children account for 42.94% of households nationally (Central Statistics Office, 2011b).

The findings in this research show that of those surveyed, 97 respondents indicated that they lived in households between 3-5 persons. This represents 61.78 % of the total sample and if larger families are allowed for, the percentage rises. This indicates a demographic purchasing food for a mixed age family unit.

4.1.1.6 Age of Residents

Q6: How many residents are ___ of age?



The age of residents were reported as follows:

- 55 respondents live with at least 1 person between the ages of 0-5 yrs. (66 individuals).
- 69 respondents live with at least 2 persons between the ages of 6-17 yrs. (135 individuals).
- 154 respondents live with at least 2 persons between the ages of 18-65 yrs. (330 individuals).
- 11 respondents live with at least 1 person over the age of 65 years (13 individuals) *

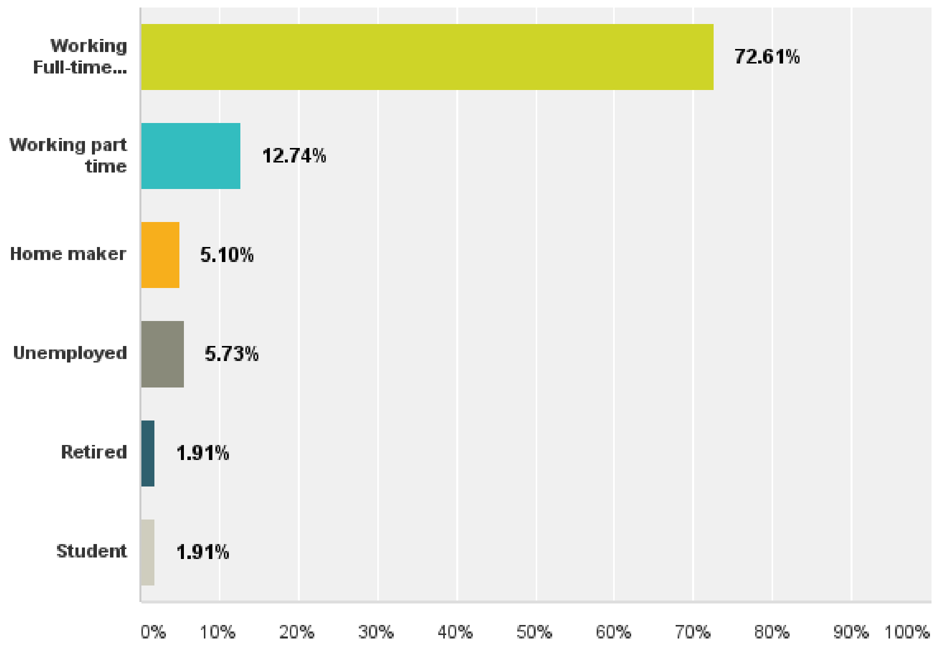
These findings are indicative of family units. 98% of respondents live in a household containing 2 household members between the ages of 18-65 yrs. 35% of respondents live in a household containing a member below the age of 5 years. 44% of respondents live in a household containing 2 household members between the ages of 6-17 yrs.

These findings are supportive of the theory that the sample surveyed whilst mixed in make-up, are largely families.

***** On May 30th at 5.53 a.m. in answer to Q.6: *How many residents are **___** of age,* respondent #111 entered ***22*** next to the 65+ answer box. The author believes this was an error on behalf of respondent #111. It is unlikely that anyone lives in a domestic setting with 22 persons older than 65years., therefore for the purposes of this survey the author is treating the answer in question as 2 instead of 22.

4.1.1.7 Employment

Q7: Employment: Are you?

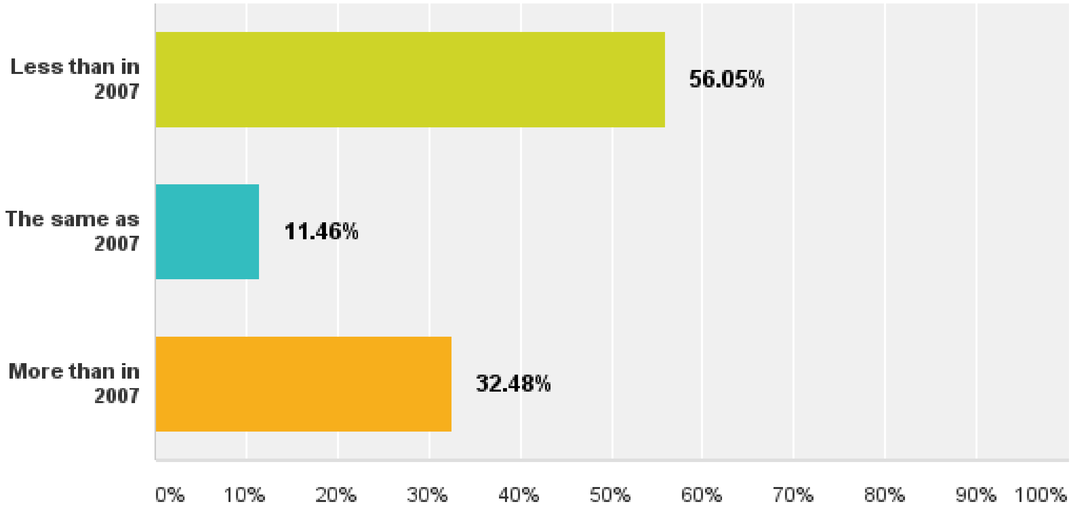


- 114 respondents are working full-time (72.51%).
- 20 respondents are working part-time (12.74%).
- 8 respondents are home-makers (5.10%).
- 9 respondents are unemployed (5.73%).
- 3 respondents are retired (1.91%).
- 3 respondents are students (1.91%)

The findings show that over 85% of respondents are working either full or part time, with 5.73% unemployed. This contrasts with the national picture which shows an 11.8% unemployment rate in May 2014 (Central Statistics Office, 2014b).

4.1.1.8 Combined Household Income

Q8. Would you say your combined household income for the last 12 months is.



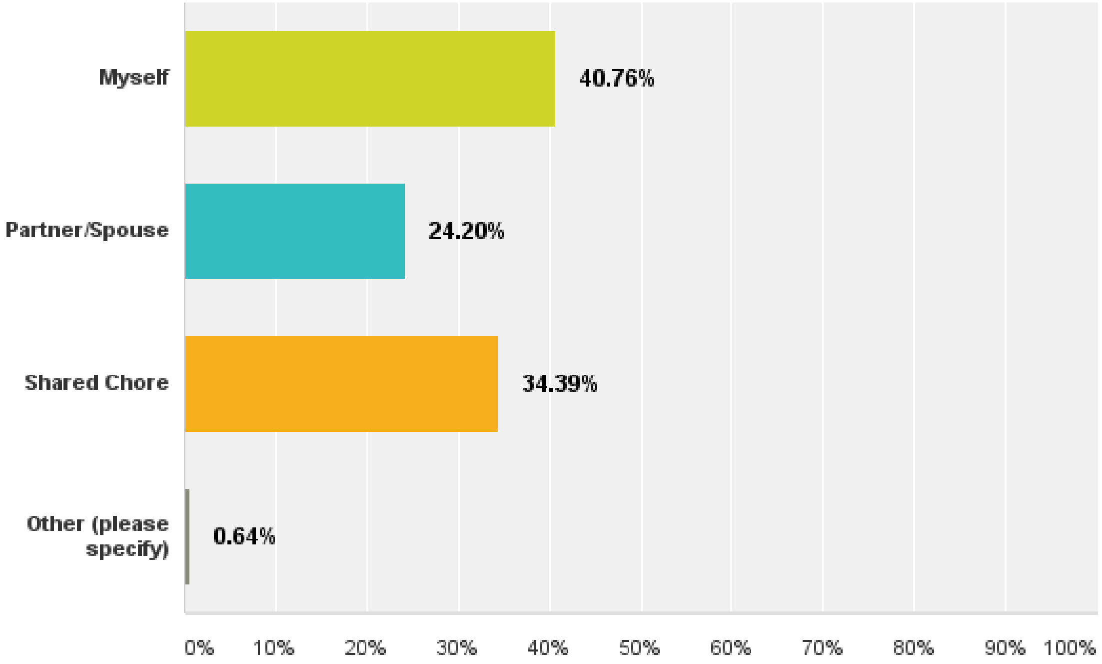
- 88 respondents said their household income was less than in 2007 (56.05%)
- 18 respondents said their household income was the same as 2007 (11.46%).
- 51 respondents said their household income was more than in 2007 (32.48%).

Over half (56.05%) of all respondents are managing households on budgets that have shrunk since 2007.

67.51% of all respondents report a household income which is less than or the same as 2007.

4.2.1.9 Who Cooks the Main Meal?

Q9: Eating at Home: Who cooks the main meal in your household?

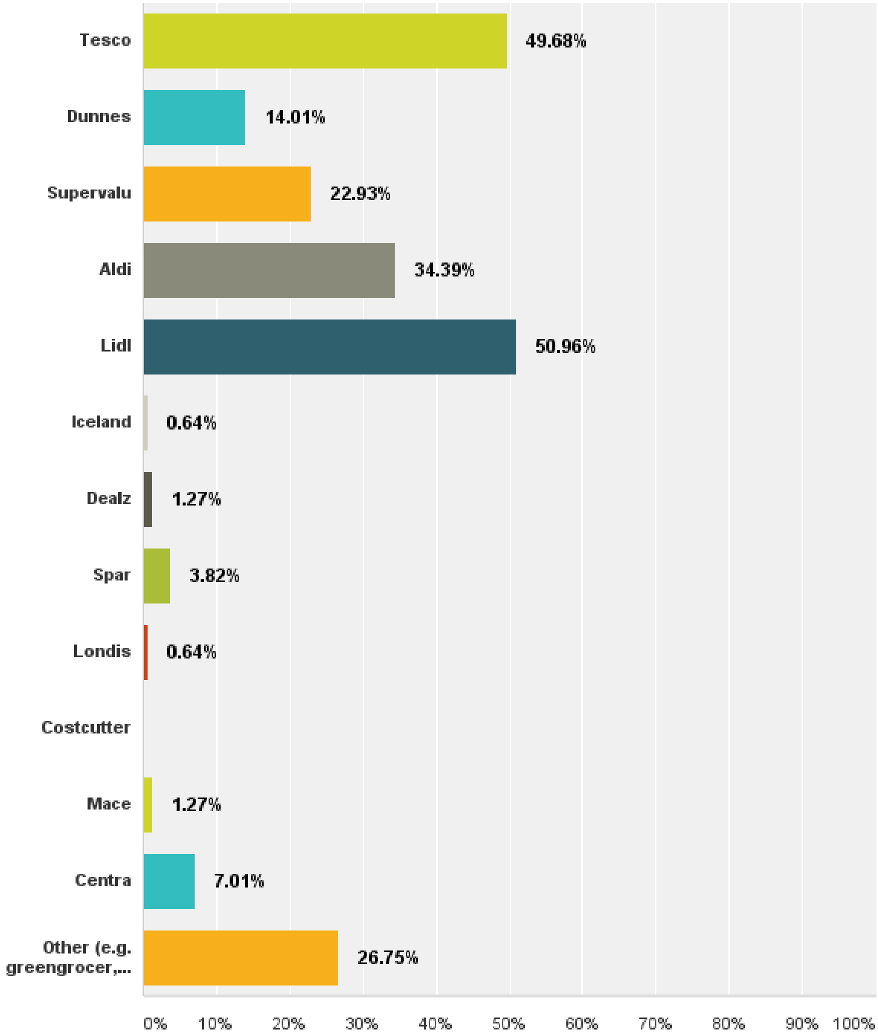


- 64 respondents cook the main meal in the household themselves (40.76%).
- 38 respondents said the main meal in the household is cooked by their partner/spouse (24.20%).
- 54 respondents said cooking the main household meal is a shared chore (34.39%).
- 1 respondent said the main meal in the household is cooked by 'other' (their grandmother)

In practice, over 99% of respondents or their partner/spouse cooked the main meal of the household themselves or shared the task with their partner/spouse. This indicates clearly that the cooking of the main household meal is still a major part of the shared family activities in most homes surveyed.

4.1.1.10 Main Weekly Shop Last Week

Q10: Shopping: Where was the main weekly shop for your household completed last week?



Respondents could tick more than one option so percentages may add up to more than 100%.

- 49.68% of respondents said they used Tesco as part of their main weekly shop last week. (8.28% of respondents shopped only in Tesco that week).
- 14.01% of respondents said they used Dunnes as part of their main weekly shop last week. (2.54% of respondents shopped only in Dunnes that week).
- 22.93 % of respondents said they used Supervalu as part of their main weekly shop last week. (5.09% of respondents shopped only in Supervalu that week).

- 34.39 % of respondents said they used Aldi as part of their main weekly shop last week. (7.0% of respondents shopped only in Aldi that week)
- 50.96% of respondents said they used Lidl as part of their main weekly shop last week. (12.71% of respondents shopped only in Lidl that week.)
- 0.64% of respondents said they used Iceland as part of their main weekly shop last week.
- 1.27% of respondents said they used Dealz as part of their main weekly shop last week.
- 3.82% of respondents said they used Spar as part of their main weekly shop last week.
- 0.64% of respondents said they used Londis as part of their main weekly shop last week.
- 1.27% of respondents said they used Mace as part of their main weekly shop last week.
- 7.01% of respondents said they used Centra as part of their main weekly shop last week.
- 26.75% of respondents specified 'other' as part of their main weekly shop last week.

When question 10 (above) was compared to question 8, a further set of patterns began to emerge. Question 8 asked respondents if there household income (2014) was less, more or unchanged from 2007.

Of the 56.05% who reported being less well off in 2014 than in 2007,

- 51.54% shopped in Lidl, an increase of .58% market share
- 44.31% shopped in Tesco, which is a drop of 5.37% market share
- 36.36% shopped in Aldi, an increase of 1.97% market share
- 11.36% shopped in Dunnes a drop of 2.65% market share
- 26.13% shopped in Supervalu, an increase of 3.2% market share

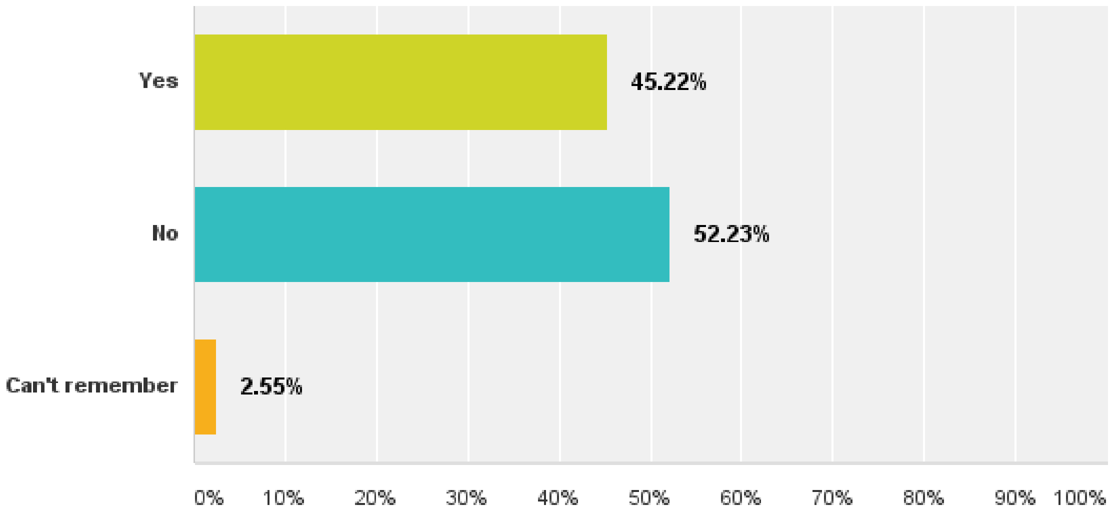
The open element in this question (Other, please specify) yielded further data of interest to the study, as follows:

Of those respondents who used Marks and Spencer as a shopping option, unsurprisingly 80% said their household income in 2014 was more or the same as in 2007 thus clearly indicating little fiscal stress leading to change from this acknowledged high-end/luxury supplier.

Of the self-identified group who are less well off in 2014 who use the ‘other’ option in the question, 43.47% visit a butcher as part of their weekly shopping, this is a clear indication that this cohort are cooking meals from scratch (using base ingredients like raw meat).

4.1.1.11 Main Weekly Shop: Is this different to 2010

Q11: Shopping: Is this different to where the main weekly shop was completed in 2010?

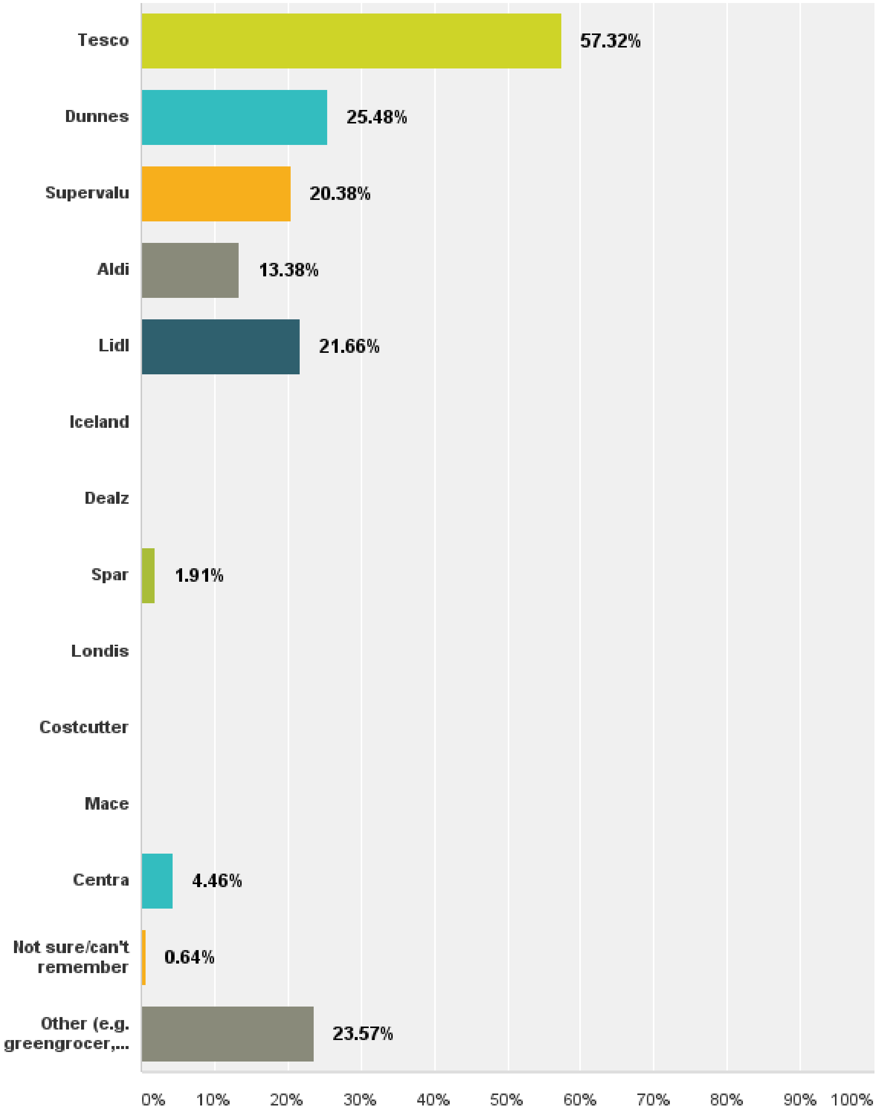


- 71 respondents said that their weekly shopping was purchased in a different place than in 2010 (45.22%).
- 82 respondents said that their weekly shopping was purchased in the same place as in 2010 (52.23%).
- 4 respondents were unable to recall (2.55%).

This result is further discussed in chapter five.

4.1.1.12 Main Weekly Shop in 2010

Q12: Shopping: Where was the main weekly shop for your household completed in 2010?



Respondents could tick more than one option so percentages may add up to more than 100%.

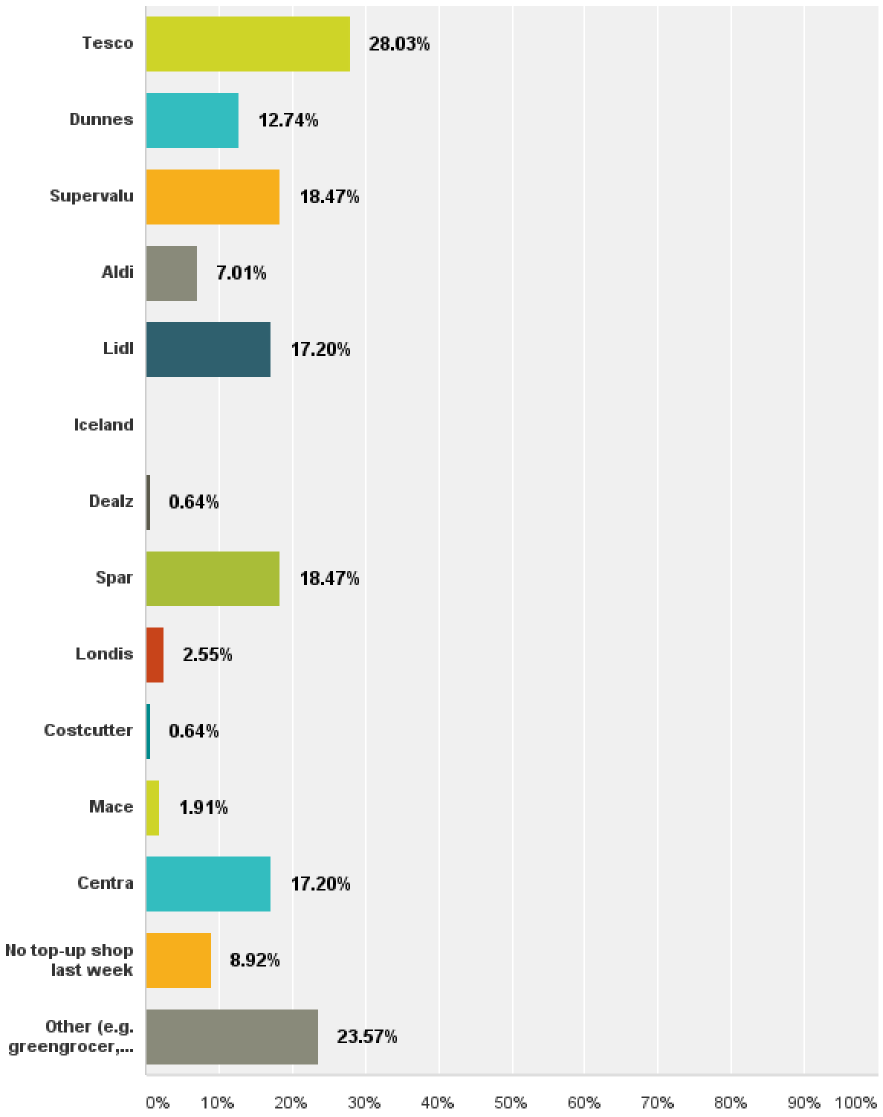
- 90 respondents (57.32%) said they did their main weekly shop (2010) in Tesco.
- 40 respondents (25.48%) said they did their main weekly shop (2010) in Dunnes Stores.

- 32 respondents (20.38%) said they did their main weekly shop (2010) in Supervalu.
- 34 respondents (21.66%) said they did their main weekly shop (2010) in Lidl.
- 21 respondents (13.38%) said they did their main weekly shop (2010) in Aldi.
- 37 respondents (23.57%) said they did their main weekly shop (2010) in ‘other’.

As this question had an open element to it (Other, please specify) it is suitable for content analysis and will be dealt with in section 4.3.3.2.

4.1.1.13 Top-up Shops Last Week

Q13: Shopping: Where were any top-up shops for your household completed last week?



Respondents could tick more than one option so percentages may add up to more than 100%.

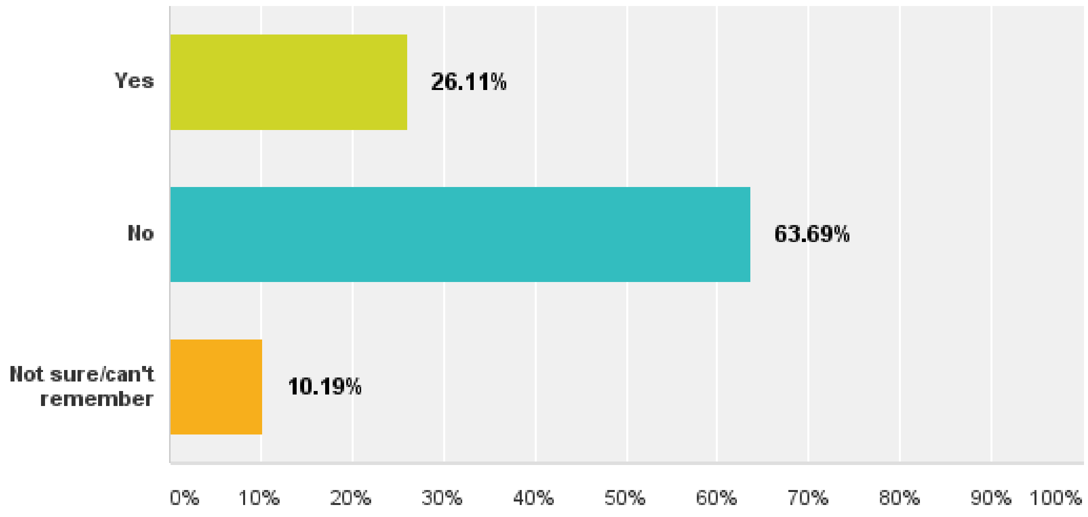
The significant responses were as follows:

- 40 respondents (28.03%) said that their top-up shopping last week was done in Tesco.

- 29 respondents (18.47%) said that their top-up shopping last week was done in Supervalu.
- 29 respondents (18.47%) said that their top-up shopping last week was done in Spar.
- 27 respondents (17.20%) said that their top-up shopping last week was done in Lidl.
- 27 respondents (17.20%) said that their top-up shopping last week was done in Centra.
- 11 respondents (7.01%) said that their top-up shopping last week was done in Aldi.
- 37 respondents (23.57%) said that their top-up shopping last week was done in ‘other’.

4.1.1.14 Top-up Shop: Is this different to 2010?

Q14: Shopping: Is this different to where any top-up shopping was completed in 2010?

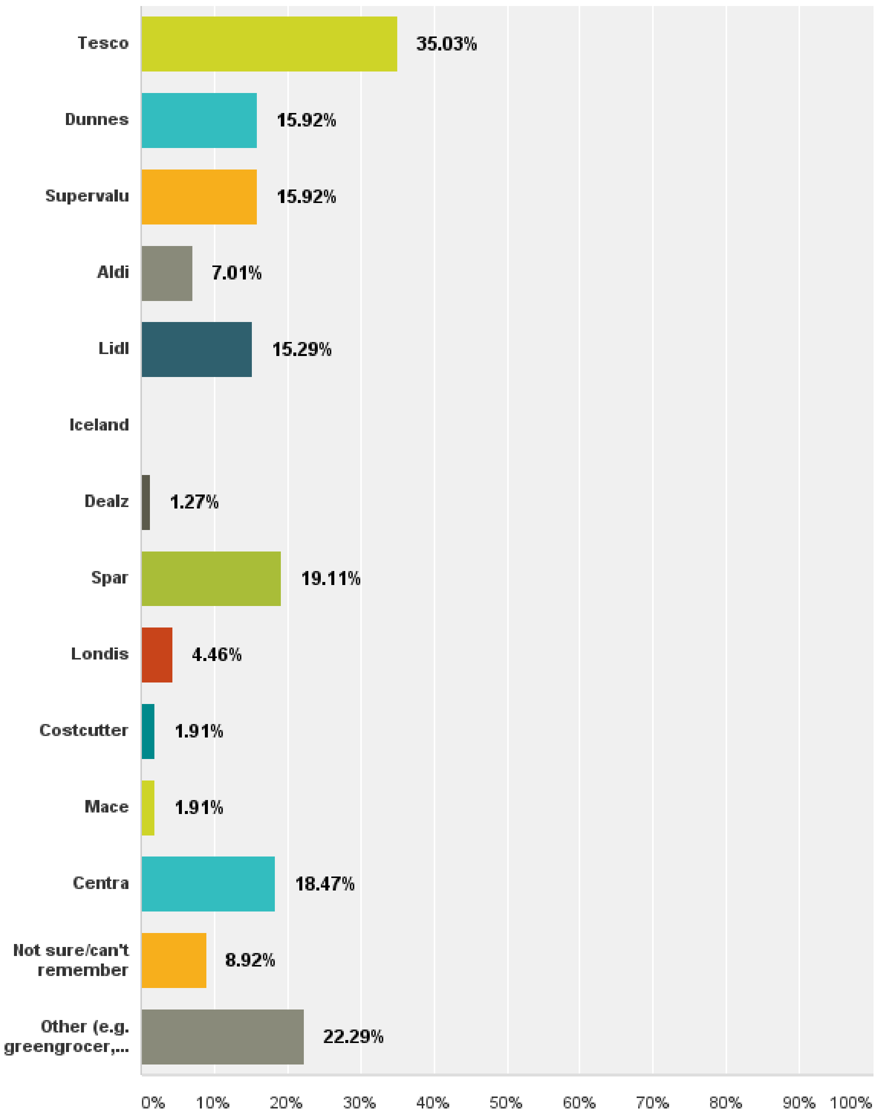


- 41 respondents (26.11%) said that their top-up shopping had moved to a different retailer since 2010.
- 100 respondents (63.69%) said that their top-up shopping had not changed retailer since 2010.

These statistics illustrate the relative importance of geographical location to top-up shopping, as most top up shopping is usually carried out at local level and at a convenience-driven retailer rather than a value-driven retailer. The nearly 64% of respondents reporting no change represent in all likelihood a cohort that are continuing to top-up shop in the easiest to reach retailer.

4.1.1.15 Top-up Shops in 2010

Q15: Shopping: Where were any top-up shops for your household completed in 2010?



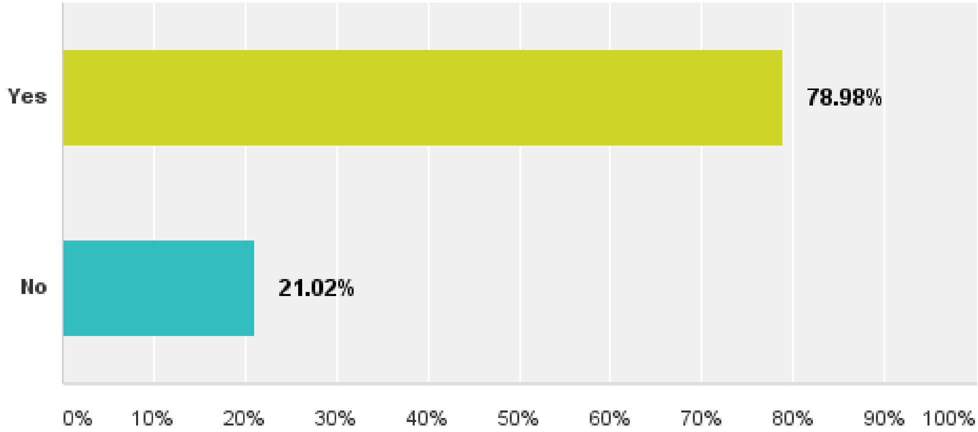
Respondents could tick more than one option so percentages may add up to more than 100%.

- 55 respondents (35.03%) said that their top-up shopping (2010) was done in Tesco.
- 30 respondents (19.11%) said that their top-up shopping (2010) was done in Spar.

- 29 respondents (18.47%) said that their top-up shopping (2010) was done in Centra.
- 25 respondents (15.92%) said that their top-up shopping (2010) was done in Dunnes.
- 25 respondents (15.92%) said that their top-up shopping (2010) was done in Supervalu.
- 24 respondents (15.29%) said that their top-up shopping (2010) was done in Lidl.
- 11 respondents (7.01%) said that their top-up shopping (2010) was done in Aldi.
- 7 respondents (4.46%) said that their top-up shopping (2010) was done in Londis.
- 35 respondents (22.29%) said that their top-up shopping (2010) was done in 'other'

4.1.1.16 Ate Breakfast at Home Yesterday

Q16: Breakfast: Did you have your breakfast at home yesterday?

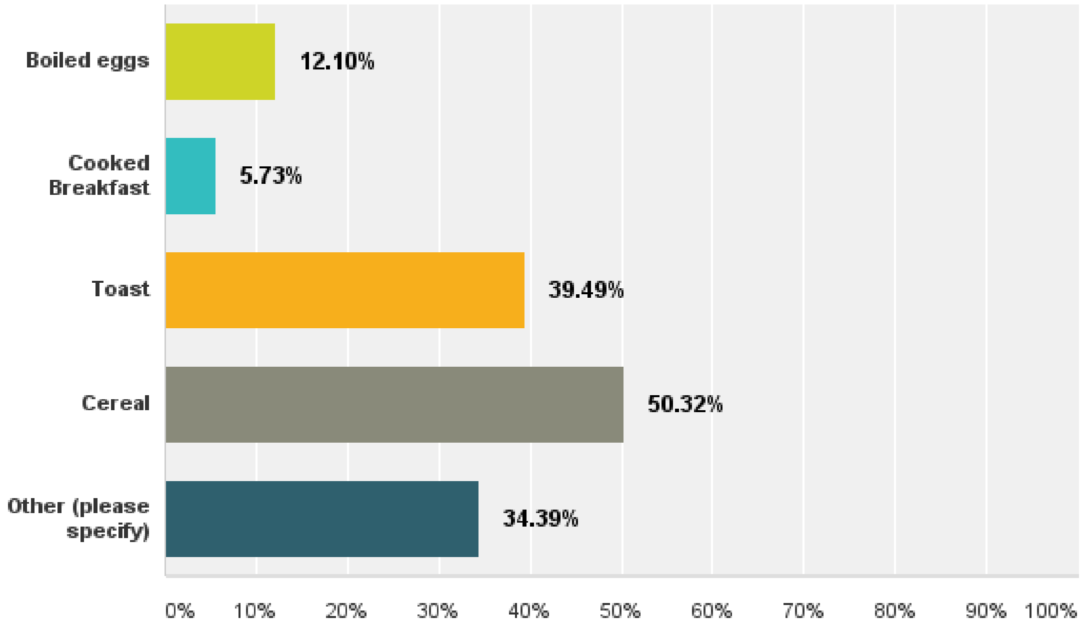


- 124 respondents (78.98%) said that they had their breakfast at home on the previous day.
- 33 respondents (21.02%) said that they did not have breakfast at home on the previous day.

This question was deliberately date-specific and was posed with the intent of focussing the individual respondent on a definite point in time as opposed to a vague or unspecified time-frame. The statistics show a clear majority of almost 79% had their breakfast at home on the previous day. This is not unexpected as in Irish culture the practice of eating breakfast out is a largely new development and is a Celtic Tiger phenomenon. This is exemplified by the ‘Breakfast Roll Man’ persona identified by economist/commentator David McWilliams in 2007 (Mac Con Iomaire, 2014).

4.1.1.17 Breakfast: Foods Prepared

Q17: Breakfast: What foods did you prepare for breakfast?



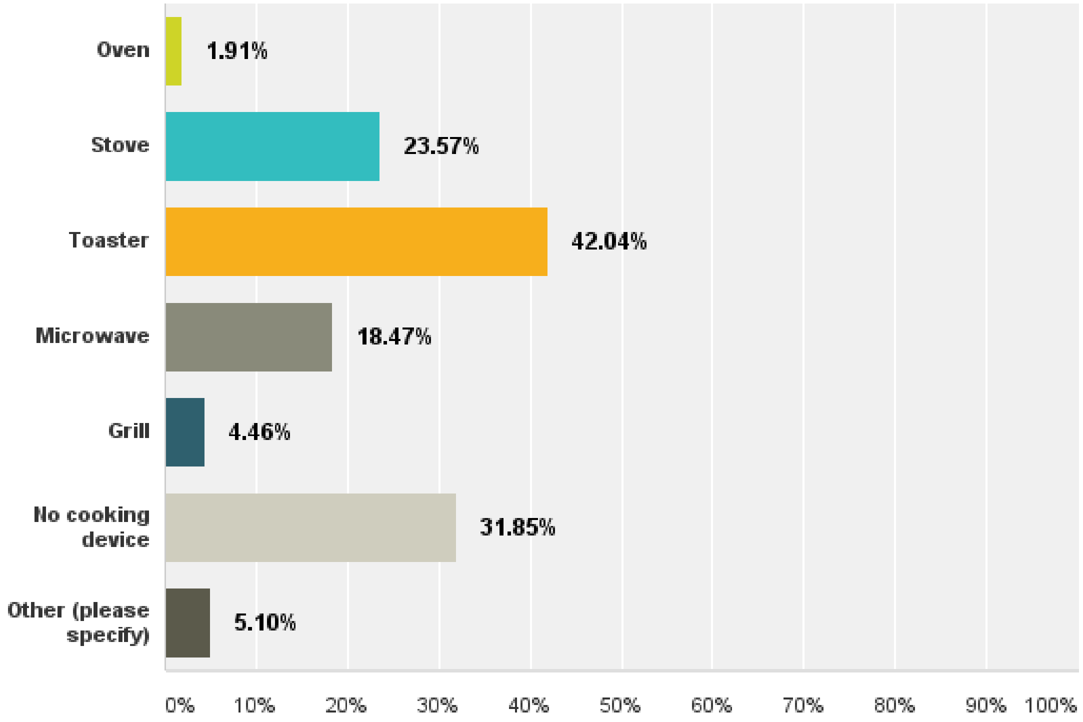
Respondents could tick more than one option so percentages may add up to more than 100%.

- 79 respondents (50.32%) said that yesterday's breakfast included cereal.
- 62 respondents (39.49%) said that yesterday's breakfast included toast.
- 19 respondents (12.10%) said that yesterday's breakfast included boiled eggs.
- 9 respondents (5.73%) said that yesterday's breakfast included a cooked breakfast.
- 54 respondents (34.39%) said that yesterday's breakfast included 'other'.

Of the 54 respondents who answered 'other' they specified a wide range of different foodstuffs, including smoothies, breakfast bars, porridge muffins and so on.

4.1.1.18 Breakfast: Appliances Used

Q18: Breakfast: Which of the following appliances did you use to cook breakfast yesterday?



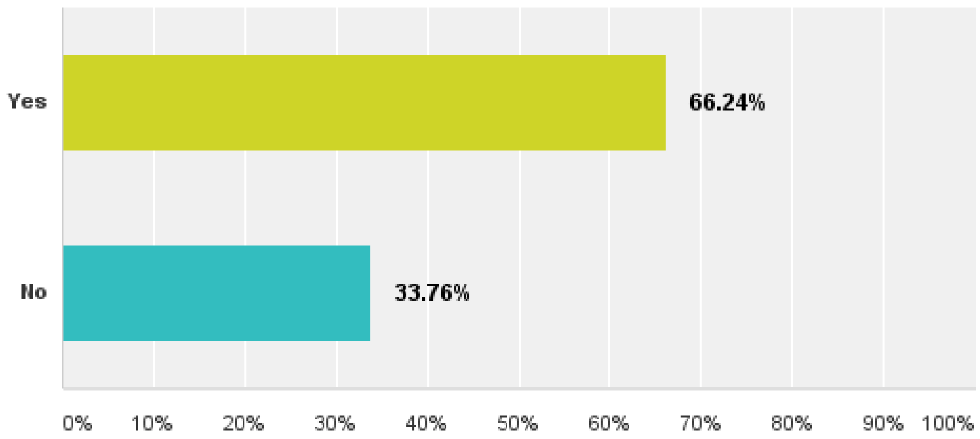
Respondents could tick more than one option so percentages may add up to more than 100%.

- 37 respondents (23.57%) used a stove to prepare their breakfast.
- 29 respondents (18.47%) used a microwave to prepare their breakfast.
- 7 respondents (4.46%) used a grill to prepare their breakfast.
- 66 respondents (42.04%) used a toaster to prepare their breakfast.
- 50 respondents (31.85%) used no cooking device to prepare their breakfast.

The significant statistics here are the combined figures for use of grill, toaster or no cooking device. When combined, these represent 107 respondents or 78.35% of all those surveyed. A closer analysis shows that this cohort for the most part had toast or cereal for breakfast which is within the expected parameters. A far smaller, yet significant cohort (40.25% - 48%) used either a stove or oven to prepare their breakfast.

4.1.1.19 Lunch: Prepared at Home

Q19: Lunch: Was the lunch you had yesterday prepared at home?

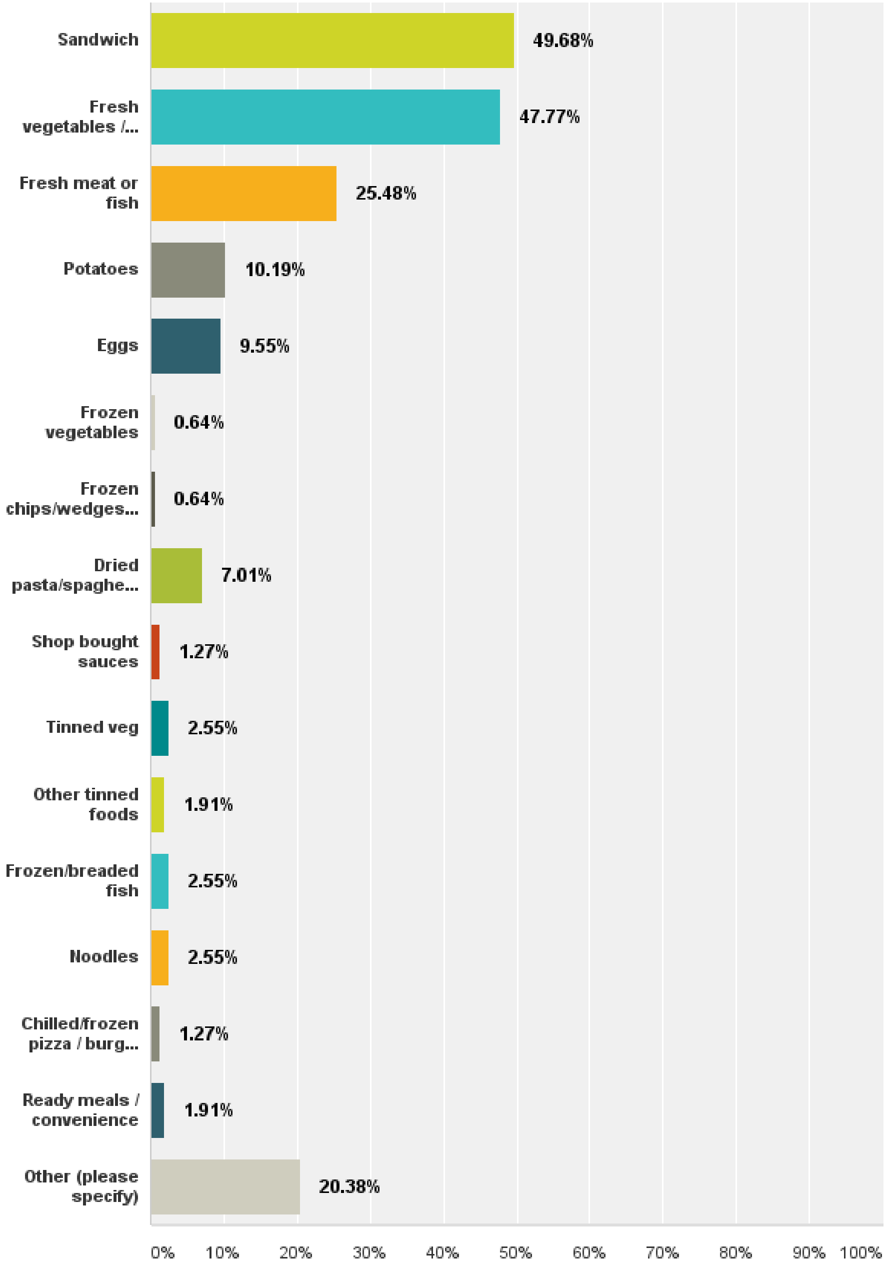


- 102 respondents (66.24%) said that the previous day's lunch had been prepared at home.
- 53 respondents (33.76%) said that the previous day's lunch had not been prepared at home.

These figures reflect the current paradigm. Most people (66.24%) are bringing their lunch to work with them, or eating lunch at home. A significant minority of 33.76% did not have a home-prepared lunch on the previous day. Q.20 will illuminate the breakdown of solutions chosen by both cohorts.

4.1.1.20 Lunch: Foods Included

Q20: Lunch: What foods were included in your lunch?



Respondents could tick more than one option so percentages may add up to more than 100%.

- 78 respondents (49.6 %) said that their lunch on the previous day included a sandwich.

- 75 respondents (47.77 %) said that their lunch on the previous day included fresh fruit/ vegetables.
- 40 respondents (25.48%) said that their lunch on the previous day included fresh meat/fish.
- 16 respondents (10.19%) said that their lunch on the previous day included potatoes.
- 15 respondents (9.55% %) said that their lunch on the previous day included eggs.
- 11 respondents (7.01 %) said that their lunch on the previous day included dried pasta.

32 respondents (20.38%) answered 'other' to this question and further asked to state what 'other' items they had, the breakdown of the more informative responses was as follows;

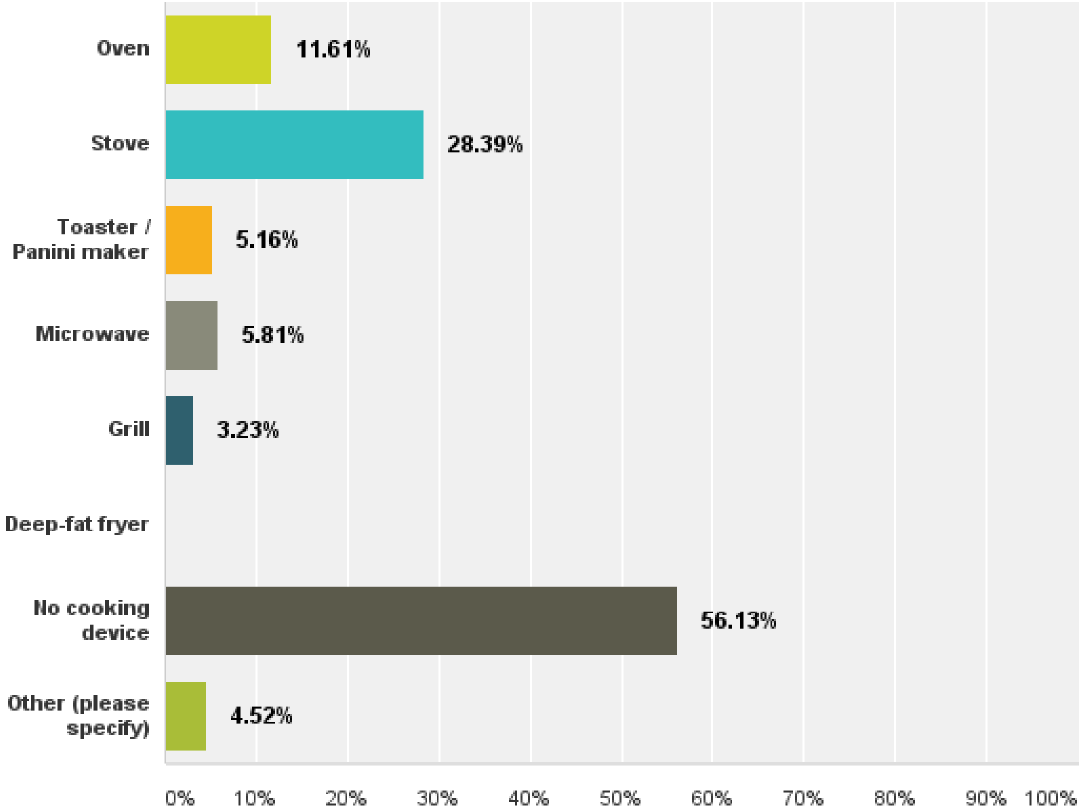
  - 4 respondents (2.54%) had no lunch.
  - 2 respondents (1.27%) had leftovers for lunch.
  - 5 respondents (3.18%) had soup for lunch of which 2 respondents identified the soup as being shop-bought.
  - 3 respondents (1.91%) purchased hot food for lunch (McDonalds, Fish & Chips, other).
  - 6 respondents (3.82%) had grains, pulses or cereals.

These figures show that approximately half of respondents (49.68%) had a sandwich as part of their lunch. This is an unsurprising outcome as anecdotally, the 'sandwich–for-lunch-at-work' solution appears to be the single-most popular in Ireland. The inclusion of fresh fruit and/or vegetables was also widespread with 47.77 % including these in their lunch. A further breakdown of statistics shows that 32 people (20.38%) had a sandwich and fresh fruit and/or veg for lunch, a mixture that points towards this cohort bringing a classic combination of sandwich/fruit to work.

An interesting statistic is the 3.82% who had pulses/grains/ cereals for lunch. These all took different forms. It is instructive in as much as pulses/grains/ cereals are cheap, yet nutrient-dense and filling and in some cases protein-rich, making them an ideal cheap lunch.

4.1.1.21 Lunch: Appliances Used

Q21: Lunch: Which of the following appliances were used to cook your lunch yesterday?



Respondents could tick more than one option so percentages may add up to more than 100%.

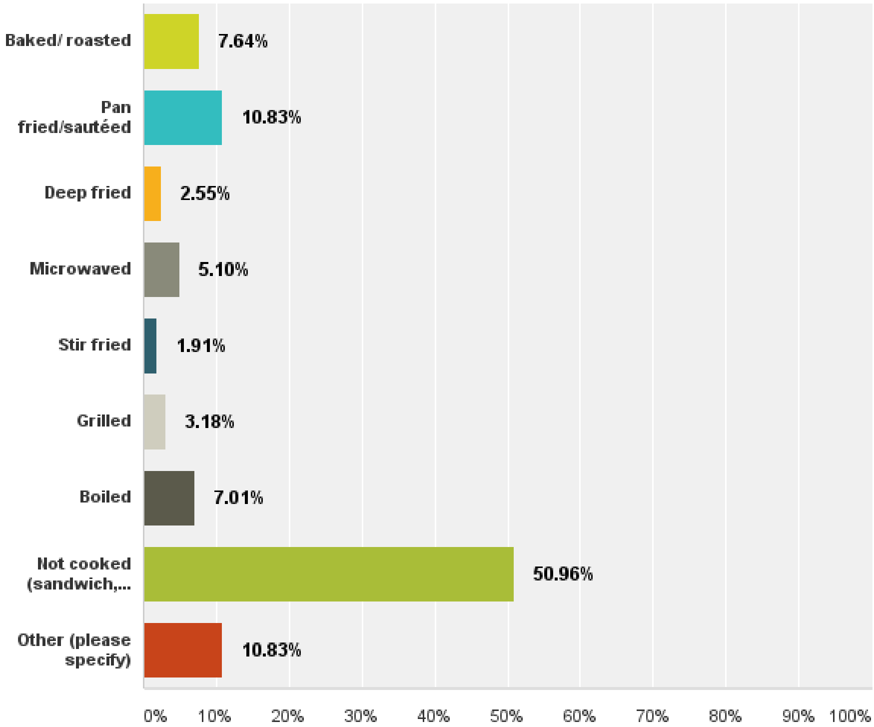
- 87 respondents (56.13%) said that the previous day's lunch was prepared using no cooking device.
- 44 respondents (28.39%) said that the previous day's lunch was prepared using a stove.
- 18 respondents (11.61%) said that the previous days' lunch was prepared using an oven.
- 9 respondents (5.81%) said that the previous day's lunch was prepared using a microwave.
- 8 respondents (5.16%) said that the previous day's lunch was prepared using toaster/panini maker.

- 5 respondents (3.23%) said that the previous day's lunch was prepared using a grill.
- 7 respondents (4.82%) specified 'other', the breakdown of which is:
    - 2 respondents (1.27%) said they had no lunch.
    - 3 respondents (1.91%) ate lunch in a restaurant.
    - 1 respondent (.63%) said they used a frying-pan. This in effect should fall under the answer 'stove' however the author has decided to leave it out of the overall calculations for 'stove'.
    - 1 respondent (.63%) said they used 'good knives'

These results serve to underpin the answers given to Q.20 where a large cohort had a sandwich for lunch. The largest single grouping of 87 respondents (56.13%) who answered 'no cooking device' was used to prepare their lunch are concomitant with these respondents.

4.1.1.22 Lunch: Method of Cooking

Q22: Lunch: Was your lunch______?



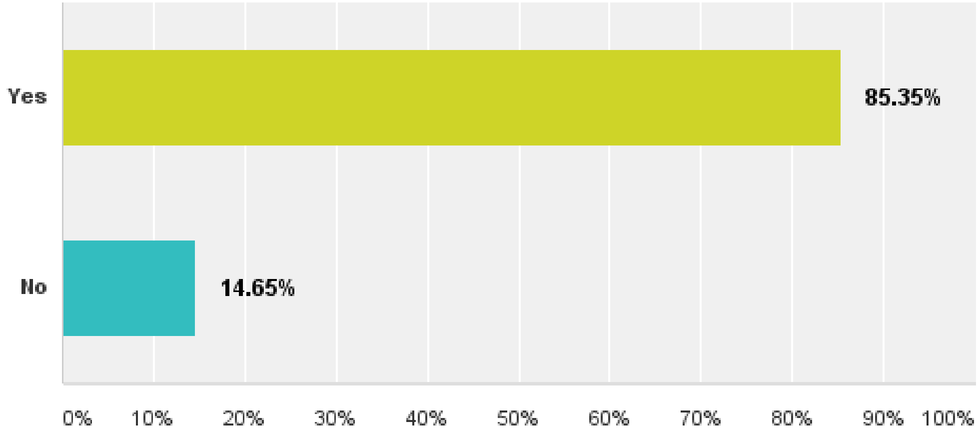
- 80 respondents (50.96%) said that their lunch on the previous day was not cooked.
- 17 respondents (10.83%) said that their lunch on the previous day was pan-fried/sautéed.
- 12 respondents (7.64%) said that their lunch on the previous day was baked/roasted.
- 11 respondents (7.01%) said that their lunch on the previous day was boiled.
- 8 respondents (5.09%) said that their lunch on the previous day was microwaved.
- 5 respondents (3.18%) said that their lunch on the previous day was grilled.
- 4 respondents (2.55%) said that their lunch on the previous day was deep-fried.
- 3 respondents (1.91%) said that their lunch on the previous day was stir-fried.
- 17 respondents (10.83%) replied ‘other’ and when asked to specify the breakdown showed the following:

- 6 respondents (3.82%) said that they had no lunch on the previous day.
- 4 respondents (2.54%) said that they had salad for lunch on the previous day.
- 2 respondents (1.27%) said that they toasted their lunch on the previous day.

The largest grouping was the 80 respondents (50.96%) who said their lunch on the previous day was not cooked. This is concomitant with the group who answered ‘sandwich’ in Q.20. The remainder of the respondents used largely conventional methods of cooking to prepare lunch. The use of a microwave by 8 respondents (5.10%) is perhaps indicative of the necessity for lunch to be swift that many people experience.

4.1.1.23 Dinner: Prepared at Home

Q23: Dinner: Was the dinner you had yesterday prepared at home?



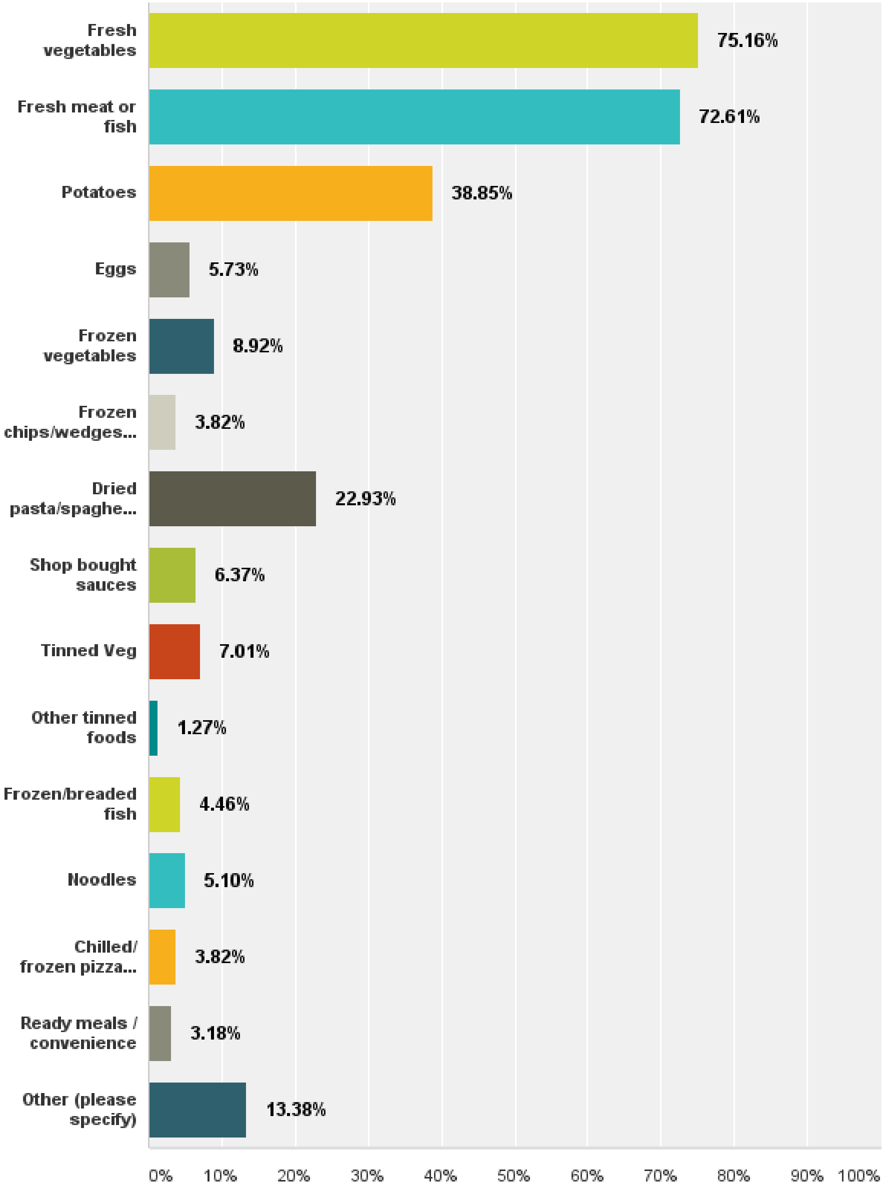
- 134 respondents (85.35%) said that their previous day’s dinner was prepared at home.
- 23 respondents (14.65%) said that their previous day’s dinner was not prepared at home.

These figures show that the clear majority of respondents (85.35%) had a home-prepared dinner on the previous day.

The figures contrast with the answers given to Q.19 ‘Was the lunch you had yesterday prepared at home?’ which showed 66.24% of respondents had lunch prepared at home. The pattern of the typical working day dictates that whilst people are having their lunch prepared at home they are more likely to eat it at work (on their lunch hour). The opposite is the case in this question; the 85.35% of respondents who said their dinner was prepared at home are likely to have consumed the meal at home also.

4.1.1.24 Dinner: Foods Included

Q24: Dinner: What foods were included in your dinner?



Respondents could tick more than one option so percentages may add up to more than 100%.

- 118 respondents (75.16 %) said that their dinner the previous day included fresh vegetables.

- 114 respondents (72.61%) said that their dinner the previous day included fresh meat or fish.
- 61 respondents (38.85 %) said that their dinner the previous day included potatoes.
- 36 respondents (22.93%) said that their dinner the previous day included dried pasta/spaghetti.
- 14 respondents (8.92%) said that their dinner the previous day included frozen vegetables.
- 11 respondents (7.01%) said that their dinner the previous day included tinned vegetables.
- 10 respondents (6.73%) said that their dinner the previous day included shop bought sauces.
- 9 respondents (5.73%) said that their dinner the previous day included eggs.
- 8 respondents (5.10%) said that their dinner the previous day included noodles.
- 7 respondents (4.48%) said that their dinner the previous day included frozen/breaded fish.
- 6 respondents (3.82%) said that their dinner the previous day included chilled/frozen pizzas.
- 6 respondents (3.82 %) said that their dinner the previous day included frozen chips/wedges.
- 5 respondents (3.18 %) said that their dinner the previous day included ready meal/convenience food.
- 2 respondents (1.27%) said that their dinner the previous day included other tinned food.
- 21 respondents (13.38%) said that the previous day's lunch included 'other 'items not listed as an option in the survey. When asked to specify, the breakdown showed a variety of results of which the most significant were the following:
    - 2 respondents (1.27 %) said that the previous day's dinner was leftovers.
    - 2 respondents (1.27%) said that the previous day's dinner was cous-cous.

- 2 respondents (1.27 %) said that the previous day's dinner was salad.
- 2 respondents (1.27 %) said that they had no dinner on the previous day.

There were several other single instances in which the respondents yielded the following answers:

- 1 respondent (.63%) said that the previous day's dinner was Chinese food.
- 1 respondent (.63%) said the previous day's dinner was Italian (meatballs).
- 1 respondent (.63%) said that the previous day's dinner was chocolate.
- 1 respondent (.63%) said that the previous day's dinner was nuts and seeds.

These figures show a clear mixture of meal solutions with fresh meat being a popular meal component, cited by 72.61% of respondents and fresh vegetables also widely used, cited by 75.16%.

A cumulative tally of frozen/breaded fish, ready meals/convenience foods and chilled/frozen pizza aggregates at 11.48% of respondents, suggesting that easy to prepare foods are a frequent solution though significantly lower than the fresh options above.

When the total usage of tinned foods is counted it shows that 8.28% of respondents used them at dinner. The usage of potatoes was high (cited by 38.85%) This reflects the Irish appetite for potatoes as part of the main meal of the day. When potatoes were added to the other categories of carbohydrates on the survey (noodles, dried pasta, frozen chips and so on), the total was 70.70%. This figure indicates that carbohydrates are still a much valued component of the Irish diet and this figure is further augmented by the 1.27% of respondents who had cous-cous with dinner.

The figures show that the traditional main meal of the day survives in a variety of formats; the significant data is as follows:

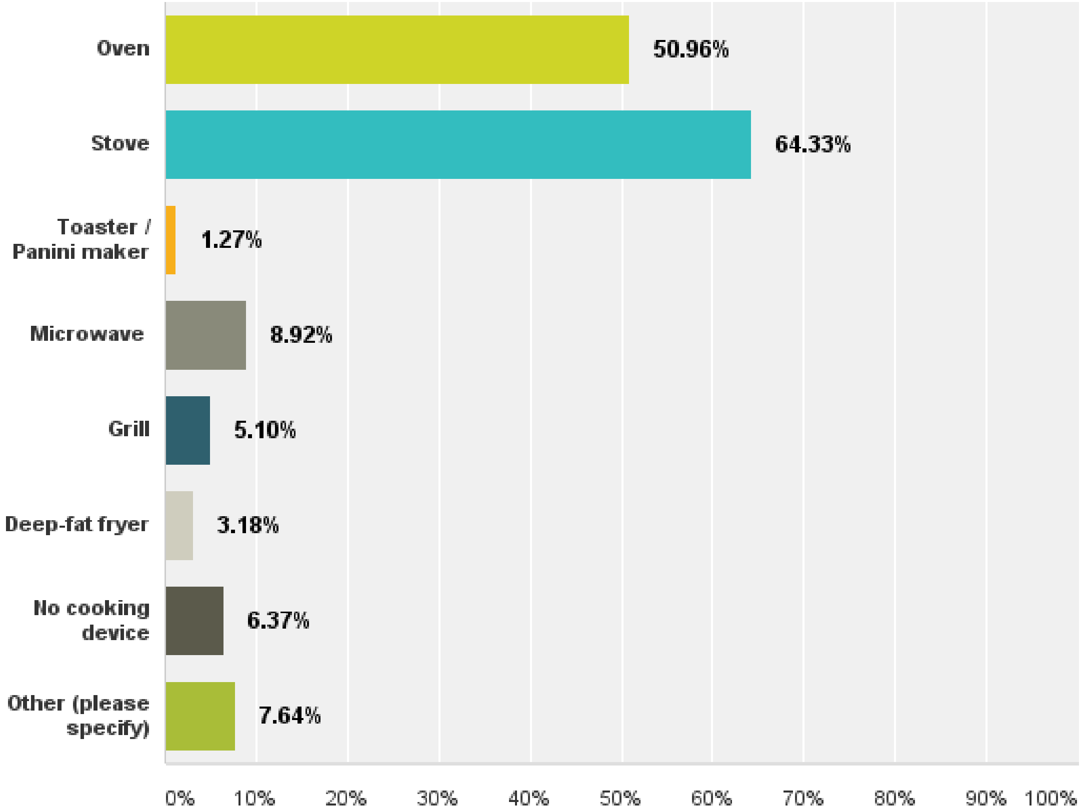
Respondents who had the following items in the previous day's dinner:

- Fresh meat or fish 75.16%
- Fresh vegetables 72.61%
- Carbohydrates in some form 71.97%

The figures above strongly suggest that the conventional main meal of protein/vegetable/carbohydrate persists in popularity with consumers in modern-day Dublin.

4.1.1.25 Dinner: Appliances Used

Q25: Dinner: Which of the following appliances were used to cook your dinner yesterday?



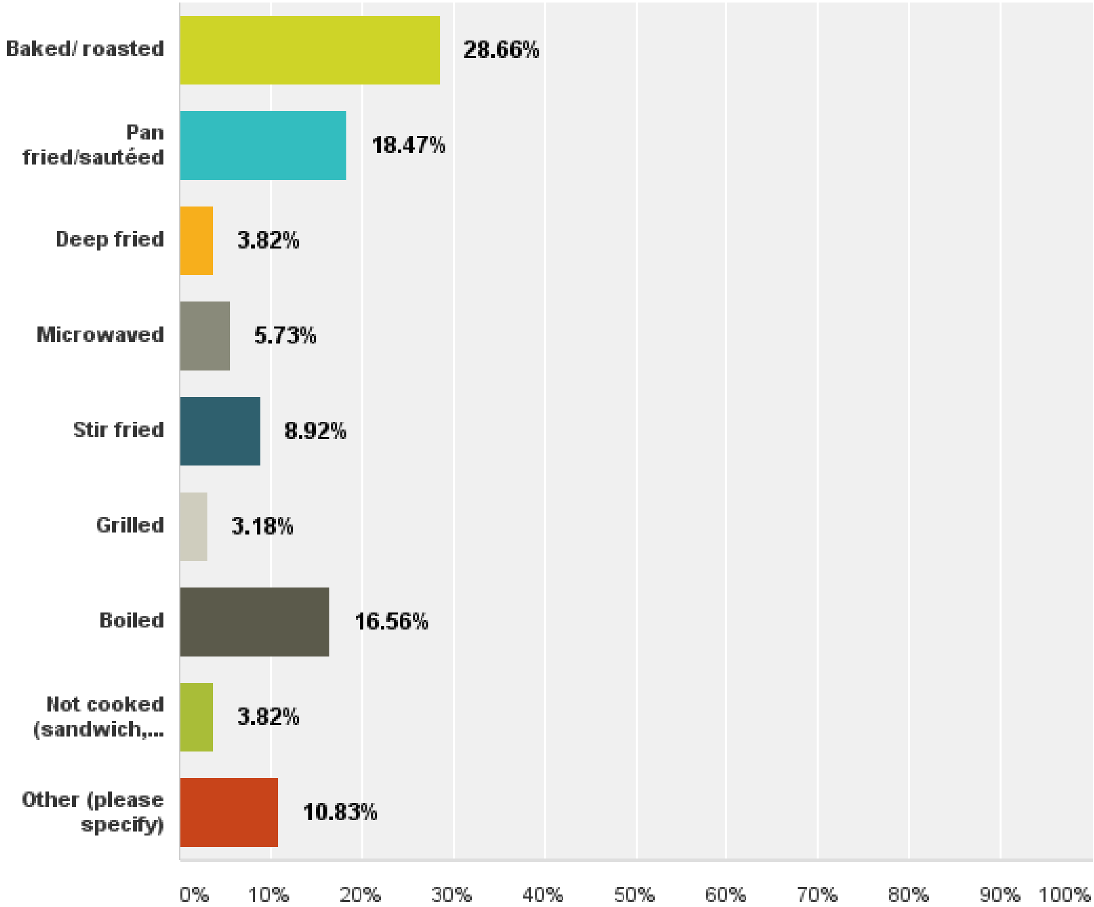
Respondents could tick more than one option so percentages may add up to more than 100%.

- 101 respondents (64.33%) said that the previous day's dinner was prepared using a stove.
- 80 respondents (50.96%) said that the previous day's dinner was prepared using an oven.
- 14 respondents (8.92%) said that the previous day's dinner was prepared using a microwave.
- 10 respondents (6.37%) said that the previous day's dinner was prepared using no appliances.
- 8 respondents (5.10%) said that the previous day's dinner was prepared using a grill.

- 5 respondents (3.18%) said that the previous day's dinner was prepared using a deep-fat fryer.
- 2 respondents (1.27%) said that the previous day's dinner was prepared using toaster/panini machine.
- 12 respondents (7.64%) said that the previous day's dinner was prepared using 'other'. When asked to specify the breakdown showed the following:
    - 5 respondents (3.18%) said that the previous day's dinner was eaten in a restaurant.
    - 2 respondents (1.27%) said that the previous day's dinner was a barbecue.
    - 2 respondents (1.27%) said that the previous day's dinner was prepared in a frying pan/on the hob, these answers belong with the option 'stove' therefore the author is adjusting the overall percentage answered for 'stove' upwards to take these two answers into account, therefore the adjusted total for stove is 103 (65.60%)
    - 2 respondents (1.27%) said they used a food processor/thermomix to prepare the previous day's dinner.
    - 1 respondent (.63%) had no dinner on the previous day.

4.1.1.26 Dinner: Methods of Cooking

Q26: Dinner: Was your dinner________?

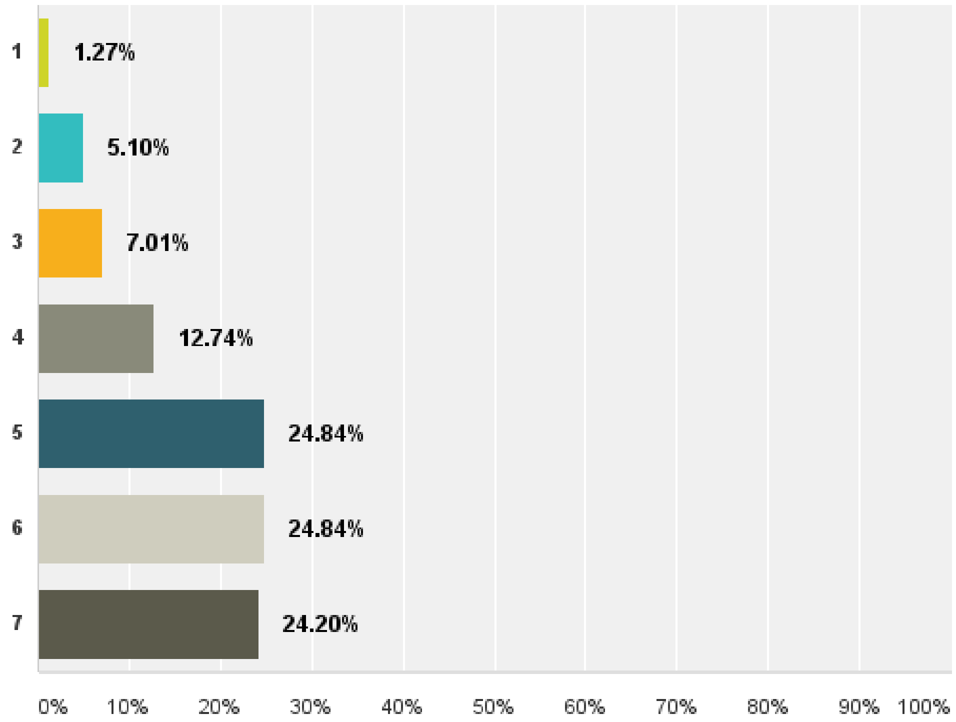


- 45 respondents (28.66 %) said that their previous day's dinner was baked/roasted.
- 29 respondents (18.47 %) said that their previous day's dinner was pan-fried/sautéed.
- 26 respondents (16.56 %) said that their previous day's dinner was boiled.
- 14 respondents (8.92 %) said that their previous day's dinner was stir-fried.
- 9 respondents (5.73 %) said that their previous day's dinner was microwaved.
- 6 respondents (3.82 %) said that their previous day's dinner was deep-fried.
- 6 respondents (3.82 %) said that their previous day's dinner was uncooked.
- 5 respondents (3.18 %) said that their previous day's dinner was grilled.

- 17 respondents (10.83%) specified ‘other’. When asked to specify the breakdown showed the following:
    - 8 respondents (5.09%) used a mixture of the above options - different elements for different ingredients.
    - 3 respondents (1.91%) said that their previous day’s dinner was barbecue.
    - 1 respondent (.63%) said they had a take-away meal delivered.
    - 1 respondent (.63%) said they had no dinner on the previous day.

4.1.1.27 Cooking from Scratch: Frequency in the last week

Q27: Cooking from scratch: In the last week, on how many days was the main meal prepared or cooked from scratch in your household? (i.e. using raw/fresh/primary ingredients)



- 39 respondents (24.84%) said they cooked from scratch on 6 days in the last week.
- 39 respondents (24.84%) said they cooked from scratch on 5 days in the last week.
- 38 respondents (24.20%) said they cooked from scratch on 7days in the last week.
- 20 respondents (12.74%) said they cooked from scratch on 4 days in the last week.
- 11 respondents (7.01%) said they cooked from scratch on 3 days in the last week.

- 8 respondents (5.10%) said they cooked from scratch on 2 days in the last week.
- 2 respondents (1.27%) said they cooked from scratch on 1 day in the last week.

These results show a clear bias in favour of preparing meals from scratch.

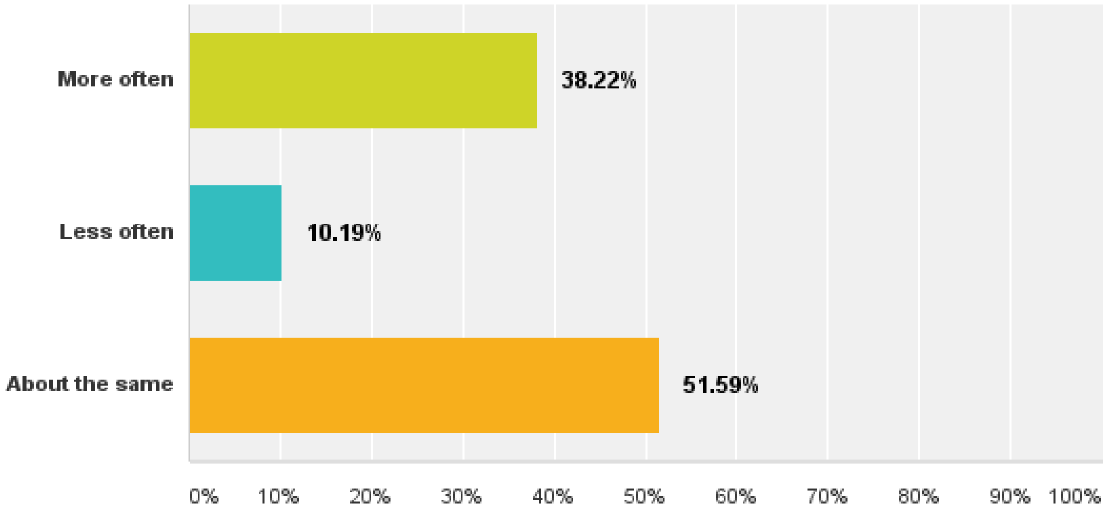
If the maximum amount of opportunities to cook the main meal is calculated in the following manner:

(***number of respondents) x (number of days in week)***

This results in 157 x 7 = 1099 opportunities within this survey to cook the main meal from scratch. Then if the amount of times all respondents said they cooked the main meal from scratch are added together, this gives a total of 886, or 80.61%. This in effect means that the cohort surveyed cooked from scratch 80.61% of the time which is high.

4.1.1.28 Cooking from Scratch: Change Since Recession

Q28: Cooking from scratch: Thinking back to start of the current recession (2007), would you say that you are preparing /cooking meals from scratch? (i.e. using raw/ fresh/primary ingredients)



- 81 respondents (51.59%) said that they were cooking from scratch about the same as before the recession.
- 60 respondents (38.22%) said that they were cooking from scratch more than before the recession.
- 16 respondents (10.19%) said that they were cooking from scratch less than before the recession.

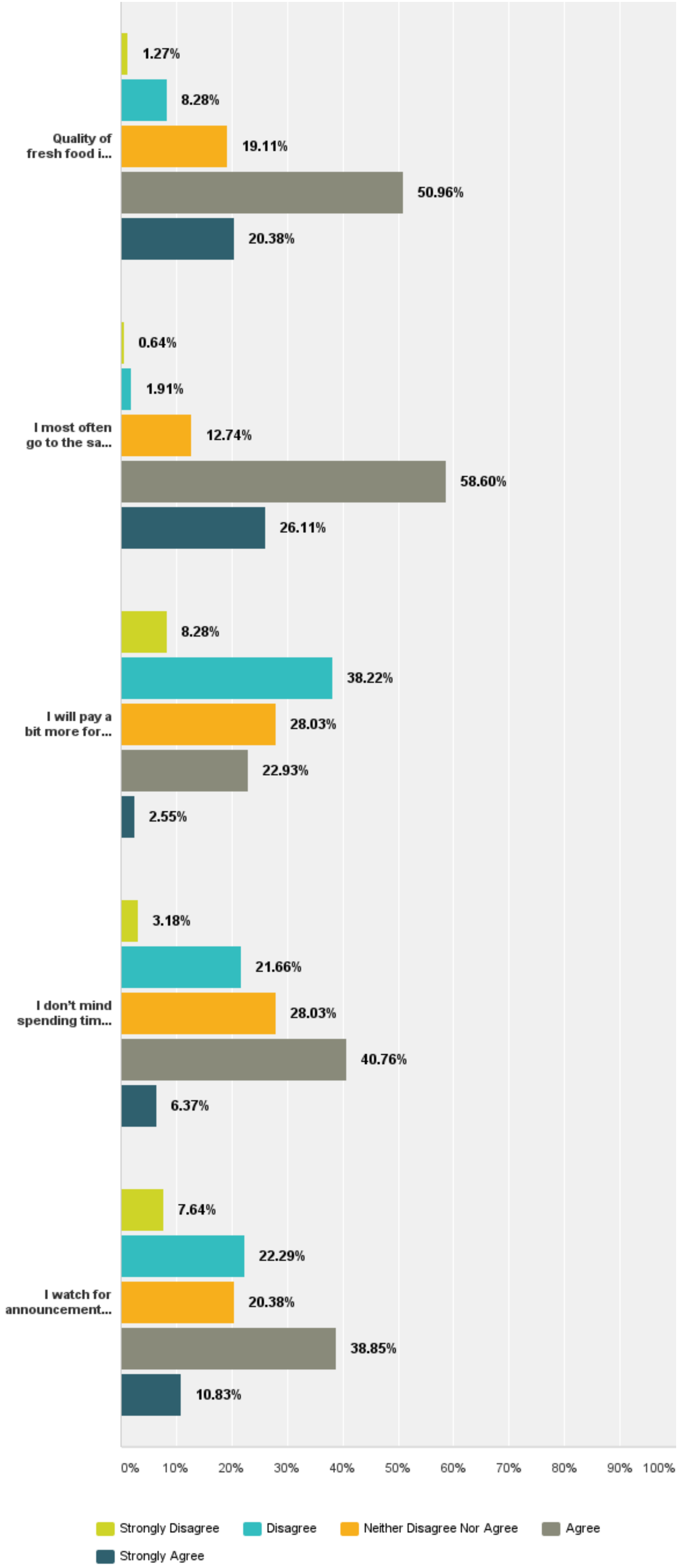
The figures show that the group who say they have been cooking from scratch more often are a significant cohort.

When Q.28 (above) was compared to Q.8 the following data emerged:

Of the 56.05% who said their household income in 2014 was less than in 2007 45.46% said that they were cooking from scratch more often. This statistic points clearly to financial concerns being a driver in households cooking from scratch.

4.1.1.29 Attitudes to Food Shopping (a)

Q29: Attitudes to food shopping: Please state how much you agree or disagree with each of the following statements.



	Strongly Disagree	Disagree	Neither Disagree Nor Agree	Agree	Strongly Agree	Total
Quality of fresh food is more important than price to me	**1.27%** 2	**8.28%** 13	**19.11%** 30	**50.96%** 80	**20.38%** 32	157
I most often go to the same store but look for the best value for money I can get	**0.64%** 1	**1.91%** 3	**12.74%** 20	**58.60%** 92	**26.11%** 41	157
I will pay a bit more for grocery shopping to get superior customer service	**8.28%** 13	**38.22%** 60	**28.03%** 44	**22.93%** 36	**2.55%** 4	157
I don't mind spending time when looking for a bargain	**3.18%** 5	**21.66%** 34	**28.03%** 44	**40.76%** 64	**6.37%** 10	157
I watch for announcements for sales or promotions on grocery	**7.64%** 12	**22.29%** 35	**20.38%** 32	**38.85%** 61	**10.83%** 17	157

Q.29 is a five part question which is attitudinal in construct.

When asked to rate the statements:

a) *'Quality of fresh food is more important than price to me'*

The following significant responses were tallied:

80 respondents (50.96%) agreed.

32 respondents (20.38%) strongly agreed.

A combined total of 112 respondents which equates to 71.34%, claim that the quality of fresh food is more important to them than price.

This figure demonstrates how the concept of fresh food is important to people. Despite austerity and recession, this figure when contrasted with those who disagreed or strongly disagreed (15 respondents equating to 9.55%) serves to underpin how important the availability of fresh food is to consumers.

b) '*I most often go to the same store but look for the best value for money I can get'*

92 respondents (58.60%) agreed.

41 respondents (26.11%) strongly agreed.

This gives an aggregate of 133 respondents (84.71%) agreeing in some form that they use the same shops but are always searching for value.

c) *'I will pay a bit more for grocery shopping to get superior customer service'*

60 respondents (38.22%) disagreed.

13 respondents (8.28%) strongly disagreed.

This gives a combined total of 73 respondents which equates to 46.49% of respondents.

44 respondents (28.03%) were ambivalent to the question neither agreeing nor disagreeing.

This data shows that of the respondents who expressed a preference a majority (64.60%) do not value customer service over value for money.

d) *'I don't mind spending time when looking for a bargain.'*

64 respondents (40.76%) agreed.

10 respondents (6.37%) strongly agreed.

This equates to 74 respondents (47.13%) who are prepared to spend time bargain hunting.

44 respondents (28.03%) were ambivalent to the question neither agreeing nor disagreeing.

This data shows that of the respondents who expressed a preference a majority (65.48%) were happy to bargain-hunt.

e) *'I watch for announcements for sales or promotions on groceries'*

61 respondents (38.85%) agreed.

17 respondents (10.83%) agreed strongly.

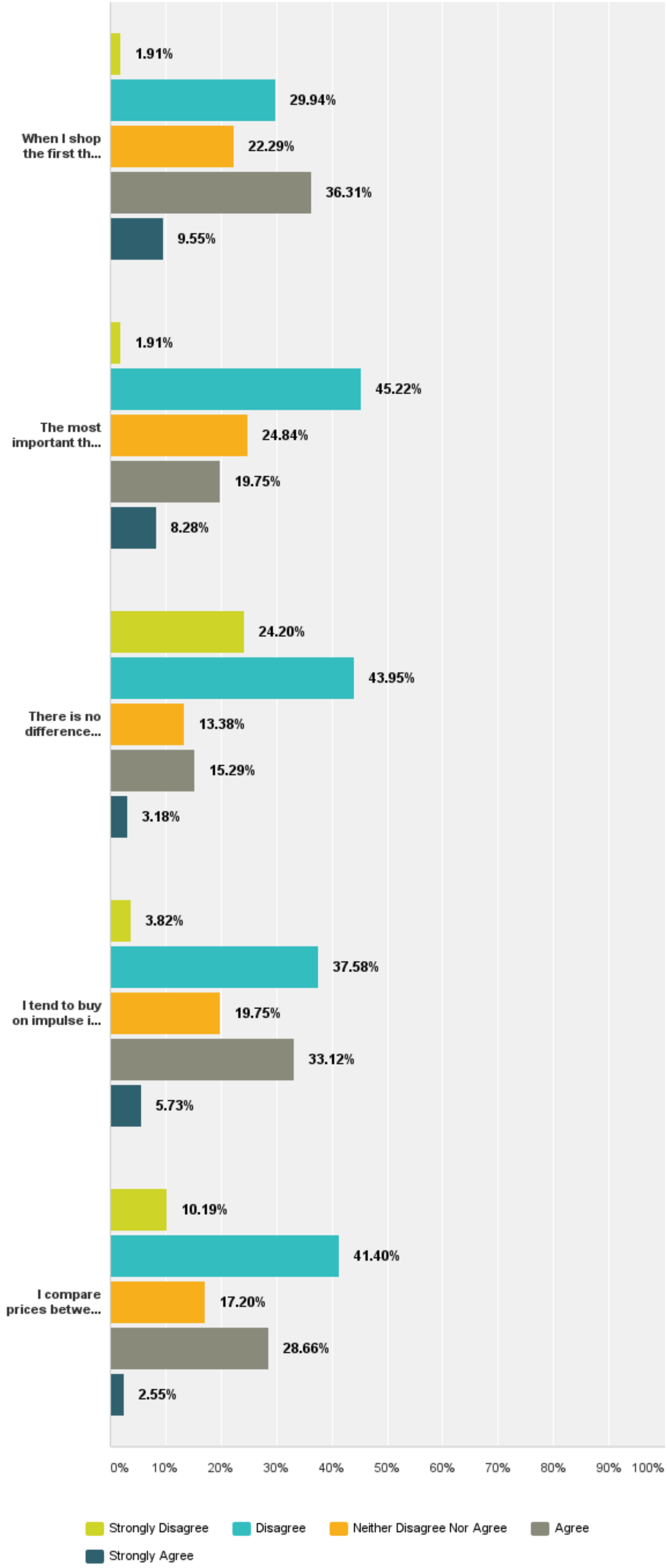
This equates to 78 respondents (49.68%) who are open to marketing and advertising materials regarding groceries.

32 respondents (20.38%) were ambivalent to the question neither agreeing nor disagreeing.

This data shows that of the respondents who expressed a preference a majority (62.4%) were happy to use promotional tools in-store and out to inform their grocery purchasing.

4.1.1.30 Attitudes to Food Shopping (b)

Q30: Attitudes to food shopping: Please state how much you agree or disagree with each of the following statements.



	Strongly Disagree	Disagree	Neither Disagree Nor Agree	Agree	Strongly Agree	Total
When I shop the first thing I look for is price	**1.91%** 3	**29.94%** 47	**22.29%** 35	**36.31%** 57	**9.55%** 15	157
The most important thing is price when grocery shopping	**1.91%** 3	**45.22%** 71	**24.84%** 39	**19.75%** 31	**8.28%** 13	157
There is no difference between the main supermarkets	**24.20%** 38	**43.95%** 69	**13.38%** 21	**15.29%** 24	**3.18%** 5	157
I tend to buy on impulse if I think that items are cheap	**3.82%** 6	**37.58%** 59	**19.75%** 31	**33.12%** 52	**5.73%** 9	157
I compare prices between outlets to see where I can buy the cheapest fresh food, even if I have to travel	**10.19%** 16	**41.40%** 65	**17.20%** 27	**28.66%** 45	**2.55%** 4	157

Q.30 is a five part question which is attitudinal in construct.

When asked to rate the statements:

a) ‘*When I shop the first thing I look for is price*’

57 respondents (36.31%) agreed.

15 respondents (9.55%) strongly agreed.

This equates to 72 respondents (45.85%) whose first point of reference in grocery shopping is price.

50 respondents (31.85%) disagreed or strongly disagreed suggesting a cohort for whom quality of food is paramount

The question above (Q.30) was compared to the answers given to Q.8 and a further set of patterns began to emerge.

Of the 31.85% people who disagreed or strongly disagreed with the statement: *When I shop the first thing I look for is price’*

52% were better off than in 2007

12% said their finances were the same as in 2007

36% were less well off than in 2007.

This shows a corollary between the cohort in a financially secure situation and the assertion that price is not the first thing that they look for. This contrasts with only 36% of the respondents who have seen household income shrink since 2007 who do not look for price first.

It is entirely unsurprising that the majority of those in the position of continuing or improved financial stability are not looking at price first.

b) '*The most important thing is price when grocery shopping'*

71 respondents (45.22%) disagreed

3 respondents (1.91%) strongly disagreed

31 respondents (19.75%) agreed.

c) *'There is no difference between the main supermarkets'*

38 respondents (24.20%) strongly disagreed

69 respondents (43.95%) disagreed

This gave a combined figure of 107 respondents (68.15%) who did not agree. This is a strong indication that there is a high recognition of brand identities in the food retailing sector.

d) '*I tend to buy on impulse if I think that items are cheap'*

59 respondents (37.58%) disagreed

6 respondents (3.82%) strongly disagreed

This gave a total of 65 respondents (41.40%) who did not agree. This figure is of interest because it closely mirrors the opposing viewpoint;

52 respondents (33.12%) agreed

9 respondents (5.73%) strongly agreed

This gave a total of 61 respondents (38.85%) who agreed. This indicates that whilst many are impulse-buying, conversely many are not. The pre-planning of shopping trips is likely to be the main driver behind this.

e) ‘I compare prices between outlets to see where I can buy the cheapest fresh food, even if I have to travel.’

65 respondents (41.40%) disagreed.

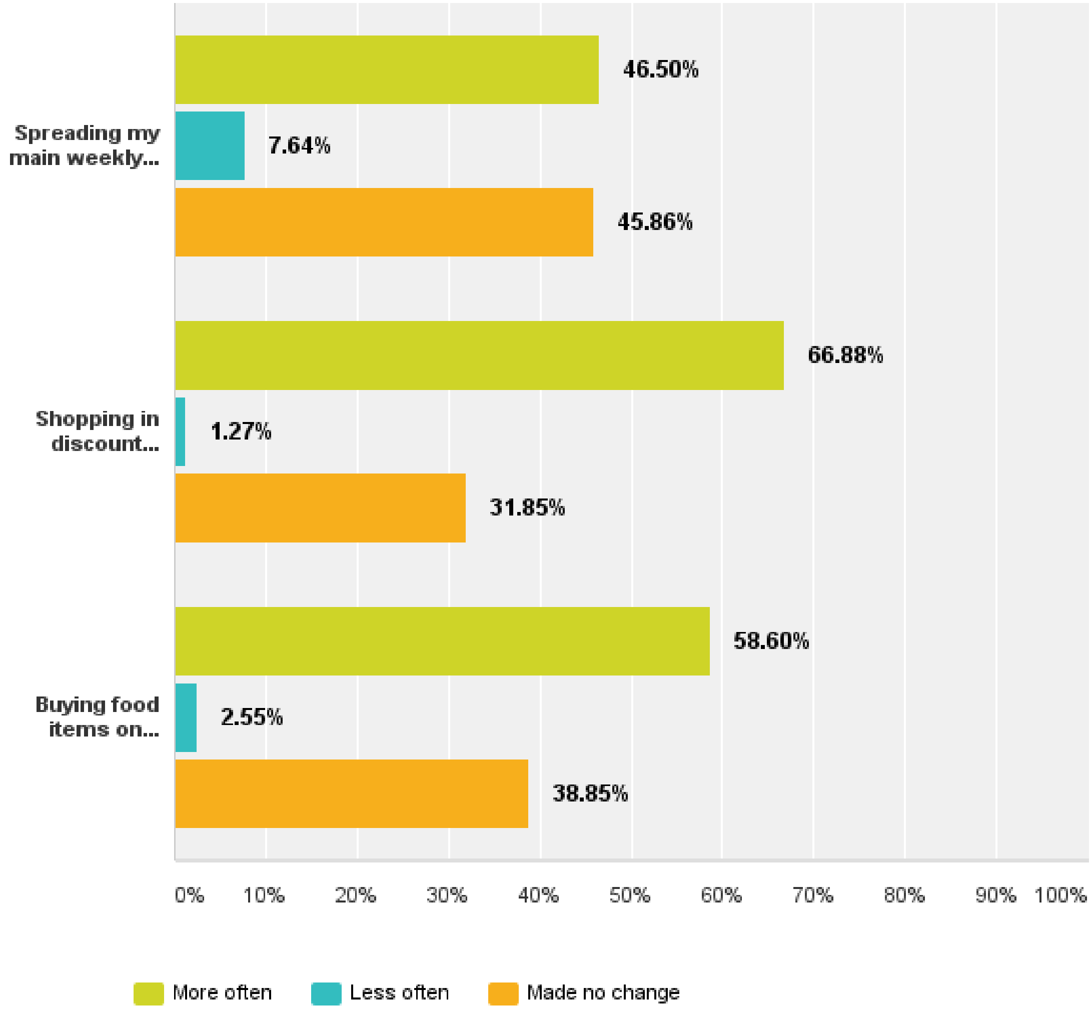
16 respondents (10.19%) strongly disagreed.

This gave a total of 81 respondents (51.59%) who did not agree with the statement.

The suggestion here is that the new ‘working poor’ are both cash and time-poor and cannot travel in search of value.

4.1.1.31 Changes to Shopping Habits

Q31: Thinking back to start of the current recession (2007), would you say that you are now doing any of the following more often, less often, or have you made no change?



	More often	Less often	Made no change	Total
Spreading my main weekly food shop across a number of shops to get the best value	**46.50%** 73	**7.64%** 12	**45.86%** 72	157
Shopping in discount retailers such as Aldi or Lidl for my main weekly food shop	**66.88%** 105	**1.27%** 2	**31.85%** 50	157
Buying food items on promotion as part of my main weekly food shop	**58.60%** 92	**2.55%** 4	**38.85%** 61	157

Q.31 is a three part question which examines shopping habits: When asked to think back to the start of the current recession in 2007, the respondents were asked whether they were doing any of the following more often, less often or the same. The responses were as follows:

a) *'Spreading my main weekly food shop across a number of shops to get the best value'*

> 73 respondents (46.50%) said they were doing this more often.
>
> 72 respondents (45.86%) said they made no change.
>
> Only 12 (7.64%) said they had made no change.
>
> The statistics here show the increase in multi-outlet shopping

b) *'Shopping in discount retailers such as Aldi or Lidl for my main weekly shop'*

> 105 respondents (66.88%) said more often.
>
> 50 respondents (31.85%) said the same.
>
> Only 2 respondents (1.27%) said they were doing so less often.

This demonstrates a strong loyalty towards these two retailers and a massive increase since 2007 of Aldi and Lidl

c) *'Buying food items on promotion as part of my weekly food shop'*

> 92 respondents (56.60%) said that they were buying promotional items on a regular basis, more often.

This shows the search for value in the weekly food shop has increased in importance since the beginning of the recession.

4.2 Interviews

To provide greater depth of understanding, ten personal interviews were conducted in the course of the primary research. A summary of each follows. The summaries are presented in chronological order, that is to say in the order the author conducted the interviews. This approach has been chosen to take into account any themes developing throughout the course of the interview process.

4.2.1 Summary of Interview #1 - AR

- **Interview Date:** 09/06/14
- **Interviewee Code:** AR
- **Interview Location:** Mezzanine, Ballsbridge Hotel, Pembroke Rd.,, Dublin 4.
- **Duration:** 4 minutes 27 seconds
- **Recorded by:** Sony IC Recorder model #ICD- PX312/PX312F
- **Profile of Interviewee:** AR is female, educated to third level and works in HR in a large multi-national company; she shares an apartment with a friend and is in the ABC1 demographic.

Summary: The interview took place in the mezzanine of the Ballsbridge Hotel, Pembroke Rd. Dublin 4. The mezzanine was chosen for its comfort and privacy which provided the optimum conditions for a recorded interview:

AR spoke of always searching for own-brand labels and the need to cut out waste. This was sometimes achieved by freezing a portion of a home cooked meal for subsequent use. The growing popularity of both Aldi and Lidl came immediately to the fore and AR asserts that previously there would have been, in her opinion, a 'stigma' surrounding the use of these retailers but that this stigma has gone. AR claims that the recession and its downward pressure on her food budget has meant that the amount of cheaper, processed foods she consumes has increased. She further commented that whilst she shops in Aldi and Lidl regularly, any shopping in Tesco is in search of bargains or 'own-brand' items. When asked about treating herself or self-gifting, AR responded that a common solution would be to get a 'meal for two' special offer in Tesco. AR said that she cooks far more now than previously, this is in part to financial constraints and in part to her relocating to Dublin away from the principal family unit and therefore having to ‘fend for herself’.

A full transcript for this interview is provided in Appendix 2.

4.2.2 Summary of Interview #2 - SL

- **Interview Date:** 09/06/14
- **Interviewee Code:** SL
- **Interview Location:** Redwood Suite, Ballsbridge Hotel, Pembroke Rd., Dublin 4.
- **Duration:** 3 minutes 25 seconds
- **Recorded by:** Sony IC Recorder model #ICD- PX312/PX312F
- **Profile of Interviewee:** SL is female, in her early fifties and the single mother of three children, two of whom are teenagers at school and live at home. Sandra works as a catering assistant in a large suburban pub. She lives in Ballyfermot and self-identifies as being working class.

Summary: The interview took place in the Redwood Suite in the Ballsbridge Hotel, Pembroke Rd, Dublin 4. The suite was chosen for privacy which provided good conditions for a recorded interview.

SL reports that she cooks the family meal from scratch every day and says this has increased from pre-recession times. The subject discussed take-away food as an alternative to cooking at home and said that take-away food consumption had receded since the onset of austerity and that take-away food consumption would have been much higher previously. SL says that shopping in Dunnes and Tesco is no longer feasible and she uses Aldi and Lidl for the weekly food shopping now, the factors in this were not just fiscal but also the geographical element as SL claimed that six or seven years ago Aldi and Lidl were not available everywhere.

SL further claimed special offers proliferated and were an important part of her shopping ritual and also that special offers extended into local Chinese restaurants in a bid to claim market share, adding that many such businesses (Chinese restaurants) were closing down.

SL spoke about Aldi doing vegetable offers for 29 cent and 49 cent and this being an incentive to purchase.

On the subject of how the family would treat itself, SL said a take-away meal would be the solution, she also claimed that if she had to work extra hours this would create the extra money to pay for a take-away whilst leaving her without the time to prepare a home-cooked meal and also as tiredness would be a factor it meant that the take-away option was a welcome deviation from the routine.

A full transcript for this interview is provided in Appendix 3.

4.2.3 Summary of Interview #3 - LT

- **Interview Date:** 10/06/14
- **Interviewee Code:** LT
- **Interview Location:** Redwood Suite, Ballsbridge Hotel, Pembroke Road, Dublin 4
- **Duration:** 2 minutes 54 seconds
- **Recorded by:** Sony IC Recorder model #ICD- PX312/PX312F
- **Profile of Interviewee:** LT is male, in his early twenties and lives with his mother in the north inner city. LT shares the shopping chores with his mother and does most of the cooking for both of them. He self-identifies as being working class.

Summary: The interview took place in the Redwood suite in the Ballsbridge Hotel, Pembroke Rd, Dublin 4. The suite was chosen for privacy which provided good conditions for a recorded interview:

LT mentioned shopping in multiple outlets a number of times during the course of the interview and also claimed that the family meal was usually made ‘from scratch’. LT signalled the shrinking of take-away usage in comparison to pre-recession times and also commented that as a family, they no longer buy any luxuries and indeed bought nothing they didn’t need. LT is a regular user of Aldi and Lidl and spoke about using these retailers as opposed to Dunnes & Tesco which would have been the previous choice. LT also alluded to the geographical expansion of Aldi and the subsequent availability in other parts of Dublin which affords people the opportunity to shop around.

LT claims to be cooking from scratch as often now as in pre-recession times, however the shopping around and the need to work with a restricted budget had ‘definitely’ made him a better cook.

The family uses take-away food as a dinner solution far less than previously and this is entirely due to budgetary constraints. The family on occasion will eat out but this is a rarity also.

A full transcript for this interview is provided in Appendix 4.

4.2.4 Summary of Interview #4 - VK

- **Interview Date:** 10/06/14
- **Interviewee Code:** VK
- **Interview Location:** Lobby of Ballsbridge Towers Hotel, Dublin 4
- **Duration:** 3 minutes 40 seconds
- **Recorded by:** Sony IC Recorder model #ICD- PX312/PX312F
- **Profile of Interviewee:** VK is female, in her early fifties and lives with husband and two adult children. She works in an accounting practice and self-identifies as being middle class.

Summary: The interview took place in the lobby area of the Ballsbridge Towers Hotel, which was chosen for its convenience for both interviewer and interviewee, and the seclusion and quiet it offers, making it ideal for recorded interview purposes:

VK stated that her weekly domestic food shop had migrated from Superquinn to Aldi and that she usually purchases fresh food and therefore it has to last. Processed foods are not usually purchased at all for the household. This is for strictly budgetary reasons, and this marks a change from pre-recession purchasing habits where expensive ready-meals would have been a regular solution. VK also said that frozen foods are not often purchased; this is due to her son developing an interest in cooking and cuisine. The emergence of her son’s interest in food coupled with the enforced change of purchasing habits has contributed to VK being a better cook now than previously.

VK claims that take-away food as a meal solution has lessened since the recession and also that she has become far more conscious of what she purchases whereas this was not the case previously.

VK claimed that treating oneself once a week is very important and that her ideal treat would be to visit Fallon & Byrne in town and eat there or purchase foodstuffs there for subsequent consumption at home.

A full transcript for this interview is provided in Appendix 5.

4.2.5 Summary of Interview #5 - DN

- **Interview Date:** 10/06/14
- **Interviewee Code:** DN
- **Interview Location:** Lobby of Ballsbridge Towers Hotel, Dublin 4
- **Duration:** 3 minutes 25 seconds
- **Recorded by:** Sony IC Recorder model #ICD- PX312/PX312F
- **Profile of Interviewee:** DN is male, in his early thirties and lives with his partner who is a vegetarian. DN works in payroll for a large company in Dublin. He is originally from Tallaght and now lives in Finglas. He strongly self-identifies as being working class.

Summary: The interview took place in the lobby area of the Ballsbridge Towers Hotel. This was chosen for its convenience for both interviewer and interviewee, and the seclusion and quiet it offers, making it ideal for recorded interview purposes:

DN purchases most of the domestic weekly shopping in Aldi and Lidl as he says the prices are better particularly for vegetables. DN cooks from scratch at least four times a week and this represents an increase from pre-recession days, DN claims that the main driver for this is budgetary. DN will cook vegetarian lasagne from scratch only utilising dried pasta and using the bulk of the rest of the ingredients from raw including tomato sauce, DN says this is due to Aldi and Lidl having the products available cheaply. Take-away food is an alternative to home cooking and DN has seen no reduction in the frequency of these meal solutions.

DN claims that most people he knows are very price conscious and would know the difference between Dunnes and Aldi and Lidl as regards price, and he also says that the only time he would visit Tesco would be to visit the frozen section to buy frozen vegetables that were on offer or exceptionally good value. DN believes that he is a better cook now than previously due to high level of participation in preparing his girlfriend's vegetarian meals.

As regards a treat, DN says that his usual method of giving himself and his girlfriend a treat is to buy food from Marks & Spencer's food-hall, When questioned further he said that a meal for two special deal would be choice at M & S.

A full transcript for this interview is provided in Appendix 6.

4.2.6 Summary of Interview #6 - KC

- **Interview Date:** 10/06/14
- **Interviewee Code:** KC
- **Interview Location:** Lobby of Ballsbridge Towers Hotel, Dublin 4
- **Duration:** 3 minutes 15 seconds
- **Recorded by:** Sony IC Recorder model #ICD- PX312/PX312F
- **Profile of Interviewee:** KC is female, in her early thirties and has lived in Dublin for nine years. She is of Anglo-Indian heritage and has recently married and started a family. KC works in finance for a large company in Dublin. She self-identifies as being in the ABC1 demographic

Summary: The interview took place in the lobby area of the Ballsbridge Towers hotel. This was chosen for its convenience for both interviewer and interviewee, and the seclusion and quiet it offers, making it ideal for recorded interview purposes:

KC says that her purchasing habits have altered radically and that whereas she used to shop in Tesco she now uses Aldi and Lidl. Her primary concern is to obtain better prices for food. KC reports that she cooks the main meal of the day from scratch at least five times a week and this represents a large increase. Her meal solutions on other days are to eat out although she also says that it is very expensive to eat out. Another food solution on days when she does not cook is to buy take-away food for home consumption. KC claims that her purchasing habits are largely a financial decision and that she is always aware of special offers and bargains. KC also says that she 'religiously' reads the direct marketing material from Aldi and Lidl that comes through the letterbox as this helps her plan the weekly shopping particularly mentioning the 39 cent vegetables and the 'six a week' (this is a reference to Aldi's super-six weekly offers). KC also said that she would plan her meals around ingredients bought on offer, and search for suitable dishes and recipes that match these offers.

KC said that when she wanted to treat herself and family, she had a number of food solutions; one of which is if entertaining, to purchase good quality fish or meat and cook it for her guests; the other being that she habitually gets a take-away meal delivered on Saturday nights.

A full transcript for this interview is provided in Appendix 7.

4.2.7 Summary of Interview #7 - DB

- **Interview Date:** 10/06/14
- **Interviewee Code:** DB
- **Interview Location:** Ballsbridge Hotel, Dublin 4
- **Duration:** 4 minutes 46 seconds
- **Recorded by:** Sony IC Recorder model #ICD- PX312/PX312F
- **Profile of Interviewee:** DB is female, in her early forties and is the executive chef of a large four-star hotel in Dublin. DB lives in the city centre with her partner who also works in the hospitality industry. DB strongly self-identifies as being middle class.

Summary: The interview took place in the bar area of the Hotel. This was chosen to balance the busy schedule of the interviewee and the privacy needed to conduct a recorded interview:

DB purchases her domestic weekly food shop at Aldi and Lidl which represents a move from Superquinn which was the preferred purchasing solution before the recession, DB also claims that supermarkets like Tesco cannot compete with Aldi and Lidl on a quality basis as the two German retailers have such a high turnover of fruit and vegetables, their products are fresh at all times and in her opinion unequalled by that of Tesco. DB claims that Aldi and Lidl cannot compete quality-wise regarding raw meat and it is this perceived lack of quality that inhibits her purchasing meats from either of these retailers. DB will shop in Aldi and Lidl with her aunt as they carpool for their shopping trips and split the fuel costs. This has led to DB and her aunt often splitting special offers such as buy-one-get-one-free and this behaviour is applied to all special offers that they find appealing.

DB says that she is far more price-conscious now than heretofore, and made a point that before the current recession she didn't know the price of a pint of milk but claims that she certainly does now. On the days when the main meal is not prepared at home the current solution is either a take-away or a meal out, but both of these solutions have decreased in frequency since the recession. In the case of eating out it has decreased from four times a month to once a month, and this is underpinned by DB's assertion that people are looking for more value in restaurants.

DB batch-cooks at the week-end and chills her food for later in the week and is heavily influenced by special offers. The special offer motif is carried over to her wine purchases where she has a loyalty card for one of Dublin's major alcohol retail chains and utilises the points system that ensures discounts on a regular basis, This has, according to DB replaced her visits to the pub as she now will drink wine at home. This too is financially driven.

On the subject of treating herself DB claims that a take-away meal or a meal out or a bottle of wine would be the chosen method of self-gifting and furthermore the savings she makes at Aldi and Lidl are in fact what pay for her treat.

A full transcript for this interview is provided in Appendix 8.

4.2.8 Summary of Interview #8 - LOC

- **Interview Date:** 11/06/14
- **Interviewee Code:** LOC
- **Interview Location:** In the interviewee's home in Dublin 7.
- **Duration:** 4 minutes 43 seconds
- **Recorded by:** Sony IC Recorder model #ICD- PX312/PX312F
- **Profile of Interviewee:** LOC is female, in her early forties and is married with three children. LOC works full time as a child-minder. She strongly self-identifies as being working class.

Summary: The interview took place in the interviewee's home as this suited both her and the interviewer's schedule. It offered convenience and privacy for a recorded interview:

LOC claimed that her weekly domestic shopping was bought in Aldi and Lidl and that because 'money is tight' this was the preferred solution, Tesco was used for certain branded items and for top-ups however LOC insisted that in Tesco nothing else would be purchased aside from the usual few items only available there or items on promotional offer. LOC stated that in her opinion even though money is tight due to the recession she is getting the same weekly shop as in pre-recession times, however she claims to be getting it cheaper. This is achieved by using the 'German Discounters' and by adhering to her self-imposed policy of looking for special offers. LOC also said pointedly that there was 'no shame' in shopping at Aldi and Lidl anymore, and that she was a user of these stores as she had become far more 'price aware'.

LOC claims that she was a good cook in pre-recession days and as she cooks almost every day she feels she is probably still a good cook. The incidence of her cooking the family meal in the home from scratch has increased since the recession began and LOC indicated she would not be inclined to purchase frozen or processed foods in great quantities.

Meals outside the home were rare but a trip to a fast-food restaurant with her children or to a local bistro with all the family were occasional events. Treating the family would involve; eating out or perhaps a bottle of wine and a good steak at home, the point of which she claimed was using expensive ingredients but prepare them at home.

A full transcript for this interview is provided in Appendix 9.

4.2.9 Summary of Interview #9 - ME

- **Interview Date:** 10/06/2014
- **Interviewee Code:** ME
- **Interview Location:** In the interviewee's home in Dublin 3.
- **Duration:** 3 minutes 41 seconds
- **Recorded by:** Sony IC Recorder model #ICD- PX312/PX312F
- **Profile of Interviewee:** ME is in her early fifties, an IT trainer and lives with her husband and two adult children. ME self-identifies as being middle class. ME is in the ABC1 demographic

Summary: The interview took place in the interviewee's home as this was deemed the most suitable for all concerned. The kitchen offered a quiet private space in which to record the interview:

ME spoke about the recession changing her domestic food purchasing habits, citing the prices of 'Irish' supermarkets as being prohibitive which makes the alternatives of Aldi and Lidl far more attractive. ME said that she cooks in the home just as much today as she did during the Celtic Tiger years, but she admits that her cooking has got better and that she cooks most meals from scratch. ME also said that in her opinion, many people were attempting to keep their weekly shop at a similar size to pre-recession levels and were achieving this by purchasing more vegetables than previously and by substituting certain meats with cheaper meat and using sausages and eggs instead of prime cuts of butchers meat. ME felt that her family's consumption of take-away foods had not altered significantly since the onset of recession. When asked about self-gifting or a treat for themselves ME was unequivocal in stating that her husband would always have good quality steak as a treat and this was unlikely to change. ME and family enjoy steady, uninterrupted income levels and have one son at home who is a student and another adult son who is working full-time but often works away from home. This leads to the family shopping increasing or decreasing on a week to week basis and ME indicated that special offers were usually of interest to her.

A full transcript for this interview is provided in Appendix 10.

4.2.10 Summary of Interview #10 - COD

- **Interview Date:** 11/06/14
- **Interviewee Code:** COD
- **Interview Location:** In the interviewee's home in Dublin 9
- **Duration:** 4 minutes 34 seconds
- **Recorded by:** Sony IC Recorder model #ICD- PX312/PX312F
- **Profile of Interviewee:** COD is male, in his late forties and is a successful businessman. He lives with his wife and four children between the ages of ten and sixteen. COD is in the ABC1 demographic

Summary: The interview took place in the interviewee's home as this was deemed the most convenient location for all concerned. The interviewee runs a large part of his business from home and the office area provided the quiet and privacy needed to conduct a recorded interview:

COD insisted that recession and austerity had not affected the domestic cooking habits at home. He did however claim that the food purchasing habits had altered substantially. COD and family have high levels of personal income and as such are not fiscally challenged by the recession, yet this has not stopped them from drifting towards using Aldi & Lidl on a regular basis, largely led by the group dynamic associated with their business and social lives. Most of their peers and colleagues are using the German discounters and they have followed suit. COD has good levels of income and good levels of leisure time and spoke of challenging himself to produce the main meal of the day for the entire family (6 people) for €5 or less, This was described as a 'fun challenge' and therefore not subject to economic necessity. COD also claims that Aldi and Lidl have 'fed the country' since the recession started, he also alluded to the perception that people were not concealing their use of the German discounters now whereas it was implied that this had not been the case previously.

The usual solution in the absence of a home-cooked family meal is a take-away or occasionally a meal out. When asked about what the family would do as a treat, the answer was unequivocally a take-away. The main purchasing whilst largely based around the German discounters was described by COD as happening in ‘multiple outlets’.

A full transcript for this interview is provided in Appendix 11.

4.3. Content Analysis

4.3.1 Coding System for Interviews

The content analysis process was undertaken in order to chart any recurring themes or motifs during the interviews and any questions within the questionnaire where the respondents were asked to choose 'other - please specify'. Transcripts of the interviews were printed and the responses forensically examined. Whenever a topic was mentioned by a respondent, it was noted and once all the interviews were examined, it was possible to detect a pattern forming. By this method, the author completed an analysis of the keywords and phrases that were repeated by the respondents.

A coding system was adopted in order to aid identification during the process of content analysis.

For the interviews, this consisted of allocating each respondent in initialised code name as follows:

#1 AR	#6 KC
#2 SL	#7 DB
#3 LT	#8 LOC
#4 VK	#9 ME
#5 DN	#10 COD

For the answers included from the questionnaire, these were allocated the same numbers as in the original questionnaire. (See Appendix 1 Survey Questionnaire.) For analysis purposes they will be coded as follows:

As there were 157 valid respondents each will be assigned a number from 1-157. For example, an answer to question 12 from respondent 45 would be coded Q12/R45.

4.3.2 Content Analysis - Interviews

Figure 3: Word Cloud Content Analysis - Interviews

Throughout the qualitative research which consisted of interviews and semi-open questions from the questionnaire, a number of themes and patterns became apparent. The questionnaire covered 157 respondents and the interviewees were all drawn from this cohort, therefore a large number of opinions were present. In order to analyse the content of the interviews and the qualitative segments of the questionnaire answers, the author conducted a keyword count to establish exactly which themes were recurring within the sample. Sorted by frequency from highest to lowest the top twenty results were as follows:

	Phrase/Expression/Word	Frequency
1	Shop	23
2	Take-Away	20
3	Buy	20
4	Aldi	19
5	Lidl	16
6	Tesco	11
7	Less	10
8	Cook	9
9	Money	9
10	Veg/Vegetables	8
11	Cheaper	7
12	Myself	7
13	Conscious	6
14	Value	6
15	Treat	6
16	Recession	3
17	Fresh	3
18	Deal	3
19	Bargain	3
20	Stigma	2

Figure 4: Content Analysis - Keyword Frequency

The analysis showed the following:

N.B. Keywords in sentences are in bold.

4.3.2.1 Shop

The word shop was understandably a recurring motif. It flagged twenty three times in interviews and interestingly on two occasions it was immediately followed by the word around. 'Shop around' was a theme mentioned by KC & LT in their interviews.

KC said: '*If you **shop around** what's on special offer, you have your Aldi, you have your six a week that you get for 39 cent and stuff*'.

LT's comment was: *'There is Aldi's in Tallaght and all that now, when years ago there wasn't. So they can **shop around** everywhere'*

Most interviewees referred to shops in terms of their brand, for example:

VK 'I ***shop*** *in Aldi now mostly, because it's cheaper*.'

Many other interviewees answered in a similar vein:

AR '*I'd **shop** in Lidl far more than maybe I would have before'*

COD '*We **shop** from multiple outlets.'*

ME *'They were starting to **shop** in Lidl and Aldi'*

Most other interviewees mentioned shops in simple functional terms such as DB who said:

DB '*Sometimes if I'm at home and my aunt and we'd **shop** together, because we pool the car'*

Or DB again, mentioning timing and frequency:

DB *'I **shop** on a Saturday and on a Sunday'*

The inherent nature of the word 'shop' and its viability as both a noun and a verb account for its appearance at the top of the keyword list, beyond that it is instructive as an identifier (Aldi, Lidl, Tesco and so on).

4.3.2.2 Take-Away

The subject of take-away food came up twenty times in interviews (take-away food formed part of the structure of the questions).

Many respondents considered take-away food as an option instead of cooking, however a large number of those interviewed reported that their expenditure on take-away food had been severely curtailed and most in fact had witnessed the paradigm shift where the take-away meal option had become an occasional event and had altered in nature from being a meal solution when the respondent was too tired or busy to cook to one where it had in fact become a treat or self-gift perhaps at the weekend.

COD *'possibly might be a little bit less **take-away**'*

COD *'we'd probably have a **take-away** or occasionally (or) eat out, but **take-away**'*

COD is referring here to take-away meals being both a replacement for home-cooked meals and as a treat. COD also alludes to the diminishing frequency of both

DB *'when I would have earned more money, it would have been simpler to get a **take-away'***

DB *'A **take-away** is a treat now' / 'which means I can afford the **take-away**'*

DB here contrasts the level of take-away with the comparative lack of discretionary income to previously, furthermore DB now reports that take-away food is a treat and finally DB claimed that the point was that the take-away was purchased with money saved by doing the grocery shopping in discount retailers

VK *'I suppose, people can't afford eating out, can't afford **take-away**s'*

VK *'… can't afford **take-away**s at all'.*

VK quite clearly states here that 'people' cannot afford take-away food in the current economic climate.

KC *‘once a week we always get a **take-away**, say every Saturday night’*

KC states here how take-away food has become a weekly ritual and is considered a treat

LT *Say one day, we’d get a **take-away***

LT is referring to using take-away food as an alternative to home-cooking

LT *I think we probably got more **take-away**s six or seven years ago.*

LT here is referring to the diminishing frequency of take-away meals

ME *Usually get a **take-away**.*

ME is referring to using take-away food as an alternative to home-cooking

SL *It would probably be a **take-away**.*

This is in answer to a question regarding the days when a home-cooked meal was not prepared

SL *We would have got more **take-away**s, before.*

SL is referring to the diminishing frequency of take-away meals

SL *But even the likes you see the Chinese restaurants are all closing down or they are all doing special meal deals now for, that wouldn’t have been available seven years ago.*

SL claims that many take-away restaurants – in particular Chinese restaurants are either closing down or attempting to gain (or re-gain) market share by offering deals to customers.

4.3.2.3 Buy

The word buy was repeated twenty times during interviews. As part of the substantive question of this study regards purchasing, this is not an unusual development.

Most interviewees used the word to describe their fundamental purchasing habits.

AR *I'd like to say I'd **buy** the ingredients, and make it up;*

AR is describing her attitude to a set question regarding the making of a shepherd's pie for dinner

DB *'I wouldn't necessarily **buy** my meat there, but I would certainly **buy** cleaning products'*

DB is describing inherent attitudes towards Aldi and Lidl

DB *'I'd **buy** the ingredients and make it myself.*

DB is describing the attitude to a set question regarding the making of a shepherd's pie for dinner

DB *'we'll **buy** the two for one offers'*

DB is discussing the sharing of two-for-one items with an aunt whom DB habitually shops with, in order to car-pool.

DN *'Yes, so we would make vegetable lasagne, so we would basically we'd **buy** the pasta sheets from Dolmio'*

DN is describing the attitude to a set question regarding the making of a shepherd's pie for dinner. DN's partner is vegetarian so the question was changed to reflect this.

KC *'I would **buy** processed foods, but I'd get whatever is on special offer in the shops, is what I'd usually go for, for fresh fruit and veg'*

KC is describing the attitude to buying special offers. Whilst fresh food (fruit and veg) are the usual target, the shopping remit extends to almost anything that is on offer, this includes processed foods.

KC *'I'd go out and I'd **buy** like you said, expensive piece of fish'*

KC describes the buying habit for a dinner party for guests or a treat for KC and partner.

LOC *.'I wasn't a huge fan of frozen anyway, but now I definitely wouldn't **buy** anything'*

LOC is explaining here how the relative low cost of fresh fruit and veg available at Aldi and Lidl makes the purchase of fresh foodstuffs affordable and contrasts with LOC's long held aversion to frozen food,

> 'LOC *We all have our few bits that we can't **buy**, where we do our main shop. For example there are a few things, we just love that Tesco do and we have **buy** them there. But other than that, it's price.'*

LOC is describing how buying the weekly shop in Aldi does not satisfy all LOC's purchasing needs and explains the necessity of visiting Tesco for certain items in certain cases. In all other cases LOC is guided by price point.

> LOC *'Yes, in our case yes, or if you were going to get a nice bottle of wine, then it would be **buy**, I suppose it's stereotypical but a nice steak and a nice bottle of wine'*

LOC is describing buying habits in answer to a question regarding a treat.

> LT *'Yes, we **buy** less now and we look around different places now'*

LT is describing the new reality of the weekly shop, explaining that buying trips often involve multi-outlet comparisons.

> LT *'No, not really now, we don't **buy** luxury foods anymore really'*

LT is explaining that since the start of the recession the family unit do not buy non-essential 'luxury' foods.

> ME *'just **buy**ing cheaper meat'*

ME claims that people are coping with a shrunken food budget by buying less expensive meat, ME claimed that some people would buy sausages instead of chops and further that people were using more eggs in their diet.

> ME *'my husband would **buy** steaks definitely it's one of his treats'*

ME is describing buying habits in answer to a question regarding a treat.

> VK *'I don't **buy** anything like ready meals or anything prepared or anything like that'*

VK is describing attitudes regarding processed foods, VK has a son who VK describes as a 'foodie' consequently VK tends to exclude processed or pre-prepared foods from the domestic weekly grocery shopping.

4.3.2.4 Aldi

Aldi are one of the German-owned supermarkets (the other being Lidl). They opened their first store in Ireland in 1999. Aldi have 105 stores in Ireland (Republic) and are currently still expanding.

N.B. Much of the commentary surrounding Aldi is the same as that surrounding Lidl. This is an indication of how the two retailers are perceived and in the public's view they seem to be very closely associated, to the point where they are almost indiscernible from one another. With this in mind the author does not intend to offer the same critique for identical statements, rather the author will attempt to offer a fresh and concise parsing of these statements. It is hoped this will avoid repetition and make the document flow more easily.

> AR *'people have ignored the stigma, so like I said that were attached to* ***Aldi'***

AR discusses here the perspective of Aldi held by many and the change those perspectives have undergone

> COD *'everyone at the club (GAA.) would be talking about* ***Aldi*** *and Lidl and the value you know'*

COD is discussing the prevalence of usage of Aldi within the wider community as shown by the opinions of COD's friends and colleagues in his local GAA club.

> COD *'it seems to me that it's Lidl and* ***Aldi*** *that have fed the country since the crash'*

COD has extrapolated the anecdotally-expressed localised rates of usage of Aldi (and Lidl) and has applied that paradigm nationally. As an opinion without research it is instructive as to the position that the German discounters hold within the national psyche.

DB *I would have been a Superquinn girl, but my mother introduced me to Lidl and* ***Aldi.***

DB is discussing the change of habitual retailer indicating a shifting position from one of strong brand loyalty to the more pragmatic approach introduced by DB's mother.

DN Well the main reason why we do the cooking from scratch now, is because you can get vegetables cheaper in places like **Aldi** and Lidl.

DN *'getting vegetables and stuff like that, we would go to* ***Aldi*** *and Lidl and if we were cooking tomato based sauce or something like that, we go there, get onions and garlic and stuff like that'*

DN is reporting on the main reason for using Aldi, DN's partner is a vegetarian and the ability to purchase cheap vegetables a key driver for DN and partner, a point underlined in both statements.

DN *'Well everybody I know is doing the same thing, they are going to places that have special offers on, people would go, basically a lot of people now, would know the difference in price between Dunnes Stores and Tesco for food and Aldi and Lidl as well'*

DN is explaining that the wider community are, anecdotally at least searching for bargains and are making price comparisons between the retailers who had traditionally dominated market-share and with the 'newer' discount retailers.

KC *I'd be shopping at Tesco before, now I'm more inclined to go to* ***Aldi*** *or Lidl or something.*

KC illustrating the move from an established retailer to the discounters.

KC *If you shop around what's on special offer, you have your* ***Aldi****, you have your six a week that you get for 39 cent and stuff.*

KC is offering a rationale for keeping the direct marketing material and using it as a shopping guide. The 'six a week' mentioned here is a reference to Aldi's' super six' which is a sales promotion run in-store but importantly almost every household in

Dublin will receive this material through the letterbox on a weekly basis via the direct marketing aspect of the campaign. KC is an avid bargain hunter and very fond of the ‘super six’ promotion, KC further stated in regard to this Aldi promotion:

KC *‘Absolutely exactly, go by that religiously’*

LT *Well places like **Aldi** and Lidl now, they can compare with different places, it’s cheaper usually than Tesco or Dunnes and there is more and more being built now.*

LT claims that Aldi are increasing market-share not only through keen pricing but also through expanding to more locations in the greater Dublin area. LT also points out that many people have a good idea of the price differentials between Aldi (and Lidl) and the established supermarkets like Dunnes or Tesco.

SL *‘before I would shop in Tesco’s or Dunnes and now it’s **Aldi** or Lidl’*

SL reports unequivocally the exchange of one set of brand loyalties for another.

SL *‘I think because we have likes of **Aldi** and Lidl here now, before seven years ago, you wouldn’t have had them here, most people shop there, than Tesco or Dunnes Stores’*

SL here is echoing the point made by LT regarding location of Aldi, and also claims that a significant segment of SL’s peer group now exclusively uses the ‘German’ discounters.

SL *‘because of **Aldi**’s deals, the 49 or the 29 cents, courgettes and stuff like that’*

SL here is explaining the attraction of Aldi. SL is a lone parent and expressed a keen interest in providing ‘fresh’ and nutritious food for her children, one of the methods was to buy fresh fruit and veg from Aldi on a regular basis.

VK *‘I shop in **Aldi** now mostly, because it’s cheaper’*

VK is unequivocal about the destination of shopping trips for food and also that the motivation for that is solely based on price.

VK *Yes, I mean you hear that all the time, people getting so much in* ***Aldi*** *getting so much in Lidl, wherever the cheapest…*

This comment was a reference to how much cheaper a typical weekly shopping trolley could be filled in either of the German discounters. Also VK referenced the phenomenon of multi-outlet shopping, here suggesting that the weekly shop could be split between Aldi and Lidl.

4.3.2.5 Lidl

Lidl are one of the German-owned supermarkets (the other being Aldi). They opened their first store in Ireland in 2000. Lidl have 160 stores in Ireland (Republic) and are currently still expanding.

N.B. Much of the commentary surrounding Lidl is the same as that surrounding Aldi. This is an indication of how the two retailers are perceived and in the public's view seem to be very closely associated, to the point where they are almost indiscernible from one another. With this in mind the author does not intend to offer the same critique for identical statements, rather the author will attempt to offer a fresh and concise parsing of these statements. It is hoped this will avoid repetition and make the document flow more easily.

AR *'I'd shop in* ***Lidl*** *far more than maybe I would have before'*

AR is describing the shift towards Lidl from other retailers.

AR *'Well I think people have ignored the stigma, so like I said that were attached to Aldi and* ***Lidl****, it's ok for everyone to shop there'*

AR is describing again the perception that many of the wider populace were dismissive of Lidl (and Aldi) and that it was perceived as 'downmarket' and positing the view that this has changed fundamentally.

LOC *'there is no shame anymore in shopping in Aldi or* ***Lidl****, it's actually the clever thing to do, whether you have money or not'*

LOC underpins the previous statement by AR and goes further by insisting that the new exemplar is for those with the intelligence to realise the value on offer are now shopping in Lidl (and Aldi).

COD *'everyone at the club would be talking about Aldi and **Lidl** and the value you know'*

COD is propounding the anecdotal evidence from COD's peer group that Lidl (and Aldi) are providing value throughout the purchase journey.

COD *'it seems to me that it's **Lidl** and Aldi that have fed the country since the crash'*

COD re-emphasises the importance of Lidl (and Aldi) to the wider population, this statement is indicative of a theme developing throughout this study.

DB *I would have been a Superquinn girl, but my mother introduced me to **Lidl** and Aldi*

DB again is discussing the change of habitual retailer.

DN *Well the main reason why we do the cooking from scratch now, is because you can get vegetables cheaper in places like Aldi and **Lidl** getting vegetables and stuff like that, we would go to Aldi and **Lidl** and if we were cooking tomato based sauce or something like that, we go there, get onions and garlic and stuff like that.*

DN's comments regarding Lidl are the same as the comments regarding Aldi

KC *I'd be shopping at Tesco before, now I'm more inclined to go to Aldi or **Lidl** or something*

KC is another example of a consumer changing brand, the purchasing journey has speeded up for many, to the point where assessment of alternatives is almost instantaneous.

4.3.2.6 Tesco

Tesco are an established brand in Ireland. The parent company is British in origin. The Tesco name appeared in Ireland in 1997 when Tesco PLC acquired the Quinnsworth supermarket chain and over the period 1997-2001 the Quinnsworth brand was phased out to be replaced by the Tesco Ireland brand.

AR *'you go into **Tesco** you look for the yellow labels'*

AR is describing a shopping trip to Tesco during which the emphasis is on purchasing special offers or 'own brand' products.

AR *'we do one of the **Tesco** meal for two for whatever it is'*

AR is reporting attitudes towards special offers with an emphasis on the treat/special occasion. This is a solution at the weekend for AR, AR and flat-mate are not native Dubliners and both usually return to the country at weekends, on occasional weekends however they both find themselves in Dublin without having planned or purchased for this eventuality, on occasions such as this the meal solution will be to buy a Tesco meal deal for two which includes a main course, side dish, dessert, and bottle of wine for two people for €10 without the wine or €12 including the wine. It is instructive that the items offered are from Tesco's 'finest' range which is their premium 'own-brand' range and yet are positioned as an economy-solution but firmly poisoned as a 'treat' or an alternative to going out..

DN *'basically if we are going around **Tesco** or anything like that; we go to anywhere that's the frozen stuff that's on special offer'*

DN is reporting on the use of Tesco, but emphasises that the nature of the shopping trip is one of bargain-hunting.

DN *'basically a lot of people now, would know the difference in price between Dunnes Stores and **Tesco** for food and Aldi and Lidl'*

DN is re-stating the opinion that Tesco (and Dunnes) are unfavourably perceived by this consumer to the German discounters when price is the main consideration.

KC *'I'd be shopping at **Tesco** before'*

KC stating clearly that Tesco was previously an option. It is implicit in this short statement that Tesco is not currently an option.

LOC *'There are a few things, we just love that **Tesco** do and we have buy them there. But other than that, it's price.'*

LOC reports here that Tesco is an option only for certain items not stocked elsewhere that LOC prefers, it is also clear that apart from these items Tesco is considered an option only when it compares favourably on price point.

LT *'cheaper usually than **Tesco**'*

LT is comparing Tesco unfavourably on price with other supermarkets.

SL *'before I would shop in **Tesco'***

SL is re-emphasising the point made by KC stating clearly that Tesco was previously an option; it is implicit in this short statement that Tesco is not currently an option.

4.3.2.7 Less

Less appeared in the keyword search on ten occasions, in a study encompassing recession and austerity this is an expected keyword.

AR *'I'm far **less** wasteful now'*

AR *'if there is something left over, I'm far **less** likely to put it in the bin.'*

AR describing the change in behaviour to the current more careful model.

AR *People are **less** likely to buy, they are more likely to settle for the shops own brand, than they maybe use to be.*

AR expresses the opinion here that people are t purchasing less randomly but are taking all solutions into account, notably the choice of 'own-brand' products and ranges.

COD *little bit **less** take-away*

COD describes the diminishing frequency of take-away food as a meal option.

COD *'we can sometimes have dinner for all of us for **less** than a fiver … not bad for six of us!'*

COD outlines how the use of cheaper supermarkets can lead to substantial savings on meal costs.

LT *'we buy **less** now'*

LT explains how as a family unit they are buying less, this statement was in the context of purchasing non-essentials, and the current pattern in LT's household of not buying anything other than essentials.

ME *It would be **less** probably.*

ME reports that home-cooked meals have declined at home. This is largely due to the differing work and study patterns of ME and partner and two adult children, ME's partner works shifts and one adult son works full-time and the other adult son studies full-time.

ME *'eating more vegetables and **less** meat'*

ME's opinion on one method used by people to cope with shrinking food budgets. ME was of the opinion that many are substituting cheaper cuts of meat or in many cases buying less meat.

VK *'it would be **less** frequent'*

VK is responding here to a question regarding frequency of take-away meals since the recession, the answer is in line with the majority in reporting the diminishing frequency of take-away meals.

4.3.2.8 Cook

The word **cook** here is mostly used as a verb although it did appear as a noun also. In the keyword search 'cook' appeared nine times.

AR *'Didn't have to **cook** my own meals'*

AR is describing home-life as a student before graduation where all cooking was done by AR's parents. A feature of AR's interview was the aspect of coming to terms with fending for oneself that AR was experiencing since the return from working overseas, AR had never purchased or cooked for personal consumption in Ireland until 2012.

COD *'rarely **cook** fully processed foods'*

COD reports that domestic cooking is usually based around fresh ingredients. The implication here is that fresh ingredients require cooking whereas processed foodstuffs in many cases only require re-heating. The corollary of this means that the choice of fresh produce over chilled/convenience/processed/frozen means that the subject is inherently engaging more with food than if any of the other options are exercised.

DB *'I would **cook** three meals for the week'*.

DB is describing a busy lifestyle in which as cooking every day is not an option, DB cooks three times in the week but freezes enough for the whole week. DB is a professional chef and has the skillset that makes this possible.

DB *'I **cook** more definitely'*

DB contrasts previous home-cooking with the current pattern, DB reported that previously when earning more money, the use of restaurants was far more frequent. This however has decreased according to DB and so naturally home-cooking has increased.

LOC *'so I suppose you **cook** more stuff yourself don't you?'*

LOC is reporting the opinion that people were cooking far more from scratch due to current budgetary constraints.

LOC *'I'd like to think I was a good **cook** then!'*

LOC is answering a question regarding the necessity of cooking more due to the financial considerations of the recession, and had that improved LOC's cooking ability.

VK *'But now I'm very conscious of what I'm purchasing and because we **cook** fresh'*

VK is describing attitudes within the household to cooking. As previously mentioned VK has a son who is described as a 'foodie' and this is an important driver in VK's household cooking habits.

VK *'I would **cook** it myself'.*

VK re-enforcing the point that food is usually cooked fresh in the home, this was in answer to a question regarding cooking or purchasing a shepherd's pie.

4.3.2.9 Money

Money appeared nine times during the keyword search and as an indicator of importance to the respondents, it is clear that money is only the means to purchasing, the clear importance of other words are instructive.

AR *'Just the wastefulness I mean especially now that I'm earning my own **money**, I'm not spending my parents **money**, I know the value of **money** more so, if there is something left over, I'm far less likely to put it in the bin'*

AR is explaining that fending for oneself has made money a far more tangible asset and as such one that needs to be spent carefully. The underlying point of this statement is that one cannot be carefree with one's own money.

DB *'I would have earned more **money**…But now I'm very conscious of what I pay, and I suppose before the recession I'd have not have known the price of a pint of milk, I certainly do now'.*

DB *'everybody is looking for value for **money**'*

DB is describing the new model whereby most people are price-conscious and looking for value.

LOC *'**money** is tighter all around'*

LOC explains that the domestic household budget has shrunk in all areas, not just food purchasing. This is likely to be the experience of many families in the current context.

LOC *'trying to feed your family, and not spend too much **money** doing it'*

LOC describes the desired outcome from weekly food shopping.

LOC *'it's actually the clever thing to do, whether you have **money** or not'*

LOC's attitude to shopping in the discount retailers. It is instructive that after a number of years in recession and subject to austerity, LOC is clear that the use of the discount retailers is a positive step and one that will continue regardless.

LOC *'I suppose people who don't have **money** then they are definitely going to'*

LOC is referring here to the use of the **'**German Discounters' which according to LOC is something that those with restricted budgets are definitely going to do, LOC opines further that this is the sensible thing for those without financial worries to do also.

4.3.2.10 Veg/Vegetables

Veg/Vegetables were mentioned on eight occasions. One respondent has a partner who is vegetarian, however the frequency of mention was also due to a widespread appreciation of fruit and veg prices available at the German discounters. This gained several mentions.

DB *'Lidl and Aldi …and stuff like that, fruit and **veg**, I find actually their fruit and **veg** is of a higher standard'*

DB is discussing the prices available at Aldi and Lidl but also is opining that the quality in those outlets was of a higher standard. DB claimed that the relatively high volumes sold accounted for this and said it was unlikely other retailers could match this.

DN *'you can get **vegetables** cheaper in places like Aldi and Lidl'*

DN *'getting **vegetables** and stuff like that, we would go to Aldi so we would make **vegetable** lasagne'*

DN and vegetarian partner use lots of vegetables both fresh and frozen, DN commented that Aldi and Lidl were the favoured venue for fresh vegetable purchasing but that Tesco was the favoured venue for frozen vegetable purchasing provided they were on offer.

KC *'but I'd get whatever is on special offer in the shops, is what I'd usually go for, for fresh fruit and **veg'***

KC is discussing the nature of the domestic weekly shopping trip. The regular appearance of special offers regarding fruit and veg is a common thread with many other respondents.

ME *'I think they are eating more vegetables and less meat'*

ME is discussing coping strategies for those dealing with a restricted food budget.

4.3.2.11 Cheaper

Cheaper appeared seven times on the keyword list. This is expected given the nature of this study and the substantive question.

DB *'Much **cheaper**'*

DB is discussing the German retailers and how across the board their products were found to be much cheaper.

DN *'because you can get vegetables **cheaper** in places like Aldi and Lidl'*

LOC *'I'm just getting it for **cheaper**'*

LOC claimed that the weekly shopping trolley had remained the same as pre-recession times in terms of size and nutritional value and quality, but LOC contended that the use of Aldi meant that LOC was in effect getting the same value of goods for less money. This attitude was replicated in varying degrees across the entire interview sample.

> LT *'places like Aldi and Lidl now, they can compare with different places, it's **cheaper** usually than Tesco or Dunnes'*

LT is discussing the general perception that price point is important and that the longer-established supermarkets are struggling to compete with Lidl and Aldi.

> ME *'just buying **cheaper** meat'*

ME is discussing the cost-saving measures employed by people in general. This is in ME's opinion and only supported by anecdotal evidence according to ME

> VK *'I shop in Aldi now mostly, because it's **cheaper**'*

VK is explaining why shopping in Aldi has become the norm: price

> VK *'I think they have had to cope, so it is about shopping more **cheaper**'*

VK is answering a question about how people in general are coping with a smaller food budget, VK's opinion was that people had no choice but to cope and that shopping more cheaply was the solution.

4.3.2.12 Myself

During one-to-one interviews the occurrence of a personal pronoun is inevitable. **Myself** came up in the keyword search on seven occasions.

> KC *'I'd go to a butchers treat **myself**'*

KC is discussing the option to treat oneself, in KC's opinion a treat would be to purchase a high quality piece of meat for prep0aration in the home.

> LOC *'I notice **myself**, even if I go to Tesco which I have to for top ups, I will not touch anything that's not on offer'*

LOC is discussing the top-up trips to Tesco. LOC is insistent that aside from the few brands that can't be done without, the top-up shopping in Tesco will consist of special offers and deals only.

*'Make it **myself'**,*

*'I would cook it **myself**',*

*I'd definitely make it **myself**,*

*I'd buy the ingredients and make it **myself**.*

*I'd make it all **myself**,*

These are a selection of answers given by the following interviewees:

SL, LOC, KC, DB, VK

These were in answer to question regarding the making of a shepherd's pie from scratch or purchasing a convenience version (frozen, chilled and so on).

4.3.2.13 Conscious

Conscious appeared six times in the keyword search.

DB *'I'm very **conscious** of what I pay'*

DB *'I think they are very **conscious** of price, they are **conscious** of value';*

*'very much more **conscious'**,*

DB in all three examples quoted is referring to awareness of price and value whilst shopping, in DB's own case but also in the wider populace 'they'

VK *'I wouldn't have been over **conscious** of what I was actually purchasing. But now I'm very **conscious** of what I'm purchasing and because we cook fresh, we have to make sure that it lasts.'*

VK discussed the need for time tolerant foodstuffs in the domestic weekly shopping trolley; the awareness being described here is of a fiscal but also of a material nature (that is to say food that won't deteriorate quickly)

4.3.2.14 Value

Value appeared six times in the keyword search.

AR *'I know the **value** of money more'*

AR is discussing the financial effect of shopping on a budget.

COD *'everyone …would be talking about Aldi and Lidl and the **value**'*

COD reports that societal narratives were discussing value for money in terms of food shopping.

DB *'looking for **value** in restaurants, more **value**'.*

*DB 'they are conscious of **value**; everybody is looking for **value** for money'*

DB discusses the broader populace as reacting to straitened circumstances by seeking better value in both restaurants and in grocery purchasing.

4.3.2.15 Treat

The word **treat** came up in the keyword search six times. The inclusion in the interviews of a question regarding treats was one designed to elucidate whether, even in times of recession and austerity do people still reserve a pleasurable interlude for themselves. This 'self-gifting' is part of human nature and perhaps designed to reassure the subject that the daily /weekly/monthly struggle is worth it or to make that struggle bearable.

AR *if we are up around the weekend and we want to **treat** ourselves, we do one of the Tesco meal for two for whatever it is,*

AR *'we get a bottle of wine and so it's still like a bargain but it's a **treat**'.*

AR is describing the chosen method for self-gifting; interestingly the emphasis is still on economy as well as a treat.

DB *A take-away is a **treat** now.*

DB reports that from eating out four times a month, the pattern had reduced to perhaps once a month and that even this was not regular, hence the statement that a take-away is a treat.

DN *Marks and Spencer's would be a **treat**.*

DN is unequivocal, the ideal treat for DN and partner is a meal bought in Marks and Spencer's food hall. As a treat this would fulfil a number of criteria; Marks and Spencer have a reputation for excellent quality and also high prices and they in fact differentiate from their competitors on these two criteria. DN was asked about any other form of treat (take-away) but insists that Marks and Spencer was the chosen solution, saying: *'Yes, the dine in for two meal or something like that.'*

KC *I'd go to a butchers **treat** myself*

KC indicates that a treat on a regular basis (Saturday) would be a take-away, however KC and partner like to entertain on occasion and this would mean cooking at home. On this basis KC claims that a trip to the butcher's would be a treat. KC also indicates that an expensive piece of fish (suggested by the author in interview) would also be a treat.

ME *'my husband would buy steaks definitely it's one of his **treats'***

ME reports that buying steaks would be the preferred treat.

VK *'I would go Fallon & Byrne in town'*

VK is unequivocally stating the treat of choice.

4.3.2.16 Recession

The word **recession** appeared three times in the keyword search.

AR *'location has affected it more than **recession**'*

AR reports that location affected cooking habits more than recession as AR had been living overseas. The corollary of this is that upon AR's return to Ireland the recession immediately affected purchasing and cooking habits, as seen in the full transcript of AR's interview.

AR *'processed food would have increased with the **recession**'*

AR discusses here the temptation to buy cheaper meal solutions, and concluded that AR's personal consumption of processed foods had increased during the recession.

DB *'I suppose before the **recession** I'd have not have known the price of a pint of milk, I certainly do now'*

DB re-states the change from pre-recessionary times to the current model whereby the prices of daily necessities are well-known to DB

4.3.2.17 Fresh

Fresh appeared on the keyword search three times.

KC *'whatever is on special offer in the shops, is what I'd usually go for, for **fresh** fruit and veg'*

KC discusses the dual incentive of both a special offer and of fresh fruit and vegetables.

VK *'I'm very conscious of what I'm purchasing and because we cook **fresh**'*

VK *'so it is about shopping more cheaper and looking for more **fresh** produce'*

VK re-asserts the importance of fresh produce in the household.

4.3.2.18 Deal

The word **dea**l appeared three times in the key6word search.

AR *'you'd always look for a **deal**'*

AR points out the current model; the search for a deal reflects the economic situation.

SL *'the Chinese restaurants are all closing down or they are all doing special meal **deals** now'*

SL discusses the current situation facing many food businesses. The lowering of price to attract customers is a standard recessionary tactic, the business is in effect sacrificing targeted margins for potential turnover.

SL *'because of Aldi's **deals**, the 49 or the 29 cents'*

SL here discusses the cheap fruit and vegetable deals. These are usually designed as loss leaders to increase footfall in the supermarkets.

4.3.2.19 Bargain

Bargain appeared three times in the keyword search.

AR *'I think everyone is looking for a **bargain**, everyone. It's affected everyone'*

AR talks about the search for value. The use of the expression '*It's affected everyone'* clearly is referring to the national financial position.

AR *'we get a bottle of wine and so it's still like a bargain but it's a treat'*

AR is discussing the dual attraction of a treat and a bargain.

KC *'there are a lot of **bargains** out there'*

KC mentions the ubiquity of bargains currently in the market-place.

4.3.2.20 Stigma

The word **stigma** appeared twice in the keyword search. The appearance is an unusual one as it highlights issues surrounding self-image and the downmarket space that people perceive is inhabited or no longer inhabited by the German discounters.

> AR *I'd shop in Lidl far more than maybe I would have before, I think it was seen as kind of…there was a* ***stigma*** *attached to it before.*

> AR *Well I think people have ignored the* ***stigma****, so like I said that we're attached to Aldi and Lidl, it's ok for everyone to shop there, I think maybe the snobs of society have make it ok to shop there, so people aren't….they are not hiding when they are going in there*

AR is expressing the opinion that whilst originally occupying a perceived downmarket niche, in fact Aldi and Lidl are becoming a venue that people do not baulk at using.

Although the exact word *stigma* was not used, two other respondents alluded to the perception that somehow there was a 'shame' attached to the use of either of the discount stores mentioned, these references were as follows

> COD *'it's Lidl and Aldi that have fed the country since the crash and people don't mind saying now where you know before they might not have liked to admit it'.*

> LOC *'there is no shame anymore in shopping in Aldi or Lidl'*

Both interviewees implicitly underline the societal discomfiture with external signs of poverty or even mild fiscal stress.

4.3.3. Content Analysis - Questionnaire

A number of survey questions were deemed suitable for content analysis due to the open nature of responses to ‘other – please specify’. The word cloud below represents the most commonly used words and phrases found in the variable answers of the questionnaire.

Figure 5: Word Cloud Content Analysis - Questionnaire

4.3.3.1 Main Weekly Shop Last Week

Q10 Shopping: Where was the main weekly shop for your household completed last week?

Q10 Shopping: Where was the main weekly shop for your household completed last week? (Tick all that apply)	
	Other (e.g. greengrocer, butcher, bakery, etc.) Please specify
Q10/R37	bakery in Stoneybatter
Q10/R51	Bakery vegetable shop and butchers
Q10/R17	bakery, greengrocer
Q10/R22	butcher
Q10/R74	Butcher
Q10/R106	Butcher
Q10/R154	Butcher
Q10/R85	butcher & greengrocer
Q10/R108	Butcher and greengrocer
Q10/R25	Butcher greengrocer
Q10/R28	butcher, fishmonger, nolans
Q10/R23	Butcher, m&s
Q10/R92	butchers
Q10/R118	butchers
Q10/R57	Dublin Food Co-op
Q10/R10	farmers market
Q10/R111	Farmers market
Q10/R24	fish shop
Q10/R135	fishmonger, bucher, greengrocer
Q10/R30	greengrocer
Q10/R36	greengrocer, bakery, fishmonger
Q10/R80	Health food shop
Q10/R100	JC's Supermarket, Swords
Q10/R84	Kinsealy Garden Centre

Q10/R73	live very close to village and support local shops
Q10/R125	local butcher
Q10/R151	Local Butcher
Q10/R90	local butcher and fishmonger
Q10/R31	local butcher bakery and veg
Q10/R146	local butcher, local greengrocer
Q10/R129	Local deli
Q10/R2	local independant shops
Q10/R21	Local shops, market
Q10/R152	M & s
Q10/R70	M&S
Q10/R149	M&S, Mortons
Q10/R96	Marks & Spencer's
Q10/R63	Small local shops
Q10/R56	tops in pops, little italy
Q10/R153	vegetable, deli, off-licence
Q10/R49	we akso shop locally
Q10/R29	Weekly Organic fruit and veg delivery

These are the answers to the option other (e.g. greengrocer, butcher, bakery, etc.) Please specify.

The predominant theme is that this group are using independent **butchers** (that is to say not supermarket meat counter or pre-cut/pre-packaged). This is supportive of a point made in interview #7 by DB who claimed that whilst Aldi and Lidl were visited on a regular basis, neither was used for meat purchasing purposes. Butchers were mentioned on eighteen occasions and this perhaps reflects the Irish dietary reliance on meat as the favoured source of protein. Furthermore it illustrates the importance of the provenance of meat in the Irish collective psyche. In an era where many providers have been eroded by the convenience and buying power of the high street chains, the local butcher is appears is a needed and much visited institution, the natural corollary of purchasing in a butchers and similarly other independent specialist providers such as greengrocers or fishmongers is that the ingredients need to be cooked and this will almost always mean ‘cooked from scratch’.

Following on in this theme the word ‘**greengrocer’** appeared ten times in the answers, and this is an extension of another motif which emerged; notably the use of the word **local,** which occurred eleven times, usually as a prefix as in ‘local butcher’ or separately as shown by respondent #49 who replied “we also shop locally” an attitude replicated by respondent #73 who wrote “live very close to the (urban) village and support local shops” and also respondent #63 who replied “small local shops” This figure can be inflated further by the consideration of expressions like ‘farmers market’ which are inherently an urban construct, whereby rurally-produced items are sold to city-dwellers usually in a temporary, movable urban setting.

The use of the word **‘fishmonger’** occurred five times as did the word **‘bakery’** which indicate that a healthy cohort exist that are supporting the local retail environment, which further suggests the use of base ingredients and therefore cooking from scratch.

Amongst other answers of interest were **‘Dublin Food Co-Op’** (respondent #57) **‘Kinsealy Garden Centre’** (respondent #84) and also **‘health food shop’** (respondent #80). To all intents and purposes both the Dublin Food Co-Op and the Kinsealy Garden Centre function in a similar manner to a Farmer’s Market, with a strong emphasis on fresh and sometimes artisan produce and therefore are not at the value or bargain end of the retail spectrum.

A total of five respondents also mentioned that their weekly food shopping was done in **Marks and Spencer’s** (food hall). These respondents are clearly shop at the luxury end of the market which suggests no discernible fiscal issues. One of this small group also shops in Mortons (of Ranelagh) which is a high-end delicatessen and again, suggests a food choice that is unencumbered by any financial stress.

4.3.3.2 Main Weekly Shop 2010

Q12 Shopping: Where was the main weekly shop for your household completed in 2010?

Q12 Shopping: Where was the main weekly shop for your household completed in 2010? (Tick all that apply)	
	Other (e.g. greengrocer, butcher, bakery, etc.) Please specify
Q12/R25	Butcher farmers markets organic
Q12/R101	butcher fish shop
Q12/R28	butcher, nolans, fishmonger
Q12/R92	butchers
Q12/R153	delicatessen
Q12/R57	Dublin Food Co-op
Q12/R10	farmers market
Q12/R51	Fresh
Q12/R106	Green grocer and Butcher
Q12/R36	greengrocer, bakery, fishmonger
Q12/R30	greengrocer, marks and spencer, temple bar food market
Q12/R80	Health food shop
Q12/R55	JC's in Swords
Q12/R151	Local Butcher
Q12/R31	local butcher veg shops
Q12/R129	Local deli
Q12/R21	Local ships markey
Q12/R152	M & s
Q12/R70	M&s
Q12/R149	M&s
Q12/R135	M&S, fishmonger, greengrocer
Q12/R88	Marks and Spencer
Q12/R73	no change in patterns
Q12/R63	Small local shops
Q12/R61	SuperQuin

Q12/R35	Superquinn
Q12/R54	Superquinn
Q12/R81	superquinn
Q12/R83	Superquinn
Q12/R90	superquinn
Q12/R108	Superquinn
Q12/R121	Superquinn
Q12/R124	Superquinn
Q12/R131	Superquinn
Q12/R56	tops in pops
Q12/R29	Weekly Organic fruit and veg delivery

These are the answers to the option other (e.g. greengrocer, butcher, bakery, etc.) Please specify. This is the same as Q10 but was asked in relation to 2010. This allows a measurable contrast and analysis of two identical questions which each refer to a different time (2010 & 2014).

The use of independent butchers is not as pronounced in 2010 as in 2014, and it is clear that other independent food retailers fared the same in 2010 as the responses show that in addition to seven respondents mentioning **butchers,** only one mentioned **bakery**, four mentioned **greengrocers** and four mentioned **fishmongers.** This in real terms shows that by 2014 the respondents were clearly using multiple food retail units and 'shopping around' in specialist stores, further suggesting a 'cooking from scratch' dynamic that increases from 2010 to 2014.

A certain number of responses did not change between 2010 and 2014. The use of **Marks and Spencer's** food hall remained at five respondents and the **farmer's market** users and **Dublin Food Co-Op** users did not change. The single–mention use of in independent supermarket in Swords and of '**health food shop'** remained the same also.

The use of the word **local** was recorded only five times and this increased hugely in 2014, once again pointing to an increase from 2010 to 2014 in the amount of shopping done locally and in smaller independent outlets which is entirely in keeping with secondary research findings which assert that consumers are doing far more price comparisons than before, and are prepared to shop around for bargains.

The responses showed an interesting development regarding the merger and ultimate disappearance of the **Superquinn** brand in favour of the Supervalu brand. This in effect took a brand with an up-market reputation and changed its stores to a brand with a mid-market position. This dilution and subsequent removal of one brand identity (Superquinn) and ultimate replacement by another brand identity (Supervalu) would appear to have left a mixed reaction to brand identity issues in the minds of consumers. The last Superquinn stores were re-flagged as Supervalu in February 2014 therefore the primary research was able to discover the following points surrounding Superquinn/Supervalu. The survey discovered that three respondents (1.91%) claimed that they used Supervalu for their main weekly shopping in 2014 and also claimed to have not altered their shopping since 2010, yet on deeper investigation these three respondents were using Superquinn in 2010. This shows that for these three respondents the brand identification issue was not important as the Superquinn store that was re-flagged as a Supervalu was to these respondents the same. The opposite was found with another three respondents (1.91%) who use Supervalu in 2014 for the weekly shopping and who also used Superquinn in 2010 for the weekly shopping, but this group claimed that they *had* changed their shopping since 2010. It is clear that this group took notice of the re-flagging and that to them the change of brand or brand re-positioning was noticeable and therefore important to them.

4.3.3.3 Top-up Shops Last Week

Q13 Shopping: Where were any top-up shops for your household completed last week?

Q13 Shopping: Where were any top-up shops for your household completed last week? (Tick all that apply)	
	Other (e.g. greengrocer, butcher, bakery, etc.) Please specify
Q13/R152	Bakert
Q13/R27	Bakery
Q13/R35	Bakery
Q13/R37	bakery and greengrocer
Q13/R135	bakery, greengrocer
Q13/R54	bakery, vegetables, butcher, deli; we don't do one main weekly shop
Q13/R70	Butcher
Q13/R77	Butcher
Q13/R106	Butcher
Q13/R111	butcher
Q13/R147	butcher
Q13/R1	butcher, bakery
Q13/R8	butcher, farmer's market
Q13/R124	Butcher, local independent supermarket , fruit&veg shop
Q13/R118	Butcher's
Q13/R101	butchers fish shop
Q13/R73	live close to centra
Q13/R21	Local
Q13/R2	local bakery and fruit and veg shop also marks and spencer
Q13/R13	Local butcher, baker, fish shop.
Q13/R50	Local butcher, fishmonger, bakery and fruit & veg shop.
Q13/R129	Local deli
Q13/R92	local grocer
Q13/R90	local shops
Q13/R122	local stores Tops in Pops

Q13/R49	Locally
Q13/R116	M&s
Q13/R121	M&S
Q13/R30	marks and spencer
Q13/R98	Marks and spencer
Q13/R29	Marks and Spensers
Q13/R134	Newsagent for milk and fruit
Q13/R33	Organic fruit and vegetable delivery; butcher
Q13/R25	Track express bakery
Q13/R34	vegetable wholesaler + bakery

The dominant themes in the responses to the question- Shopping: Where were any top-up shops for your household completed last week? (2014) were as follows:

The mention of **butchers** was high with fourteen separate references. This again suggests the increasing use of base ingredients and the prevalence of 'cooking from scratch' found in 2014.

Baker was mentioned on twelve occasions and **greengrocer** on eight occasions which add to the emerging dynamic of a cohort prepared to shop around and not simply collect all their groceries under one roof. This finding is further supported by the use of the word **local** which illustrates a pattern of top-up purchasing typified by the convenience aspect of the neighbourhood providers. The word **local** featured heavily and appeared on ten occasions sometimes as a prefix for 'grocer' or 'deli'; it is a persuasive development in as much as it underpins the move toward multi-outlet shopping being noted throughout the research. The only other numerically significant response was **Marks and Spencer** which was mentioned on six occasions as a venue for top-up shopping, this statistic represents an increase of one from those who claimed to use **Marks and Spencer** for their weekly shopping, which reflects the perceived luxury market it occupies, as only one respondent additionally uses it for top-up shopping. **Fishmonger** was mentioned on three occasions and **Farmer's Market** on one occasion, again this shows an emphasis on multi-outlet shopping.

The main points to be taken from this analysis are the increasing use of small independent providers at the expense of the supermarket meat counters and in-store bakeries and fruit and vegetable sections.

4.3.3.4. Top-up Shops in 2010

Q15 Shopping: Where were any top-up shops for your household completed in 2010?

Q15 Shopping: Where were any top-up shops for your household completed in 2010? (Tick all that apply)	
	Other (e.g. greengrocer, butcher, bakery, etc.) Please specify
Q15/R128	17 shops in cabra
Q15/R33	As above
Q15/R50	As for Q13
Q15/R35	Bakery
Q15/R37	bakery and market
Q15/R135	bakery, greengrocer, fishmonger
Q15/R77	Butcher
Q15/R107	Butcher
Q15/R147	butcher
Q15/R106	Butcher& Greengrocer
Q15/R54	butcher, bakery, veg shop, deli
Q15/R8	butcher, farmer's market
Q15/R32	corner shop
Q15/R55	Eurospar
Q15/R124	Farmers markets and deli
Q15/R70	Green grocer
Q15/R30	greengrocer, temple bar food market
Q15/R21	Local
Q15/R13	Local butcher, baker, fish shop.
Q15/R129	Local deli
Q15/R92	local grocery

Q15/R121	Local shop
Q15/R96	Local small super market
Q15/R49	locally
Q15/R116	M&S
Q15/R88	Marks and Spencer
Q15/R98	Marks and spencer
Q15/R29	Marks and Spenser
Q15/R134	Newsagents
Q15/R73	no change in patterns in last 6 years
Q15/R61	SuperQuin
Q15/R90	superquinn and local shops
Q15/R1	Superquinn, greengrocer, farmers market

The dominant themes in the responses to the question were as follows:

There were seven separate mentions of **butchers** which is a far less than in 2014 (fourteen mentions). **Greengrocer** was mentioned on six occasions which again is less than in 2014 (eight). In 2010, only five respondents claimed to be using a bakery/bakers for top-up shopping, and this is much less than in 2014 when twelve reported doing so.

The number of respondent who used the word **local** was seven compared to ten in 2014.There were four mentions of **Farmer's Market** which is a higher figure than in 2014, perhaps reflecting the growth of the movement in the intervening years. In 2010 four respondents claimed to be using **Marks and Spencer** for top-up shopping, a drop of two from 2014. The only other numerically significant responses were the three respondents using **Delis** in 2010. **Fishmongers** were mentioned on two occasions (one less than 2014). **Superquinn** had three mentions in 2010 for top-up shopping, (by 2014 Superquinn had been re-flagged as Supervalu)

These data show the main developments between 2010 and 2014 are that the one-stop-shop idea of a supermarket is no longer as attractive to consumers as before. The patterns emerging illustrate a demographic far more likely to shop in multiple outlets and are prepared to shop around for value.

Chapter Five: Discussion and Conclusions

5.0 Introduction

Chapter five details the research findings and examines them in relation to the research aim and objectives and presents the overall conclusions of the study. The key recommendations drawn from the research conclusions are also presented.

This study looked to examine how austerity has affected the food purchasing and cooking habits of people living in Dublin and the objectives were set as follows:

- Conduct an extensive literature review to contextualise the issues;
- Conduct quantitative research by means of questionnaire designed to chart current consumer habits;
- Conduct qualitative research by means of interviews to measure current consumer behaviours and attitudes;
- Examine the trends in purchasing choices for household foods;
- Examine the trends in preparation choices for household foods.

The substantive question is re-examined and a final conclusion is made.

5.1 Contextualising the Issues

The issues that informed the background of the substantive questions are those that are largely still prevalent today and can be summed up as follows:

The world economy has suffered a huge near-collapse and subsequent downturn since 2007. This global financial crisis affected almost the entire free-market capitalist-reliant world, including the EU which has been affected adversely due to the collective attempts of member states to protect the main currency of the EU, the Euro. This has resulted in a long slump and a series of EU and European Central Bank-led austerity measures which in turn have filtered down to sovereign parliament level where individual countries have implemented the policies of fiscal rectitude by the instrument of domestic budgets. Ireland has suffered a sequence of domestic budgets which have served to burden the populace with higher taxes and levies/charges and have had the cumulative effect of extracting billions of Euro from the economy and severely constraining domestic growth. These emergent macroeconomic realities have led to the national economy which was over-reliant on cheaply borrowed money as a means of achieving liquidity, having to service large boom-era loans with a severely restricted national exchequer. This has further led to downward pressure on expenditure and the microeconomic landscape has reflected this in almost every aspect of modern Irish life. The latest reports on face value would appear to show a miniscule lift in forecasts however economic orthodoxy would suggest a sustained recovery is not yet imminent.

This has a domino effect down to the individual or individual family unit, who are compelled to both refinance the State and pay its sovereign debt via direct and indirect taxation and also attempt to preserve their everyday lives on a shrunken budget. The pressure on household expenditure, resulting in a collapse of consumer confidence and a knock-on effect on retail sales. This has left much of the population with the need to prioritise household spending, deciding what are necessary expenditures and what are discretionary. In some cases this may mean mortgage or grocery shopping, in others it may mean health insurance or grocery shopping.

The issues then, according to primary and secondary research are reduced to the following;

- In many, if not most cases, there is pressure on people to finance a lifestyle on a reduced budget.
- The level of the energy/ nutrient content of the typical food intake needs to be maintained to a reasonable level that will sustain health.
- The choice between buying costly convenience/chilled/processed foods is juxtaposed with cheaper options. This is a fiscal issue.
- To make ends meet, the choice between buying calorie-rich nutrient-poor budget options is juxtaposed with the healthier option of buying base ingredients and preparing the meal at home, with the knowledge that this method delivers wholesome, unadulterated and ‘good’ food. This is a health issue.

- The preceding points needs to be balanced between culinary ability, time required to prepare and cook, perceived benefits of one against the other from the perspective of the individual
- For many the choice to protect the energy/ nutrient content of the typical food intake may mean a radical alteration of habitual food practices.

5.2 Quantitative & Qualitative Research

The literature review outlined the modern Irish consumer and how as a nation it was arrived at, up to and including the middle of the last decade (2007). The primary research in questionnaire and interview format continued to assess and measure consumer purchasing and preparation habits and focused in particular on 2007, 2010, and 2014 in order to accurately chart any changes to the consumer experience.

Consumer purchasing and preparation habits were tracked and compared to previous years. These were followed by further interviews which were drawn from a group of volunteers all of whom had completed the questionnaire and were deemed suitable for further investigation.

5.3 Charting Trends in Purchasing Choices for Household Foods

5.3.1 Market Shares

5.3.1.1 Aldi & Lidl

The dominant emerging theme from the primary research with regards to purchasing showed a clear move towards the discount retailers, Aldi and Lidl. The data from the research showed increased growth in their market shares and this was underpinned by a resounding corroboration from the interviews.

Shopping: Where was the main weekly shop for your household completed? (Tick all that apply)			
	In 2010?	Last week?	
	%	%	Difference
Tesco	57.32	49.68	-7.64
Dunnes	25.48	14.01	-11.47
Supervalu	20.38	22.93	+2.55
Aldi	13.38	34.39	+21.01
Lidl	21.66	50.96	+29.30
Iceland	0	0.64	+0.64
Dealz	0	1.27	+1.27
Spar	1.91	3.82	+1.91
Londis	0	0.64	+0.64
Costcutter	0	0	0
Mace	0	1.27	+1.27
Centra	4.46	7.01	+2.55
Other (e.g. greengrocer, butcher, bakery, etc.) Please specify	23.57	36.75	+13.18

Figure 6: Main Weekly Shop 'last week' v's 2010

Figure 6 compares the data for the mainly weekly shop from ‘last week’ and ‘2010’from the questionnaire and shows that over the period 2010 to 2014, Lidl and Aldi are the big winners in terms of market share.

The table clearly shows Tesco and Dunnes losing market share (7.64% and 11.47% respectively). The brands gaining market share are Aldi (increase of 21.01%) and Lidl (increase of 29.30%).

The value end of the market has experienced massive growth whilst the mainstream traditional supermarkets are in decline. The figures are a powerful re-endorsement of the secondary and other primary research which all show a marked uplift in the throughput of Aldi and Lidl and a downturn in Dunnes and Tesco. These themes are constantly repeated throughout both the primary and secondary research. Both the questionnaires and the interviews all show consumer sentiment strongly supporting these emerging motifs.

It is a significant point that market share for Aldi and Lidl in this study are considerably higher than the latest national figures from Kantar Worldpanel with Lidl standing at 50.96% and Aldi at 34.39% as against 8.4% and 8.3% respectively. There may be a regional element to this as Lidl and Aldi have a more significant retail presence in the Dublin region than nationally, or it could be a factor related to the demographic reflected in the research. This significant trend merits a further investigation in another study.

5.3.1.2 Multi-outlet Shopping

A secondary theme revealed by the data was the current preference for multi-outlet shopping. Where consumers indicated that they only used one outlet to complete their food purchasing the figures were as follows:

- Tesco 8.28%
- Supervalu 5.09%
- Dunnes 2.54%
- Lidl 12.71%
- Aldi 7.0 %

This is hard data that shows the difference between single retailer shopping and the more modern paradigm of multi-retailer shopping.

5.3.1.3 Superquinn to Supervalu

To further illustrate the shift towards a value proposition within retail in the Dublin region, it is instructive to examine the re-branding and subsequent repositioning of Superquinn to Supervalu. Both of these brands were originally separate and were positioned differently in the market. Superquinn catered at an up-scale level whilst Supervalu catered at the mid-level. Through merger and acquisition, the two brands were united and a decision was made to phase out the Superquinn brand. By February 2014 the Superquinn brand had been replaced entirely by the Supervalu brand. This was achieved by a simple name change and very few stores were closed thus the parent group. Musgrave retained the geographical foothold and the important high-street presence.

The point here is that the Musgrave group decided that the ‘retail estate’ should be re-pointed at the value end of the market, no doubt driven by the economic landscape. The decision to bring the new stores to the value end makes sense as the recessionary backdrop to these merger and acquisition choices were made at a time when the national economy was deeply mired in a period of negative growth and gloomy fiscal projections. So to introduce stores that are perceived as value retailers at a time of fiscal uncertainty would appear to be a shrewd business manoeuvre.

This study showed that Supervalu’s share of the market rose by 2.55% between 2010 and 2014, yet there was within the respondents a dichotomous attitude; equal numbers of respondents showed awareness that the re-branding had occurred and a similar cohort showed no awareness of the change referring to Supervalu historically as Supervalu when their responses showed that they had in fact been using Superquinn, This shows that any public perception regarding brand dilution exists but is not universal.

This underlines a number of important points; whenever a retailer changes name or brand identity, the consumer will follow if the conditions demand it, the reason the Musgrave group gave for the re-branding exercise was after a review of options and considered it to be the logical move *“given the realities of a totally changed grocery market and what the Irish consumer now needs”* (Musgrave Group, 2014).

This could be seen as a tacit acceptance that the high-end market for groceries had shrunk to the point that it was no longer commercially viable to exist in that space, and further that to retain any significant market-share Musgrave needed to react by placing retail brands that have inherent value propositions, which was done at the expense of Superquinn.

5.3.2 Key Findings – Purchasing Habits

The survey established that the trend in 2014 is that consumer habits are changing to reflect the disposable incomes of the group investigated.

The survey data relating to purchasing was found to be broadly in agreement with the secondary research presented. The interviews further agreed and indicated that considerable change has occurred in regard to consumer habits.

The key findings for purchasing habits were as follows:

- Many, if not most consumers are price-conscious.
- Many are seeking better value by searching for special offers such as BOGOF, price reductions or discounts due to loyalty marketing initiatives (points, and so on). This attitude was a strong feature of the secondary research also.
- Many consumers are literally shopping around. The trend has returned to multi-outlet shopping which offers the best opportunity to avail of the best value in more than one retailer. This is consistent with the secondary research which showed the trend developing towards shopping in a variety of outlets based on price; in effect consumers are sub-dividing their purchases between retailers in order to get maximum value. The one-stop-shop solution that had become prevalent is disappearing.
- Consumers are taking notice of promotional material and point of sale material that highlights special offers.
- The primary research came across no spontaneous evidence that consumers were pricing items 'in-store' on mobile devices.
- Consumers are buying less made-up items and more ingredients. The increased use of base ingredients alone is an indication of an increase in cooking from scratch. This is a trend identified by Bord Bia as being on the increase between 2007 and 2013, the primary and secondary research are in agreement in this case.
- The take-away meal option has changed from an ordinary meal solution and an outward display of fiscal normality to a re-contextualised position where it has become a 'treat' verging on a luxury. This is consistent with

the trends identified in the secondary research which showed consumers re-assessing non-essential purchases.

- The respondents of the questionnaire were largely educated and in the ABC1 demographic yet many (56.06%) were budgeting on less money than previously. This indicates that the ‘squeezed middle-class’ are still being squeezed and are using reduced food budgets as part of the overall coping strategy. The increase in the average shopping trolley cost of 12% year-on-year that the secondary research reported is not being replicated in the primary research. The primary research reports a coping strategy which sees the cost of shopping drop but the calorific and nutritional value largely protected.
- Aldi and Lidl have emerged as the retailers of choice for those who are coping with a shrunken food budget. The percentage of market share for these retailers shown in the secondary research is substantially increased in the primary research. The differential maybe accounted for by the fact that the secondary research was conducted on a nationwide basis and the primary research was conducted on a regional basis.
- The interview respondents largely showed no recognition of any difference between Aldi and Lidl, with both brands usually being mentioned in the same breath and almost interchangeably. This theme is present in both secondary and primary research and indicates a widespread acknowledgement of these retailers sharing a similar positioning of being good-value, low-cost, good-quality options.
- It is a significant finding of this study that a sizeable tranche of respondents to the questionnaire (32.48%) said they were managing on higher budgets than before, however only a smaller group of perhaps 3-4% of them were maintaining their pre-recession shopping habits. This indicates that despite not necessarily suffering from recession, a large percentage of people are purchasing differently today. This serves to highlight that the purchasing habits of both rich and poor have been altered by recession and further that a sea-change in Irish food purchasing is underway.

5.4 Charting Trends in Preparation Choices for Household Foods

5.4.1 Cooking from Scratch

The dominant theme emerging from the primary research with regard to food preparation is the move towards cooking from scratch as a response to shrunken food budgets. This is borne out by the data which shows that for the survey as a whole, 38.22% are cooking from scratch more often. This figure rises to 45.46% when considering only those who report being less well off in 2014. These figures link the practice with the fiscal imperative.

This point is augmented by the predominance of fresh ingredients being cooked from scratch. This in particular, was a strong theme during the interviews. When asked if they were to have Shepherd's Pie for dinner, if they would buy it pre-made or make it themselves, all respondents indicated the home-made option was the solution of choice. This is a positive development in Ireland but is at odds with the secondary research cited for the U.K. and the U.S.A. which found that in those countries, fiscal stress has led to many people choosing less healthy options in an effort to budget.

The data here has shown clearly that far more people are preparing and cooking meals more often than previously, and this when taken with the data showing the decrease in other meal solutions such as eating out or buying take-away food, show that the core reason for this is financial. In other words, in 2014 the recession has forced people back into the kitchen in order to feed their household within their budget.

5.4.2 Methods of Cookery

The study has found that traditional cooking methods remain to the fore in recessionary Ireland.

The primary research largely mirrored the findings of the Bord Bia Periscope 7 report which outlined choice of cooking methods in Ireland in 2013. When contrasted with the questionnaire (2014) the following comparisons could be made:

	Periscope 7	Questionnaire
Boiled	16%	16%
Oven baked/ roasted	17%	28.66%
Pan-fried/sautéed	18%	18.47%
Microwaved	6%	5.73%
Grilled	15%	3.18%

Figure 7: Comparison of Cooking Methods

These comparisons show that, like-for-like cookery methods are largely in agreement, with the exception of grilling which shows a drop of 11.82% in this study, however this is compensated for elsewhere by an increase in oven baked/roasting of 11.66%.

The home-cooking of meals remain an important family ritual and most households have retained it during the recession and it in many cases has increased. The list of equipment used to prepare main meals is also instructive as it shows a clear presence of home-cooking and the wide use of oven and stove-top is an indication that foods are being 'cooked' not just re-heated.

5.4.3 Self-Reward

In an attempt to discover whether any portion of a reduced weekly food budget is reserved for 'treats' or rewards a question was included on this subject in the interviews. It was illuminating that all interviewees immediately understood that they were being asked to describe the process of 'rewarding' themselves.

All interviewees who rewarded themselves did so with either 'special' foods such as a take-away or a prime cut, sometimes in conjunction with a bottle of wine. This shows the importance of food and the wider role it plays, far from being just the necessity shown by the bottom of Maslow's Hierarchy. The role that comestible titbits play in self-actualisation is key, as food is a basic component of day-to-day life. Food security becomes paramount when the fiscal situation is fraught and the idea of self-gifting with food is a way of acknowledging that the struggle continues but this reward (steak, chocolate, take-away and so on) means it is worth it and perhaps better times are ahead. Collins (Bord Bia, 2012) describes this as: *"Rich rewards- indulgent experiences that offer respite and reward."*

5.4.4 Key Findings – Food Preparation

The survey established that the trend in 2014 is that food preparation habits are adapting to reflect the disposable incomes of the group investigated.

The survey data and interview insights relating to food preparation was found to be in agreement with the Irish secondary research presented and puts current Irish practice in a favourable position when compared to the U.K. and U.S. findings.

The study uncovered a number of motifs as follows:

- Many more people are cooking from scratch than before.
- Far more ingredients are being purchased with the necessary corollary that these need to be cooked – from scratch.
- A desire to cook 'real' food intimating that home-made is better - a point clearly present in many Bord Bia reports.
- A decrease in the use of convenience foods - leading to the use of ingredients.
- An increase in consumers buying locally which suggests shopping for ingredients.
- The increase in visits to butchers and other specialist retailers suggesting again – cooking from scratch.
- The maintenance of traditional cooking methods and use of traditional ingredients. The study showed large numbers of Irish people continue to use potatoes in their daily diet as shown in the secondary research.
- Despite the recession, the practice of self-gifting in the form of food treats/rewards is important. On face value this may seem at odds with the secondary research which claimed that consumers were forgoing such items. However people in many cases have re-assessed what constitutes a 'treat' or luxury.
- The incidence of consumers using take-away food as a meal solution has reduced substantially - this is consistent with the trend identified by the majority of findings from the secondary research. Other research suggested

that despite recession, lack of time and desire was a barrier to home-cooking, but this is not borne out by this study.

5.5 Addressing the Substantive Question

Austerity in 21st century Dublin: has recession altered our relationship with food purchasing and preparation?

The research has led the author to conclude that austerity and recession has altered our relationship with food purchasing and preparation**.**

5.6 Final Conclusions

The author has concluded that austerity and recession have altered our relationship with food purchasing and preparation. The research has shown that the situation in Dublin has changed rapidly since the start of the current recession. The study paints a picture of consumers for the most part adjusting their lifestyles to suit the new economic realities and endeavouring to sustain pre-recession domestic food norms at a reduced level of expenditure. The study indicates that in many instances the rate of household change or adaptation is accelerating. It is clear that as a group, Dublin residents have reacted with tenacity and shown much resourcefulness in the face of adverse fiscal conditions.

The return of mass emigration and the existence of a national debt of over €200 bn. mean that difficulties may lie ahead for the foreseeable future. The national debt will need to be repaid whilst the section of society best equipped to do this – the young and skilled - are largely overseas. This means that whilst the current economic downturn may be over the worst, it may never be truly ‘over’. Nobel Prize winning economist Paul Krugman said in 2013:

> *“long-term recession might be the new normal”*

This is not an isolated view. Malmgren (2013) suggests that Ireland will experience a 20-year economic slump. Other commentators agree: *“France: la rigeur budgetaire et fiscale s'annonce pour 20 ans”* (Ginder, 2014)

> (Translated as “fiscal and budgetary rigor looks set to last for 20 years” (Author’s translation).

It is clear that the continent-wide fiscal crisis is not yet behind us.

In 2012, 67% of Irish consumers questioned agreed with the statement, *“I’ll never spend my money again as freely as I did before the recession”* (Collins, 2012).

From this, it is clear that no matter what the future may bring for the national economy and its effect on household budgets, the Irish consumer will be circumspect with money and may never relinquish the new-found attitudes to cooking and purchasing.

The main points shown repeatedly throughout the data are that:

- Consumers are shopping around more than before.
- Consumers are cooking from scratch more than before.
- Many consumers have changed retailers.
- Brand loyalty is largely dead or dying in the food retail area.
- Consumers are preparing more meals using base ingredients.
- Ireland has become in food terms a nation of bargain-hunters-within the ABC1 demographic 34% self-identify as such.
- Consumers are making do with less money and are balancing calorific value against monetary value.
- Consumers are shopping in a number of locations to obtain value.

Both the secondary and primary research appears to be consistent in most of the important issues, with only minor discrepancies in reported data. The existence of so much source material for the secondary research has been beneficial, however due to the rapidly changing fiscal landscape, it does not reflect the primary research in every aspect, particularly the ongoing rise of the ‘German Retailers’.

A substantial part of the middle-class ABC1 demographic in Dublin have turned to Aldi and Lidl during the recession in order to maintain the nutritional integrity of their household shopping. This demographic are eating as well now as ever.

The recession and economic downturn may be seen in the future to have had positive effects on Irish society. The re-emergence of home-cooking and the increased use of fresh ingredients are helping safeguard the future health of the nation and are guaranteeing that the much-needed social skill of cooking is preserved.

One constant *leitmotif* that appeared throughout the survey was the search for value for money within food shopping.   In the author's opinion, it is this determination to maintain lifestyles and nutritional values that has kept the typical Dublin household healthy during the recession.

5.7 Recommendations

1. A further, more detailed study into food choices focusing on the correlation (if any) between relative food poverty and consumer choice of high-sugar, high-salt foods, or foods that will maintain energy intakes at a lower cost
2. A study into the food challenges experienced by those struggling financially in Dublin.
3. A further, wider study to investigate food choices based on the cost of cooking fuels.
4. A further study to investigate the possibility of basic cooking lessons and basic nutrition information being disseminated to those at risk of food poverty by the relevant competent authorities.
5. The introduction of a policy instrument designed to protect the nutritional intakes of all citizens under the age of eighteen

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Appendix 1: Copy of Questionnaire

Masters Thesis - Survey regarding Food Purchasing and Preparation

1. Questionnaire regarding Food Purchasing and Preparation May/June 2014

Compiled by Diarmuid Murphy for inclusion in his dissertation for an MSc.in Culinary Innovation & Food Product Development, D.I.T, Cathal Brugha St. The purpose of this survey is to collect data on household food purchasing & cooking activity in the Dublin area. This research is being conducted by Diarmuid Murphy. This online survey should take less than 10 minutes to complete. You can discontinue taking this survey at any time by leaving the site. The survey tool is designed to be anonymous and confidential. The results of this study will be used for academic purposes only.

If you have any questions about the research study, please contact: Diarmuid Murphy: 086-381 6388
Email: diarmuid.murphy3@mydit.ie Please answer all questions.
To participate in the survey it is necessary to be resident on the Dublin City or County.

***1. Do you live in Dublin city or County Dublin?**

- ◯ Yes
- ◯ No

2. Basic Information

***2. What is your gender?**

- ◯ Female
- ◯ Male

***3. What is the highest level of education you have completed?**

- ◯ PhD
- ◯ Masters
- ◯ Bachelors
- ◯ Diploma/ Certificate
- ◯ Trade/Technical/Vocational
- ◯ Secondary

3. Family

***4. Do you live in:**

- ◯ Single-family house
- ◯ Single-family apartment/flat
- ◯ Multi-family apartment/flat
- ◯ Multi-family house

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***5. How many people currently live in your household?**

***6. How many residents are __ of age?**

0-5 yrs

6-17 yrs

18-65 yrs

over 65 yrs

4. Employment

***7. Employment: Are you?**

- Working Full-time /Self-employed
- Working part time
- Home maker
- Unemployed
- Retired
- Student

***8. Would you say that your combined household income for the last 12 months is:**

- Less than in 2007
- The same as 2007
- More than in 2007

5. Eating & Shopping Habits

***9. Eating at Home: Who cooks the main meal in your household?**

- Myself
- Partner/Spouse
- Shared Chore
- Other (please specify)

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***10. Shopping: Where was the main weekly shop for your household completed last week? (Tick all that apply)**

- [ ] Tesco
- [ ] Dunnes
- [ ] Supervalu
- [ ] Aldi
- [ ] Lidl
- [ ] Iceland
- [ ] Dealz
- [ ] Spar
- [ ] Londis
- [ ] Costcutter
- [ ] Mace
- [ ] Centra
- [ ] Other (e.g. greengrocer, butcher, bakery, etc.) Please specify

***11. Shopping: Is this different to where the main weekly shop was completed in 2010?**

- ◯ Yes
- ◯ No
- ◯ Can't remember

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***12. Shopping: Where was the main weekly shop for your household completed in 2010? (Tick all that apply)**

- [ ] Tesco
- [ ] Dunnes
- [ ] Supervalu
- [ ] Aldi
- [ ] Lidl
- [ ] Iceland
- [ ] Dealz
- [ ] Spar
- [ ] Londis
- [ ] Costcutter
- [ ] Mace
- [ ] Centra
- [ ] Not sure/can't remember
- [ ] Other (e.g. greengrocer, butcher, bakery, etc.) Please specify

***13. Shopping: Where were any top-up shops for your household completed last week? (Tick all that apply)**

- [ ] Tesco
- [ ] Dunnes
- [ ] Supervalu
- [ ] Aldi
- [ ] Lidl
- [ ] Iceland
- [ ] Dealz
- [ ] Spar
- [ ] Londis
- [ ] Costcutter
- [ ] Mace
- [ ] Centra
- [ ] No top-up shop last week
- [ ] Other (e.g. greengrocer, butcher, bakery, etc.) Please specify

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***14. Shopping: Is this different to where any top-up shops was completed in 2010?**

- ◯ Yes
- ◯ No
- ◯ Not sure/can't remember

***15. Shopping: Where were any top-up shops for your household completed in 2010? (Tick all that apply)**

- ☐ Tesco
- ☐ Dunnes
- ☐ Supervalu
- ☐ Aldi
- ☐ Lidl
- ☐ Iceland
- ☐ Dealz
- ☐ Spar
- ☐ Londis
- ☐ Costcutter
- ☐ Mace
- ☐ Centra
- ☐ Not sure/can't remember
- ☐ Other (e.g. greengrocer, butcher, bakery, etc.) Please specify

6. Breakfast

***16. Breakfast: Did you have your breakfast at home yesterday?**

- ◯ Yes
- ◯ No

***17. Breakfast: What foods did you prepare for breakfast? (Tick all that apply)**

- ☐ Boiled eggs
- ☐ Cooked Breakfast
- ☐ Toast
- ☐ Cereal
- ☐ Other (please specify)

Masters Thesis - Survey regarding Food Purchasing and Preparation

***18. Breakfast: Which of the following appliances did you use to cook breakfast yesterday? (Tick all that apply)**

- [ ] Oven
- [ ] Stove
- [ ] Toaster
- [ ] Microwave
- [ ] Grill
- [ ] No cooking device
- [ ] Other (please specify)

7. Lunch

***19. Lunch: Was the lunch you had yesterday prepared at home?**

- ( ) Yes
- ( ) No

***20. Lunch: What foods were included in your lunch? (Tick all that apply)**

- [ ] Sandwich
- [ ] Fresh vegetables / fruit
- [ ] Fresh meat or fish
- [ ] Potatoes
- [ ] Eggs
- [ ] Frozen vegetables
- [ ] Frozen chips/wedges/waffles
- [ ] Dried pasta/spaghetti / rice
- [ ] Shop bought sauces
- [ ] Tinned veg
- [ ] Other tinned foods
- [ ] Frozen/breaded fish
- [ ] Noodles
- [ ] Chilled/frozen pizza / burgers etc.
- [ ] Ready meals / convenience
- [ ] Other (please specify)

Masters Thesis - Survey regarding Food Purchasing and Preparation

21. Lunch: Which of the following appliances were used to cook your lunch yesterday? (Tick all that apply)

- [ ] Oven
- [ ] Stove
- [ ] Toaster / Panini maker
- [ ] Microwave
- [ ] Grill
- [ ] Deep-fat fryer
- [ ] No cooking device
- [ ] Other (please specify)

***22. Lunch: Was your lunch:**

- ○ Baked/ roasted
- ○ Boiled
- ○ Deep fried
- ○ Grilled
- ○ Microwaved
- ○ Not cooked (sandwich, salad etc.)
- ○ Pan fried/sautéed
- ○ Stir fried
- ○ Other (please specify)

8. Dinner

***23. Dinner: Was the dinner you had yesterday prepared at home?**

- ○ Yes
- ○ No

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***24. Dinner: What foods were included in your dinner? (Tick all that apply)**

- ☐ Fresh vegetables
- ☐ Fresh meat or fish
- ☐ Potatoes
- ☐ Eggs
- ☐ Frozen vegetables
- ☐ Frozen chips/wedges/waffles
- ☐ Dried pasta/spaghetti/ rice
- ☐ Shop bought sauces
- ☐ Tinned Veg
- ☐ Other tinned foods
- ☐ Frozen/breaded fish
- ☐ Noodles
- ☐ Chilled/ frozen pizza/ burgers etc.
- ☐ Ready meals / convenience
- ☐ Other (please specify)

***25. Dinner: Which of the following appliances were used to cook your dinner yesterday? (Tick all that apply)**

- ☐ Oven
- ☐ Stove
- ☐ Toaster / Panini maker
- ☐ Microwave
- ☐ Grill
- ☐ Deep-fat fryer
- ☐ No cooking device
- ☐ Other (please specify)

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***26. Dinner: Was your dinner**

- Baked/ roasted
- Pan fried/sautéed
- Deep fried
- Microwaved
- Stir fried
- Grilled
- Boiled
- Not cooked (sandwich, salad etc.)
- Other (please specify)

9. Cooking from scratch

***27. Cooking from scratch: In the last week, on how many days was the main meal prepared or cooked from scratch in your household? (i.e. using raw/fresh/primary ingredients)**

***28. Cooking from scratch: Thinking back to start of the current recession (2007), would you say that you are preparing /cooking meals from scratch? (i.e. using raw/ fresh/primary ingredients)**

- More often
- Less often
- About the same

10. Attitudes to food shopping

Masters Thesis - Survey regarding Food Purchasing and Preparation

***29. Attitudes to food shopping: Please state how much you agree or disagree with each of the following statements.**

	Strongly Disagree	Disagree	Neither Disagree Nor Agree	Agree	Strongly Agree
Quality of fresh food is more important than price to me	○	○	○	○	○
I most often go to the same store but look for the best value for money I can get	○	○	○	○	○
I will pay a bit more for grocery shopping to get superior customer service	○	○	○	○	○
I don't mind spending time when looking for a bargain	○	○	○	○	○
I watch for announcements for sales or promotions on grocery	○	○	○	○	○

***30. Attitudes to food shopping: Please state how much you agree or disagree with each of the following statements.**

	Strongly Disagree	Disagree	Neither Disagree Nor Agree	Agree	Strongly Agree
When I shop the first thing I look for is price	○	○	○	○	○
The most important thing is price when grocery shopping	○	○	○	○	○
There is no difference between the main supermarkets	○	○	○	○	○
I tend to buy on impulse if I think that items are cheap	○	○	○	○	○
I compare prices between outlets to see where I can buy the cheapest fresh food, even if I have to travel	○	○	○	○	○

Masters Thesis - Survey regarding Food Purchasing and Preparation

***31. Thinking back to start of the current recession (2007), would you say that you are now doing any of the following more often, less often, or have you made no change.**

	More often	Less often	Made no change
Spreading my main weekly food shop across a number of shops to get the best value	○	○	○
Shopping in discount retailers such as Aldi or Lidl for my main weekly food shop	○	○	○
Buying food items on promotion as part of my main weekly food shop	○	○	○

11. Thank you for your participation in this research project. One final questi...

32. Would you be willing and available to provide further insights by taking part in a semi-structured interview by phone or face to face which would take about 10-15 minutes to complete. If yes, please provide your phone and email address here. Many thanks. Diarmuid Murphy

Appendix 2: Interview #1 AR

Typically how often do you cook the main meal of the day from scratch in a week?

Four to five days.

That's good, is that more now than it was six or seven years ago?

I live on my own now, six or seven years ago, I would've lived at home. So my parents would have cooked it, say four or five days, I would have only done 3 or 4, so it would be more now yes.

Ok, and on the days you don't cook the main meal at home, what would you do, would you get a takeaway or would you eat out?

I mean it would be a selection, takeaways, eating out, or if I make something big during the week, I'll freeze a portion and then I'll take that out of the freezer and have that.

And has that changed in six or seven years?

Yes, I'm far less wasteful now! If there is a portion left over, freeze it and have it for another day's dinner.

Ok and what part has the recession played in that?

Just the wastefulness I mean especially now that I'm earning my own money, I'm not spending my parents money, I know the value of money more so, if there is something left over, I'm far less likely to put it in the bin.

So has the recession affected your food shopping?

Oh yes - you go into Tesco you look for the yellow labels, you'd always look for a deal or I'd shop in Lidl far more than maybe I would have before, I think it was seen as kind of…there was a stigma attached to it before.

And has the recession affected your cooking habits?

No I can't say…well I'm trying to think, location has affected it more than recession, because I would have lived in the UK before.

Ok, if you are coping on a tighter food budget which many are, which of these is more suitable for you, are you using more cheaply available processed foods, or are you using more cheaply available basic ingredients. And the example I would give you, if you wanted Shepherd's Pie, would you buy from Iceland or one of those shops or would you make it yourself, buy the ingredients and make it yourself?

I'd like to say I'd buy the ingredients, and make it up; it's very tempting when it's already made, so my processed food would have increased with the recession.

So would you say you are a better cook now than six or seven years ago?

Yes, six or seven years ago, I was only a chap! Didn't have to cook my own meals.

And what are your thoughts on how people in general have coped with a shrinking food budget?

Well I think people have ignored the stigma, so like I said that were attached to Aldi and Lidl, now it's ok for everyone to shop there, I think maybe the snobs of society have make it ok to shop there, so people aren't….they are not hiding when they are going in there. And definitely I think everyone is looking for a bargain, everyone. It's affected everyone, so I'd say they are constantly totting up in their head as they are going through their shop, rather than just kind of, I'll throw this in the basket, I'd say a lot less kids go shopping with their parents as well.

Yes the temptation of the kids coming up, mummy…

Yes, difficult to say no. People are less likely to buy, they are more likely to settle for the shops own brand, than they maybe use to be.

What would you do to treat yourself, if you were spending x amount a week on food and then you say you know what, I deserve a treat, what would you do to treat yourself, would you get a takeaway or would you just buy a Gateaux?

We do sometimes, my roommate and I, if we are up around the weekend and we want to treat ourselves, we do one of the Tesco meal for two for whatever it is, we get a bottle of wine and so it's still like a bargain but it's a treat.

Yes, it's a bargain but it's a treat yes. Excellent, ok, thank you very much.

End…

Appendix 3: Interview #2 SL

Typically, how often do you cook the main meal of the day from scratch in your house?

Every day, seven days.

Seven days, that's great. Is that more now, than it would have been six or seven years ago?

Yes.

Ok, so on the days that you don't cook the main meal at home, if that ever happens, what do you do for the main meal, do you get a takeaway, do you eat out?

It would probably be a takeaway.

And has that changed in the last six or seven years?

Yes.

How has that changed?

We would have got more takeaways, before.

And what part in that has the recession played, is it a financially driven thing?

Yes that is the main.

Has the recession affected your food shopping, the way you do your shopping?

Yes.

How has it affected it?

Because before you wouldn't be minding the prices, when you'd be going around a supermarket, now you do. And before I would shop in Tesco's or Dunnes and now it's Aldi or Lidl.

So how have you coped with a tighter food budget, are you for instance, are you using more cheaply available processed foods, or are you using more cheaply available basic ingredients, now an example I have is, say you wanted to cook, you wanted to give the kids Shepherd's Pie, would you buy Shepherd's pie frozen, in one of the shops or would you make it yourself?

Make it myself.

Excellent. So are you a better cook now, that you were six or seven years ago?

Probably so yes.

This last question I have is what are your thoughts in how people in general have coped with a shrinking food budget?

I think because we have likes of Aldi and Lidl here now, before seven years ago, you wouldn't have had them here, most people shop there, than Tescos or Dunnes Stores or anything like that. But even the likes you see the Chinese restaurants are all closing down or they are all doing special meal deals now for, that wouldn't have been available seven years ago.

So special offers is something that features heavily.

Yes.

And say you have got a tight food budget for instance, but you have less money to spend than you would have done previously, how do you give yourself a treat, what would you do, would you say once a week, we'll just get a takeaway tonight, or I'll tell you want I'll do, I'll buy steak just on Friday or Saturday?

Yes, I'd probably get a takeaway if I had to work extra hours, that way and then you are just too tired to cook.

The extra hours gives you the money.

Yes, it would be really only down to tiredness that you would get a takeaway.

That's great and you would be buying lots of fresh vegetables then?

Yes because of Aldi's deals, the 49 or the 29 cents, courgettes and stuff like that.

Great, thank you very much.

End…

Appendix 4: Interview #3 LT

Typically, how often do you cook the main meal of the day from scratch in your house?

Five days.

And is that more often now than it would have been six or seven years ago?

It's the exact same, five days.

And the days that you don't cook the main meal at home, what would you do to get the main meal, would you maybe eat out or would you get a takeaway?

Say one day, we'd get a takeaway and the next we might eat out.

Great, and has that changed in six or seven years?

Yes, I think we probably got more takeaways six or seven years ago.

Ok and what part has the recession played in that, I mean is it due to the recession you have less money to spend on it?

Yes.

And has the recession affected your food shopping?

Yes, we buy less now and we look around different places now.

You buy less?

Yes.

But you still eat, buy less and you shop around. Ok, where would you shop around?

Aldi, Lidl, Iceland sometimes.

Ok and has the recession affected your cooking habits?

No, not really now, we don't buy luxury foods anymore really, stuff we don't really need.

And how have you coped with a tighter food budget, for instance are you using more cheaply available processed foods or more cheaply available basic ingredients. I mean an example would be, you want Shepherd's Pie for dinner, are you buying a frozen Shepherd's Pie from Iceland maybe, or are you making it?

We make it from scratch, nearly everything.

Very good. And are you a better cook yourself now, than you would have been six or seven years ago?

Definitely yes.

Good stuff, and tell me, what are your thoughts on how people in general have coped with shrinking food budgets?

Well places like Aldi and Lidl now, they can compare with different places, it's cheaper usually than Tesco or Dunnes and there is more and more being built now.

You can buy the same stuff pretty much; you are not buying the big brands.

There is Aldi's in Tallaght and all that now, when years ago there wasn't. So they can shop around everywhere.

Excellent, thank you very much.

End….

Appendix 5: Interview #4 VK

Typically, how often do you cook the main meal of the day from scratch in your house?

I would do that probably six days a week.

Very good, is that more often now, than it would have been six or seven years ago?

Yes it is.

And on the days that you wouldn't cook the main meal at home, what would you do, would you take-away or eat out?

It would be takeaway.

And has that changed since six or seven years ago?

Yes it would be less frequent.

And what part has the recession played in that?

Not hugely a financial decision. I suppose it would be a small part of it, but my children are very interested in food, particularly my son. He has taken a huge interest in cooking. So that would be the main reason for it, because he's hugely interested.

So this current recession has that affected your shopping?

Hugely.

How?

Well we are not shopping, I mean I would have shopped in Superquinn and I wouldn't have been over conscious of what I was actually purchasing. But now I'm very conscious of what I'm purchasing and because we cook fresh, we have to make sure that it lasts.

So if you are not going to Superquinn where are you going?

I shop in Aldi now mostly, because it's cheaper.

So tell me this, has recession then affected your cooking habits, how you cook, what you cook?

Yes it has, yes it has.

In what way really?

I don't buy anything like ready meals or anything prepared or anything like that.

So say, if you were coping on a tighter food budget, I have a question, would you be using more cheaply available processed foods, or more cheaply available basic ingredients. For example, if you wanted Shepherd's Pie for your son, would you buy somewhere or would you cook it yourself?

I would cook it myself.

And are you a better cook now, than you were six or seven years ago?

I would be yes.

Necessity is the mother of invention! So one final question, what are your thoughts on how people in general have coped with shrinking food budgets?

I think they have had to cope, so it is about shopping more cheaper and looking for more fresh produce I suppose, people can’t afford eating out, can’t afford takeaways… can’t afford takeaways at all.

Shopping around looking for the bargains.

Yes, I mean you hear that all the time, people getting so much in Aldi getting so much in Lidl, wherever the cheapest…

And tell me this, if you were going to treat yourself, say you have been shopping in Aldi, you have been cooking all week, you have been cooking nice fresh product, putting good food on the table. Say you wanted a treat for yourself, what would you do, would you say I'm going to bite the bullet and buy a nice steak or would you get a takeaway, or would you say, no we are going….

I would go Fallon & Byrne in town.

And is it important to have a treat?

Very much so, yes.

Kind of let you know that the struggle has been worth it?

Very much so yes.

Thank you very much.

End…

Appendix 6: Interview #5 DN

Typically how often do you cook the main meal of the day from scratch in your house?

I'd say about 4 times I'd say.

Ok is that more often now than it would have been six or seven years ago?

Yes, it would yes.

So on the days that you don't cook the main meal at home, what would you do, would you get a takeaway?

Take-away yes.

And has that changed in six or seven years?

I'd say it's the same at the moment yes.

Ok and it's about the same, so there is no huge financial driver saying, I can't afford the takeaway's I can't afford this?

Well the main reason why we do the cooking from scratch now, is because you can get vegetables cheaper in places like Aldi and Lidl.

Ok, so how has recession affected your food shopping then?

Well we would basically if we are going around Tesco or anything like that; we go to anywhere that's the frozen stuff that's on special offer.

Ok, so really you are price conscious then?

Yes, of course yes.

So how has it affected your cooking habits?

Well now as I was saying, getting vegetables and stuff like that, we would go to Aldi and Lidl and if we were cooking tomato based sauce or something like that, we go there, get onions and garlic and stuff like that.

Great stuff, you are cooking from scratch. Here's a question for you then, if you are price conscious and you are cooking with a tighter food budget, are you using more cheaply available processed foods or would you be using more cheaply available basic ingredients. For instance if you wanted to have Shepherd's Pie, would you buy one, or would you make it yourself?

Well our main thing is that we would eat; you see my girlfriend is a vegetarian.

Well that definitely puts a….

Yes, so we would make vegetable lasagne, so we would basically we'd buy the pasta sheets from Dolmio.

You cook it yourself; you'd make it from scratch pretty much.

Yes and the stir fries and stuff like that.

Now, are you a better cook now than you were six or seven years ago?

Definitely yes, yes.

Final question I have here, what are your thoughts on how people in general have been coping with a shrinking food budget.

Well everybody I know is doing the same thing, they are going to places that have special offers on, people would go, basically a lot of people now, would know the difference in price between Dunnes Stores and Tesco for food and Aldi and Lidl as well.

Price conscious yes, and they are delivering the leaflets through the door these days, so you can see just at a glance. So say you are cooking on a tighter budget, your girlfriend if a vegetarian, say you wanted to treat yourself, how would you treat yourself, would you say, I'm going to go and buy some really nice fish for yourself or tofu or something for her?

Marks and Spencer’s would be a treat.

That’s your treat M&S and their food hall is where you would treat yourself, or wouldn’t necessarily be a takeaway, it would be Marks and Spencers, top of the range.

Yes, the dine-in for two meal or something like that.

Again though, it’s a treat but it’s driven by the special offer aspect of it, that’s fantastic, well thank you very much for helping me.

End…

Appendix 7: Interview #6 KC

Typically how often do you cook the main meal of the day from scratch in your house?

About five times.

Really good. Is that more often now, than say six or seven years ago?

Yes.

A lot more?

Yes a lot more.

On the days that you don't cook the main meal at home, what would you do for the main meal, would you eat out or do you get a takeaway?

Yes I'd eat out.

Ok, and has that changed since six or seven years ago?

Yes.

A lot?

Yes, a lot.

And what part has the recession played in that?

Just being expensive to eat out.

So a financial decision then?

Yes.

Has recession affected your food shopping, the way you shop, where you shop, things like that?

Yes definitely.

So what way has it affected it?

Just looking for better prices for food.

The bargains and the special offers?

Exactly, I'd be shopping at Tesco before, now I'm more inclined to go to Aldi or Lidl or something.

So say for instance you are coping on a tighter food budget, are you using more cheaply available process foods, or are you using more cheaply available basic ingredients. An example I have for that, is say you were cooking Shepherd's Pie, or you wanted Shepherd's Pie, would you but it frozen or would you make it yourself?

I'd make it all myself, I would buy processed foods, but I'd get whatever is on special offer in the shops, is what I'd usually go for, for fresh fruit and veg.

Brilliant and are you a better cook now, that you were six or seven years ago?

A lot better!

And one final question then, what are your thoughts on how people in general have coped with a shrinking food budget?

I think they have all coped well to be honest, I mean there are a lot of bargains out there.

So people are looking for bargains?

If you shop around what's on special offer, you have your Aldi, you have your six a week that you get for 39 cent and stuff.

You are obviously reading the promotional material that they are putting through your door?

Absolutely exactly, go by that religiously.

And you do the price comparisons.

Yes and then you just find out what to make through with those ingredients.

Brilliant and tell me one other little thing, say you were going to treat yourself, how would you treat yourself, would you for instance buy a nice, you might buy an expensive piece of fish and say it's Saturday, I'm just going to cook a nice piece of fish, or do you get a takeaway or do you say, hang the expense, we are going out to dinner?

Depends, once a week we always get a takeaway, say every Saturday night. If I was having visitors and I was catering for them, then yes, I'd go out and I'd buy like you said, expensive piece of fish. I'd go to a butchers treat myself and the guests. That's the only time I'd really spend, or if I was going out for the evening.

Thank you very much.

End…

Appendix 8: Interview #7 DB

Typically how often do you cook the main meal of the day from scratch in the week?

I generally…, I'm off on Saturday and Sunday, I shop on a Saturday and on a Sunday I would cook three meals for the week.

So you batch cook. Is that more often now than say six or seven years ago?

Yes.

And on the days when you don’t cook the main meal at home, what is your solution, do you get a takeaway do you eat out?

Both, but not all the time, it depends.

And has that changed in six or seven years?

Yes not eating out as much, the budget isn’t there, definitely looking for value in restaurants, more value.

So what part has the recession played in that?

Huge part in terms of, whereas before when I would have earned more money, it would have been simpler to get a takeaway or eat out. But now I'm very conscious of what I pay, and I suppose before the recession I’d have not have known the price of a pint of milk, I certainly do now.

Cash rich and time poor, not anymore. So has recession affected your food shopping?

Yes.

And how?

I would have been a Superquinn girl, but my mother introduced me to Lidl and Aldi and I certainly, not for meat, I wouldn’t necessarily buy my meat there, but I would certainly buy cleaning products, the basics, the household basics, toiletries and stuff like that, fruit and veg, I find actually their fruit and veg is of a higher standard than the other supermarkets like Tesco, they have a quicker turnover in terms of their food sells much faster.

And it's very cheap.
Much cheaper, but I find their meat quality is much poorer than the other supermarkets.

And tell me, has the recession affected your cooking habits?
It's changed because I'm actually doing more precooked meals making more home cooked soups and things like that at home to have during the week. So mightn't necessarily have dinner but I might have soup and sandwich.

So if you are coping with a tighter food budget, because you said you are more financially aware now, would you be using more cheaper available processed foods or more cheaper available basic ingredients, and for instance if you fancied Shepherd's Pie, would you buy the Shepherd's Pie off the shelf, microwave it or something or would you buy the ingredients and make it yourself?
I'd buy the ingredients and make it myself.

Excellent, would you say you are a better cook today, than you were six or seven years ago?
Yes.

And that's because you are cooking more?
I cook more definitely.

And what are your thoughts on how people in general have coped with shrinking food budgets?
I think people are really started to look what they are spending as opposed to before, they necessarily weren't. I think they are very conscious of price, they are conscious of value; everybody is looking for value for money.

Everyone is looking for deals and special offers.

Yes, sometimes if I'm at home and my aunt and we'd shop together, because we pool the car, so there might be a two for one offer ,we'll buy the two for one offers, she'll take one and we'll split the difference, so things like that. So very much more conscious, I'm more inclined now in supermarket to look at the special offers first. But I do look at prices a lot more now than I use to.

Yes, a lot of people are doing that. So there was one other thing there, so say you are provisioning your house on a slightly, on a tighter food budget, what would you do to treat yourself, just say some weeks, I'm just going to buy that really nice fillet steak and cook it, or would you say, no let's go out and have a meal, or would you get a takeaway?

A takeaway is a treat now. I'd probably go from eating out maybe four times a month to once a month.

Really from four to one eating out. Well you can see everyone in the restaurants, they are all chasing the same pay packet, so there are lots of deals out there now, but people are and I think drinking as well, I think people drinking at home.

A lot more people drink at home, I know I am, I'm not in the pub anymore, it's a bottle of wine at home, and I find the likes of O'Briens is excellent. So buy a couple of bottles of wine every week, you get your loyalty card and the next time I go, I might have a fiver off.

Exactly, yes, people are still very price-conscious everywhere, across the board.

Certainly indeed

But you can sustain your life now, whereas before you could have gone to Tesco and done your weeks shopping and not batting an eyelid, you can do your weeks shopping in Aldi now, and you will be getting out for a lot less.

Absolutely which means I can afford the takeaway.

Thank you very much D.

End.

Appendix 9: Interview #8 LOC

Lillian, typically how often do you cook the main meal of the day from scratch in a week?

I suppose five to six.

Really good, and is that more often now than say six or seven years ago?

Yes, it would be yes.

Ok, and on the days you don't cook the main meal at home, what would you do, would you get a takeaway or would you eat out?

Probably eat out, but it would be more in the day time and it would be something like just taking the kids to McDonalds or going around the corner to a Bistro or something.

Has that changed since six or seven years ago?

Yes, we would have gone out more night six or seven years ago, where it's a night out for adults, as opposed to eating out as a family.

Ok and what part has the recession played in that?

Yes it's had a big role, because just money is tighter all around.

So has the recession affected your food shopping?

It has, because you just are more price aware aren't you? But I'd like to think that I'm buying the same food I was five or six years ago, I'm just getting it for cheaper.

Following on from that then, has the recession affected your cooking habits?

Yes, well if you are eating more at home, I suppose you are cooking more at home and you are trying to feed your family, and not spend too much money doing it, so I suppose you cook more stuff yourself don't you?

Ok, if you are coping on a tighter food budget which many are, which of these is more suitable for you, are you using more cheaply available processed foods, or are you using more cheaply available basic ingredients. And the example I would give you, if you wanted to give the children for instance Shepherd's Pie, would you buy that off the shelf in Iceland or wherever or would you make it yourself, buy the ingredients and make it yourself?

So you are not talking about an expensive ready meal, I see what you mean. No I'd definitely make it myself, I mean apart from anything else, there was just such a huge scare with frozen food there last year that I'd stay clear of everything frozen since then. I wasn't a huge fan of frozen anyway, but now I definitely wouldn't buy anything.

It was a huge shock to everybody. So would you say you are a better cook now than six or seven years ago?

No probably the same, I'd like to think I was a good cook then!

Reflects very well on you. And what are your thoughts on how people in general have coped with a shrinking food budget, people you know, just by context people you know.

Well lots of people I know are quite well off funnily enough. But I suppose in general even the people who are well off, there is no shame anymore in shopping in Aldi or Lidl, it's actually the clever thing to do, whether you have money or not. I suppose people who don't have money then they are definitely going to, I think they are called the 'German Discounters' or whatever. And even I notice myself, even if I go to Tesco which I have to for top ups, I will not touch anything that's not on offer, it has to be half price or three for two or whatever. Because we all have our few bits that we can’t buy, where we do our main shop. For example there are a few things, we just love that Tesco do and we have buy them there. But other than that, it’s price.

And one final thing, how do you treat yourself, if you wanted to give yourself a treat at the end of the week, you have been cooking bits and pieces all week and you decided it’s time for a treat, how would you treat yourself?

I’d just go out to eat.

You wouldn’t get a takeaway?

No.

It would be go out?

Yes, in our case yes, or if you were going to get a nice bottle of wine, then it would be buy, I suppose it’s stereotypical but a nice steak and a nice bottle of wine and do something like that. So it’s more expensive ingredients cooked in the house, or else just go out.

Yes, L thank you very much.

End.

Appendix 10: Interview #9 ME

ME, typically how often do you cook the main meal of the day from scratch in your house?

About four times, five times a week maybe.

Really good, and is that more often now than say six or seven years ago?

It would be less probably.

Less! Ok, and on the days you don't cook the main meal at home, what would you do, would you get a takeaway or would you eat out?

Usually get a takeaway.

Has that changed since six or seven years ago?

Not really actually we are probably more religious about it than six or seven years ago.

Ok, and the general consensus is that recession is affecting people's food habits, shopping and cooking, would you say that it has affected your food shopping the recession?

Yes definitely.

And how has it affected it?

Well it seemed that the prices from the Irish supermarkets were going up all the time and my friends and stuff, had all said they were starting to shop in Lidl and Aldi.

The German retailers?

Yes.

Yes, and has the recession affected your cooking habits?

Not really, I don't think so.

Ok, if you are coping on a tighter food budget which many are, which of these is more suitable for you, are you using more cheaply available processed foods, or are you using more cheaply available basic ingredients. And the example I would give you, would be that, say for instance your kids wanted Shepherd's Pie, would you buy the Shepherd's pie and put it in the microwave or the oven, or would you make it from scratch?

Make it from scratch.

And would you say that you are a better cook now, than you were six or seven years ago?

I'd say; I've progressed six or seven years ago.

What are your thoughts in general, on how people in general are coping with shrinking food budget, because many people are, how do you think people are coping, what's their solution to a shrinking food budget?

I think they are eating more eggs, I think they are eating more vegetables and less meat. In some cases now, and then they are just buying cheaper meat.

And for instance maintain the size of the grocery basket or the trolley, but just trying to get it cheaper?

Yes probably I'd say sausages instead of chops or something like that.

So basically they are trimming their sails according to the wind. If you were going to treat yourself, how would that represent itself food-wise? Would you say once a week, I'm going to buy two nice steaks and cook them and sit in, or would you go out and eat or would you get a takeaway?

It varies, my husband would buy steaks definitely it’s one of his treats.

So the treat would be the steak, and you cook it at home though?

Yes.

Ok ME thank you very much for helping and it’s been nice to talk to you.

End…

Appendix 11: Interview #10 COD

Typically, how often do you cook the main meal of the day from scratch in your house?

Probably six times a week.

Very good and is that more often now than it was six or seven years ago?

No it would be the same.

Ok and on the days that you don't cook the main meal at home, what do you do, do you get a takeaway, would you eat out, all of you together?

We'd probably have a takeaway or occasionally eat out, but takeaway.

Has that changed since six or seven years ago?

Not much, not much possibly might be a little bit less takeaway, but not very much no.

Little less take away. Do you think the recession has affected your food shopping?

Yes, I'd say it would be more, we shop from multiple outlets.

You are not alone there; there are lots of people doing that. And do you think the recession has affected your cooking habits?

No, it hasn't no.

Lots of people are coping on a tighter food budget and I was wondering are you more likely to use more cheaply available process foods or use more cheaply available basic ingredients and the example I have, we'll say for instance you wanted to have Shepherd's Pie for dinner, would you buy a frozen Shepherd's Pie or would you get the ingredients and make it yourself?

No we'd normally make it ourselves, so rarely cook fully processed foods, heated or frozen meals.

Would be more into the fresh?

Yes, with the exception where the kids, the kids might have a preference for a frozen pie or something.

Are you a better cook yourself now, than you would have been six or seven years ago?

Well yes we definitely experiment more and you know we can sometimes have dinner for all of us for less than a fiver … not bad for six of us! It's like a fun challenge sometimes … of course you have to satisfy six different sets of taste buds.

What are your thoughts on how people in general have coped with shrinking food budgets?

Well I suppose you know… everyone at the club (G.A.A.) would be talking about Aldi and Lidl and the value you know… We would hear a lot about those places the German shops and it seems to me that it's Lidl and Aldi that have fed the country since the crash and people don't mind saying now where you know before they might not have liked to admit it.

Say you were going to treat yourself, how would you treat yourself? Would you buy some top quality produce and cook it here? Or maybe eat out? Or a take-away?

Well eating out if was just the two of us but you know if it's for the whole family, kids and all it would definitely be the take-away option for us…

Thanks for that you've been very helpful Ends

Appendix 12: Euro Zone Countries

List of Eurozone Countries

Austria

Belgium

Cyprus

Estonia

Finland

France

Germany

Greece

Ireland

Italy

Latvia

Luxembourg

Malta

The Netherlands

Portugal

Slovakia

Slovenia

Spain.

States with formal EU permission to use the Euro

Monaco

San Marino

Vatican City

Andorra

States that have unilaterally adopted the Euro

Kosovo

Montenegro

Appendix 13: European Union Countries

List of European Union (EU) Countries

Year of entry in brackets

Austria (1995)
Belgium (1952)
Bulgaria (2007)
Croatia (2013)
Cyprus (2004)
Czech Republic (2004)
Denmark (1973)
Estonia (2004)
Finland (1995)
France (1952)
Germany (1952)
Greece (1981)
Hungary (2004)
Ireland (1973)
Italy (1952)
Latvia (2004)
Lithuania (2004)
Luxembourg (1952)
Malta (2004)
Netherlands (1952)
Poland (2004)
Portugal (1986)
Romania (2007)
Slovakia (2004)
Slovenia (2004)
Spain (1986)
Sweden (1995)
United Kingdom (1973)

Appendix 14: List of OECD Countries

Australia	Austria
Belgium	Canada
Chile	Czech Republic
Denmark	Estonia
Finland	France
Germany	Greece
Hungary	Iceland
Ireland	Israel
Italy	Japan
Korea	Luxembourg
Mexico	Netherlands
New Zealand	Norway
Poland	Portugal
Slovak Republic	Slovenia
Spain	Sweden
Switzerland	Turkey
United Kingdom	United States

Appendix 15: EFTA Countries

List of European Free trade Association (EFTA) Countries

Iceland

Liechtenstein

Norway

Switzerland

Appendix 16: Schengen Area Countries

Austria	Lithuania
Belgium	Luxembourg
Estonia	Malta
Finland	Norway
France	Poland
Germany	Portugal
Greece	Slovakia
Hungary	Slovenia
Iceland	Spain.
Italy	Sweden
Latvia	Switzerland
Liechtenstein	The Netherlands

De Facto Members of Schengen area

Andorra

Monaco

San Marino

Vatican City

Appendix 17: EEA Countries

List of European Economic Area (EEA) Countries

Austria

Belgium

Bulgaria

Cyprus

Czech Republic

Denmark

Estonia

Finland

France

Germany

Greece

Hungary

Iceland

Ireland

Italy

Latvia

Liechtenstein

Lithuania

Luxembourg

Malta

Norway

Poland

Portugal

Romania

Slovakia

Slovenia

Spain.

Sweden

Switzerland

The Netherlands

United Kingdom

Pending

Croatia

Appendix 18: Glossary of Terms

B.O.G.O.F.

A marketing term used by retailers meaning Buy One, Get One Free usually used in point of sale or in-store advertising.

Bord Bia

The Irish State board responsible for promoting the sale of Irish food, domestically and internationally.

European Central Bank (ECB)

The central bank for the Euro and responsible for administering the monetary policy of the Eurozone and exerting fiscal controls within that grouping.

European Commission (EC)

The executive of the European Union--responsible for the day-to-day running of the EU. The *de facto* government of Europe.

European Economic Area (EEA)

A group comprising the EFTA countries and the EU countries. (With the exception of Croatia). This grouping is dedicated to free exchange of goods, services, money and people between members and all signatories are free-market economies.

European Free Trade Association (EFTA)

A grouping of non-EU countries that trade with each other and the EU.

European Union (EU)

A political and economic union of European states and their dependencies. The EU is a single market and is the largest trade bloc globally.

German Discounters / German Retailers

Expressions that are used to describe Aldi & Lidl in common parlance.

Groceries Order

A piece of Irish legislation which ran from 1987-2006, implemented to prevent the selling of groceries beneath the invoice value. This was designed to protect smaller retail groceries from multiples and to protect consumers and end-users from speculative pricing.

Gross Domestic Product (GDP)

The market value of all goods and services produced within a country. Often used as a *per capita* measure of the standard of living within that country.

Gross National Product (GNP)

The market value of all goods and services and incomes produced within a country and owned by its citizens, therefore GNP measure offshore earnings in addition to domestic earnings.

Inflation

The level of price increase within an economy over a period of time (usually annually) an inflationary economy gradually erodes the purchasing power of a currency unit.

International Monetary Fund (IMF)

An organisation of 188 member-states. The IMF oversees and adjudicates on the international monetary system. The IMF will also regulate payment systems globally and monitor fiscal policies of member-states. The IMF also acts as a lending institution, usually of last resort.

Kantar Worldpanel (KWP)

A consumer behaviour specialist firm based in London, KWP conduct market analysis globally and are experts at examining consumer purchase and consumption patterns and the motivations behind them.

Mintel

A consumer behaviour specialist firm based in London, Mintel conduct market analysis globally and are experts at examining consumer purchase and consumption patterns and the motivations behind them.

Organisation for Economic Co-operation and Development (OECD)

A Paris-based international economic grouping the members of which are all committed to parliamentary democracy and free market principles. The OECD are mostly European or English-speaking former British colonies with the exception of Japan. The OECD is an important contributor to international debate within the grouping and prepares many reports enabling member states to compare and contrast social contexts as a result of economic policy.

Retail Estate

Commercial estate agents use this term to describe a company's bricks-and-mortar street presence, in the case of food retailers this would largely refer to the physical stores on the high street.

Schengen Area

A continental-European based border agreement that waives the necessity for passports, it enables the free movement of goods, services, capital and people.

Standards & Poor's (S&P's)

A New York-based financial services company that publish financial analysis for the global money markets. S&P's are responsible for international credit ratings and rank nations by their sovereign debt and ability to fund-raise.

Thermomix

A multi-functional piece of kitchen equipment very expensive and used mostly in commercial settings, however they are available to the general public.

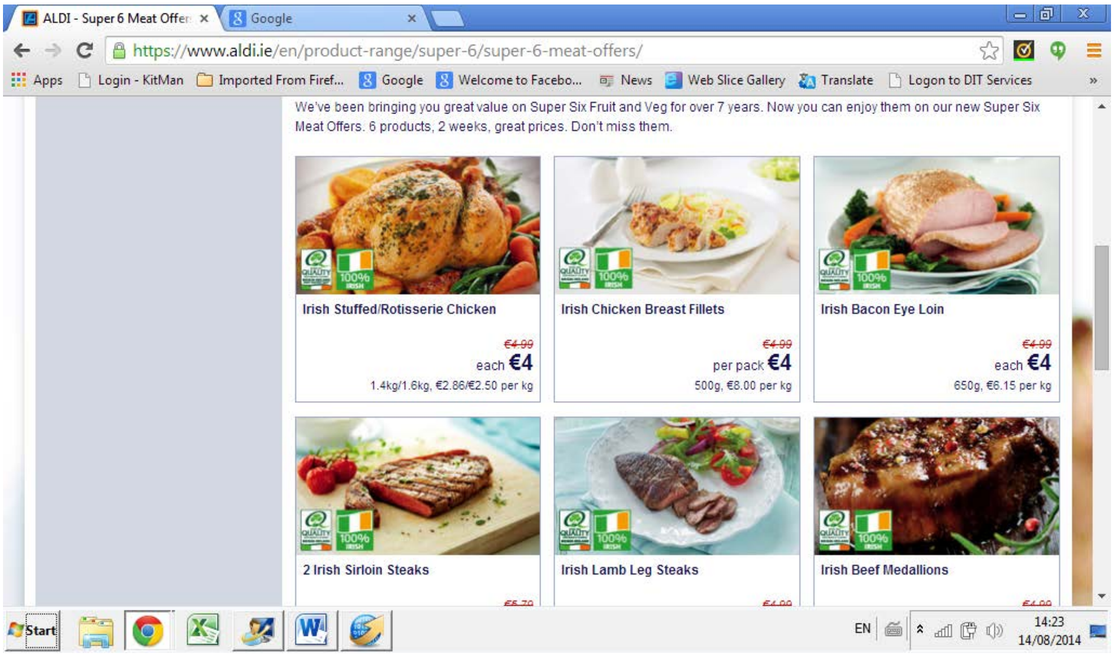
World Bank

An international banking reserve that lends to third world countries in need of infrastructural development. The World Bank is a vehicle for foreign investment, capital investment and international trade based on open market principles. The World Bank will oversee structural adjustments in countries that struggle with sovereign debt.

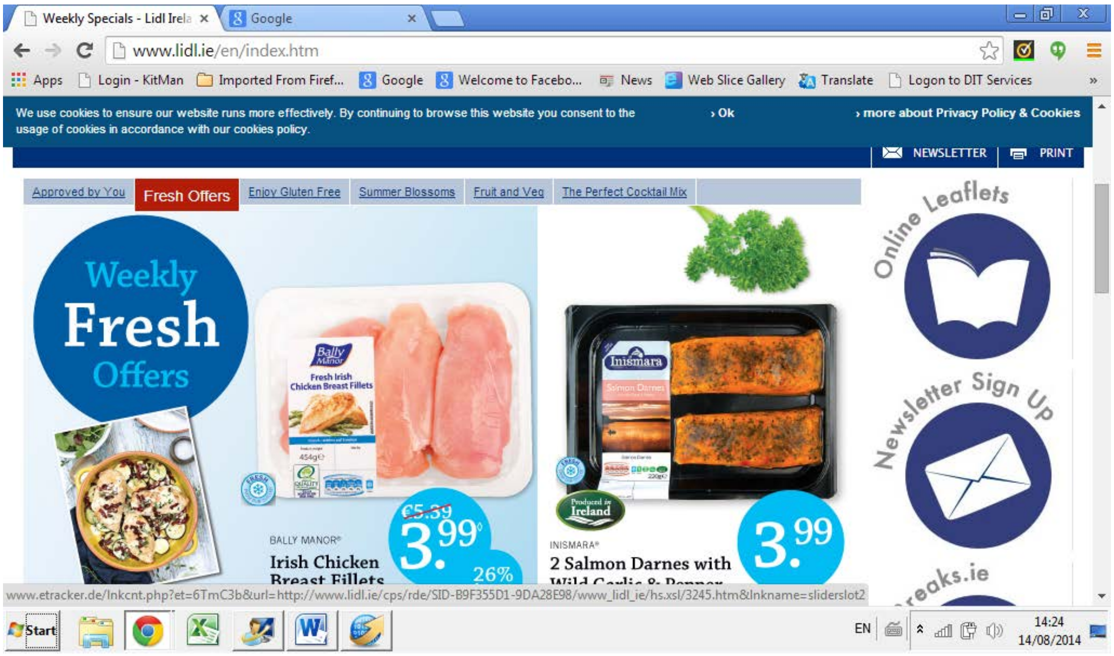
Appendix 19: Weekly Promotions – Main Retailers

All screen grabs taken 14.08.2014

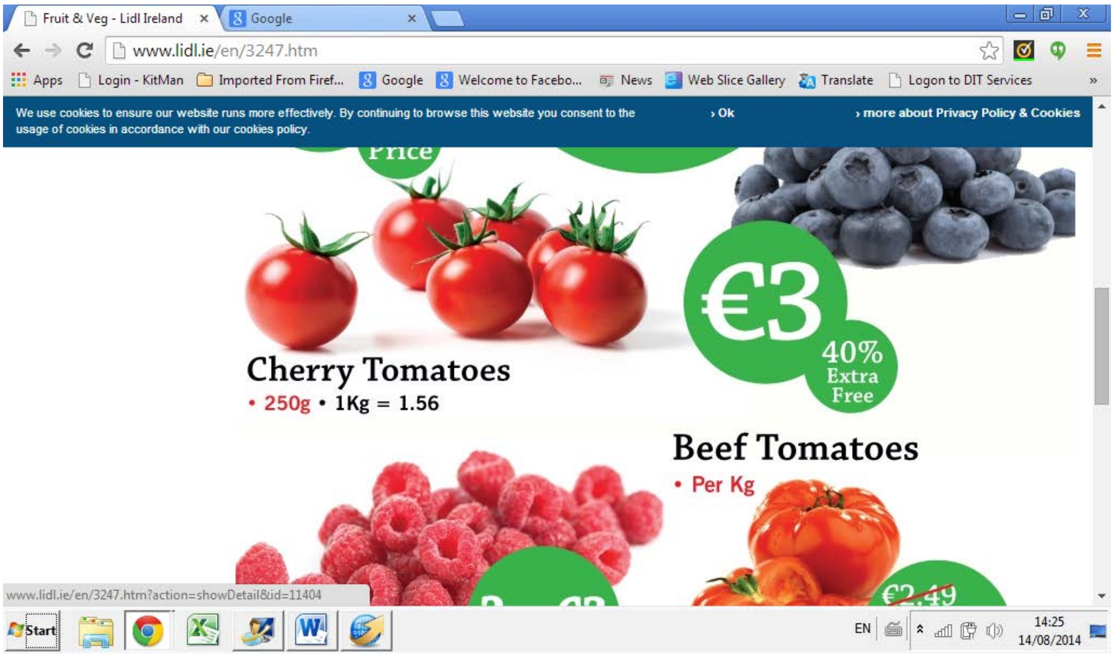
Aldi Super Six – Vegetables and Fruit



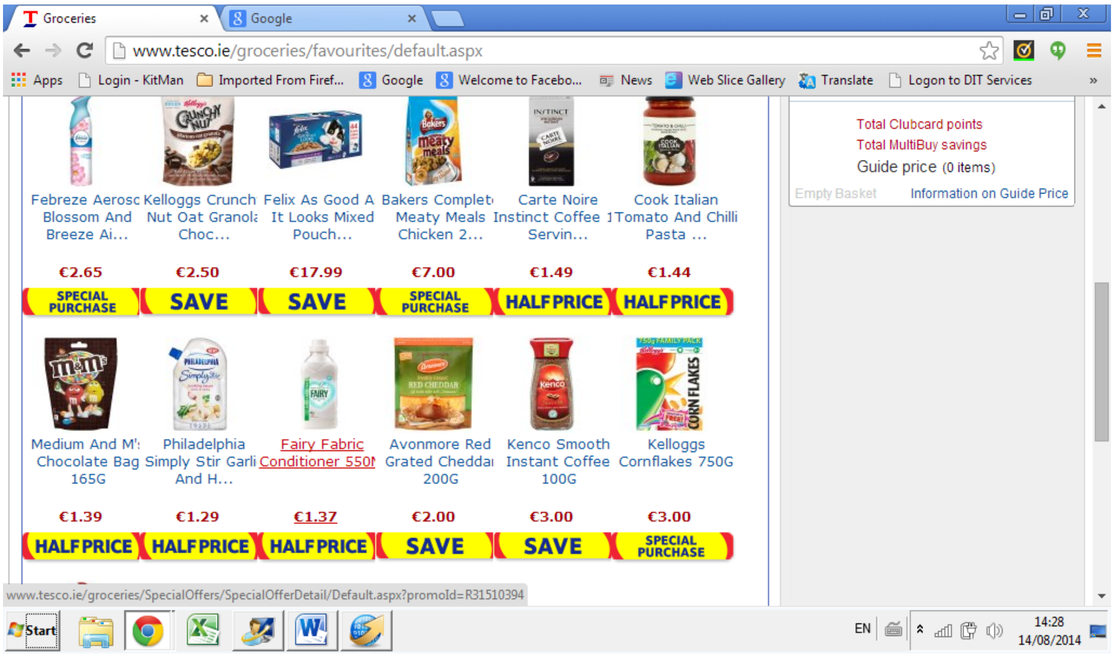
Aldi Super Six – Meat



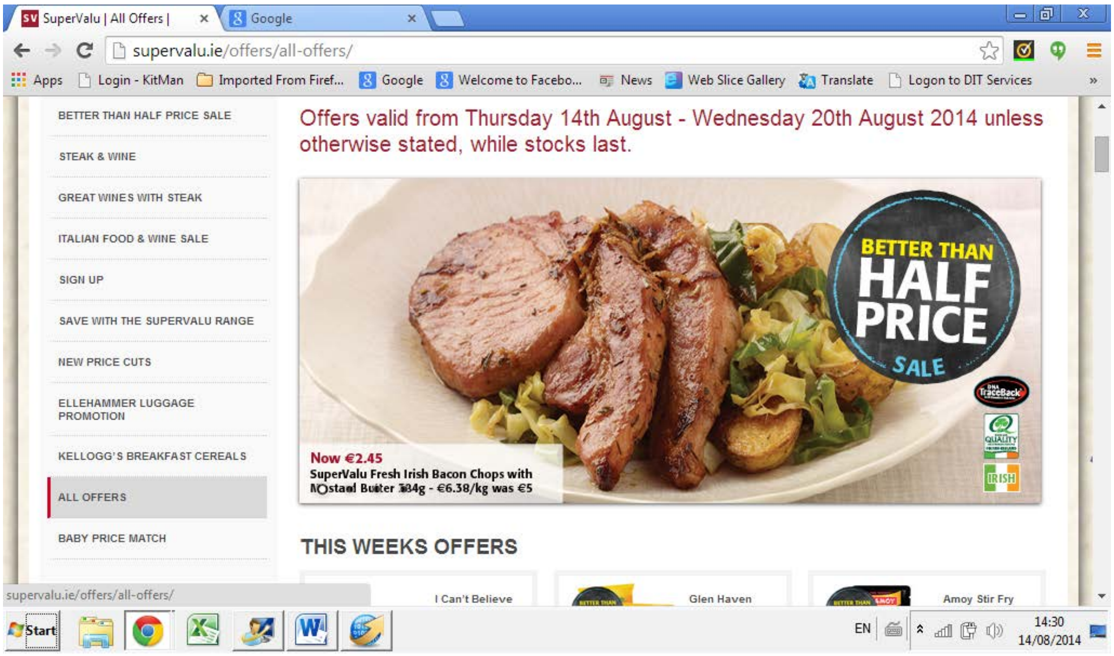
Lidl Offers



Lidl Offers



Tesco Offers



Supervalu offers

Dunnes Offers