

An analysis of the future viability of the hard discount retail stores in the UK in a post-recession economic environment.

MASTER OF BUSINESS ADMINISTRATION
(MBA)
MICAYLA TIDD – P126711



Prifysgol Cymru
Y Drindod Dewi Sant
University of Wales
Trinity Saint David

NOTICE OF CANDIDATURE

Surname/Family Name: Tidd

Date of Birth: 16/06/1994

Forenames (in full): Micayla, Sharon

Title: Miss

Institution Number (if known): P126711

Title of Degree (eg MA, MSc, MBA etc): MBA

Title of Taught Master's degree scheme followed (eg Equine Studies): MBA

Department/School in which study pursued: Business studies

Name of your Supervisor: Gareth Hughes

Full Title of the dissertation submitted: An analysis of the future viability of the hard discount retail stores in the UK in a post-recession economic environment.

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ABSTRACT

This dissertation concentrates on the grocery retail sector, with a particular focus on the German discount stores Aldi and Lidl and their future viability in the UK economy post-recession. The main objective of this study is to determine if the German discounters are likely to remain competitive if the UK economy recovers and consumers suddenly come into an increase in disposable income.

The review of current literature criticises the lack of analysis on why so many researchers believe that the German discounters are likely to continue their growth in sales and market share without further explanation. It highlights some key themes, in particular, the change in attitudes towards the German discount stores and some of the current threats that the discounters need to overcome if they wish to remain competitive.

A positive, quantitative approach was selected as the chosen research method for this study. An online survey was conducted in order to ascertain participants' shopping habits concerning the discounters. The survey also investigates what factors influence consumers when buying products and what their opinions of the discounters are.

The conclusions suggest that the future of the discounters appear to be rather bright after all. However, not solely for the reason that they can offer lower prices than their

competitors. The primary research gathered found that the majority of participants, in fact, no longer classed the German discounters as discount stores, instead, they saw the discounters as being more on the same league as the superstores. Furthermore, the quality of a product was actually voted as the most important factor for consumers whilst they were shopping and not the price. This means that most believed that the discounters are able to offer good quality products at lower prices than their competitors.

In addition, from an extensive review of current literature and data collected from the survey, the researcher determined that an improvement in the economy is not only questionable but it is also not the biggest threat that the discounters could face. Instead, it is the rivalry from competitors, particularly the threat of the new merger between Asda and Sainsbury who are proposing a 10% reduction in their prices. The stores that offer an online option to order their shopping can also be seen as a serious threat to the future of the discounters if they fail to adapt to the digital world.

This has led to the researcher recommending that the discounters need to continually review their strategies in order to remain competitive, taking every new threat seriously and developing their online platform to not be left behind.

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INTRODUCTION

1.1.The rise of the discounters

The recession of 2008 created a massive growth for the discounters in Britain. The German discounters, Aldi and Lidl, were left with a very healthy market share of 10%; a mere 5.4% behind grocery giant Asda (McKeever: 2017). A large part of this market share increase is thought to be a result of an increase in stores. Hope (2015) found a great difference in the speed that discount stores have grown since 2010; a massive 48% in comparison to the big four's (Tesco, Asda, Morrisons and Sainsbury) 34%. The discounter's growth is only predicted to keep increasing. Gray (2015) estimates that by 2019, discounters will grow 12.2%, whilst traditional supermarkets and hypermarkets have a predicted growth of only 0.01%. Whilst all these studies forecast a growth in size and sales for the discounters, none of this research is acknowledging the changing environment of the UK post-recession and what effect this could have on the proposed prosperous future of the discounters. As the economy slowly recovers, the future of the discount stores could be uncertain. If the recession is seen as a big cause for the increase in popularity for the discounters, what is to say that an improvement in the economy would not see a decrease in popularity for the discounters?

So far, the discounters have achieved their success because they gave customers what they wanted; in times of economic uncertainty, they provided the lowest prices meaning that their customers did not need to worry about spending too much

(Kervenoael et al: 2006). However, as society is slowly recovering from the recession, our main concern may not solely be price. Therefore, the discounters may then need to change their strategy, becoming more customer focussed, improving the quality of not only their products but also of their shopping experience if they wish to remain competitive. The closures of Woolworths (Hall: 2009) and more recently British Homes Stores (Wood & Butler: 2017) shows the harsh fate that could lie in wait for any discounter if they fail to adapt and meet customer needs. The success of any store needs to be about more than just having the lowest price on the market. McKeever's (2017) study supports this idea as he found that although as a whole, people do love to find a bargain, it will not be long before we grow tired of high volume, poorly organised bargain buys. He believes that the retail environment will soon become extremely important, particularly for discounters if they wish to remain competitive. They cannot continue to rely solely on their cheap prices; they may have to begin to consider other factors that may help them stand out from the competition.

Interestingly, whilst the recession is believed to be the result of the increase in discount shoppers, Hyde (2015) discovered that nearly 1 in 3 of Aldi and Lidl's customers were actually middle-class and perhaps were not at discount stores, purely because they needed to be. McKeever (2017) coincides with this idea, claiming that 57% of people that shop in discounters are not there through financial need. A lot of research seems to suggest that the consumers of discount stores are there purely because they struggled, during the recession, to afford the prices of the traditional supermarkets, so these statistics are interesting and could lead with more analysis to a different explanation to the increased popularity of the discount stores.

1.2. The gap in current research

Whilst there is vast research available theorising how the discounters became so widespread, there does not appear to be any work investigating the effects that an improved economy post-recession could have on the future of the discounters. The majority of research acknowledges that it was the recession that caused the increase in sales at discounters, however many now affirm that a large part of discount store consumers are also middle-class. This does not coincide with the reasons that were previously speculated as to why people shopped at discount stores. It is for this reason that this dissertation aims to answer the question of whether there are other reasons other than price that consumers shop at discount stores. In particular, are these reasons enough to keep consumers shopping at discount stores if they suddenly have more disposable income due to improvement in the economy, compared to the recession.

1.3. Rationale

Therefore, this study aims to investigate the current views consumers have of the discounters and whether these views are likely to change in the near future. It will do this by answering as fully as possible the following three objectives;

- 1) Why do people shop at discount stores?
- 2) Is there a link between the amount of income a person has and their likelihood of shopping at discount stores?
- 3) What are the most pressing threats that could harm the discounter's projected future successes?

This study endeavours to provide some justification as to why so many believe the future of the grocery retail sector will be led by the discounters and what effect this could have on the sector. It will also analyse the shortfalls of how the superstores' complacency allowed the discounters to take so much market share and what effect this has had for the superstores. Furthermore, it will look at what rivals could pose a threat to the future growth of the discounters and what they can do to retain their popularity.

For the purpose of this study, quantitative research was undertaken in the form of an online survey to which 194 responses were gathered in only two days. The online application Survey Gizmo was used to create the survey. Following this, the survey was posted on the social media site Facebook in order to quickly reach a large amount of people. All gathered data was inputted into SPSS, the statistical analysis software, in order to present data clearly in graphs and tables and look for any correlations that would aid in answering the specified objectives.

The dissertation is organised as follows:

Chapter one is the introduction that highlights the dissertations topic. It includes the aims and objectives of the research and its significance in the current field of research. Chapter two is the literature review. This is an extensive review of the current literature concerning the subject matter and an analysis of the key themes that can be drawn from the research. Chapter three explains the research

methodology used for this study and what benefits and disadvantages it has. It is also in this chapter that any limitations to the study and ethical considerations will be outlined. Chapter four presents all the data gathered from the survey with a discussion of the relevance of this data, in regards to current literature. Finally, chapter five provides the overall conclusion of the study, presenting the key findings that have been drawn from this study and how the research aims and objectives have been met. The chapter will end with recommendations from the researcher concerning ways that the discounters can continue to remain competitive and any areas of interest that have been identified for further study. All conclusions have been drawn from issues raised from the review of the literature and the primary data collected from the survey.

LITERATURE REVIEW

2.1 Introduction

This chapter will begin by outlining the background of the introduction of the hard discount stores in the UK, analysing the recent growth within the discount sector and examining any possible attributing factors that aided to their growth. It will then go on to discuss the relationship between economic uncertainty or downfall and the increase of consumers frequenting discounters. Lastly, an investigation of the current threats to the future viability of the discounters will be undertaken.

2.2 The rise of the discounters

Before beginning to analyse the future viability of the discounters, it is first necessary to understand their current position and their journey to how they got to that position. The grocery sector has undergone some rather drastic changes over the last few decades. Elms et al (2010) in their study of consumer buying intentions, compare the way in which consumers shop today with an article published in The Sunday Times by Milner and Wheatcroft in 1980 entitled 'Where will you be shopping in 1984?'. Whilst the author has been unsuccessful in finding the original article, Elms et al (2010) encapsulate the essence of the article in an effective way that provides an interesting comparison. Milner and Wheatcroft's article hypothesised that by 1985, Tesco, Sainsbury and ASDA would be the three shops that consumers buy half of their groceries from. They also believed that consumers may also experience a lack of choice with regards to not only the number of stores available to them but also

between the number of food brands on shelves. They also feared that as these superstore giants began to monopolise the grocery market, the smaller shops that could offer reduced prices would close which would leave the superstores with no incentives to keep their prices low as they would know that consumers would not be able to find these products anywhere else. This would leave them being able to charge any price they wanted as there would be a lack of competition. Elms et al (2010) agree with Milner and Wheatcroft's hypothesis as they believe that the superstores have successfully expanded to the detriment of the co-ops and local corner shops. However, both studies do not account for any other factors that may have led to these closures. The discounters now seem to be causing the superstores as much trouble as the superstores originally caused local corner shops (Wood: 2017). Therefore, it seems rather naïve to not consider the effect that the introduction of the discounters has had on the local corner shops as well as purely the superstores.

As little as thirty years ago researchers were concerned about the effect that the superstores were having on the grocery retail scene and now today the effect that the discounters are having on the superstores is of a great concern. This indicates the severity of uncertainty in the grocery market; consumers hold all the power and if they are enticed to shop elsewhere then there is a very real threat of store closures. Knights (2016) predict that the foreseeable future of the grocery retail sector in the UK will be dominated by the discounters. Ruddick (2015) supports this idea, arguing that by 2019, consumer buying will have changed so much that the majority of our spending will be in convenience stores, discount stores and online rather than at the superstores. Knights (2016) in his investigation of the future of the discounters found

that between 2009 and 2019 superstores and hyper stores only had a projected growth of 0.01%, whereas the discount stores in the same time period had a projected growth of 12.2%. Despite, the discount stores growth being higher than the hypermarkets and supermarkets, this figure has slowed. Between 2009 and 2014, following the recession the discounters grew 17.8%. It would be interesting to look at the same figures for the superstores; whilst their projected growth in the near future is lower than that of the discounters, it would be interesting to see if their growth is likely to increase as the economy is beginning to improve. If this was the case then the discounters' growth could be attributed to the recession and could possibly begin to fall now that the economy begins to recover.

Knights (2016) also acknowledges that the discounters, Aldi and Lidl, are becoming more mainstream, introducing more fresh produce to their stores and more premium ranges for their products. They hypothesise that this will lead to attracting a wider audience of customers that could pose an even more extreme threat to the big four. This could be seen as the discounters' strategy to adapting to the improvement in the economy, perhaps by widening their target audience, they may not see such a decline in sales.

Whilst several studies seem to suggest that the future of the grocery sector will be led by the discounters, based on how quickly this market appears to change, it seems unfeasible to be certain of anything within this sector. Lambin et al (2007) explored the reaction that the superstores had to the rise of the discounters. They explain that the only way that the superstores were able to compete was by cutting

their prices which ultimately led to the notorious price war. If such a simple strategy could be employed to attempt to compete against the discounters, all it would take to rival the future viability of the discounters would be for the superstores to find a more competitive way to fight against the discounters. A new competitor could also enter the market and rival the discounters.

Wrigley (1994) investigates the reasons behind what he calls the 'store wars' of the 1990s. His study proves interesting to the theme of this dissertation as he is one of the very few researchers that examines the exact time period that the discounters became an apparent viable threat to the superstores. He firstly observes the immense power that was the superstore and how they dominated market share; rising from 25% in 1982 to an incredible 61% in 1990. The three so-called 'giants' that he follows are Tesco, Sainsbury and Argyll (who were bought by Safeway and then Morrisons in 2004). Wrigley (1994) then examines the threat to the future viability of the superstores as they struggled to compete in the cutthroat market of the food retail industry on the cusp of the recession. He saw clear indicators that the superstores could be in serious jeopardy; perhaps most notably, because Tesco lost 22% in sales in just one year in 1993/94. Several studies support this idea, Grewal et al (1998), for example, saw the recession as a key turning point in the grocery market. They purported that following the fall in sales that the superstores experienced following the recession, their attempt to draw customers back was to lower their prices. This could have, however, had disastrous effects to the sales for the superstores as Morrell (2000) suggests that this led to the realisation that by refusing to pay full price for their products, consumers could demand lower prices.

Varley (2001) saw this as the birth of the discount trend, where consumers were starting to view discount shopping as a smart decision instead of a sign of poverty.

The majority of studies previously mentioned seem to view the superstores as victims of the discounters as if they were simply unable to compete with the discounters' low prices and have thus lost sales with Tesco, for example, reporting a loss of £6.4 billion (Butler and Farrell: 2015). Conversely, Wrigley (1994) supposes an intriguing argument. He sees the superstores as to blame for their own loss of sales. His argument is that the superstores' complete and utter focus on their own expansion left them vulnerable to attack. He believed that as a result of them being so focused on themselves they left a hole in the market and even when the discounters first surfaced, they failed to react in a way which would have eliminated them as competition. Instead, because of the teething problems the German discounters first encountered when they came to the UK, adjusting to a new market and culture, the superstores naively believed that they were not a direct threat, that they were in a different market to themselves. It is this complacency and almost arrogance, that Wrigley (1994) blames for the rise of the discounters, instead of viewing the superstores as victims of circumstance. Guy (1996) observed that the big three supermarkets instead of giving specific plans for their expansion, simply claimed that they would continue to grow. He noted that this was the first time that specific details were left out of their strategies and saw this as an indication that the future of grocery retail was sure to be a harsh and competitive environment.

2.3 A change in consumer buying behaviour

Whilst there may be several different arguments of why the discounters were able to grow in popularity and size so quickly, if there is one thing that can be agreed upon it is that attitudes towards the discounters have definitely evolved which have consequently affected consumer buying behaviour. Elms et al (2010) investigate the way in which the superstores attempt to compete with the discounters. They believe that the way in which Tesco is competing is by attempting to become a 'one-stop shop' store, providing everything that they believe that their customers need in one convenient location. The hope here is that consumers would not have to go to a competitor to find a certain product and find that that competitor could offer better deals on other products. The issue with this differentiating strategy is that it is easily imitated. Aldi and Lidl, for example, whilst they do not have the same extensive range that Tesco can offer due to their no-frills strategy, they do have the weekly offers that give their consumers the opportunity to purchase an array of different products varying from clothing, homeware products, gardening equipment, stationery and much more. Wortmann (2004) saw the introduction of these weekly offers as the first sign of real threat to the superstores. He saw this diversification strategy as the beginning of the discounters widening their target audience. This has resulted in a common perception that the discounters are not solely discounters anymore, they appear to be more upmarket and because of this, they can be seen to be attracting more customers which could explain why so many more middle-class consumers shop at discount stores now.

An interesting observation with regards to the weekly offers is that previously, an individualised selection of offers personalised by a product such as the Tesco Clubcard would have been more favourable than any offers in a discount store. However, these weekly offers have actually had a lot of success. Gammall (2015) highlights that consumers who were previously loyal to one store or one particular brand, are now much more likely to abandon that loyalty if it means saving money, which could explain the popularity of the weekly offers.

This brings to light a rather substantial difference in consumer buying behaviour now. Discounters in the UK have recently undergone a rather dramatic role reversal. They started off being seen as quite an embarrassment, with consumers being ashamed to be seen at their local discounter for fear of it being seen as a sign of poverty. However, now, there seems to be an almost need to find the best bargain and to then brag about it, particularly on social media. This again has led to a change in consumer buying behaviour; as a nation, Britain seems now to be a lot more price conscientious, abandoning its previous loyalty for the best bargain which would, again, lead to an increase in popularity for the discounters.

Not only have attitudes towards the discounters changed over recent years but attitudes towards shopping, in general, have evolved. Gable et al (2007) conducted a study to determine attitudes towards discounters. However, their sample was purely female college students. They justified their sample by stating that women shop more than men and women are also more likely to shop for the household than men. Timothy's (2005) study on grocery shopping trends criticises this kind of

stereotypical, generalised view as being outdated as men now play a more active role in the household. In fact, an article written by Skrovan (2017) suggests that a whopping 58% of households now consider themselves to be co-shopper households. This data suggests that studies such as Gable et al.'s (2007), although they may prove to be interesting, in today's society their data is not sufficient to come to an unbiased outcome; statistics on the shopping habits of men must also be considered.

Applebaum (1951) in his study of consumer behaviour in retail outlets, discovered a number of characteristics that influenced what customers buy. He defined these characteristics as 'sex, age group, colour, economic and educational status, occupation, religion and nationality origin' (p.173). He did, however, acknowledge that it was unnecessary to analyse all of these characteristics when looking at consumer behaviour and that each researcher should choose those most relevant to his or her study. For the purpose of this dissertation, the characteristics that the author will endeavour to analyse are sex, age group and economic status as she believes these are the three most defining characteristics that may lead to an answer for the theme of the dissertation.

The aim is to discover if previous studies such as Gable et al.'s (2007) could be considered outdated by hopefully, collecting rich data from male participants. With the age characteristic, the researcher hopes to determine if attitudes could be seen as evolving with age; perhaps younger participants, on a student budget are more likely to frequent discount stores. On the other hand, younger participants might also

be less used to budgeting and more frivolous with their money and could, therefore, be more likely to go to more expensive shops than those participants who are older, possibly with families who see more expensive shops as a waste of money when the discounters provide the same products at a reduced price. Finally, with economic status, the researcher hopes to see if previous studies such as Hyde (2015) where he suggests that 1 in 3 of Aldi and Lidl's customers are middle class is still true today or if this figure has increased or decreased.

Interestingly, despite previous research conducted by the likes of Hyde (2015) and McKeever (2017) suggesting that a surprisingly high percentage of discount shoppers are middle class, the common idea appears to remain that those who frequent discount stores are doing so out of financial need and not through choice. Despite this conception, a lack of research between the discounters and the level of income of consumers or the even the state of the economy is available. Lamey (2014) is one of very few researchers who actually looks at the relationship between the economy and the discounters. He examines the relationship between the discounters' market share and contractions (declines) and expansions (improvements) in the economy. Lamey (2014) discovered that there was a significant relationship between a contraction in the economy and the resulting increase in market share for the discounters. Furthermore, he witnessed some of that market share remaining after an improvement in the economy which led to a permanent boost in their popularity.

Lamey (2014) accounts the discounters' popularity during times of economic uncertainty to the fact that they are able to offer lower prices for their merchandise. This is an effective way of retaining their customer base because consumers do not have the extra money to spend on luxury items. He continues to explain that crisis-hit consumers behave differently both financially and psychologically to those who enjoy economic prosperity. He believes that there was a direct link between the economic environment and consumer buying behaviour. That link was that during times of economic uncertainty, he observed that consumers would look to reduce their costs where possible and whilst there may not be a cheaper alternative for some products, groceries were one thing that consumers could save money on and did quite often. This would account for the increase in popularity for the discounters when the economy is down. Shama (1981) coincides with this theory as he found that 35% of consumers see looking for cheaper alternatives to food as an effective way to reduce their overall expenses.

Applebaum (1951) believes that consumer buying behaviour can be grouped into five different categories; 1) The place of the purchase, 2) What items are purchased, 3) When the items are purchased and how frequently they are purchased, 4) How they are purchased and finally 5) The response to sales promotions. The response to sales promotions is an interesting area to investigate in relation to this dissertation. More recently, Gilbert and Jackaria (2002) conducted a study to identify what effects some of the biggest promotional deals in shops have on consumer buying intentions. They discovered that out of price discounts, samples, buy one get one free offers and coupons, consumers mostly preferred price discounts. This could provide an explanation for the increased popularity for the discounters; whilst the

superstores can offer deals such as buy one get one free or reduced prices, they still are not able to compete with the prices of the discounters and if it is price discounts that consumers prefer, then inevitably, the discounters are going to draw in more consumers because, at least for now, they appear to be unbeatable on price.

Applebaum (1951) also found that most consumers do not buy all of their products from the same store, even if everything they were looking for could be found in one place. Instead, they preferred to visit several different locations, searching for the best deal. He explores the frivolity of loyalty within the retail sector, explaining that a new entrant to the field has many consumers abandoning any loyalty they may harbour for the possibility of a better price. This coincides with Gammall's (2015) study where he found that consumers are likely to abandon any loyalty that they might have for a particular brand or store if it means getting a better price.

This comparison is rather interesting; these two studies were conducted sixty four years apart from each other but both report the same findings. This suggests that whilst consumer buying behaviour, attitudes to the discounters and even the grocery retail sector has changed drastically over the same time period, attitudes towards loyalty and the search for a better price has not really changed. It may be considered more acceptable or even trendy to shop at discounters and get the best bargain now but it appears that a lack of loyalty may have been evident even sixty years ago.

Ginsberg et al (2009) discovered another change in consumer buying behaviour during economic contractions. They found that customers experiencing economic hardship also experienced a decrease in brand loyalty. This emphasises Lamey's (2014) statement that as the economy worsens, the discounters share increases. Gisbrechts et al (2008) found that a large percentage of grocery shoppers go to a number of different stores so that they can shop around for the cheapest prices. This suggests that brand loyalty could become redundant; if consumers are not looking for a particular level of quality of a product or even a particular level of service from a store, then they may be much more likely to frequent the no-frills, low prices of the discounters. This leaves the traditional superstores in a tricky situation; if their differentiation strategies are becoming redundant, then they need to find another strategy that will allow them to remain competitive or the discounters may very well cause a serious threat to the future prospects of the superstores.

Lamey (2014) believes that even after the economy recovers after a contraction, consumers will have become used to doing their shopping at discount stores and are likely to keep frequenting them. Whilst this idea could be true for many consumers as shopping at discounters may become a habit and a lot more convenient, it seems too simplistic an idea to just assume that the discounters would retain their increase in market share because consumers would not want to return to another a store, particularly after highlighting the lack of loyalty that consumers now experience towards stores, as demonstrated by Shama (1981) and Gisbrechts et al. (2008).

2.5 The current threats to overcome

The frivolity of consumers buying intentions and a lack of any kind of loyalty to brand or stores makes the future of the grocery retail sector a very difficult thing to predict. If there appear to be no patterns to consumer buying intentions, then how can any store predict what their next strategy needs to be? Though confusing, this is not the only obstacle that the discounters need to overcome in order to remain competitive. Whilst the majority of studies seem to believe that the discounters will continue their growth over the next however many years, it is important to consider anything that may threaten their future for the theme of this dissertation. Looking back fifty years ago, no one would have predicted that the superstores would now be in jeopardy. This highlights the importance of continual strategic reviews and improvement as otherwise, the discounters could too be in just as much trouble in a few years' time as the superstores face today.

Firstly, rivalry among competitors could be considered a definite threat for the discounters. Lambin et al (2007) in their investigation of the grocery retail market, attributed the introduction of the discounters to the market as the reason that started the infamous price wars. They believed that the only way that the superstores were able to compete at the start was by reducing their prices which is what caused the price war. Interestingly, this same competitiveness in regards to prices is still evident today even though the superstores are unable to compete with the discounters on price. The superstores themselves are in a battle; each receipt from the superstores boasts about its price, claiming to be cheaper than its competitors or their brand guarantee promises to match the price of another store. Perhaps this could be seen

as a sign of weakness on the part of the superstores? They are now unable to compete on prices with the discounters so their only way to appear competitive is by claiming that they are the cheapest superstore.

The brand-like adverts created by Aldi could also cause competition between the superstores and the discounters; whilst the superstores struggle to compete on price, one thing they could have previously been relatively sure about was that the quality of their products was of a higher standard, however, with claims from such adverts, it could mean that consumers are led to believe that they can purchase the same quality of product at a discount store as they could at a superstore but at a much lower price.

It is important to note here that Aldi has been criticised by the Advertising Standards Authority for its 'crunch' adverts where it displays a basket of shopping from one of the big four supermarkets and the same basket of shopping from Aldi, comparing quite a significant price difference (Sweeney: 2016). The issue with these adverts was that the Aldi basket showed an array of Aldi products whereas the supermarket basket contained only branded products even though the supermarket had its own value range which would inevitably have reduced the price. Whilst these adverts have been banned for being misleading (Sweeney: 2008), there would still have been a price difference if the supermarkets' basket contained own brand products.

Interestingly, McKeever (2017) highlights in his study that the majority of consumers no longer associate the discounters Aldi and Lidl as being in the same field as the discount stores Home Bargains, B&M and similar stores. This could mean that they are perceived as being of a higher quality than they used to, meaning that they are more of a threat to the superstores as they offer better quality now but have still kept their lower prices. He also found that the need to find a bargain amongst consumers meant that a loyal Waitrose or M&S shopper would be just as likely to grab a bargain at the discounters Aldi or Lidl as a core discount shopper would be, again emphasising this lack of loyalty and the fact that the discounters are widening their target audience.

Finkelstein (2018), a chief operating officer of Shopify, in an article published by Forbes, highlights the future differences that will affect the way that consumers begin shopping. The two main differences that he identifies that could pose a possible threat to the future of the discounters could be an increase in mobile shopping and social shopping. These could be seen as Porter's threat of substitute products and services. Finkelstein (2018) points out that 65% of Black Friday and Cyber Monday deals were purchased via a mobile phone. He believes that mobile shopping will slowly begin to replace even computer and tablet shopping. Though the discounters do have mobile apps, they seem rather limited in what they can offer and are not very well known. To remain competitive in the future, this could be an area that the discounters might want to invest some money in.

The second difference that Finkelstein (2018) identifies is the increase in social shopping. He defines this method of shopping as purchases made through the platform of social media. A popular example of this channel of shopping choice could be Wish, a regularly advertised discount Chinese shopping website and app that sells a massive range of products at a reduced price. Whilst the majority of social media shopping at the moment seems to be clothing or homeware products, with the increase in popularity of this method of shopping, it does not seem to far-fetched to suggest that grocery shopping may turn this way also. If it is not the discounters that initially branch out to this method of shopping, which it seems unlikely that they would be the first based on their lower budget, then whichever store was the first would pose a serious threat to the discounters. Having a more expansive product base and a larger budget, one of the superstores could be the first to enter this new way of shopping, however, it must be considered that the threat could come from a new competitor altogether, perhaps a Chinese competitor might enter the market, the threat of a new entrant being another competitor jeopardise competitiveness. Nothing in this market seems certain enough to be able to predict anything so everything could change in such a short period of time.

2.6. Concluding points

Through conducting this literature review, the researcher would like to highlight the four most important themes that have emerged from previous research. Firstly, the grocery retail sector has undergone some very drastic changes over recent years. From the introduction of the superstores, their monopolisation of the market and now the threat from the discounters. This sector seems to be full of change and

uncertainty and no prediction for the future can, therefore, be assured. Secondly, most research in the field seems rather certain that the future of the sector will be led by the discounters (Planet Retail Ltd.: 2016), (Ruddick:2015), however these researchers fail to account for any improvements in the economy. Thirdly, attitudes towards the discounters have changed over recent years. Nowadays, consumers are demanding lower prices (Morrell: 2000) which portrays discount shopping as almost trendy rather than a last resort out of economic need (Varley: 2001). With this change in attitudes, stores are beginning to see that price is now more important than quality (Applebaum: 1951) and as a result, loyalty towards certain stores or brands are nearly non-existent (Gammall: 2015). Finally, whilst the future of the superstores and even the discounters are uncertain, one thing that seems relatively sure is that the channels in which consumers chose to shop are evolving and there is a very real chance that the future of grocery shopping could turn to mobile or social shopping (Finkelstein: 2018). The intention of the researcher now, is to try and see if any of these themes can be drawn from her primary research.

RESEARCH METHODOLOGY

3.1. Introduction

This chapter will outline the choice of research methodology used to gather primary data for the purpose of this dissertation. It will provide a brief summary of the background to the study, previous research and the aims and the objectives of this study. Following this, it will highlight the research paradigm and discuss the particular methods selected for the purpose of this study. A discussion of the sample size, piloting of the study and the methods in which the researcher intends to send out the questionnaire will then be undertaken before concluding with any issues relating to reliability and validity and any potential limitations the researcher may encounter.

3.2. Background into the study

Through extensive research of current literature, it was revealed that price is now becoming the most important factor that consumers look for when searching for products (Applebaum: 1951). So much so that consumers are now viewing discount shopping as a preferable method of shopping (Varley: 2001), in fact, consumers are now demanding lower prices more often than not in regards to their shopping (Morrell: 2000). All of this suggests that the already soaring discount stores could see an even further growth in their market share. This appears to be a popular belief with many suggesting that the future of the grocery retail sector will be dominated by the discounters (Planet Retail Ltd.: 2016), however, the researcher argues that with

such drastic changes having occurred within the sector over the last 50 years with the growth of the big four supermarkets and now the dominance of the discount stores, how can anyone be certain of what the future of the sector will be? The researcher aims to investigate the reasons behind the increase in popularity of the discount stores to see if there are any other reasons beyond simply the price and if this popularity is likely to sustain itself if an increase in disposable income was available or a new entrant entered the market. In order to analyse the aim and objectives of this research question, an appropriate methodology must first be chosen.

3.3. Methodology

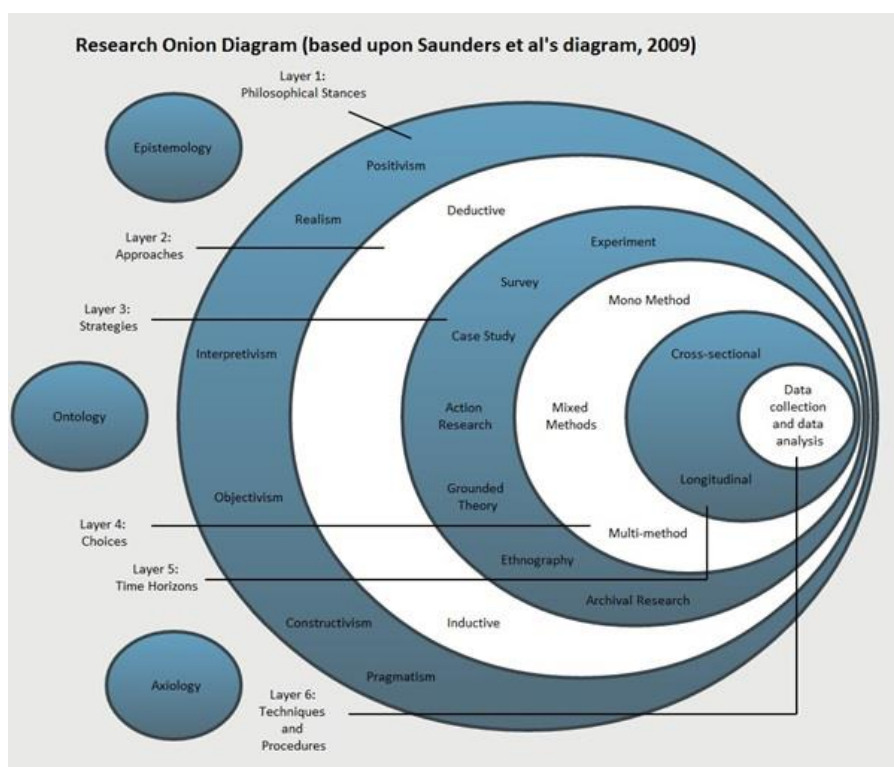
In order to investigate the research objectives of this study, an investigation of the methodological options available needs to first be conducted. By doing this, the researcher hopes to find the most effective method of analysis to be able to answer the aims and objectives of this study. Khan (2008) suggests that there are two main methods of research; quantitative and qualitative. Lupia and Alter (2014) define quantitative analysis as the more mathematical approach that is able to offer causal relationships in the form of numbers for ease of analysis and comparison. Whereas, qualitative research focuses more on depth rather than numbers; looking more for the reasons why people behave, act or think the way that they do (Ambert et al.:1995). Therefore, quantitative analysis was chosen as the method for this research as an in-depth analysis is not required. Whilst the researcher has stated that she endeavours to identify any changing attitudes towards discount stores, she

is not looking for why attitudes may have changed, purely to determine if they have or not so qualitative research is not required for the purpose of this research.

3.4. Research design

In order to devise an effective study to identify why attitudes have changed towards discount stores and if they would be likely to change again, an appropriate framework was needed. For this, Saunders et al.'s (2007) Research onion was used, see figure 1.

Figure 1: The research onion



The Research onion is broken down into five different sections. Sahay (2016) argues that most researchers often start from the centre of the onion, thinking only of what data they need to get and how they could best obtain this. Saunders and Tosey (2013) explain the issues that arise from this. They believe that unlike an actual

onion where the outer layers are simply discarded, in regards to research, the outer layers are actually the most important and more emphasis needs to be paid on the importance of the research design.

3.4.1. Research philosophy

Saunders et al (2007) outline three different types of research philosophies; positivism, realism and interpretivism. Saunders and Tosey (2013) describe a research philosophy as the method that researchers think about their research; their pre-conceived assumptions concerning their research and the general nature of what they are studying and how this consequently affects their research design and how their study is understood. Sahay (2016) in his study of the understanding of the research onion found that amongst the 115 research scholars that he included in his study, the majority had no idea about the research philosophy, instead, they simply found it was too confusing a concept to grasp and most ignored it. Knox (2004) emphasises that the research philosophy should not be ignored, in fact, he believes that it should be given the utmost importance in research because choosing the wrong philosophy or mixing philosophies could have a detrimental effect on not only on the validity and credibility of the research but also on its significance too. Positivism can be defined as the approach that focuses on observing trends such as cause and effect, where the researcher simply observes certain behaviours and predicts outcomes (Saunders and Tosey: 2013). For this approach, Sahay (2016) explains that a quantitative approach is normally undertaken, where a high volume of statistical data is collated and analysed. Therefore, for the purpose of this dissertation, a positivist approach has been applied.

3.4.2. Research approaches

There are two main research approaches; deductive and inductive. Generally speaking, deductive normally leads to the use of quantitative data whilst inductive utilises qualitative data (Sahay: 2016). Goel et al (1997) explain that deduction normally starts from a general idea or theory and works down more specific to a research question, whereas induction would start with a precise objective and work backwards to find theory. Therefore, seeing as the anticipated method of data collation is to be questionnaires founded on closed questions where the author is trying to prove or disprove theory, the deductive approach is most effective.

3.4.3. Research strategies

The research strategies layer of the research onion offers the different options available for collecting the intended data. Saunders and Tosey (2013) highlight that the researcher of any study need not be limited to choosing only one strategy; in fact, a selection of different methods may provide richer data. However, based on the time constraints of this particular research, the researcher has elected to concentrate on only one method; surveys, in particular questionnaires. For any future research though, the researcher does acknowledge that another method may enrich this research, perhaps a qualitative method to analyse more the opinions and reasoning behind certain responses.

3.4.4. Time horizons

Saunders et al (2007) define two different time horizons; cross-sectional and longitudinal. Saunders and Tosey (2013) differentiate the two by explaining that cross-sectional studies look at a particular point in time and longitudinal studies focus on an extended time period. Again, due to time constraints of this particular research, a cross-sectional time horizon has been elected. However, the researcher does anticipate that a longitudinal time horizon would prove interesting because it would highlight any differences in attitudes towards the discounters over a longer period and could perhaps offer a more valid response to the question of the future viability of the discount stores.

3.4.5. Data collection methods

Boeije and Hox (2005) describe the two types of data collection methods; primary and secondary. They define primary research as research conducted by an individual for the purpose of their own research, whereas, secondary data is that of another researcher that can be adapted for the purpose of other research. As aforementioned, there is a lack of research surrounding this topic area so the use of primary data will be used.

3.5. Piloting the study

Teijlingen and Hundley (2001) highlight one of the most significant advantages of conducting pilot studies. They believe that pilot studies provide advance warning for areas that may lead to failure. They do, however, also acknowledge that conducting

a pilot study does not guarantee the success of a study, it simply makes its success more likely than not performing a pilot study. Hill and McCormack (1997), on the other hand, go as far as to recommend that no quantitative data should be conducted without first having piloted it because they believe that most issues pertaining to validity and reliability, in particular, can be ironed out through the use of a pilot study.

For the purpose of this study, the questionnaire was piloted to five individuals from the general public to identify any possible problems. Following feedback gathered from the pilot study, a few alterations were made before sending the questionnaire. More information was added before the questionnaire to add clarity on how more information concerning the study could be obtained and how responders could access the results if they wanted to do so. A few questions were moved around so that the questionnaire would flow better and a couple of questions were altered slightly so that they read better.

One thing that unfortunately was not picked up in the pilot study was that question eight which asks responders to rate a list of characteristics in order of importance to them with one being the least important and six being the most important was not formatted correctly. The intention was that each number could only be awarded once, meaning that the characteristics were ranked by each responder. Whilst the responders in the pilot study appeared to rank the characteristics automatically, several of the responses received through sending the questionnaire out, did not. This means that in several of the questionnaires, the characteristics being analysed

were not accurately attributed a number of significance so some responses, instead of having one characteristic that they considered to be the most important, they may have attributed two or three characteristics with the same level of importance. Unfortunately, this will mean that the validity of this particular question will be negatively affected for the intention of the question; to find the one key characteristic that is given the most importance and that influences consumer buying intentions.

The data obtained can, however, still be used as long as the intention of the question is changed so that the researcher is not looking for one sole characteristic that is considered the most important but looking at how important all of the characteristics are considered. Perneger et al. (2015) suggest that a small sample, which they define as 5 to 15 people, only had a 40% chance of identifying any issues. Instead, they recommend that at least 30 people need to be included in a sample. Whilst the researcher acknowledges that a higher sample may have foreseen this issue, on a small project with limited time, unfortunately, a larger sample was not feasible.

3.5.1. Sending the questionnaire

As the online survey generator Survey Gizmo was used to create the questionnaire for this study, the researcher decided that the use of social media would be the easiest and quickest way of sending the questionnaire. The researcher believed that this may also vary the sample of responses obtained as the researchers' friends list contained a mixture of people across all age categories and locations. Clarke and Cooke (2004) hypothesise that by choosing a random sample when conducting

research, the researcher can limit any bias they may harbour. For this dissertation, this proves very important. If the researcher believed the notion that a certain type of person shopped at discount stores; someone on a lower income for example, it could be considered relatively easy to manipulate data by choosing people on a very low income and people on a very high income and generalising that their economic status was the only factor that influenced their likelihood of shopping at discount stores so a random sample was of great importance to the researcher. Yeager et al (2011) express the effectiveness of the use of online surveys. They found that not only did online surveys generate a higher response rate than paper or postal surveys but they also believed that online surveys had a higher rate of validity and incurred fewer errors as participants were more relaxed and able to fill out online surveys at their own pace. They also found that participants were more likely to click on a link for an online survey, whereas postal questionnaires were likely to be thrown.

On the 6th of March, the questionnaire was shared on the researchers Facebook page alongside a disclaimer explaining the purpose of the study and what the information gathered would be used for. The intention was to keep the questionnaire live for seven days in the hope that one hundred and fifty responses would be gathered. On the 8th of March, following the 203rd questionnaire to be answered, the researcher decided to close the questionnaire early to start analysing the data. Only 194 of the responses were actually usable as the majority of the answers were left blank so the researcher has decided not to include these in her results.

3.6. Reliability and validity

Murphy (2009), in his study looking at different methods for analysing reliability and validity, discusses the difficulties surrounding reliability. He argues that the same person could take the same test at different times and could answer differently both times, leading to a different score. In relation to the topic of this dissertation, Murphy's argument could have serious weighting. The survey is asking for opinions on whether participants consider a store to be a discount store or not and on their particular shopping habits. These things are subjective to each person and could change from week to week; a bad experience at a store that someone might not consider to be a discount store could change their opinion of that store. Springer (2005) describes validity as the comprehensiveness of a question. He explains that a question must be easy to understand or the responses gathered will not be reflecting what the researcher intended to find. The question of reliability and validity in this dissertation will be focused on whether the questions would gather the same answers if they were tested again and if the responses answer what the researcher intended on asking. The pilot study is one method of helping improve the validity of a study as it could pick up on any confusing questions.

3.7. Analysis of findings

The data gathered with Survey Gizmo will be entered into SPSS to provide more in-depth analysis than is offered by the website. To be able to analyse the data, a coding frame will be required. This frame can be found in the appendix. The data will be presented using tables and charts to allow for ease of understanding. The use of Chi Squares, a statistical test to analyse any relationships in data, and other

methods of analysis through SPSS will be used to identify if there are any relationships between different characteristics.

3.8. Limitations to the study

One issue that has arisen from the preparation of this study is the representativeness of the sample. Originally, the researcher feared that a rather large percentage of the responses received would be of the same age as the researcher as the method of sending the questionnaire was to post it on social media. The researcher, therefore, feared that the sample would mainly be the same age as the researcher, however, she realised that this would be the easiest way to reach a larger number of people and the method that she believed more people were likely to respond to. Through starting to look at the data collected, the opposite has happened. A very large percentage of responses are from the 36-45 age category and are male because the researcher's father shared the questionnaire to some sport society pages that he is a member of and a lot more responses were obtained from this than from the original post.

3.9. Ethical considerations

Ethical considerations will be taken throughout the entirety of the research for this dissertation, with emphasis on the data collection. Whilst, as previously discussed, there may have been a change in attitudes towards discount shopping, the author will consider that some people may still be embarrassed by where they shop or what they buy and how much they spend. Every effort will be taken to avoid any

discomfort or embarrassment to any parties involved with this research. The respondents will remain anonymous and will be informed of this prior to any participation in the study. They will also be informed of the purpose of the research and be informed that a summary of results will be available to them online, to reassure them that their answers are being used for only the intended aim of the research and nothing else. In addition, any personal information taken for the purpose of the research will be safeguarded on password protected documents and devices. A copy of the ethics form is included in the appendix.

DATA ANALYSIS

This chapter endeavours to clearly present the main findings collected from the primary research conducted. All data will be presented in graphs and tables for ease of understanding, all of which can also be found in the appendix. Alongside a portrayal of the main findings, a discussion of the main themes that have arisen from the data will be had with analysis of its relevance in relation to the current literature and the research aims and objectives. The data gathered will be broken down into five sections in order to provide clarity of themes. These sections are:

- 1) Demographics of participants
- 2) Perception of discount stores
- 3) Shopping habits
- 4) Agreement of statements
- 5) Responses to the open question

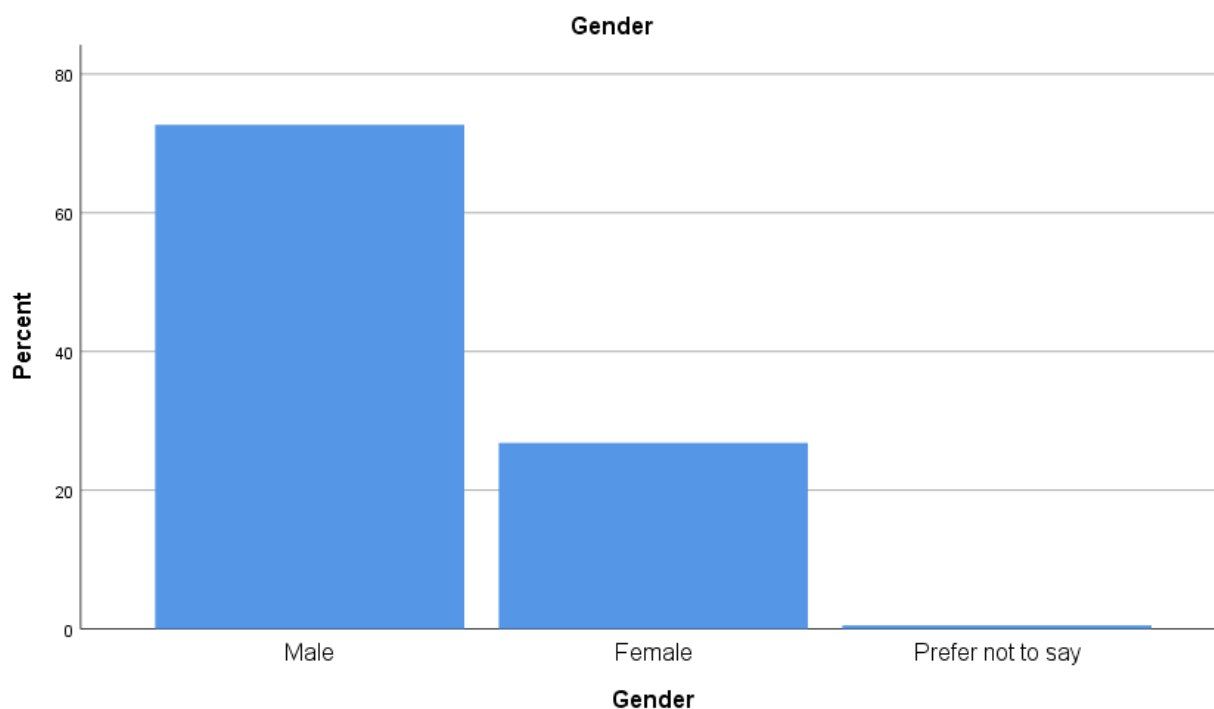
4.1. Results

The results are presented within these sections with the use of SPSS to create graphs and cross-tabulations.

4.1.1. Demographics of participants

The first four figures all concern the demographics of the participants. These demographics will later be further analysed against other characteristics of the questionnaire to try and meet the study's aims and objectives.

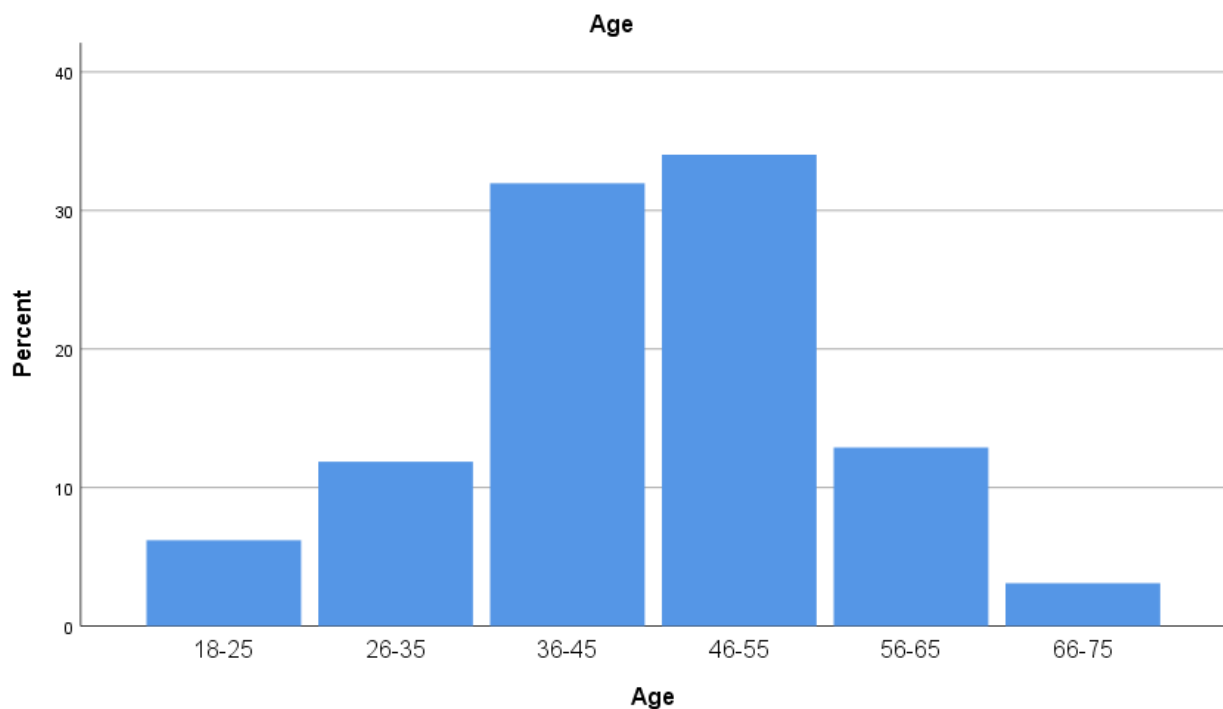
Figure 2: Gender of participants



Conversely to Gable et al.'s (2007) study, wherein they included only female participants in their study of attitudes towards discount shopping because they believed that females shopped more than males, the researcher wanted a completely random sample as to not stereotype between the sexes. The researcher will admit, however, whilst she tried to avoid any bias towards the research, she did, like Smith (2008) assume that the response rate would be higher for females than males. However, this was not the case. Figure 2 emphasises how wrong this assumption was; an enormous 72.7% of participants were male, 26.8% were female and one person (0.5%) opted for the 'prefer not to say' choice. Considering that research by Skrovan (2017) suggests that now, 58% of households consider themselves to be co-shopper households and research of the like of Gable et al (2007) do not consider the opinions of male participants, the fact that so many

responses were generated by males could be very interesting, however, the researcher does acknowledge that a more even split would be needed before generalising any trends between the sexes concerning discount shopping.

Figure 3: Age of participants



As previously mentioned, the researcher hypothesised that as a result of the method chosen for sending out the questionnaire, she believed that the majority of participants would fall into the 18-25 age category as it is the same age as the researcher herself. The researcher believed that this would be undesirable, however, unavoidable because it would solely be those on the researchers' friends list and given the time constraint of this research, online surveys would still generate more responses than attempting to do a paper format. As visible from figure 3, the researcher was pleasantly surprised to be wrong. Not only was the age category 18-25 not the largest category but it was, in fact, the second smallest with only 6.2%. The only smaller category was 66-75 with 3.1%. The largest of the categories was

46-55 with 34%, closely followed by the 36-45 category with 32%. 12.9% of participants were aged between 56 and 65 and finally, 11.9% were aged between 26 and 35. The number of responses per category here was interesting. Contradictory to research carried out by Dietsch and Gigliotti (2014) where they found that over 65s had a much higher response rate than any other category, it was, in fact, the smallest category. That is not to say, however, that if an equal amount of participants were chosen from each category, that the over 65s would be the lowest response group as this was a random sample.

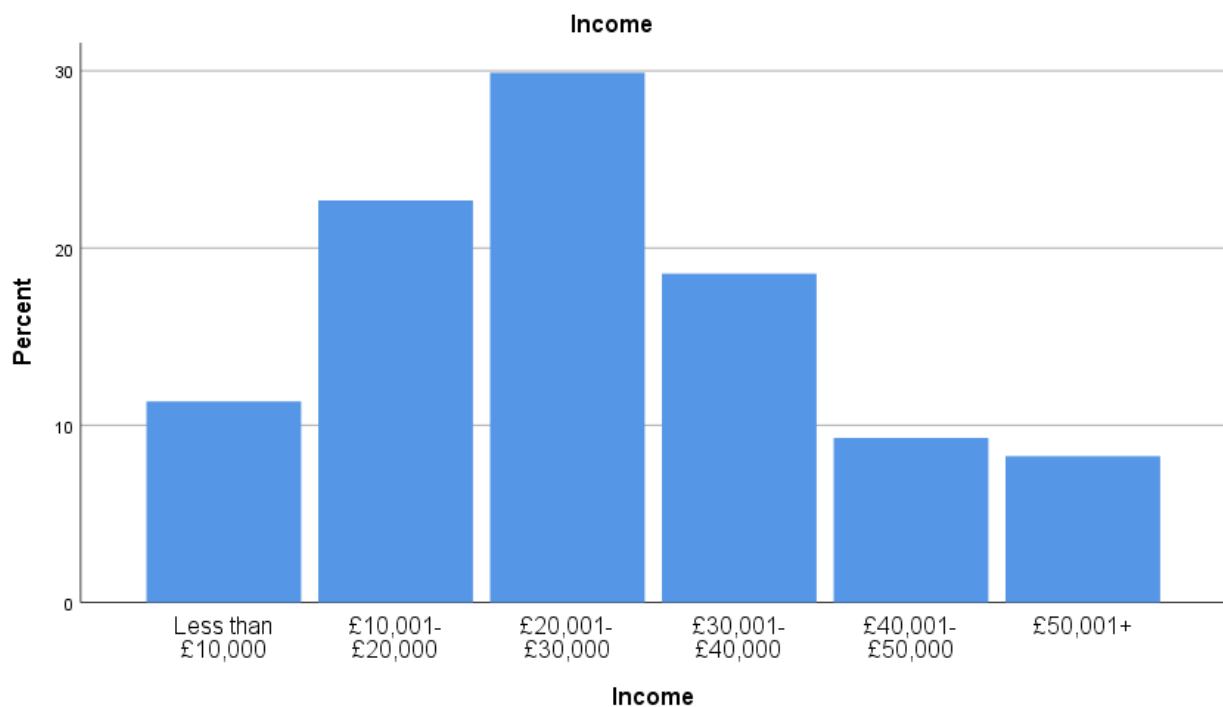
Figure 4: Occupation of participants



For this question, a substantial 62.9% of participants answered that they were employed full-time. The second largest category with only 12.9% was self-employed. 9.3% stated that they were employed part-time. 7.2% classed themselves as being

in the 'other' category where 3 out of the 14 specified that they were unemployed due to disability and the remaining 11 were retired. 5.7% of participants were unemployed and the smallest category was that of 'student' with only 2.1%.

Figure 5: Participants' income

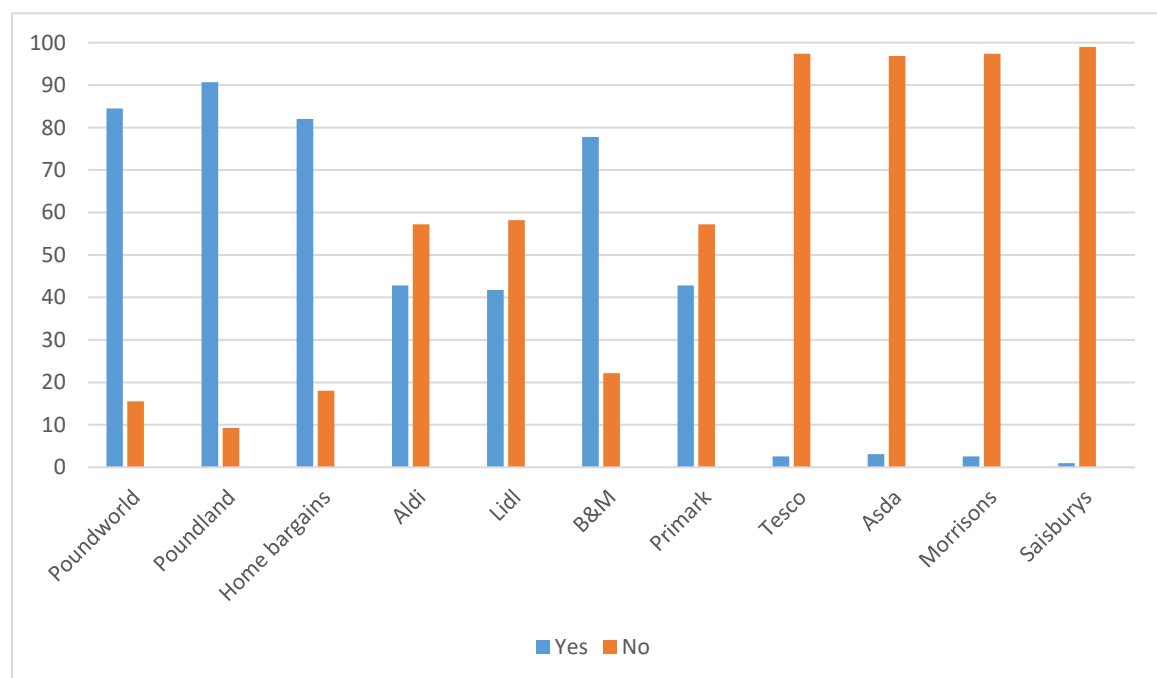


Although a very large percentage of participants are employed full-time, there are quite varied incomes across the participants which will later be analysed against their attitudes towards discount stores and their likelihood of shopping at them to analyse if there is a link between the level of income and a person's probability of shopping at discount stores. 29.9% of participants earn between £20,001 and £30,000 a year. Statistics taken from the income tax calculator state that the average UK salary for 2016/17 was £26,500, this question is representative of that statistic. The second and third largest categories are just above and just below that of the national average with 22.7% of participants earning between £10,001 and £20,000 and 18.6% earning between £30,001 and £40,000 a year. Whilst the majority of

participants for this study fall around the national average wage, there are those who participated in the study that earn significantly higher and lower than the average wage in the UK with 11.3% earning less than £10,000 and at the other end of the scale 9.3% earn between £40,001 and £50,000 a year and 8.2% are earning more than £50,001 a year. This should provide great breadth when analysing if income has a direct link to spending habits at discount stores later on in the study.

4.1.2. Perception of discount stores

Figure 6: Perception of stores



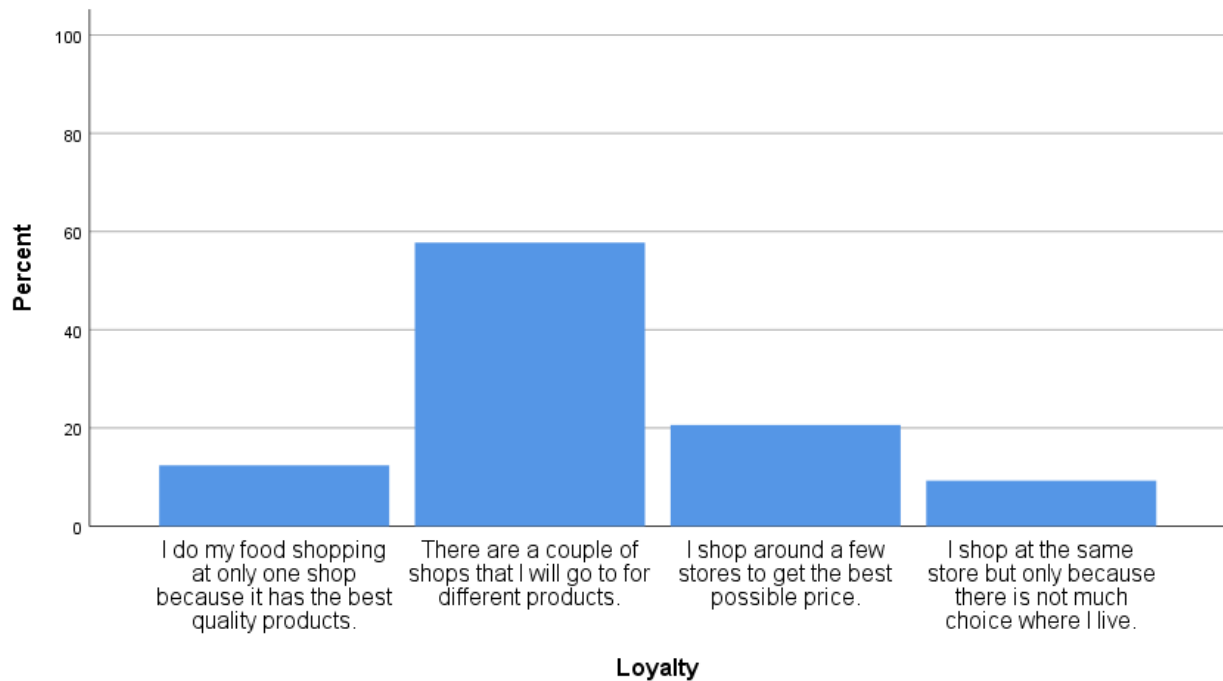
To ascertain participants perceptions of discount stores, they were asked from a series of stores, some of which class themselves as discount stores and others who do not, if they considered the stores to be discount stores or not. Three things stand out from this graph; firstly, in nearly all cases (99%, 97.4%, 96.9% and 97.4%) participants agree that the big four supermarkets, Tesco, Asda, Morrisons and Sainsburys are not considered to be discount stores. Secondly, there is accordance

that Poundworld, Poundland, Home Bargains and B&M are discount stores with the yes responses varying from 77.8% for B&M to 90.7% for Poundland. The third thing that can be drawn from this question is that, coinciding with McKeever's (2017) findings that the German discounters are not actually considered to be discounters anymore, 57.2% of participants believed that Aldi was not a discount store and 58.2% thought the same for Lidl. This could perhaps give a reason as to why 1 in 3 of the German discounter's customers are middle-class (Hyde:2015); if the two stores are no longer considered discount stores then that would explain why the stigma of only the poor shopping at discount stores (Wortmann: 2004) appears to have vanished.

4.1.3. Shopping habits

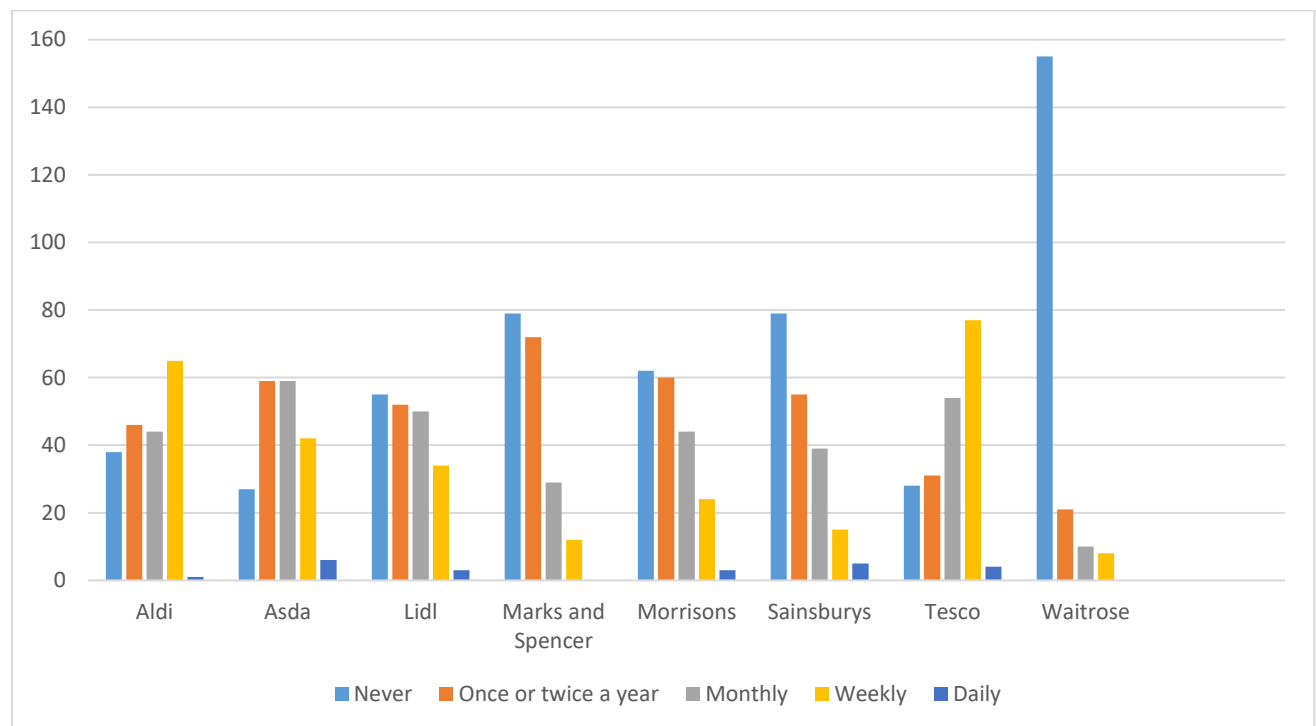
To identify common shopping habits that affect the likelihood of someone shopping at discount stores, the researcher firstly wanted to identify if nearly 70 years after his study, Applebaum's (1951) statement that consumers lack loyalty was still true today. He believed that even if consumers could purchase all required products in one place, they would still shop around to see if they could find a better deal. To investigate this, the researcher first asked participants to choose the statement that they most agreed with from the following demonstrated in the graph.

Figure 7: Store loyalty



57.7% of participants answered that they did their shopping at a couple of stores because they bought certain products at different stores. 20.6% of participants responded that they shop around a few stores searching for the best prices. 12.4% stated that they do their shopping at only one store because they believed that it had the best quality products. Finally, 9.3% of participants answered that they shopped at one store but only because there is no choice where they live. Nearly 70 years later, these results coincide with Applebaum's (1951) findings; a massive 78.3% of participants in this study demonstrated that they did not particularly have store or brand loyalty. Instead, they are more lead by price discounts rather than loyalty to a particular store or product (Jackaria: 2002).

Figure 8: Shopping frequency



For this question, the researcher asked respondents to choose how frequently they went to a range of grocery stores. Two observations can be drawn from these responses. Firstly, the responses answering 'never' were significantly higher for Waitrose (79.8%), Marks and Spencer (41.1%) and Sainsbury's (40.9%). Coffey (2017) found that in a survey conducted by Which regarding 7000 shoppers preferences, Waitrose was actually voted the best supermarket in Britain with a score of 74% where participants were asked to rate supermarkets based on the appearance of the store, the quality of the products and how easily products could be found in store. Marks and Spencers were named the second best with a score of 73% (Coffey: 2017). However, this contradicts the findings of this study, where Waitrose and Marks and Spencers appear to be the least popular. A possible explanation to this could perhaps be the wording of this question; whilst the two

stores may have been voted the best in terms of store appearance and quality of products, this does not necessarily mean that more people frequent the stores. A person could believe that a store such as Waitrose could have the best quality products but they may not shop there because of the price of products which could bias the study mentioned by Coffey. Equally, with Sainsbury ditching the brand guarantee (Rampen: 2016), they are now not as competitive on their prices as the other three 'big' supermarkets.

The second observation that can be drawn from this question is that the 'weekly' category was highest for Tesco (39.9%), Aldi (33.5%), Asda (21.8%) and Lidl (17.5%). This demonstrates that of the participants in this study, whilst they may shop at other stores at varying frequencies, there are preferred stores where they choose to conduct the majority of their shopping. Unfortunately, there are no further reasons given in a closed question such as this, however, certain hypotheses could be drawn as to the reasons why participants have a preferred weekly shop and browse elsewhere. One reason could be that participants are actually looking to see if they can find a better-priced product elsewhere and would then perhaps consider changing their weekly shop. Another could simply be that someone has some spare time, on a lunch break perhaps, and they just have a wander and end up finding something that they were not looking for. Examples such as these could bias a persons' appearance of brand or store loyalty.

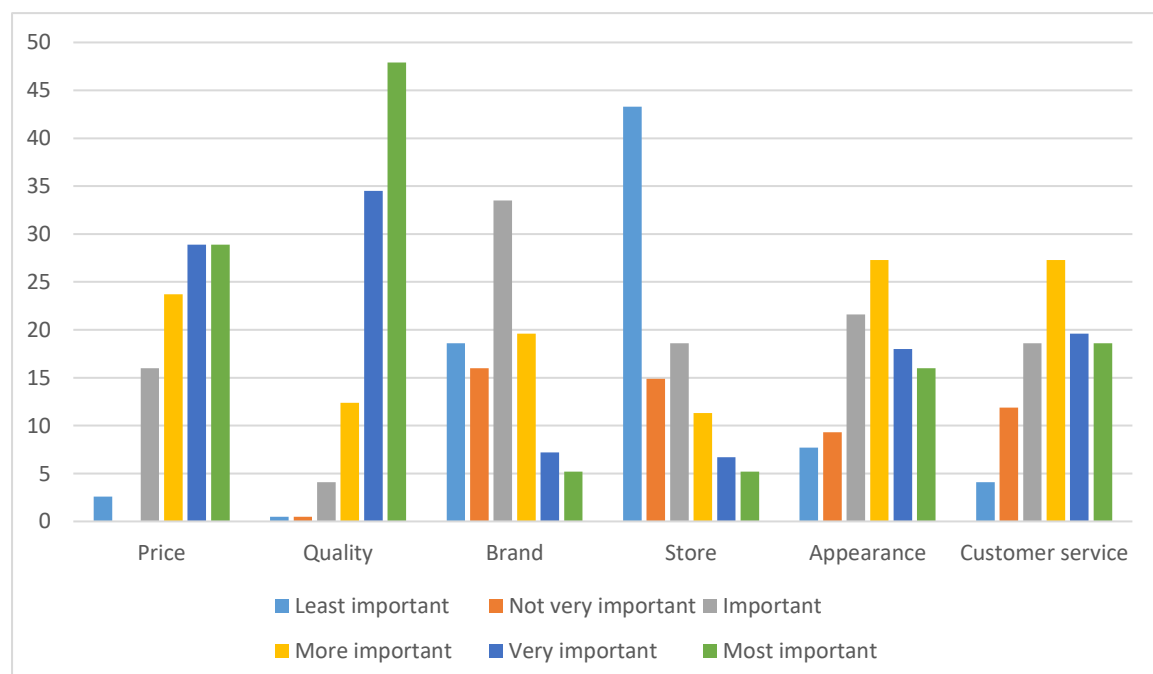
Gammall's (2015) findings that people are much more likely nowadays to abandon any loyalty they have for a particular store or brand if it means saving money could

be questioned. In this question, 21 of the 24 participants who answered in the previous question that they only shop in one store because it has the best products, answered here that they shop in another store as well. This demonstrates that of the participants that view themselves as being loyal to only one store, the majority of them cannot be considered to be completely loyal.

4.1.4. Agreement of statements

To ascertain what characteristics or components were the most important for consumers when looking at which stores to attend and which products to purchase, the researcher asked two questions; firstly, amongst the provided characteristics, which would they rank as the most important.

Figure 8: Most important quality

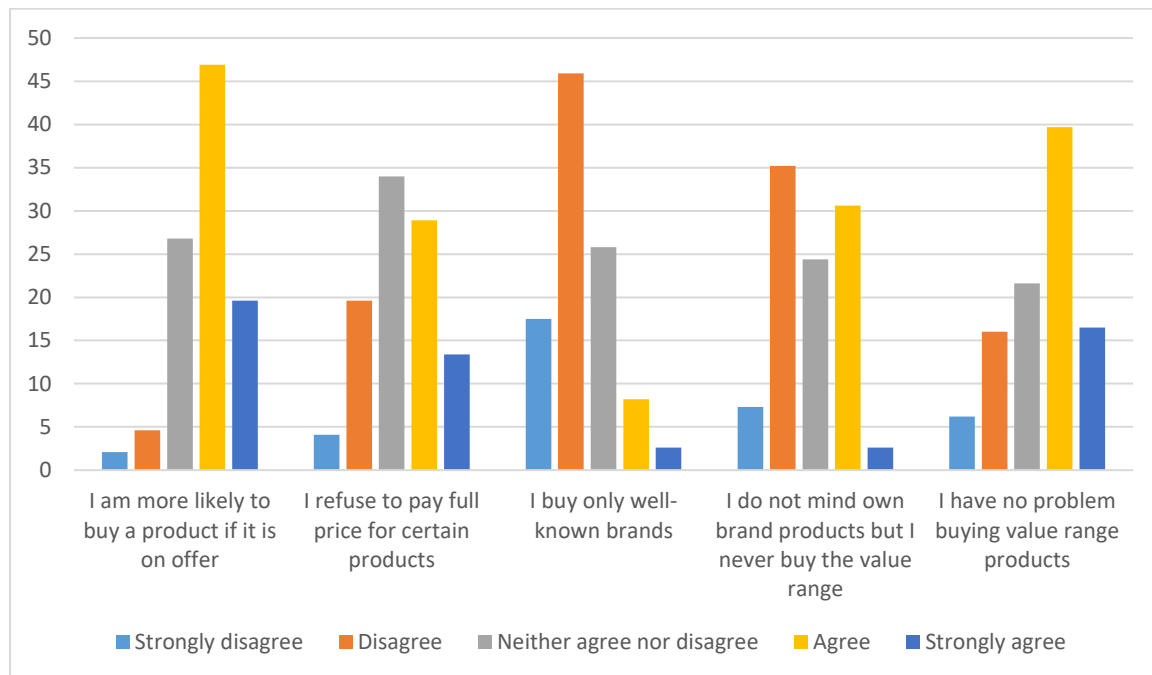


There are two results that stand out amongst the rest here. Firstly, the most important characteristic that participants of this study search for is the quality; 47.9%

voted it as the most important characteristic. This result is interesting as several researchers believe that most people will compromise on quality if it means saving money (Applebaum:1951). Whilst price has been voted the second most important quality with 28.9% of participants voting that it is the most important characteristic for them, this data suggests that, contrary to findings by Applebaum (1951), the need to save money does not necessarily mean that quality is considered any less important. It could simply mean that there are certain things that consumers wait until they come on offer to purchase or they might buy a non-branded product rather than an everyday value product so that they are conscious of the price but they do not place price above quality.

To further investigate participants' shopping preferences and opinions towards discount stores, the researcher listed a number of statements and asked participants to tick a box based on their level of agreement or disagreement with each statement. The results have been collated and presented across the next three graphs for easy viewing.

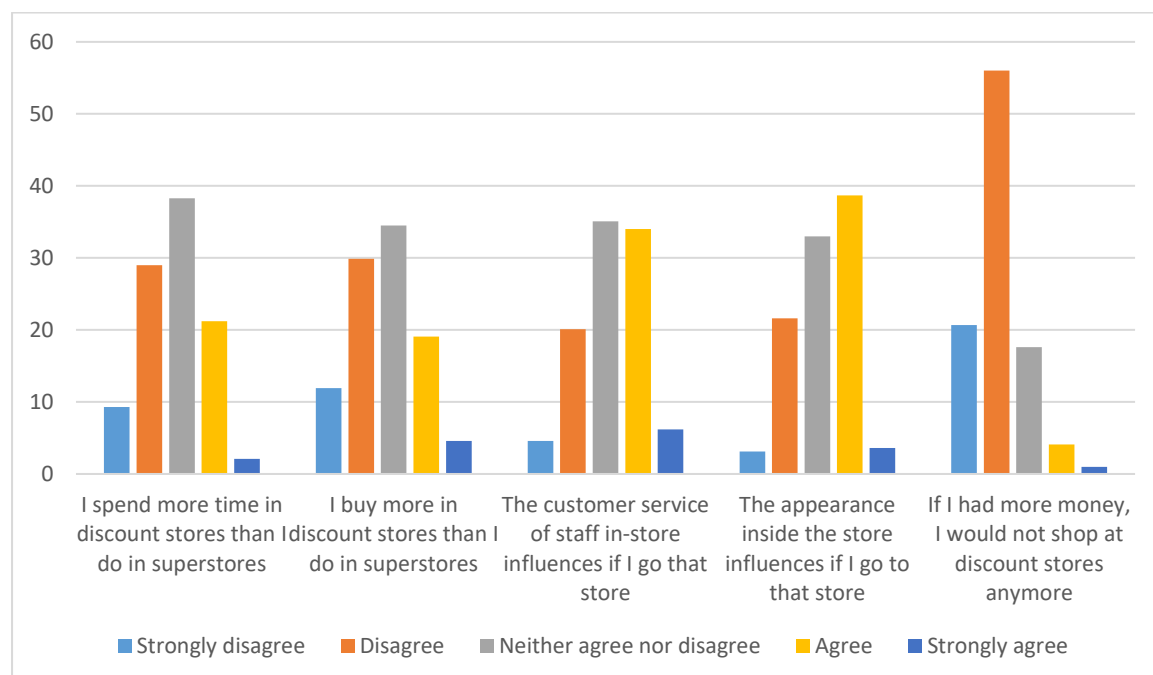
Figure 9: Agreement of statements part 1.



This graph supports the previous hypothesis that the price of a product does not necessarily lower the importance of quality to consumers. The response to the first question had a significant 46.9% agreeing that they are more likely to buy a product if it is on offer and 19.6% strongly agreeing with the same statement. Furthermore, 28.9% agree and 13.4% strongly agree that they refuse to pay full price for certain products. Whilst the issue of store loyalty has been raised and questioned, no analysis has yet to be made about brand loyalty. This question found that 45.9% of participants disagreed with the statement 'I buy only well-known brands' and 17.5% strongly disagreed with this statement. This shows that the majority of participants have no brand loyalty. However, it is important to note that there are those who do have brand loyalty as 8.2% agreed with this statement and 2.6% strongly agreed. Therefore, it can be argued that the majority of participants coincide with Gammall's (2015) view that there is a lack of brand loyalty nowadays, however, this is not true for everyone; there are those who remain loyal to their favourite brands. The reaction

to own brand and value range products in this graph is interesting; 30.6% of participants stated that they had no problem in buying own brand products but they would not buy value products. 39.7% of participants also answered that they had no problem with buying value range products. This will be analysed later on to see if there is a commonality between the level of income and the willingness to be a value product. However, for further study, it would be interesting to try and ascertain what participants would define a value range product as; if it was literally a range such as Tesco that labeled their products with 'value range' or if they considered own brand products from a discounter to be a value range too.

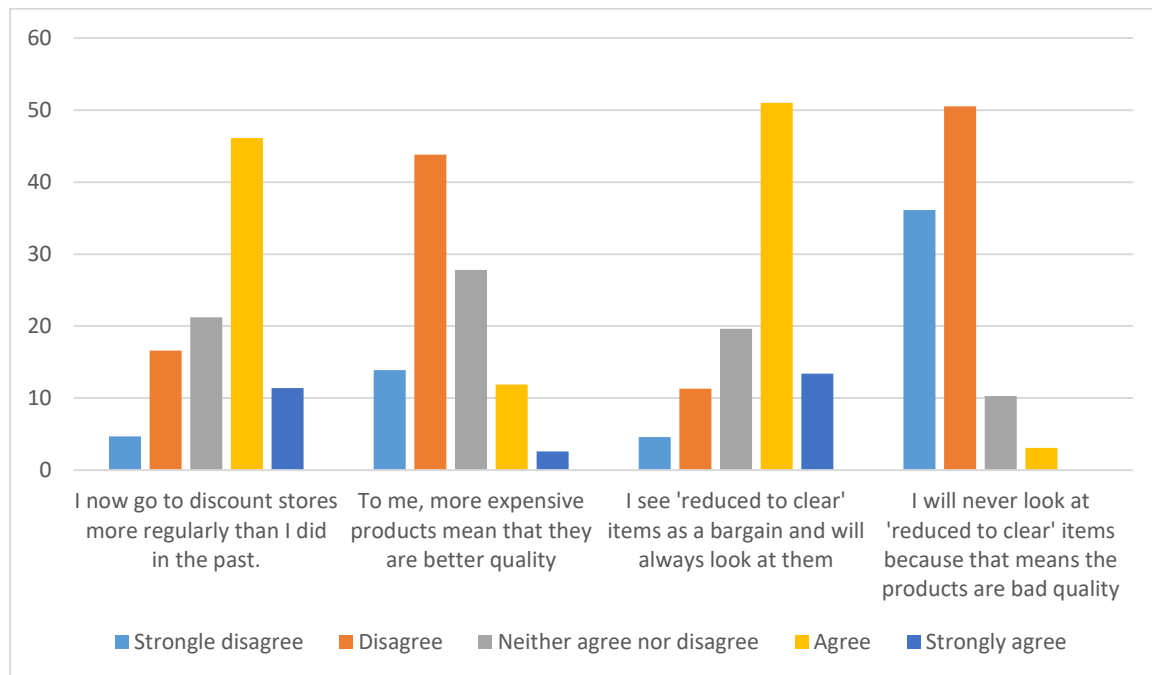
Figure 10: Agreement of statements part 2.



Unfortunately, the downside to having a 'neither agree nor disagree' option is evident from this chart. When asked if they spent more time and bought more in discount stores now than they did in superstores, most participants chose not to commit to an answer with 38.3% and 34.5% opting for the neither-nor option. Similarly, with the

customer service of staff in the store being an influencing factor of going to a store 35.1% answered that they neither agreed nor disagreed with the statement. This was, however, closely followed by 34% of participants agreeing that this was a contributing factor for them. The appearance inside a store, on the other hand, had a majority of 38.7% agreeing that it was an influential factor of going to a store for them. The most staggering result so far with the most participants in accordance is for the hypothetical statement 'if I had more money, I would not shop at discount stores anymore' with 56% of participants disagreeing with the statement. This statement encapsulates the entire essence of this dissertations' purpose; if there was an improvement in the economy or consumers suddenly had more disposable income available to them, would discount stores suffer a loss in trade? From this study, it appears as though the answer is no; although there are some who would inevitably spend more because they had more, there are also those who would stick to their normal habits, perhaps still not seeing the need in spending more than they need to.

Figure 11: Agreement of statements part 3.



A whopping 46.1% of participants agreed and 11.4% strongly agreed that they now go to discount stores more regularly than they did in the past. These figures demonstrate value to Ruddick (2015) and Planet Retail Ltd. (2016) findings that the discounters have become and will continue to become more popular so that the majority of our spending will be done in discount stores. The last three statements are all to do with seeing if participants saw a correlation between good quality products and a more expensive price. 43.8% disagreed and 13.9% strongly disagreed that they see more expensive products as better quality. However, 11.9% agreed and 2.6% strongly agreed to the same statement. This suggests that whilst the majority of participants did not see a correlation between price and the perception of quality. This could mean that they would possibly not view discount stores as lower quality than the superstores. Those that did agree to this statement though could be seen as not evolving from the preconceived notion of discount stores being seen as a sign of poverty to the now more popular view of the discounters being seen as a smart decision to spending wisely (Varley:2001). This

idea is also highlighted in the analysis of the open question later on. The same conclusions can be drawn from the last two statements; the majority of participants saw 'reduced to clear' items as a bargain and items that were worth looking at, however, there was also a small percentage disagreeing, believing that this meant they were bad quality.

4.1.5. Open-ended question

The final question of the survey simply asked participants if they had any further comments that they would like to add to the topic. A full list of which can be found in the appendix. Evans and Mathur (2005) found that open-ended questions had a much lower response rate to closed questions because it required participants to actually think about their opinions than simply choosing a response from provided options. Having said that, some interesting responses were derived from this question. It was highlighted in this question that there were some participants from the North of Ireland where there are apparently no Morrisons or Aldi stores which could have affected the results of question seven, however, the researcher had not anticipated that her survey would reach quite that far. For further study, ensuring that all stores being analysed are available to the participants would provide more valid data.

There were also a few comments stating that their influence over where they shopped was based purely on convenience and their choice of shop would possibly change if there were more options available closer to them; 'I would possibly shop in Lidl, Aldi and Asda if there was one anywhere close to where I live'. There were also

some participants that answered here that the only deciding factor for them was that they, or a family member, work in a superstore and therefore take advantage of staff discount; 'Me and my family go to Morrison's a lot because I have a sister who works there and because of this we get a staff and family card which allows us 10% of our shop'. Again, this might skew the data in that, these participants, without the store discount, may choose to shop elsewhere.

From some responses, there appears to be disagreement on if the discount stores provide a cheaper price to superstores. One statement argues that prices are reasonable and that is a deciding factor for them shopping at discounters; 'I am on a limited income, I need to buy what I can afford. Discount stores offer reasonable products at a reasonable price'. However, there are those that disagree, particularly; 'I believe the 'discount' stores are not always the best priced for a weekly shop' and 'As I've got older tend to go to some discount stores more than i used to but sometimes the prices are the same as big suoermarkets'. This would be an interesting point of further study; whilst the aforementioned adverts of a basket comparison at the discount stores are apparently cheaper than at one of the superstores, is there actually a difference on a full weekly shop?

From question 8 it was established that quality is the most important characteristic for participants when shopping for products, followed by the price. However, question 9 deduced that the majority of participants did not actually view a lower price as an indicator of lower quality. This is emphasised in this response; 'Quality is a big factor in shopping. I would rather pay for quality than but cheap and have poor quality. But that doesn't mean that expensive is always good quality or that cheap is always poor quality'. Another participant commented 'Offers aren't always real

discounts, you have to know what is a bargain'. This statement coincides with Jackaria's (2002) findings that consumers actually prefer an original reduced price than offers such as buy one get one free; they prefer actually working out what is good value for money rather than simply buying something because it is on offer.

One participant raised a very interesting comment for the theme of this dissertation, they commented 'I think the uk is back in recession and has been through 2017. The first 3 months of 2018 have been slow sales like the sales of 2008'. This is of particular interest to the researcher because the analysis in this paper has been based upon the future viability of the discount stores in a post-recession UK economy as the economy has improved from the initial introduction of the discount stores and from the recession of 2008 which saw a massive growth in sales and popularity for the discounters (Varley: 2001). Whilst the UK is currently not deemed to be in a recession, this comment raises some thought-provoking issues. Official statistics taken from the Bank of England's Statistical Interactive Database demonstrate that the bank's interest rate is currently at one of its lowest ever rates of 0.5%. However, following a meeting of the Monetary Policy Committee on the 21st of March 2018 during which 9 out of the 12 policy committee members voted to raise bank's interest rates, there is a very real fear that anyone with a loan or mortgage on a variable rate of interest is likely to see that percent increase very soon. This, alongside fears that Brexit will have a detrimental effect on the UK economy (Mussaddigue: 2017) and the number of well-known store closures such as Toys 'r' us (Butler: 2018) and New Look (Owen: 2018), the future of the UK economy seems very uncertain that it is actually improving. So, whilst question 9 of the survey found that if consumers had more money they would not stop frequenting discount stores,

for further study it would be very interesting to analyse if the economy worsened and consumers had less money, would they start shopping at discount stores more? If this further study was conducted it would be interesting to examine opinions of the participants in this study that saw discount stores as bad quality and claimed that they never shopped there to analyse if their opinions are likely to change. It would be particularly intriguing to find the participants that answered 'Discount stores Quality usually really bad' and 'You get a lot more unhygienic people in discount stores!!' as their responses are especially negative and quite judgmental, especially with the regards to the people shopping at discount stores.

4.2. Cross-tabulations

For further analysis, the researcher has cross-tabulated some of the results from this survey using Chi-squares to analyse the significance of the results. 0.05 is considered significant with 0.01 being considered highly significant. According to these figures, there are a few points to be drawn from this survey which are significant. For all Chi-squares conducted, income was kept as one of the factors as the researcher was aiming to see if there were any correlations between the more money a participant had and their view towards the discounters. The results of the tests are listed below. An analysis of their importance will be conducted in the next chapter.

- 1) The level of income and the view that Aldi is a discounter scored a p. value of 0.027.
- 2) The level of income and the view that Lidl is a discounter scored a p. value of 0.015.

- 3) The level of income and agreement to the statement that participants only buy well-known brands scored a p. value of 0.013.
- 4) The level of income and stating that they never buy value range products has a p. value of 0.049.
- 5) The level of income and the importance of buying branded products scored a p. value of 0.042.

CONCLUSIONS

5.1. Introduction

This chapter will recapitulate the findings of the primary research conducted for this study and discuss its relevance to the current literature on the topic. It will then proceed to investigate if the objectives set out at the start have been met, before concluding with recommendations that can be drawn from this study.

5.2. Discussion

It was highlighted at the start of this survey that there appears to be a lack of current literature surrounding this topic. There is an abundance of literature concerning the rise of the discounters and how they became so popular but the gap in knowledge came from the future of the discounters in the scenario that the British economy was improving. The researcher aimed to investigate if consumers would leave the discounters if they had more disposable income. Not only did the data gathered suggest that this was not the case but it also identified a significant change in consumer behaviour concerning the discount stores.

This change in attitudes towards the discounters could account for their increase in popularity. The data suggests that the majority of people shop at the German discounters frequently, in fact, more frequently than they did in the past but the majority of participants no longer consider Aldi and Lidl to be discount stores. This

could be the cause of the change in attitudes towards the discounters; if they are no longer considered to be discount stores by most then there is a possibility that more people will start shopping at them because the fear of being seen there and being thought of as poor because of this has, arguably, disappeared. This study also brought to light the possibility that the UK economy is not actually improving at all and so the threat of the discounters losing popularity as the economy improves could be a problem for the future and not the present.

5.3. Objectives

5.3.1. Objective 1 – What are the motives of discount shoppers?

It is clear from previous research that the common belief is that consumers go to discount stores purely for financial reasons. Gammall (2015) expresses that consumers will abandon any loyalty they may harbour for their favourite brands or stores because society, nowadays, is more focused on lower prices than anything else. This notion is supported by Gisbrechts et al.'s (2008) study where they found that a large percentage of consumers will go to a number of different stores for their weekly shop in order to find the cheapest prices. To answer this objective, the researcher endeavoured to find out if the price was actually considered the most important factor for consumers when shopping. If the price was considered the most important factor then it could be seen as the main reason that consumers shop at discount stores, as suggested by previous research.

Whilst price was considered an important factor for participants in this survey with 28.9% voting it as the most important characteristic, 47.9% actually voted that quality was the most important factor for them whilst shopping. 46.1% of participants agreed that they now go to discount stores more regularly than they did in the past and a further 11.4% strongly agreed to the same statement. This data suggests that the motives for consumers going to discount stores cannot purely be attributed to the lower prices as they are searching for quality above price. This is not to suggest that products at the discounters are any better than similar products at the superstores but perhaps consumers are finding a balance between good quality products and affordable prices.

The responses to the hypothetical statement 'if I had more money, I would not shop at discount stores anymore' further supports this argument; 56% of participants disagreed and 20.7% strongly disagreed with this statement. One could suggest that if the basis of a person shopping at a discount store was purely out of a financial constraint, then an increase in funds would mean that the need to shop at discount stores would become obsolete. Therefore, based on the fact that the majority of participants claim that an increase in funds would not change their likelihood of shopping at discount stores, consumers arguably shop at discount stores for more than just the low prices. Other influencing factors that were derived from this survey other than price and quality were the store appearance and the customer service of staff within the store.

5.3.2. Objective 2 – Is there a link between the level of disposable income and a persons' likelihood of shopping at a discount store?

Lamey (2014) suggests a correlating relationship between contractions in the economy and increases in the discounters market share. This suggests that when society is feeling more cash-stricken, more people turn towards the discounters because they are able to offer more competitive prices (Jackaria: 2002). To ascertain if a link between the level of income and the likelihood of shopping at a discount store was visible from this survey, several Chi-squares were undertaken, measuring the significance of all responses of the survey against the level of income of the participants. Five correlations were deemed as significant. The most significant of the six was the agreement of the statement 'I only buy well-known brands'. This scored a p. value of 0.013 meaning that it was highly significant; the higher the level of income of a participant, the more likely they are to only buy well-known brands. This data appears to agree that there is this correlation between the level of income and discount shopping as there are much more brands available at superstores so one could assume that if a person is heavily led by the need to buy only well-known brands then they are far less likely to shop at discount stores. In question 8 where participants were asked to rate a number of characteristics based on the level of importance to them whilst they were shopping, the importance of buying branded products scored a p. value of 0.042 when measured with income. This further cements the importance of buying branded products for those participants on a higher income.

There was also a definite link between the level of income and opinion of what constitutes a discount store. The survey provided a list of a number of discount stores and superstores and asked participants to select the ones that they believed to be discount stores. 57.2% voted that Aldi was not a discount store and 58.2% voted that Lidl was not a discount store. This resulted in the level of income and the view that Aldi is a discount store scoring a p. value of 0.027. Lidl scored a lower score again of 0.015. These figures show that the relationship between income and viewing the German discount stores as discount stores is highly significant; the majority of participants in this survey believe that the German discounters have evolved from their roots of hard discounters. It is those participants with a higher income that view the stores purely as discounters. This supports McKeever's (2017) findings that Aldi and Lidl are no longer being considered as being in the same field as discounters such as Home Bargains and B&M.

The last significant point that can be drawn from this research is the relationship between income and the likelihood of buying value range products. This relationship scored a p. value of 0.049 when tested. This means that from the participants in the survey, the higher the level of income, the more they were likely to agree that they never buy value range products. For further study, it would be interesting to try and determine why this is. One can assume it is because they view the discounted range as poor quality, the same reason that they perhaps do not shop at discounters but it would be interesting to analyse if any other reasons came from this.

5.3.3. Objective 3 – What threats are there to overcome if the discount stores wish to remain competitive in the UK?

Previous research seems to suggest that the future of the grocery sector will be heavily led by the discounters (Knights: 2016, Ruddick: 2015). The researcher started this dissertation, unhappy to simply believe that recent success for the discounters was indicative of a successful future, which is all previous research appeared to provide as a reason for their hypothesis. However, after having conducted this research, the researcher is leaning towards agreeing with previous research that the discounters are likely to continue remaining competitive. Whilst nothing in this research is going to determine success for the discounters, it has found that participants frequent the German discounters more than they did in the past, in fact, the majority of participants no longer view Aldi and Lidl as discount stores. Society appears to be a lot more accepting of shopping at discount stores now; the stigma of them being for the poor appears to have disappeared. One threat could be this view changing. There are still those who look down at discount stores, viewing the products as poor quality and the people who shop at them as unhygienic as found in the open question of the survey. The threat here would be letting standards slip in store and having more people sharing this view.

One threat that the researcher had anticipated being problematic for the discounters was that as the British economy improved, the researcher believed that the discounters may become less popular if consumers suddenly had more disposable income. However, results from this survey found that a total of 76.7% of participants disagreed that they would frequent discount stores any less if they had more money.

In addition to this, with proposed rises to interest rates and the uncertainty of what will happen following Brexit, the state of the economy actually seems more uncertain now than ever before.

Finally, perhaps the biggest threat that could challenge the discounters is the threat of competition. This threat could come from other discounters such as Home Bargains and Poundland expanding their product base, beginning to stock some fresh food. Alternatively, the superstores could find a strategy that allows them to lower their prices, being more competitive. Another competitor that was derived from reviewing current literature was the internet. Finklestein (2018) identifies the tremendous increase in online and social shopping, with particular emphasis on mobile app shopping. If the discounters fail to adapt to the development of digital shopping then they may very well be left behind by stores that provide an online buying service, instead of simply a platform to view products which they currently have.

A very new threat could be that of the proposed merger of Asda and Sainsburys; it has been announced on the 28th of April that the two superstores are in advanced discussions concerning the merger (Bevan: 2018). Bevan (2018) looks at the severity of the threat that could be posed by this merger; he identifies that not only would it be a threat to the likes of Tesco but it would also challenge the German discounters as this merger would mean they are likely to be able to have a wider array of products available at lower prices.

5.4. Recommendations

Through conducting this research, both secondary through the review of current literature and primary through data gathered from the survey, the researcher has identified three recommendations that she believes would either help the discounters remain competitive or provide interesting leads for further research.

The first of these recommendations is concerned with the discounters and a strategy for their further development. The researcher believes that whilst the discounters seem to be growing in popularity because of their success in their stores, if they fail to develop their online platform then they will not be able to remain competitive over the next ten years. Online shopping, for the researcher, is the biggest threat for the discounters. They currently have online websites and apps to view some of their products and their weekly offers. In a society so concerned with digitisation, this type of website and app is not sufficient. The researcher believes that if the discounters do not develop their online platforms to include an online ordering facility, they will begin to lose some of their popularity as they will be losing those consumers who chose to go to buy from a superstore purely for the convenience of being able to order online and have it delivered directly to their door.

The second recommendation that the researcher proposes for the discounters is to remember their purpose and their humble beginnings. Wrigley (1994) supposes that the superstore's loss in sales following the introduction of the discounters was their fault. He believed that they were too focussed on themselves and their own

expansion and they, consequently, left themselves vulnerable to attack from the discounters because they did not recognise them as a threat until it was too late. This recommendation is based on this observation; the discount stores need to remember that just because they are experiencing growth in market share and sales, this does not mean that they are infallible. In order to remain competitive, they must continue to review their strategies and look for ways to further advance themselves. They must also view every competitor and new entrant to the field as a threat, never taking anything for granted.

The final recommendation is that of further study. From the data gathered in this study, the researcher has unearthed that there still remains those that view the discount stores as below them; a place where only the poorer shop. For further study, it would be interesting to ask why this view still persists; is it only because of this stigma that they do not want to be viewed as poor or are there any other reasons? Whilst this survey discovered that the majority of participants who shop at discount stores would not stop doing so if they had more disposable income, it would be interesting to analyse the opposite. Would those who claim to never shop at the discount stores start doing so if they suddenly found themselves with a much tighter budget or would they rather compromise on something else?

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APPENDICES

Appendix 1 – The survey

1. What Gender Are you?

- ☐ Male
- ☐ Female
- ☐ Prefer not to say

2. How old are you?

- ☐ 18-25
- ☐ 26-35
- ☐ 36-45
- ☐ 46-55
- ☐ 56-65
- ☐ 66-75
- ☐ 76+

3. Which occupation best describes your circumstances?

- ☐ Student
- ☐ Self-employed
- ☐ Employed part-time
- ☐ Employed full time
- ☐ Unemployed
- ☐ Other

4. What is your current income?

- ☐ Less than £10,000
- ☐ £10,001-£20,000
- ☐ £20,001-£30,000
- ☐ £30,001-£40,000
- ☐ £40,001-£50,000
- ☐ £50,001+

5. Which of the following stores would you consider to be discount stores?

- ☐ Poundworld
- ☐ Poundland
- ☐ Home Bargains
- ☐ Aldi
- ☐ Lidl
- ☐ B&M Bargains
- ☐ Primark
- ☐ Tesco
- ☐ Asda
- ☐ Morrisons
- ☐ Sainsburys

6. Which of these statements best describes your grocery shopping habits?

- ☐ I do my food shopping at only one shop because it has the best quality products
- ☐ There are a couple of shops that I will go to for different products
- ☐ I shop around a few stores to get the best possible price
- ☐ I shop at the same store but only because there is not much choice where I live.

7. How often would you shop at each of these stores?

	Never	Once or twice a year	Monthly	Weekly	Daily
Aldi					
Lidl					
Asda					
Marks and Spencers					
Morrisons					
Sainsburys					
Tesco					
Waitrose					

8. Please rate the following characteristics based on level of importance to you when purchasing goods. 1= Least important, 6= Most important.

	1	2	3	4	5	6
The price of the product						
The quality of the product						
The brand of the product						
The store it is in						
The appearance of the product						
Customer service in the store						

9. Please rate the following statements on a scale of strongly disagree to strongly agree.

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree
I am more likely to buy a product if it is on offer					
I refuse to pay full price for certain products					
I buy only well-known brands					
I don't mind own brand products but I never buy the value range					
I have no problem buying value range products					
I spend more time in discount stores than I do in superstores					
The customer service of staff in a store influences if I go to that store					
The appearance inside a store influences if I go to that store					
If I had more money, I wouldn't shop at discount stores anymore					
I now go to discount stores more regularly than I did in the past.					

To me, more expensive products mean they are better quality					
I see 'reduced to clear' items as a bargain and will always look at them					
I will never look at 'reduced to clear' items because that means the products are bad quality					

10. Do you have any other comments you would like to make on this topic?

Appendix 2 – The coding frame

This coding frame contains the numerical value of all responses obtained by the survey and how they were, consequently, inputted into SPSS.

Q1

1=Male

2= Female

3=Prefer not to say

Q2

1= 18-25

2= 26-35

3= 36-45

4=46-55

5=56-65

6=66-75

7=76+

Q3

1= Student

2=Self-employed

3= Employed part-time

4=Employed full time

5= Unemployed

6= Other

Q4

1= Less than £10, 000

2= £10,001-£20,000

3=£20,001-£30,000

4=£30,001-£40,000

5=£40,001-£50,000

6=£50,001+

Q5

1= Yes

2= No

5.1= Poundworld

5.2=Poundland

5.3=Home Bargains

5.4=Aldi

5.5=Lidl

5.6=B&M Bargains

5.7=Primark

5.8=Tesco

5.9= Asda

5.10=Morrisons

5.11= Sainsburys.

Q6

1= I do my food shopping at only one shop because it has the best quality products

2= There are a couple of shops that I will go to for different products

3= I shop around a few stores to get the best possible price

4= I shop at the same store but only because there is not much choice where I live.

Q7

1= Never

2= Once or twice a year

3= Monthly

4= Weekly

5= Daily

7.1 = Aldi

7.2 = Asda

7.3= Lidl

7.4= Marks and Spencers

7.5=Morrisons

7.6= Sainsburys

7.7=Tesco

7.8= Waitrose

Q8

1= Least important

6= Most important

8.1= The price of the product

8.2= The quality of the product

8.3= The brand of the product

8.4= The store it is in

8.5= The appearance of the product

8.6= Customer service in store.

Q9

1= Strongly disagree

2= Disagree

3=Neither agree nor disagree

4=Agree

5= Strongly disagree.

9.1=I am more likely to buy a product if it is on offer.

9.2=I refuse to pay full price for certain products.

9.3= I buy only well-known brands.

9.4= I don't mind own brand products but I never buy the value range.

9.5= I have no problem buying value range products.

9.6= I spend more time in discount stores than I do in superstores.

9.7= I buy more in discount stores than I do in superstores.

9.8= The customer service of staff in a store influences if I go to that store.

9.9= The appearance inside a store influences if I go to that store.

9.10= If I had more money, I wouldn't shop at discount stores anymore.

9.11= I now go to discount stores more regularly than I did in the past.

9.12= To me, more expensive products mean they are better quality.

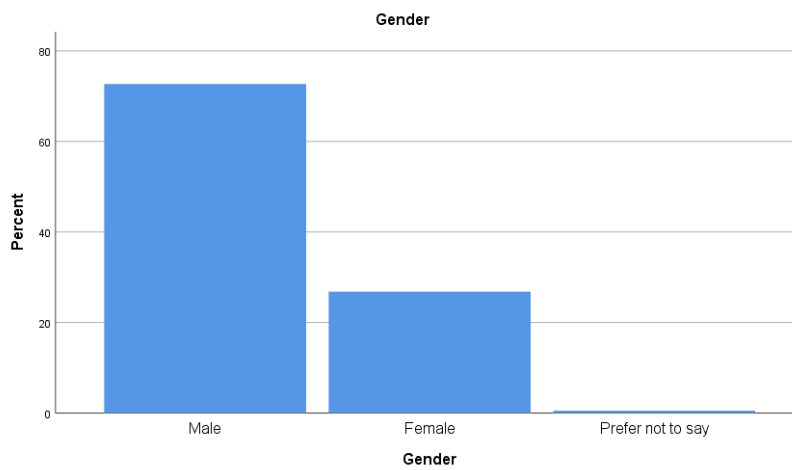
9.13= I see 'reduced to clear' items as a bargain and will always look at them.

9.14= I will never look at 'reduced to clear' items because that means the products are bad quality.

Appendix 3 – Frequency tables and graphs

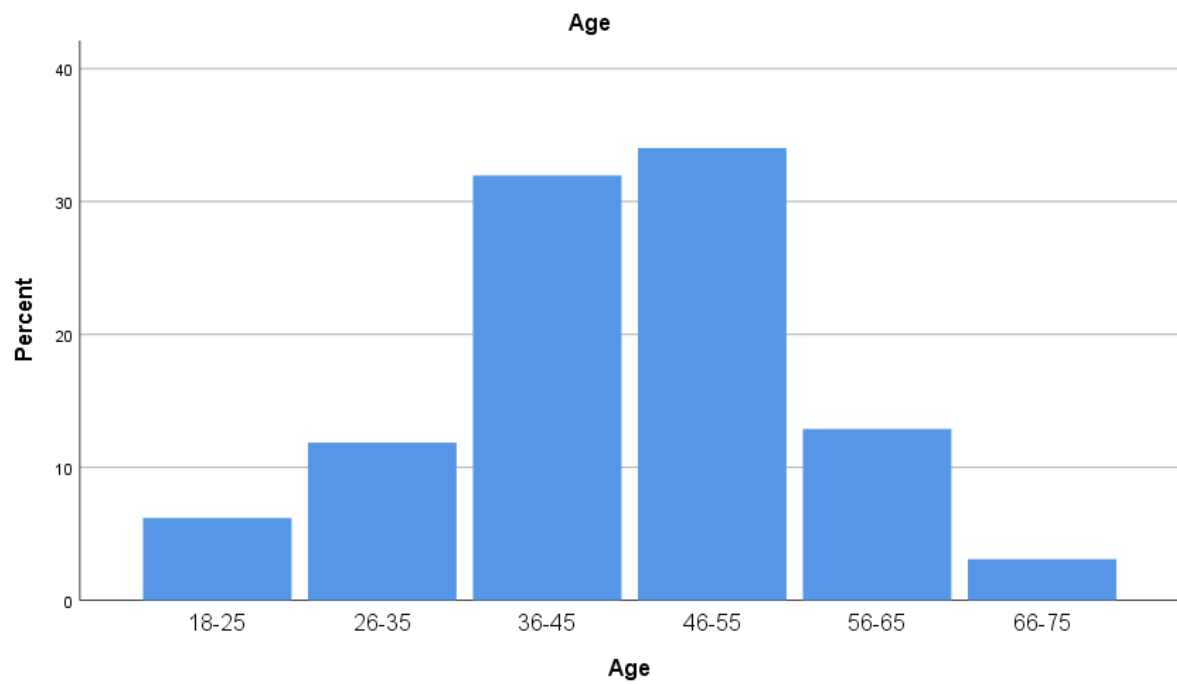
Question 1

Gender				
	Frequency	Percent	Valid Percent	Cumulative Percent
Male	141	72.7	72.7	72.7
Female	52	26.8	26.8	99.5
Prefer not to say	1	.5	.5	100.0
Total	194	100.0	100.0	



Question 2

Age				
	Frequency	Percent	Valid Percent	Cumulative Percent
18-25	12	6.2	6.2	6.2
26-35	23	11.9	11.9	18.0
36-45	62	32.0	32.0	50.0
46-55	66	34.0	34.0	84.0
56-65	25	12.9	12.9	96.9
66-75	6	3.1	3.1	100.0
Total	194	100.0	100.0	



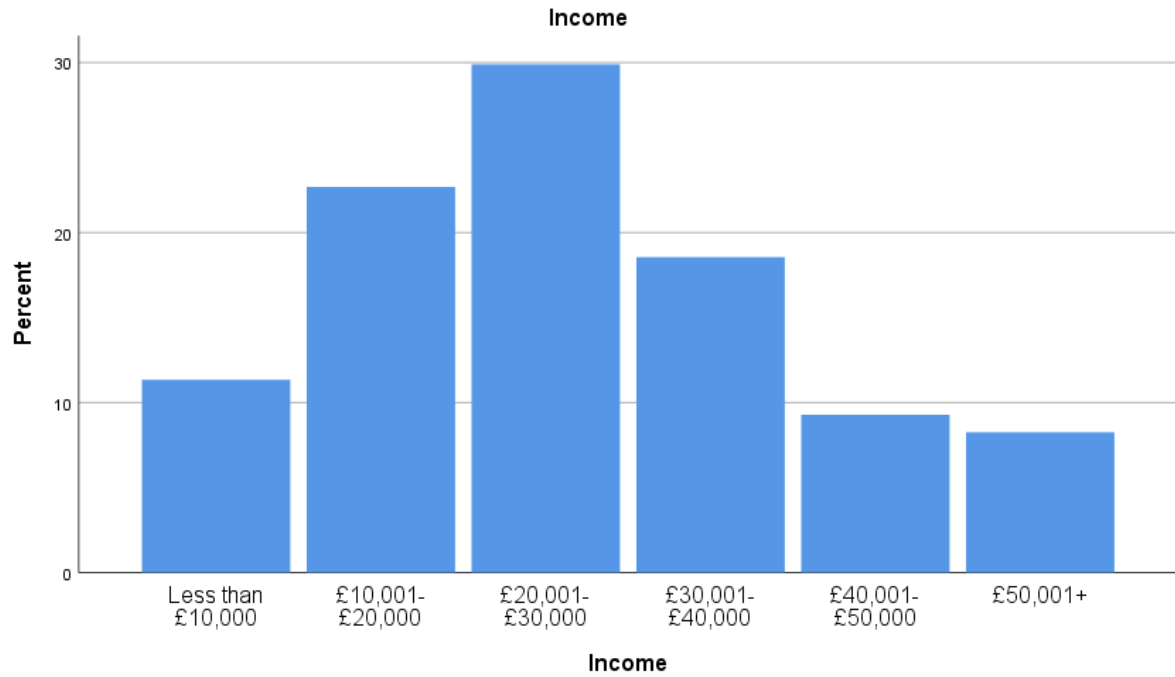
Question 3

Occupation				
	Frequency	Percent	Valid Percent	Cumulative Percent
Student	4	2.1	2.1	2.1
Self-employed	25	12.9	12.9	14.9
Employed part-time	18	9.3	9.3	24.2
Employed full-time	122	62.9	62.9	87.1
Unemployed	11	5.7	5.7	92.8
Other	14	7.2	7.2	100.0
Total	194	100.0	100.0	



Question 4

Income				
	Frequency	Percent	Valid Percent	Cumulative Percent
Less than £10,000	22	11.3	11.3	11.3
£10,001-£20,000	44	22.7	22.7	34.0
£20,001-£30,000	58	29.9	29.9	63.9
£30,001-£40,000	36	18.6	18.6	82.5
£40,001-£50,000	18	9.3	9.3	91.8
£50,001+	16	8.2	8.2	100.0
Total	194	100.0	100.0	



Question 5

Poundworld

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	164	84.5	84.5	84.5
No	30	15.5	15.5	100.0
Total	194	100.0	100.0	

Poundland

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	176	90.7	90.7	90.7
No	18	9.3	9.3	100.0
Total	194	100.0	100.0	

Home Bargains

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	159	82.0	82.0	82.0
No	35	18.0	18.0	100.0
Total	194	100.0	100.0	

Aldi

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	83	42.8	42.8	42.8
No	111	57.2	57.2	100.0
Total	194	100.0	100.0	

Lidl

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	81	41.8	41.8	41.8
No	113	58.2	58.2	100.0
Total	194	100.0	100.0	

B&M

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	151	77.8	77.8	77.8
No	43	22.2	22.2	100.0
Total	194	100.0	100.0	

Primark

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	83	42.8	42.8	42.8
No	111	57.2	57.2	100.0
Total	194	100.0	100.0	

Tesco

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	5	2.6	2.6	2.6
No	189	97.4	97.4	100.0
Total	194	100.0	100.0	

Asda

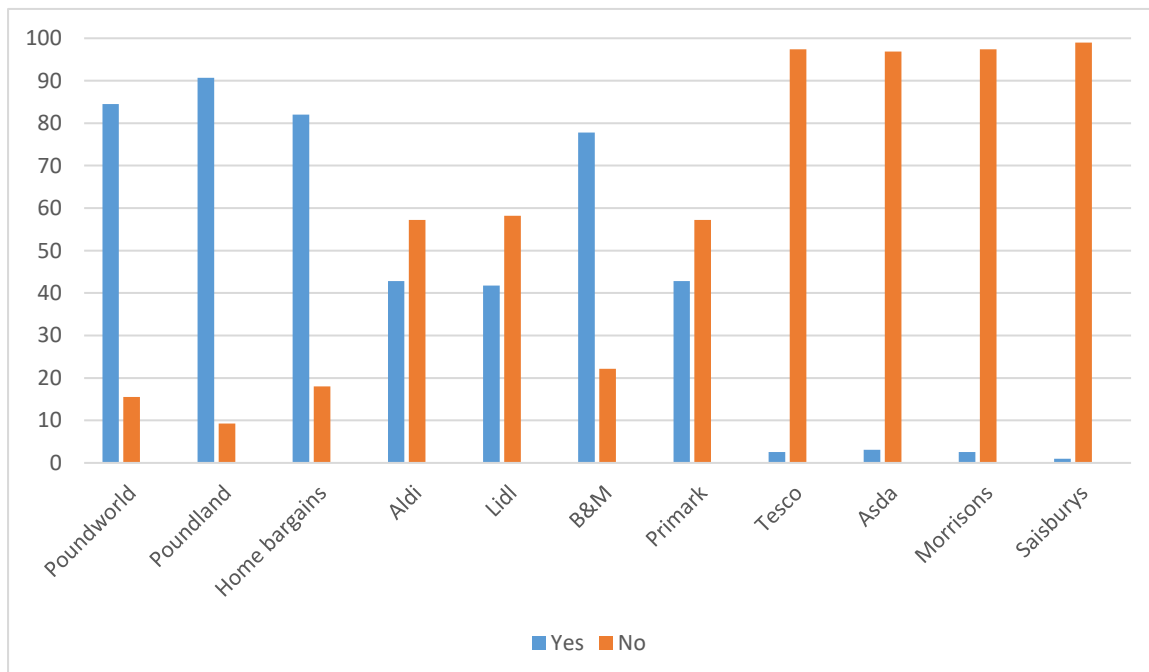
	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	6	3.1	3.1	3.1
No	188	96.9	96.9	100.0
Total	194	100.0	100.0	

Morrisons

	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	5	2.6	2.6	2.6
No	189	97.4	97.4	100.0
Total	194	100.0	100.0	

Sainsburys

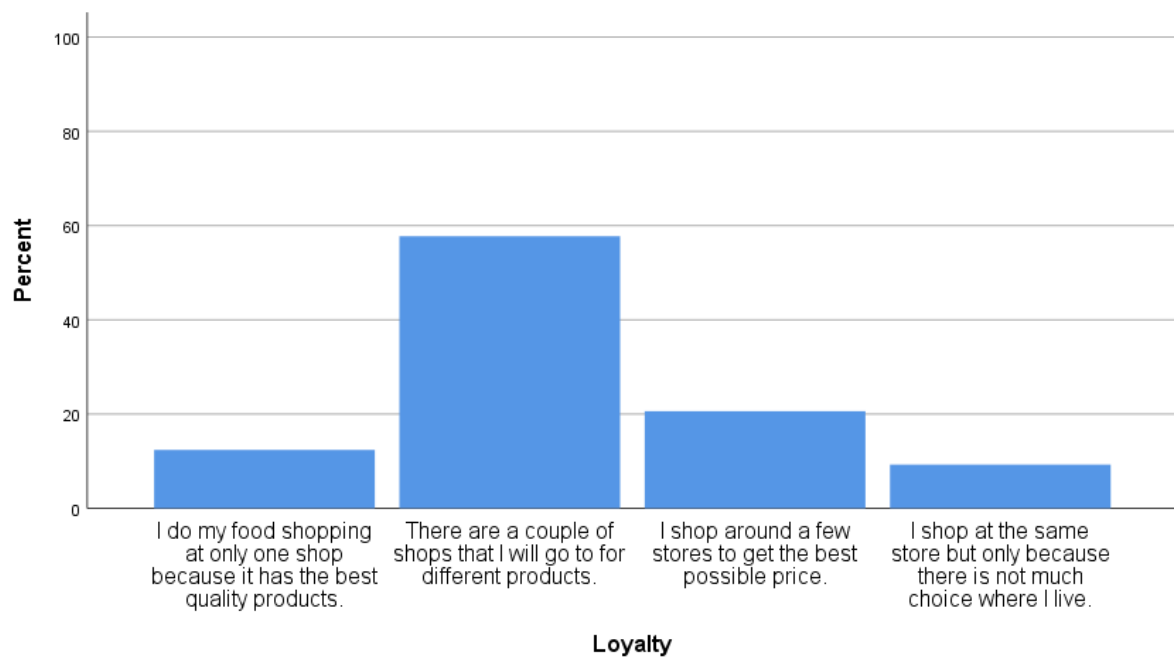
	Frequency	Percent	Valid Percent	Cumulative Percent
Yes	2	1.0	1.0	1.0
No	192	99.0	99.0	100.0
Total	194	100.0	100.0	



Question 6

Loyalty

	Frequency	Percent	Valid Percent	Cumulative Percent
I do my food shopping at only one shop because it has the best quality products.	24	12.4	12.4	12.4
There are a couple of shops that I will go to for different products.	112	57.7	57.7	70.1
I shop around a few stores to get the best possible price.	40	20.6	20.6	90.7
I shop at the same store but only because there is not much choice where I live.	18	9.3	9.3	100.0
Total	194	100.0	100.0	



Question 7

Frequency - Aldi				
	Frequency	Percent	Valid Percent	Cumulative Percent
Never	38	19.6	19.6	19.6
Once or twice a year	46	23.7	23.7	43.3
Monthly	44	22.7	22.7	66.0
Weekly	65	33.5	33.5	99.5

	Daily	1	.5	.5	100.0
	Total	194	100.0	100.0	

Asda

		Frequency	Percent	Valid Percent	Cumulative Percent
	Never	27	13.9	14.0	14.0
	Once or twice a year	59	30.4	30.6	44.6
	Monthly	59	30.4	30.6	75.1
	Weekly	42	21.6	21.8	96.9
	Daily	6	3.1	3.1	100.0
	Total	193	99.5	100.0	
Missing	System	1	.5		
	Total	194	100.0		

Lidl

		Frequency	Percent	Valid Percent	Cumulative Percent
	Never	55	28.4	28.4	28.4
	Once or twice a year	52	26.8	26.8	55.2
	Monthly	50	25.8	25.8	80.9
	Weekly	34	17.5	17.5	98.5
	Daily	3	1.5	1.5	100.0
	Total	194	100.0	100.0	

Marks and Spencer

		Frequency	Percent	Valid Percent	Cumulative Percent
	Never	79	40.7	41.1	41.1
	Once or twice a year	72	37.1	37.5	78.6
	Monthly	29	14.9	15.1	93.8
	Weekly	12	6.2	6.3	100.0
	Total	192	99.0	100.0	
Missing	System	2	1.0		
	Total	194	100.0		

Morrisons

		Frequency	Percent	Valid Percent	Cumulative Percent
	Never	62	32.0	32.1	32.1
	Once or twice a year	60	30.9	31.1	63.2
	Monthly	44	22.7	22.8	86.0
	Weekly	24	12.4	12.4	98.4
	Daily	3	1.5	1.6	100.0
	Total	193	99.5	100.0	
Missing	System	1	.5		
Total		194	100.0		

Sainsburys

		Frequency	Percent	Valid Percent	Cumulative Percent
	Never	79	40.7	40.9	40.9
	Once or twice a year	55	28.4	28.5	69.4
	Monthly	39	20.1	20.2	89.6
	Weekly	15	7.7	7.8	97.4
	Daily	5	2.6	2.6	100.0
	Total	193	99.5	100.0	
Missing	System	1	.5		
Total		194	100.0		

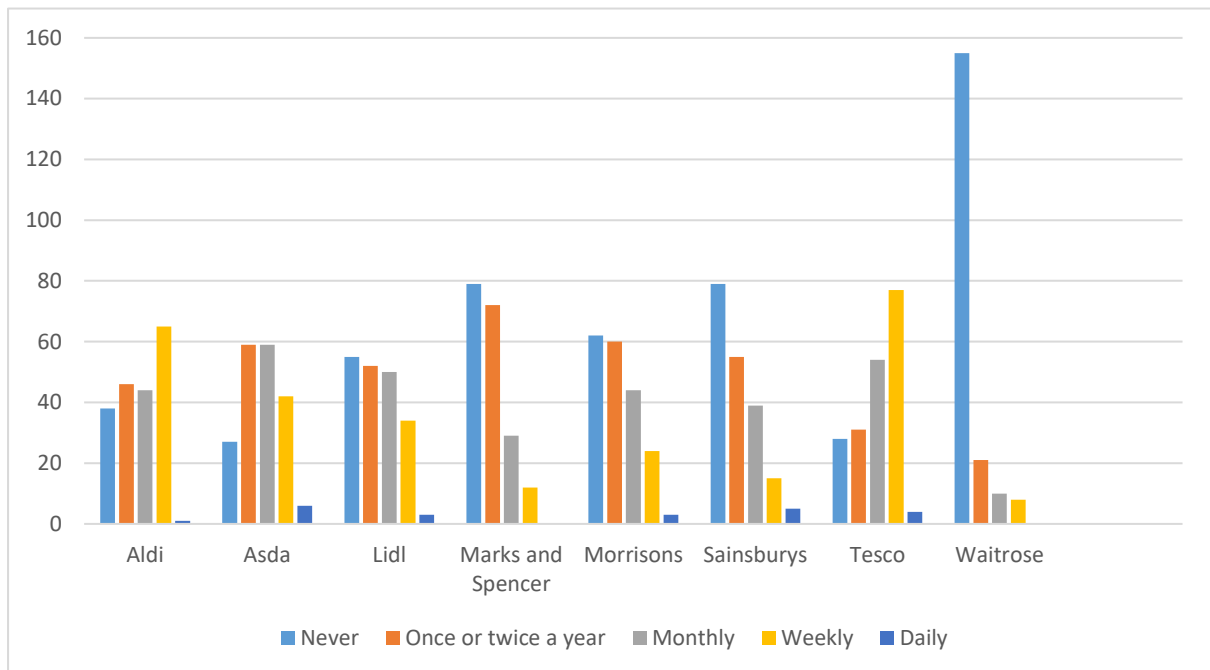
Tesco

		Frequency	Percent	Valid Percent	Cumulative Percent
	Never	28	14.4	14.4	14.4
	Once or twice a year	31	16.0	16.0	30.4
	Monthly	54	27.8	27.8	58.2
	Weekly	77	39.7	39.7	97.9
	Daily	4	2.1	2.1	100.0
	Total	194	100.0	100.0	

Waitrose

		Frequency	Percent	Valid Percent	Cumulative Percent
	Never	154	79.4	79.8	79.8

	Once or twice a year	21	10.8	10.9	90.7
	Monthly	10	5.2	5.2	95.9
	Weekly	8	4.1	4.1	100.0
	Total	193	99.5	100.0	
Missing	System	1	.5		
Total		194	100.0		



Question 8

Price				
	Frequency	Percent	Valid Percent	Cumulative Percent
Least important	5	2.6	2.6	2.6
Important	31	16.0	16.0	18.6
More important	46	23.7	23.7	42.3
Very important	56	28.9	28.9	71.1
Most important	56	28.9	28.9	100.0
Total	194	100.0	100.0	

Quality			
Frequency	Percent	Valid Percent	Cumulative Percent

Valid	Least important	1	.5	.5	.5
	Not very important	1	.5	.5	1.0
	Important	8	4.1	4.1	5.2
	More important	24	12.4	12.4	17.5
	Very important	67	34.5	34.5	52.1
	Most important	93	47.9	47.9	100.0
	Total	194	100.0	100.0	

Brand				
	Frequency	Percent	Valid Percent	Cumulative Percent
Least important	36	18.6	18.6	18.6
Not very important	31	16.0	16.0	34.5
Important	65	33.5	33.5	68.0
More important	38	19.6	19.6	87.6
Very important	14	7.2	7.2	94.8
Most important	10	5.2	5.2	100.0
Total	194	100.0	100.0	

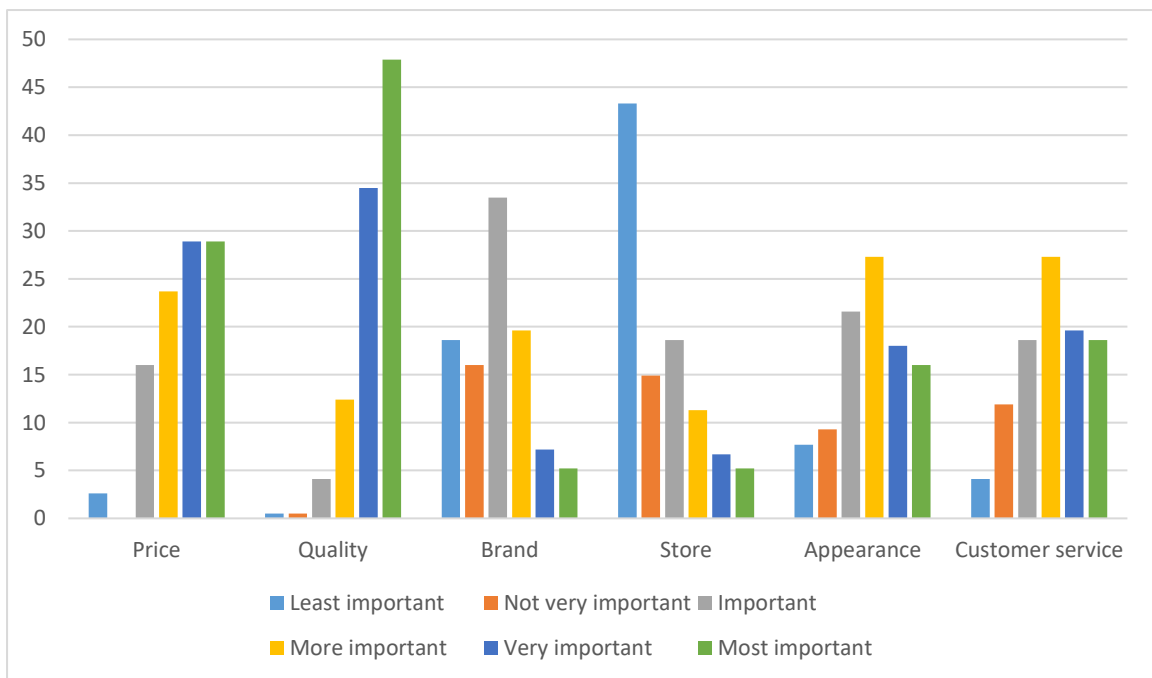
Store				
	Frequency	Percent	Valid Percent	Cumulative Percent
Least important	84	43.3	43.3	43.3
Not very important	29	14.9	14.9	58.2
Important	36	18.6	18.6	76.8
More important	22	11.3	11.3	88.1
Very important	13	6.7	6.7	94.8
Most important	10	5.2	5.2	100.0
Total	194	100.0	100.0	

Appearance				
	Frequency	Percent	Valid Percent	Cumulative Percent
Least important	15	7.7	7.7	7.7
Not very important	18	9.3	9.3	17.0
Important	42	21.6	21.6	38.7
More important	53	27.3	27.3	66.0
Very important	35	18.0	18.0	84.0

Most important	31	16.0	16.0	100.0
Total	194	100.0	100.0	

Customer service

	Frequency	Percent	Valid Percent	Cumulative Percent
Least important	8	4.1	4.1	4.1
Not very important	23	11.9	11.9	16.0
Important	36	18.6	18.6	34.5
More important	53	27.3	27.3	61.9
Very important	38	19.6	19.6	81.4
Most important	36	18.6	18.6	100.0
Total	194	100.0	100.0	



Question 9

Offers

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	4	2.1	2.1	2.1
Disagree	9	4.6	4.6	6.7

Neither agree nor disagree	52	26.8	26.8	33.5
Agree	91	46.9	46.9	80.4
Strongly agree	38	19.6	19.6	100.0
Total	194	100.0	100.0	

Full price

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	8	4.1	4.1	4.1
Disagree	38	19.6	19.6	23.7
Neither agree nor disagree	66	34.0	34.0	57.7
Agree	56	28.9	28.9	86.6
Strongly agree	26	13.4	13.4	100.0
Total	194	100.0	100.0	

Value range

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	14	7.2	7.3	7.3
Disagree	68	35.1	35.2	42.5
Neither agree nor disagree	47	24.2	24.4	66.8
Agree	59	30.4	30.6	97.4
Strongly agree	5	2.6	2.6	100.0
Total	193	99.5	100.0	
Missing System	1	.5		
Total	194	100.0		

Value range

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	12	6.2	6.2	6.2
Disagree	31	16.0	16.0	22.2
Neither agree nor disagree	42	21.6	21.6	43.8
Agree	77	39.7	39.7	83.5
Strongly agree	32	16.5	16.5	100.0
Total	194	100.0	100.0	

Discount stores

		Frequency	Percent	Valid Percent	Cumulative Percent
	Strongly disagree	18	9.3	9.3	9.3
	Disagree	56	28.9	29.0	38.3
	Neither agree nor disagree	74	38.1	38.3	76.7
	Agree	41	21.1	21.2	97.9
	Strongly agree	4	2.1	2.1	100.0
	Total	193	99.5	100.0	
Missing	System	1	.5		
Total		194	100.0		

Superstores

		Frequency	Percent	Valid Percent	Cumulative Percent
	Strongly disagree	23	11.9	11.9	11.9
	Disagree	58	29.9	29.9	41.8
	Neither agree nor disagree	67	34.5	34.5	76.3
	Agree	37	19.1	19.1	95.4
	Strongly agree	9	4.6	4.6	100.0
	Total	194	100.0	100.0	

Customer service

		Frequency	Percent	Valid Percent	Cumulative Percent
	Strongly disagree	9	4.6	4.6	4.6
	Disagree	39	20.1	20.1	24.7
	Neither agree nor disagree	68	35.1	35.1	59.8
	Agree	66	34.0	34.0	93.8
	Strongly agree	12	6.2	6.2	100.0
	Total	194	100.0	100.0	

Appearance

		Frequency	Percent	Valid Percent	Cumulative Percent
	Strongly disagree	6	3.1	3.1	3.1
	Disagree	42	21.6	21.6	24.7
	Neither agree nor disagree	64	33.0	33.0	57.7
	Agree	75	38.7	38.7	96.4

Strongly agree	7	3.6	3.6	100.0
Total	194	100.0	100.0	

More money

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	40	20.6	20.7	20.7
Disagree	108	55.7	56.0	76.7
Neither agree nor disagree	34	17.5	17.6	94.3
Agree	8	4.1	4.1	98.4
Strongly agree	2	1.0	1.0	99.5
22.00	1	.5	.5	100.0
Total	193	99.5	100.0	
Missing System	1	.5		
Total	194	100.0		

Regularity

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	9	4.6	4.7	4.7
Disagree	32	16.5	16.6	21.2
Neither agree nor disagree	41	21.1	21.2	42.5
Agree	89	45.9	46.1	88.6
Strongly agree	22	11.3	11.4	100.0
Total	193	99.5	100.0	
Missing System	1	.5		
Total	194	100.0		

Expensive

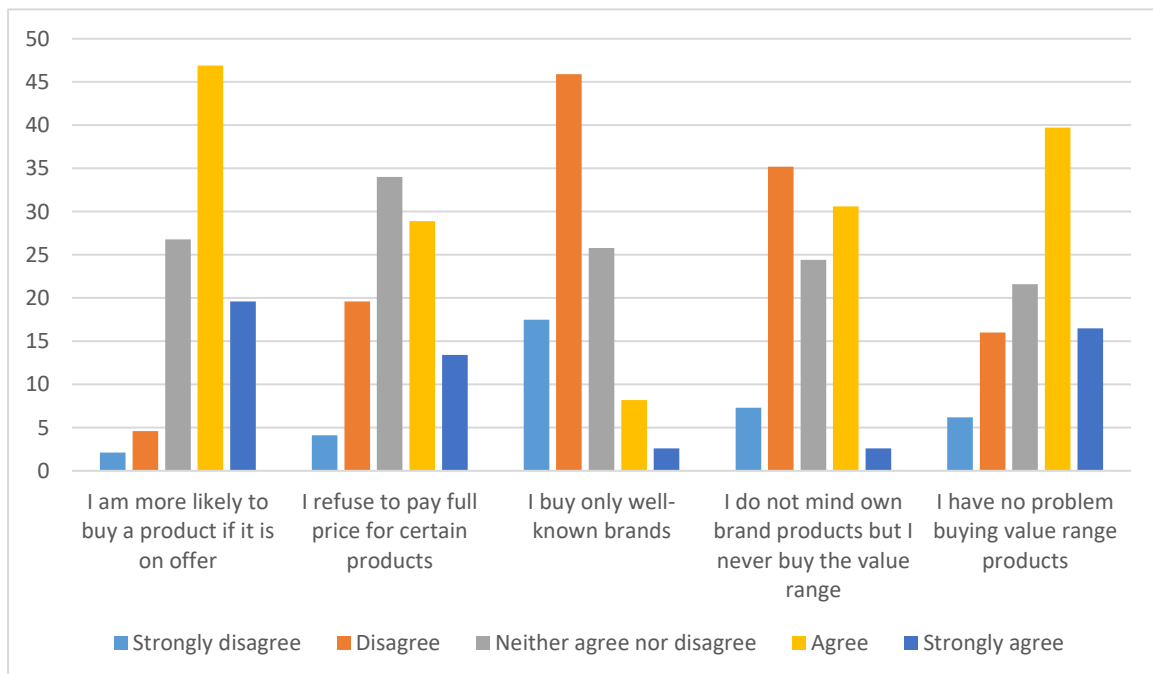
	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	27	13.9	13.9	13.9
Disagree	85	43.8	43.8	57.7
Neither agree nor disagree	54	27.8	27.8	85.6
Agree	23	11.9	11.9	97.4
Strongly agree	5	2.6	2.6	100.0
Total	194	100.0	100.0	

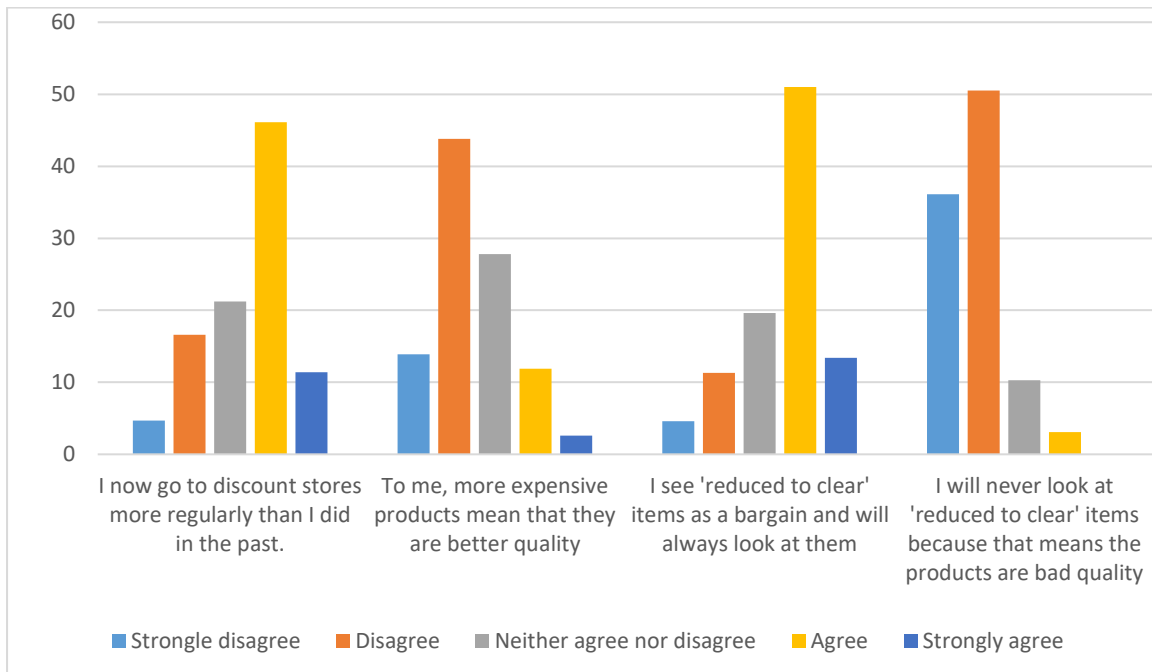
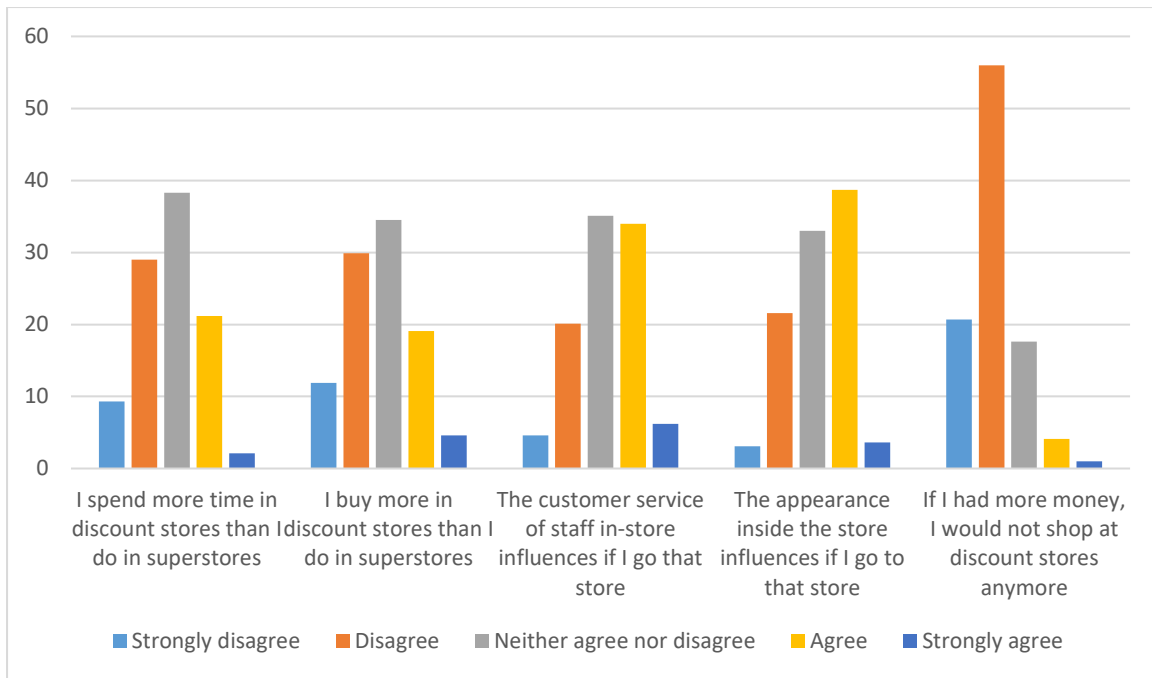
Reduced to clear

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	9	4.6	4.6	4.6
Disagree	22	11.3	11.3	16.0
Neither agree nor disagree	38	19.6	19.6	35.6
Agree	99	51.0	51.0	86.6
Strongly agree	26	13.4	13.4	100.0
Total	194	100.0	100.0	

Bad quality

	Frequency	Percent	Valid Percent	Cumulative Percent
Strongly disagree	70	36.1	36.1	36.1
Disagree	98	50.5	50.5	86.6
Neither agree nor disagree	20	10.3	10.3	96.9
Agree	6	3.1	3.1	100.0
Total	194	100.0	100.0	





Appendix 4 – Cross tabulations

Income * Aldi Crosstabulation

Count

		Aldi		
		Yes	No	
	Less than £10,000	10	12	22
	£10,001-£20,000	26	18	44
	£20,001-£30,000	16	42	58
	£30,001-£40,000	19	17	36
	£40,001-£50,000	6	12	18
	£50,001+	6	10	16
Total		83	111	194

Income * Lidl Crosstabulation

Count

		Lidl		
		Yes	No	
	Less than £10,000	10	12	22
	£10,001-£20,000	28	16	44
	£20,001-£30,000	17	41	58
	£30,001-£40,000	15	21	36
	£40,001-£50,000	5	13	18
	£50,001+	6	10	16
Total		81	113	194

Income * Brand Crosstabulation

Count

		Brand				
		Least important	Not very important	Important	More important	Very important
	Less than £10,000	5	5	4	4	1
	£10,001-£20,000	13	7	11	10	1
	£20,001-£30,000	10	4	20	16	5
	£30,001-£40,000	4	4	18	5	4
	£40,001-£50,000	3	8	6	0	1
	£50,001+	1	3	6	3	2
Total		36	31	65	38	14

Income * Brands Crosstabulation

Count

		Brands					
		Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly disagree	
	Less than £10,000	4	7	9	1	1	2
	£10,001-£20,000	14	19	5	4	2	4
	£20,001-£30,000	8	33	14	2	1	5
	£30,001-£40,000	1	14	15	6	0	3
	£40,001-£50,000	5	8	5	0	0	1
	£50,001+	2	8	2	3	1	1
Total		34	89	50	16	5	19

Income * Value range Crosstabulation

Count

		Value range					
		Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	
	Less than £10,000	1	7	5	8	0	2
	£10,001-£20,000	5	16	10	12	1	4
	£20,001-£30,000	3	13	22	19	1	5
	£30,001-£40,000	0	17	6	13	0	3
	£40,001-£50,000	2	9	3	2	2	1
	£50,001+	3	6	1	5	1	1
Total		14	68	47	59	5	19

Appendix 5 – Ethics form

APPLICATION FOR ETHICAL APPROVAL

In order for research to result in benefit and minimise risk of harm, it must be conducted ethically. A researcher may not be covered by the University's insurance if ethical approval has not been obtained prior to commencement.

The University follows the OECD Frascati manual definition of **research activity**: “creative work undertaken on a systematic basis in order to increase the stock of knowledge, including knowledge of man, culture and society, and the use of this stock of knowledge to devise new applications”. As such this covers activities undertaken by members of staff, postgraduate research students, and both taught postgraduate and undergraduate students working on dissertations/projects.

The individual undertaking the research activity is known as the “principal researcher”.

Ethical approval is not required for routine audits, performance reviews, quality assurance studies, testing within normal educational requirements, and literary or artistic criticism.

Please read the notes for guidance before completing ALL sections of the form.

This form must be completed and approved prior to undertaking any research activity. Please see Checklist for details of process for different categories of application.

SECTION A: About You (Principal Researcher)

Full Name:	Micayla Tidd				
Tick all boxes which apply:					
Member of staff:	☐	Student:	☒	Honorary research fellow:	☐

Faculty/School/Centre:	Business school		
Campus:	Swansea		
E-mail address:	mtidd.126711@student.uwtsd.ac.uk		
Contact Telephone Number:	07597236872		
<i>For students:</i>			
Student Number:	P126711	Undergraduate	☐
Programme of Study:	MBA	Taught Postgraduate	☒
Director of Studies/Supervisor:	Gareth Hughes	Research	☐

SECTION B: Approval for Research Activity

Has the research activity received approval in principle? (please check the Guidance Notes as to the appropriate approval process for different levels of research by different categories of individual)		YES	☒	NO	☐
					Date
	Research Degrees Committee		☐		
	Faculty Research Committee		☐		
	Other (write in)		☒	Supervisor	

Approval in principle **must** be obtained from the relevant source prior to seeking ethical approval.

SECTION C: External Ethical Guidance Materials

Please list the core ethical guidance documents that have been referred to during the completion of this form (including any discipline-specific codes of research ethics, and also any specific ethical guidance relating to the proposed methodology). Please tick to confirm that your research proposal adheres to these codes and guidelines.	
Dissertation handbook	☒
Supervisor's advice	☐
	☐

SECTION D: External Collaborative Research Activity

Does the research activity involve collaborators outside of the University?	YES	☐	NO	☒
If Yes, please provide the name of the external organisation and name and contact details for the main contact person:				
Institution				
Contact person name				
Contact person e-mail address				

Where research activity is carried out in collaboration with an external organisation

Does this organisation have its own ethics approval system?	YES	☐	NO	☐
If Yes, please attach a copy of any final approval (or interim approval) from the organisation				

SECTION E: Details of Research Activity

Indicative title:	An analysis of the future viability of hard discount retail stores in the UK in a post-recession economic environment.		
Proposed start date:	29 th September	Proposed end date:	4 th May
Purpose of research activity (including aims and objectives) Outline the purpose, aims and objectives of the research activity, including key research questions. Show briefly how existing research has informed the proposed activity and explain what the research activity will add and how it addresses an area of importance. (Maximum 300 words)			
Aim: to analyse if the 'discounters' have a future in the UK or if they will cease to exist as the economy improves. Objectives: 1) Identify the motives of discount shoppers. 2) Establish a good link between the level of disposable income and the frequency of discount shopping. 3) Evaluate the possibilities for improvement for discount shops if they wish to remain competitive. (this box should expand as you type)			
Proposed methods Provide a brief summary of all the methods that may be used in the research activity, making it clear what specific techniques may be used. If methods other than those listed in this section are deemed appropriate later, additional ethical approval for those methods will be needed. (Maximum 600 words)			

Online questionnaire.

Face to face questionnaire if responses online are low.

(this box should expand as you type)

4y

Location of research activity Identify all locations where research activity will take place.
Swansea business school (this box should expand as you type)
Research activity outside of the UK If research activity will take place overseas, you are responsible for ensuring that local ethical considerations are complied with and that the relevant permissions are sought. Specify any local guidelines (e.g. from local professional associations/learned societies/universities) that exist and whether these involve any ethical stipulations beyond those usual in the UK (provide details of any licenses or permissions required). Also specify whether there are any specific ethical issues raised by the local context in which the research activity is taking place, for example, particular cultural sensitivities or vulnerabilities of participants.
(this box should expand as you type)

SECTION F: Scope of Research Activity

Will the research activity include:	YES	NO
Use of a questionnaire or similar research instrument?	☒	☐
Use of interviews?	☐	☒
Use of diaries?	☐	☒
Participant observation with their knowledge?	☐	☒
Participant observation without their knowledge?	☐	☒
Use of video or audio recording?	☐	☒

Access to personal or confidential information without the participants' specific consent?	☐	☒
Administration of any questions, test stimuli, presentation that may be experienced as physically, mentally or emotionally harmful / offensive?	☐	☒
Performance of any acts which may cause embarrassment or affect self-esteem?	☐	☒
Investigation of participants involved in illegal activities?	☐	☒
Use of procedures that involve deception?	☐	☒
Administration of any substance, agent or placebo?	☐	☒
Working with live vertebrate animals?	☐	☒
Other primary data collection methods, please explain in this box	☐	☒

If NO to every question, then the research activity is (ethically) low risk and **may** be exempt from **some** of the following sections (please refer to Guidance Notes).

If YES to any question, then no research activity should be undertaken until full ethical approval has been obtained.

SECTION G: Intended Participants

Who are the intended participants:	YES	NO
Students or staff at the University?	☒	☐
Adults (over the age of 18 and competent to give consent)?	☒	☐
Vulnerable adults?	☐	☒
Children under 18?	☐	☒
Prisoners?	☐	☒
Young offenders?	☐	☒
Those who could be considered to have a particularly dependent relationship with the investigator or a gatekeeper?	☐	☒
People engaged in illegal activities?	☐	☒
Others (please identify):	☐	☒

Participant numbers and source

Provide an estimate of the expected number of participants. How will you identify participants and how will they be recruited?

A minimum of 100 participants. Use of online questionnaires, use of social media to inform participant of the study.

this box should expand as you type)

Information for participants:	YES	NO	N/A
Will you describe the main research procedures to participants in advance, so that they are informed about what to expect?	☒	☐	☐
Will you tell participants that their participation is voluntary?	☒	☐	☐
Will you obtain written consent for participation?	☒	☐	☐
Will you explain to participants that refusal to participate in the research will not affect their treatment or education (if relevant)?	☐	☐	☒
If the research is observational, will you ask participants for their consent to being observed?	☐	☐	☒
Will you tell participants that they may withdraw from the research at any time and for any reason?	☒	☐	☐

With questionnaires, will you give participants the option of omitting questions they do not want to answer?	☒	☐	☐
Will you tell participants that their data will be treated with full confidentiality and that, if published, it will not be identifiable as theirs?	☒	☐	☐
Will you debrief participants at the end of their participation, in a way appropriate to the type of research undertaken?	☒	☐	☐
If NO to any of above questions, please give an explanation			
(this box should expand as you type)			

Information for participants:	YES	NO	N/A
Will participants be paid?	☐	☒	☐
Is specialist electrical or other equipment to be used with participants?	☐	☒	☐
Are there any financial or other interests to the investigator or University arising from this study?	☐	☒	☐
Will the research activity involve deliberately misleading participants in any way, or the partial or full concealment of the specific study aims?	☐	☒	☐
If YES to any question, please provide full details			
(this box should expand as you type)			

SECTION H: Anticipated Risks

OUTLINE ANY ANTICIPATED RISKS THAT MAY ADVERSELY AFFECT ANY OF THE PARTICIPANTS, THE RESEARCHERS AND/OR THE UNIVERSITY, AND THE STEPS THAT WILL BE TAKEN TO ADDRESS THEM.
Risks to participants
For example: emotional distress, financial disclosure, physical harm, transfer of personal data, sensitive organisational information
Financial disclosure – some participants may feel embarrassed to disclose how much they spend or how regularly they shop at discount stores. 100% anonymity will be assured.
(this box should expand as you type)
If research activity may include sensitive, embarrassing or upsetting topics (e.g. sexual activity, drug use) or issues likely to disclose information requiring further action (e.g. criminal activity), give details of the procedures to deal with these issues, including any support/advice (e.g. helpline numbers) to be offered to participants. Note that where applicable, consent procedures should make it clear that if something potentially or actually illegal is discovered in the course of a project, it may need to be disclosed to the proper authorities
N/A
(this box should expand as you type)
Risks to investigator
For example: personal safety, physical harm, emotional distress, risk of accusation of harm/impropriety, conflict of interest
All participants of the study will be treated with the utmost respect at all times.

(this box should expand as you type)
University/institutional risks For example: adverse publicity, financial loss, data protection
The good name of UWTSD will be respected at all times. (this box should expand as you type)
Adverse outcomes List measures put in place to limit any adverse effects or outcomes of research activity where appropriate. Include any emergency protocols.
Anonymity will be guaranteed at all times and all data collected will be stored securely and confidentially. (this box should expand as you type)

Disclosure and Barring Service			
If the research activity involves children or vulnerable adults, a Disclosure and Barring Service (DBS) certificate must be obtained before any contact with such participants.			
	YES	NO	N/A
Has a DBS certificate been obtained?	☐	☐	☒

SECTION I: Feedback, Consent and Confidentiality

Feedback

What feedback will be provided to participants, how will this be done and when?

Feedback will be available to all participants by email request.

(this box should expand as you type)

Informed consent

Describe the arrangements to inform potential participants, before providing consent, of what is involved in participating. Describe the arrangements for participants to provide full consent before data collection begins. If gaining consent in this way is inappropriate, explain how consent will be obtained and recorded.

There will be a form attached to the online survey so that participants will tick to say that they give their consent.

(this box should expand as you type)

Confidentiality / Anonymity

Set out how anonymity of participants and confidentiality will be ensured in any outputs. If anonymity is not being offered, explain why this is the case.

Anonymity will be assured for all participants, no names will be used and all data collected will be stored on password protected devices.

(this box should expand as you type)

SECTION J: Data Protection and Storage

In completing this section refer to the University's Research Data Management Policy and the extensive resources on the University's Research Data Management web pages (<http://uwtsd.ac.uk/library/research-data-management/>).

	YES	NO
Does the research activity involve personal data (as defined by the Data Protection Act)?	☐	☒
If YES, provide a description of the data and explain why this data needs to be collected:		
(this box should expand as you type)		
Does it involve sensitive personal data (as defined by the Data Protection Act)?	☐	☒
If YES, provide a description of the data and explain why this data needs to be collected:		
(this box should expand as you type)		

Will the research activity involve any of the following activities:	YES	NO
Electronic transfer of data in any form?	☐	☒
Sharing of data with others at the University?	☐	☒
Sharing of data with other organisations?	☐	☒
Export of data outside the European Union or importing of data from outside the UK?	☐	☒
Use of personal addresses, postcodes, faxes, emails or telephone numbers?	☐	☒
Publication of data that might allow identification of individuals?	☐	☒
Use of data management system?	☐	☒
Data archiving?	☐	☒

If YES to any question, please provide full details, explaining how this will be conducted in accordance with the Data Protection Act (and/or any international equivalent):

(this box should expand as you type)

Will the research activity involve storing personal data on one of the following:	YES	NO
Manual files (i.e. in paper form)?	☐	☒
University computers?	☐	☒
Private company computers?	☐	☒
Home or other personal computers?	☒	☐
Laptop computers/ CDs/ Portable disk-drives/ memory sticks?	☒	☐
“Cloud” storage or websites?	☒	☐
Other – specify:	☐	☒

For all stored data, explain the measures in place to ensure data confidentiality, including details of password protection, encryption and anonymisation:

All data collected will be anonymous and stored on password protected devices.

(this box should expand as you type)

List all who will have access to the data generated by the research activity:

Student

(this box should expand as you type)

List who will have control of, and act as custodian(s) for, data generated by the research activity:

Student

(this box should expand as you type)

Give details of data storage arrangements, including where data will be stored, how long for, and in what form. Will data be archived – if so how and if not why not.

All data storage will be arranged by the student and deleted after a period of 5 years.

(this box should expand as you type)

SECTION K: Declaration

The information which I have provided is correct and complete to the best of my knowledge. I have attempted to identify any risks and issues related to the research activity and acknowledge my obligations and the rights of the participants.

In submitting this application I hereby confirm that I undertake to ensure that the above named research activity will meet the University's [Research Ethics and Integrity Code of Practice](#)

Signature of applicant: M.S.Tidd

Date: 07/11/17

For students:

Director of Studies/Supervisor:	
Signature:	
Date:	

For staff:

Head of School/Assistant Dean:	
Signature:	
Date:	

Checklist: Please complete the checklist below to ensure that you have completed the form according to the guidelines and attached any required documentation:

☒	I have read the guidance notes supplied before completing the form.
☒	I have completed ALL RELEVANT sections of the form in full.

☒	I confirm that the research activity has received approval in principle
☒	I have attached a copy of final/interim approval from external organisation (where appropriate)
☒	I understand that it is my responsibility to ensure that the above named research activity will meet the University's Research Ethics and Integrity Code of Practice.
☒	I understand that before commencing data collection all documents aimed at respondents (including information sheets, consent forms, questionnaires, interview schedules etc.) must be confirmed by the DoS/Supervisor, module tutor or Head of School.

RESEARCH STUDENTS AND STAFF ONLY

All communications relating to this application during its processing must be in writing and emailed to pgresearch@uwtsd.ac.uk , with the title 'Ethical Approval' followed by your name.

You will be informed of the outcome of your claim by email; therefore it is important that you check your University and personal email accounts regularly.

STUDENTS ON UNDERGRADUATE OR TAUGHT MASTERS PROGRAMMES

should submit this form (and receive the outcome) via systems explained to you by the supervisor/module leader.