ABOUT THE RESEARCH

The research consisted of four consecutive stages.

Phase I – At-Store Interviews. 2500 interviews were conducted at the main food stores in the study area (replicating a survey undertaken in 1980 by Hallsworth, 1988), and focused on exploring the characteristics of shopper groups, shopping travel times and modes, and patterns of shopping *behaviour*.

Phase II – At-Home Attitudinal Survey. The questionnaire was distributed to 2150 homes in four contrasting neighbourhoods. This survey focused on their views on grocery shopping, choice criteria and attitudes to particular stores.

Phase III – Neighbourhood Focus Groups. This involved a series of four focus groups in each of the contrasting neighbourhoods to explore particular aspects of retail choice and to consider inter and intra-neighbourhood variations in perceptions. This phase – which also utilised projective mental mapping techniques to understand issues relating to perceived access and constraints – provided a link between the survey-stages of the research and subsequent in-depth household research.

Phase IV – In-depth Qualitative Household research. This final in-depth stage of the project used a combination of householder shopping diaries, accompanied shopping trips, household interviews and kitchen visits to dig more deeply into the day-to-day shopping habits, practices, motivations and constraints of eight carefully selected households in different domestic circumstances and in two contrasting neighbourhoods. The powerful insights provided were used to draw out cross-cutting issues between different households and explore the impact of different household compositions and routines on how retail provision is experienced.

Each phase of the research informed subsequent phases. For example, issues arising from the attitudinal surveys in Phase II were picked up and explored in subsequent qualitative investigations. The phasing approach also helped with sampling: case study households for the qualitative studies in Phase IV being recruited from the focus group participants in Phase III.

ABOUT THE DATA FOR ARCHIVING

Phase I : At Store Interview: Complete data set in SPSS

Phase II: At-Home Attitudinal Survey: Complete data set in SPSS

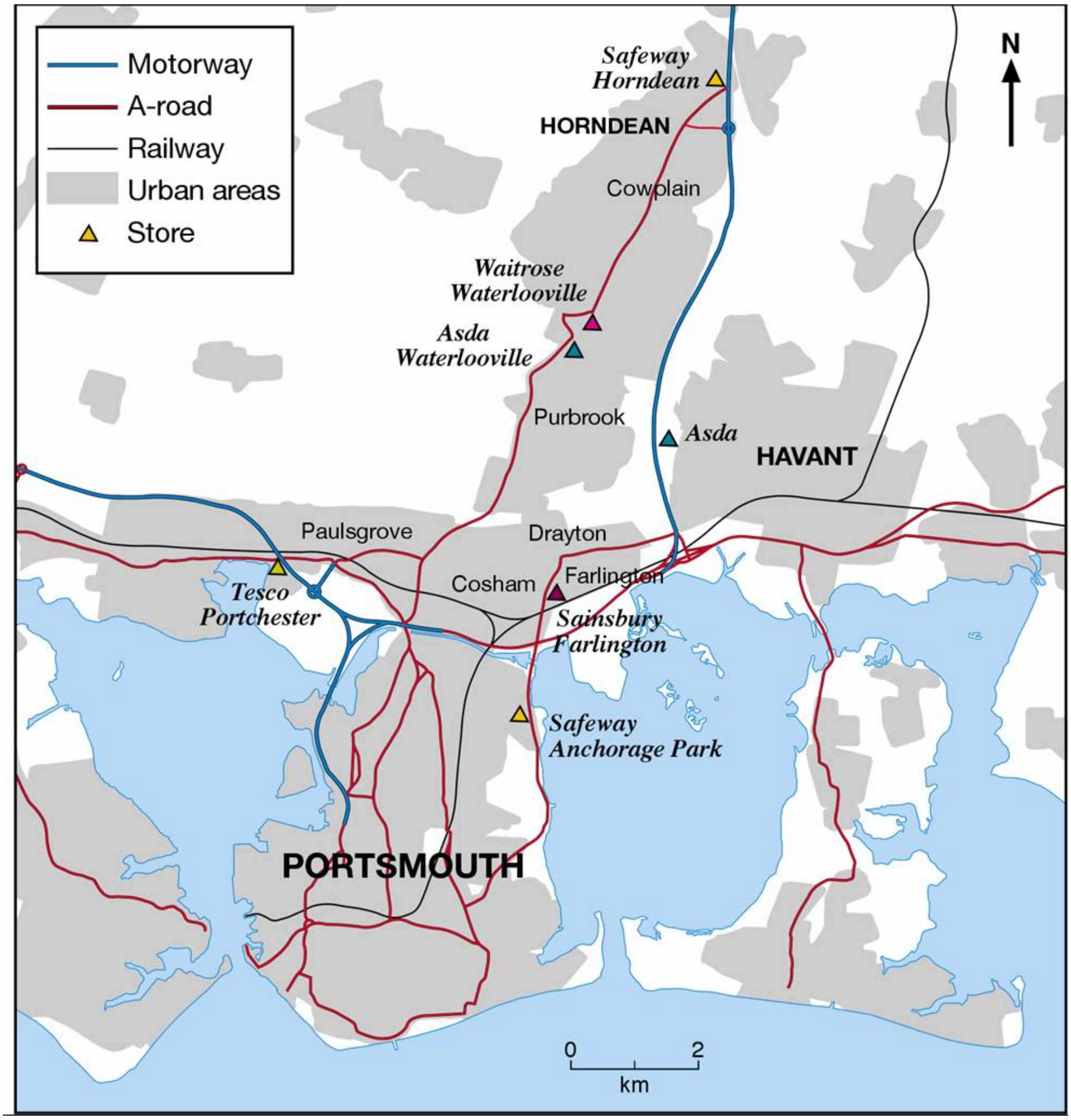
Phase III: Neighbourhood Focus Groups: None of the focus groups are offered for archiving

Phase IV: Only the second shopping trip and kitchen visits are offered for archiving. The first shopping trip is a combination of observations and was not fully transcribed. We decided not to offer hard copies of shopping diaries because they show the real names of participants. Both the first shopping trip and shopping diaries are summarised in first part of the 2nd shopping trip Guide that we prepared for each participant. It was important to identify the main characteristics of participants' shopping behaviour in order to follow them up in the second shopping trip.

The RCCC study was designed following earlier survey work details of which can be consulted in the following publication:

Hallsworth, A.G. 1988. The human impact of hypermarkets and superstores. Aldershot: Avebury.

Figure 1 – Portsmouth: Location of Surveyed Stores



PORTSMOUTH SHOPPER SURVEY

Store Number ………………

Day ………… Time ………… Weather ………………….. Initials of Interviewer…………

Preamble (read to all respondents):

"We are conducting an official survey on the shopping behaviour of local Portsmouth residents – could you tell me if you are a permanent resident of the survey area?"

(If yes) *"How long have you been resident in the area?"* (in years and/or months) ………………………………

(If a visitor to the area, discontinue the interview, with thanks)

Q1 **Where is your home?** Town ……………………… Area ………………………. Postcode …………..

If postcode unknown, ask and note street name ………………………………………………………………..

Q2 **How long did your journey here take?** (Tick one answer only)

< 5 mins ☐	6 – 10 mins ☐	11 – 15 mins ☐
16 – 20 mins ☐	21 - 30 mins ☐	over 31 mins ☐

Q3 **Did you come here straight from home?** Yes ☐ No ☐

Q4 **If No, where did you come from?** Work ☐ Other shops ☐ Other ☐

Q5 **Are you now going home directly?** Yes ☐ No ☐

Q6 **If No, where <u>are</u> you going?** Work ☐ Other shops ☐ Other ☐

Q7 **How did you get here**
(Main mode of transport)

Walk ☐	Bus ☐	Shopper Bus ☐
Bicycle ☐	Train ☐	Other ☐
	Scooter/Moped/M.Bike ☐	Car ☐

Q8 **Excluding 'cashback', roughly how much have you spent here today?**

1 On food and drink £…………………

2 On other shopping in the store £ …………………

3 What did this 'other shopping' include? (list 3 maximum)

……………………………………………………………………………………………………..

Q9 **Have you used today, or do you intend to use on this visit**

(a) **the store petrol station?** (where relevant) Yes ☐ No ☐

(b) **The store Customer Restaurant?** (where relevant) Yes ☐ No ☐

Q10 How often do you shop here?

3 times and week or more ☐ Twice a week ☐ Once a week ☐

Once a fortnight ☐ Once a month ☐ Less frequently ☐ First visit ☐

Q11 Roughly how much time did you spend in the store today? ……..…………hrs ……………….mins

Q12 Is this your main store for grocery shopping? (That is, the <u>bulk</u> or your weekly shopping by £value)

Yes ☐ No ☐

Q13 If not, what is your main grocery store?

Name ………………………………………….. Branch Location ………………………………………..

Q14 If not your main grocery store, why are you here today? ………………………………………………..

Q15 Are there further local grocery stores (not yet mentioned) that you also sometimes use? (please specify)

1 ………………………………. Branch ………………………………….

2 ……………………………….. Branch ……………………………

Q16 How much of your total <u>grocery</u> requirements <u>do</u> you buy here?

Under ¼ ☐ ¼ to ½ ☐ More than ½ ☐ All ☐

Q17 How many cars or vans (if any) does your household have?

None ☐ One ☐ Two ☐ Three ☐ Four + ☐

Q18 What is your occupation?

Housewife/person ☐ Retired ☐ Unemployed ☐ Student ☐

Specify (with Grade) Occupation ……………………………………………………….

If <u>Retired or Unemployed</u> what was your previous occupation? ………………………………………..

Q19 What is the occupation of any other main earners in your household? ……………………………...

(Make a note of whether interviewee is) Male ☐ or Female ☐

(Make a note of the **Number of People** in the group) …………………

Q20 Which of these age groups do you fall into? (Show card A)

01 ☐ 02 ☐ 03 ☐ 04 ☐ 05 ☐

Q21 Which of the following household types best describes your household? (Show card B)

01 ☐ 02 ☐ 03 ☐ 04 ☐ 05 ☐ 06 ☐

Q22 What do you <u>like</u> about the store? (please list 3 maximum)

………..

Q23 What do you <u>dislike</u> about the store? (please list 3 maximum)

………..

Q24 Have you ever ordered groceries over the internet? Yes ☐ No ☐

Close Interview (by saying):

"We are offering a cash payment (c.£100 at the start and c.£100 on completion) to a small number of shoppers prepared to take part in a follow-up study of local shopping habits. If you are interested, could we please take a note of your details so that one of the research team can call you back?"

- **Telephone No. (incl. Code):** ………………………………………..
- **Who should we ask for when we call?** ………………………………………..
  (Your name)
- **And what is your address>** ………………………………………..

  ………………………………………...

THANK YOU VERY MUCH, THAT IS ALL

NB: Please note any additional observations about the respondent that might be of interest to us here:

PORTSMOUTH SHOPPER SURVEY

Store Number ………………

Day ………… Time ………… Weather ………………….. Initials of Interviewer…………

Preamble (read to all respondents):

"We are conducting an official survey on the shopping behaviour of local Portsmouth residents – could you tell me if you are a permanent resident of the survey area?"

(If yes) *"How long have you been resident in the area?"* (in years and/or months) ………………………………

(If a visitor to the area, discontinue the interview, with thanks)

Q1 Where is your home? Town ……………………… Area ……………………… Postcode …………..

If postcode unknown, ask and note street name …………………………………………………………..

Q2 How long did your journey here take? (Tick one answer only)

< 5 mins 1 ☐	6 – 10 mins 2 ☐	11 – 15 mins 3 ☐
16 – 20 mins 4 ☐	21 - 30 mins 5 ☐	over 31 mins 6 ☐

Q3 Did you come here straight from home? Yes 1 ☐ No 2 ☐

Q4 If No, where did you come from? Work 1 ☐ Other shops 2 ☐ Other 3 ☐

Q5 Are you now going home directly? Yes 1 ☐ No 2 ☐

Q6 If No, where <u>are</u> you going? Work 1 ☐ Other shops 2 ☐ Other 3 ☐

Q7 How did you get here
(Main mode of transport)

Walk 1 ☐	Bus 2 ☐	Shopper Bus 3 ☐
Bicycle 4 ☐	Train 5 ☐	Other 6 ☐
	Scooter/Moped/M.Bike 7 ☐	Car 8 ☐

Q8 Excluding 'cashback', roughly how much have you spent here today?

1 On food and drink £…………………

2 On other shopping in the store £ …………………

3 What did this 'other shopping' include? (list 3 maximum)

……………………………………………………………………………………………………..

Q9 Have you used today, or do you intend to use on this visit

(a) the store petrol station? (where relevant) Yes 1 ☐ No 2 ☐

(b) The store Customer Restaurant? (where relevant) Yes 1 ☐ No 2 ☐

Q10 How often do you shop here?

3 times and week or more 1 ☐ Twice a week 2 ☐ Once a week 3 ☐

Once a fortnight 4 ☐ Once a month 5 ☐ Less frequently 6 ☐ First visit 7 ☐

Q11 Roughly how much time did you spend in the store today? ……..…………hrs ………………mins

Q12 Is this your main store for grocery shopping? (That is, the bulk or your weekly shopping by £value)

Yes 1 ☐ No 2 ☐

Q13 If not, what is your main grocery store?

Name ……………………………………………. Branch Location ………………………………………..

Q14 If not your main grocery store, why are you here today? ………………………………………………...

Q15 Are there further local grocery stores (not yet mentioned) that you also sometimes use? (please specify)

1 ………………………………… Branch …………………………………

2 ……………………………….. Branch ……………………………

Q16 How much of your total grocery requirements do you buy here?

Under ¼ 1 ☐ ¼ to ½ 2 ☐ More than ½ 3 ☐ All 4 ☐

Q17 How many cars or vans (if any) does your household have?

None 1 ☐ One 2 ☐ Two 3 ☐ Three 4 ☐ Four + 5 ☐

Q18 What is your occupation?

Housewife/person 1 ☐ Retired 2 ☐ Unemployed 3 ☐ Student 4 ☐

Specify (with Grade) Occupation ……………………………………………………

If Retired or Unemployed what was your previous occupation? ………………………………………..

Q19 What is the occupation of any other main earners in your household? ……………………………..

(Make a note of whether interviewee is) Male 1 ☐ or Female 2 ☐

(Make a note of the **Number of People** in the group) …………………

Q20 Which of these age groups do you fall into? (Show card A)

01 ☐ 02 ☐ 03 ☐ 04 ☐ 05 ☐

Q21 Which of the following household types best describes your household? (Show card B)

01 ☐ 02 ☐ 03 ☐ 04 ☐ 05 ☐ 06 ☐

Q22 What do you like about the store? (please list 3 maximum)

……………………………………………………………………………………………………...

Q23 What do you dislike about the store? (please list 3 maximum)

……………………………………………………………………………………………………...

Q24 Have you ever ordered groceries over the internet? Yes 1 ☐ No 2 ☐

Close Interview (by saying):

"We are offering a cash payment (c.£100 at the start and c.£100 on completion) to a small number of shoppers prepared to take part in a follow-up study of local shopping habits. If you are interested, could we please take a note of your details so that one of the research team can call you back?"

- **Telephone No. (incl. Code):** ………………………………………..
- **Who should we ask for when we call?** ………………………………………..
  (Your name)
- **And what is your address>** ………………………………………..
  ………………………………………...

THANK YOU VERY MUCH, THAT IS ALL

NB: Please note any additional observations about the respondent that might be of interest to us here:

Lancaster University
MANAGEMENT SCHOOL

Hillslopes Local Food Shopping Survey

- This survey should be filled in by the main shopper of the household and should take about 10-15mins to answer
- Please answer as many questions as possible
- If you are unable to give any precise information, please provide an estimate
- Please return your completed questionnaire in the pre-paid envelope provided to the address below by the 4th of November

Professor of Retailing Alan Hallsworth, Manchester Metropolitan University, Manchester M13GH

the MANCHESTER METROPOLITAN UNIVERSITY

E·S·R·C ECONOMIC & SOCIAL RESEARCH COUNCIL

We are interested in your attitudes towards **food shopping**. For each question, please circle the appropriate answer

Example (WHERE YOU STRONGLY DISAGREE WITH THE STATEMENT)

	strongly agree	agree	have no opinion on this	disagree	strongly disagree
I find that shopping is a nuisance	1	2	3	4	(5)

1	Shopping for groceries is usually enjoyable	1	2	3	4	5
2	I like food shopping because it gets me out of the house	1	2	3	4	5
3	Given a choice between good shops and good parking facilities, I would choose to shop where there is better parking.	1	2	3	4	5
4	I usually do my grocery shopping on a journey when I do other errands or other shopping.	1	2	3	4	5
5	There are already plenty of food stores to choose from in this area	1	2	3	4	5
6	I find shopping for my groceries very tiring.	1	2	3	4	5
7	I usually do a lot of comparing of prices for ordinary food purchases.	1	2	3	4	5
8	I can easily get to any food store I wish in my local area	1	2	3	4	5
9	The convenience of local shops is worth the extra it can cost.	1	2	3	4	5
10	I usually try hard to look for bargains.	1	2	3	4	5
11	My choice of food stores is too dominated by large retailers	1	2	3	4	5
12	Getting food shopping done quickly is very important to me.	1	2	3	4	5
13	I try to avoid walking for more than five minutes with my shopping.	1	2	3	4	5
14	I don’t mind going out of my way to get better shops.	1	2	3	4	5
15	I find the staff more friendly in small shops.	1	2	3	4	5
16	When it comes to buying food, price is not important to me.	1	2	3	4	5
17	Chain stores and supermarkets make for better grocery shopping all around.	1	2	3	4	5
18	I would prefer to do all my shopping just once a week.	1	2	3	4	5
19	There’ s not much difference between food shops these days.	1	2	3	4	5
20	The way a person shops for the household groceries is a good indication of how capable they are all round.	1	2	3	4	5
21	I prefer to shop at small shops	1	2	3	4	5
22	I always try to buy good quality food, even if prices are higher.	1	2	3	4	5
23	I wish I had more small local shops to choose from	1	2	3	4	5
24	I want more food discounters (e.g. Netto, Lidl, Aldi etc) in my local area	1	2	3	4	5
25	I always use a list when I do my shopping	1	2	3	4	5
26	Large food stores have too many own label products	1	2	3	4	5
27	Convenience is more important than quality when I do my food shopping	1	2	3	4	5
28	There are too many brands of the same basic product on offer in large stores	1	2	3	4	5
29	I always buy the same brands when I do my shopping	1	2	3	4	5

30. Please give the name and location of up to two stores where you buy most of your groceries

	1	2
Name		
Location		
Why/Reason		

31. For the main store you have indicated in Q30, please indicate how you get there and back. **Please Rank from 1(most used method) and so on up to a maximum of six. Do not rank those you do not use.**

Foot		M/cycle		Car		Taxi	
Cycle		Bus		Other			

32. Please give the name(s) and location of any other stores you sometimes use.

	1	2
Name		
Location		
Why/Reason		

33. How many cars does your household have? (Please circle) 0 1 2 3 4+
if 0 go to question 35

34. If your household has a car, how often is it normally available for you to use for grocery shopping (Please tick one of these 6 boxes)

All the time		Evenings and weekend		Never	
Evenings only		Weekends only		Other (please specify)	

35.What time of the day do you normally make your grocery shopping trips?

Early morning (5AM-8AM)		Between 8am and midday	
Midday –5PM		Between 5 PM and 9PM	
Night (9PM - 5AM)		No particular time	

36. On which Days of the week do you usually shop for your groceries?

Monday ☐ Thursday ☐ Sunday ☐
Tuesday ☐ Friday ☐
Wednesday ☐ Saturday ☐

37. Can you think of any grocery stores in the area that you would <u>like</u> to use but cannot do so since they are too difficult for you to reach?

	1	2
Name		
Location		
Why/Reason		

38. How many adults do you shop for in your household? 0 1 2 3 4 5+

39. How many children (under 18) do you shop for in your household? 0 1 2 3 4+
IF 0 GO TO QUESTION 42
40. How many children are under 5? 0 1 2 3 4 5+

41. If you have children under 5, do you have to take them with you when you shop?
Yes ☐ No ☐

42. How many adults in your household are retired? 0 1 2 3 4 5+

43. In which of these age groups would you put yourself?
Up to 24 ☐ 25 to 34 ☐ 35 to 44 ☐ 45 to 60 ☐ over 60 ☐

44. Do you have to fit in your shopping around paid work?
Yes ☐ No ☐ if no go to Q 46

45. If yes, is your work full time or part time? FT ☐ PT ☐

46. What is the occupation of the main earner in your household?
…………………………………………………………………………………

47. Approximately how many years have you lived at this address? …………. years

48. Are you Male ☐ or Female ☐

Would you be interested in participating in a local group discussion about shopping in your area? If yes, please leave your name and telephone number.

Title: Mrs Ms Mr Surname: House number: Street:	City: Post code (all six digits): Telephone no (including STD):

Thank you for your co-operation. Your help is most appreciated. Please return the completed questionnaire <u>in the pre-paid envelope provided</u> to Professor of Retailing Alan Hallsworth, Manchester Metropolitan University, Manchester M13GH

Lancaster University
Management School

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	strongly agree	agree	have no opinion on this	disagree	strongly disagree
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1	Shopping for groceries is usually enjoyable	1 2 3 4 5
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3	Given a choice between good shops and good parking facilities, I would choose to shop where there is better parking.	1 2 3 4 5
4	I usually do my grocery shopping on a journey when I do other errands or other shopping.	1 2 3 4 5
5	There are already plenty of food stores to choose from in this area	1 2 3 4 5
6	I find shopping for my groceries very tiring.	1 2 3 4 5
7	I usually do a lot of comparing of prices for ordinary food purchases.	1 2 3 4 5
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10	I usually try hard to look for bargains.	1 2 3 4 5
11	My choice of food stores is too dominated by large retailers	1 2 3 4 5
12	Getting food shopping done quickly is very important to me.	1 2 3 4 5
13	I try to avoid walking for more than five minutes with my shopping.	1 2 3 4 5
14	I don't mind going out of my way to get better shops.	1 2 3 4 5
15	I find the staff more friendly in small shops.	1 2 3 4 5
16	When it comes to buying food, price is not important to me.	1 2 3 4 5
17	Chain stores and supermarkets make for better grocery shopping all around.	1 2 3 4 5
18	I would prefer to do all my shopping just once a week.	1 2 3 4 5
19	There' s not much difference between food shops these days.	1 2 3 4 5
20	The way a person shops for the household groceries is a good indication of how capable they are all round.	1 2 3 4 5
21	I prefer to shop at small shops	1 2 3 4 5
22	I always try to buy good quality food, even if prices are higher.	1 2 3 4 5
23	I wish I had more small local shops to choose from	1 2 3 4 5
24	I want more food discounters (e.g. Netto, Lidl, Aldi etc) in my local area	1 2 3 4 5
25	I always use a list when I do my shopping	1 2 3 4 5
26	Large food stores have too many own label products	1 2 3 4 5
27	Convenience is more important than quality when I do my food shopping	1 2 3 4 5
28	There are too many brands of the same basic product on offer in large stores	1 2 3 4 5
29	I always buy the same brands when I do my shopping	1 2 3 4 5

30. Please give the name and location of up to two stores where you buy most of your groceries

	1	2
Name		
Location		
Why/Reason		

31. For the main store you have indicated in Q30, please indicate how you get there and back. **Please Rank from 1(most used method) and so on up to a maximum of six. Do not rank those you do not use.**

Foot	1	M/cycle	2	Car	3	Taxi	4
Cycle	5	Bus	6	Other	7		

32. Please give the name(s) and location of any other stores you sometimes use.

	1	2
Name		
Location		
Why/Reason		

33. How many cars does your household have? (Please circle) 0 1 2 3 4+
if 0 go to question 35

34. If your household has a car, how often is it normally available for you to use for grocery shopping (Please tick one of these 6 boxes)

All the time	1	Evenings and weekend	2	Never	3
Evenings only	4	Weekends only	5	Other (please specify)	6

35.What time of the day do you normally make your grocery shopping trips?

Early morning (5AM-8AM)	1	Between 8am and midday	2
Midday –5PM	3	Between 5 PM and 9PM	4
Night (9PM - 5AM)	5	No particular time	6

36. On which Days of the week do you usually shop for your groceries?

Monday 1 ☐ Thursday4 ☐ Sunday7 ☐
Tuesday 2 ☐ Friday5 ☐
Wednesday 3 ☐ Saturday6 ☐

37. Can you think of any grocery stores in the area that you would like to use but cannot do so since they are too difficult for you to reach?

	1	2
Name		
Location		
Why/Reason		

38. How many adults do you shop for in your household? 0 1 2 3 4 5+

39. How many children (under 18) do you shop for in your household? 0 1 2 3 4+
IF 0 GO TO QUESTION 42
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42. How many adults in your household are retired? 0 1 2 3 4 5+

43. In which of these age groups would you put yourself?
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Yes ☐ No ☐ if no go to Q 46

45. If yes, is your work full time or part time? FT ☐ PT ☐

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48. Are you Male ☐ or Female ☐

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Title: Mrs Ms Mr Surname: House number: Street:	City: Post code (all six digits): Telephone no (including STD):

Thank you for your co-operation. Your help is most appreciated. Please return the completed questionnaire in the pre-paid envelope provided to Professor of Retailing Alan Hallsworth, Manchester Metropolitan University, Manchester M13GH

Methodology of the Qualitative Phase of the study

Our study[1] employed a combination of different methods to achieve an in-depth understanding of consumers' shopping practices. The use of focus groups, accompanied shopping trips, diaries and kitchen visits provided an opportunity to triangulate our data (Denzin 1978). It was also a valuable research strategy that enhanced the validity and reliability of our results. Each of the methods that we used revealed different aspects of participants' shopping experience. Our findings relied on the complementarity of the results from each method.

The qualitative study began with focus groups in Paulsgrove and Purbrook, two contrasting neighbourhoods in the Portsmouth area. Drawing on the survey results, we focused this phase of the study on two areas with distinct socio-economic characteristics. Paulsgrove is a post-war housing estate located in the north of Portsmouth. It is the second most deprived ward in Portsmouth with 4.3% unemployment and 54.7% owner-occupied housing. By contrast, Purbrook is a middle class neighbourhood with 83.1% owner-occupied houses and unemployment levels of 2%.[2]

Focus groups were conducted in each neighbourhood in November 2002. Ten participants were recruited through local contacts in Paulsgrove, plus a further eight participants in Purbrook. The objective of the focus groups was to uncover public discourses about food shopping to get an initial understanding of consumer choice at the local level. The focus groups were designed to encourage participants to talk about three general themes: whether they liked or disliked food shopping; their attitudes towards retail change, competition between stores, and comparison with the past; and their experiences within their chosen stores.

The second stage of the qualitative research involved eighteen months fieldwork in Paulsgrove and Purbrook, working with eight households, four in each neighbourhood (see *Table 1*). Based on the methodological principles of case study research, our selection aimed to ensure 'variety but not necessarily representativeness' (Stake 1994: 244; see also Mitchell 1983). Our eight households generated ten 'main shoppers' with married couples sharing the task in two of the households and with the other six

1 See Jackson et paper (2004) for a full report on the findings of the qualitative phase

2 Clarke et al. paper (2004) provides comparative data on the Portsmouth area confirming that it is broadly representative of 'middle England'.

households all represented by female shoppers. Participants were informed about the nature of the project and were offered a small payment to encourage their continued involvement over the full eighteen-month period (£100 at the recruitment stage and £100 on completion of the fieldwork). Informants were asked for their written consent to share all the information that we gathered, suitably anonymised for publication.

Table 1: Key informants

Paulsgrove	**Purbrook and environs**
Laura (late 20s)	Paul and Wanda (60s)
Nigel (late 30s) and Zara (late 20s)	Sheila (50s)
Nora (early 30s)	Joan (mid 30s)
Eleanor (mid 30s)	Hilary (mid 40s)

Fieldwork started with accompanied shopping trips, a method that has been used very little for obtaining data on consumers' shopping behaviour (Otnes et al 1995). Our study has demonstrated that 'shopping with consumers' is a valuable research procedure for understanding consumers' shopping experiences *in situ*. We carried out two accompanied shopping trips with each informant on their regular shopping days and times, and with their usual companions. The first shopping trip was more of an unstructured observation, asking limited questions in that our main purpose was to get a general view of shoppers' purchasing behaviour. Based on the first shopping experience, the second trip was more structured, asking participants to explain their choices as they shopped. We took notes and tape-recorded both accompanied shopping trips using an inconspicuous microphone suitable for a supermarket environment.

Informants were also asked to keep a food shopping diary for a period of ten days. Following a series of guidelines recommended in the literature (Burgess 1987; Corti 1993), we adopted a semi-structured approach in designing the diary. We asked participants to write about their feelings, emotions, likes and dislikes during their shopping experience. Not all the participants were equally able to express their feelings in writing, but even short answers proved to have significant meaning for our analysis. The diary was a useful research tool not only for recording routines and everyday shopping practices (Elliot 1997; Meth, 2003) but also for reflection on those practices. When they had completed their diaries, participants were asked to reflect on the experience and to consider whether the exercise had led them to alter their normal behaviour in any way (as the following quotations demonstrate): *"When I read it, I found that we eat an awful lot of cakes and bread!!"* (Joan); *"I have realised my lifestyle is such that I don't need to do a big shop … this diary has semi organised me … to occasionally think about the next meal…"* (Sheila); *"I knew I was organised, now I'm certain!"* (Paul).

Kitchen visits were the final stage of the fieldwork. Similarly to Vu's study (2000), we used a combination of observations, photographs and semi-structured interviews to get a sense of people's kitchens, food habits, and lifestyles. Sitting around the kitchen-table, as in Gullestad's study (1984), was a way to encourage participants to talk about their domestic space. Unlike other studies where 'consuming kitchens' has been the focus of attention (e.g. Miller 1988; Southerton, 2003), our study used the domestic kitchen to understand the geographical space where food consumption and other mundane activities take place.

For the analysis we used NUDIST to manage the data, Framework Analysis to identify themes (Ritchie & Spencer 1994), and 'grounded theory' (Glaser & Strauss, 1967) to move progressively towards a more abstract understanding of our data. We carried out an analysis 'within cases' (Huberman & Miles 1994) -- in order to become familiar with each household -- and a thematic analysis 'across cases'. Following the relevance of Jones' (2000) experience of analysing solicited diaries with Framework Analysis, we systematically applied the same coding procedures to develop themes and categories. Building on those categories, we analysed transcripts from accompanied shopping trips and kitchen visits. The initial identification of general themes involved all of the research team members. Later stages were conducted principally by two members of the team (Perez del Aguila and Jackson). Re-reading, building on and revisiting earlier codes ensured that our interpretation was as grounded as possible.

Framework Analysis provided a systematic way of coding the data, reducing over 20 initial categories to a smaller number of ever-more abstract themes. Our final three constructs represent the highest level of abstraction derived from our analysis of the data. We are confident that our case study findings are generalizable to other neighbourhoods and cities because of the way the research was designed (with the results of the earlier survey work feeding into the later qualitative analysis) and because of the systematic way we have analysed the data. In this respect, our work follows previous studies such as those undertaken by Wallman in South London (Wallman et al. 1982; Wallman 1984), where survey work was integrated with in-depth ethnographic research and where the evidence from eight London households, set firmly within their social and geographical context, provided a sound empirical basis for wider claims to be made.

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Title: Retail Competition and Consumer Choice project
Depositor: Peter Jackson

Accompanied shopping trips: List of Participants

Transcript ID	Participant's name	Age	Gender	Date and Place of accompanied shopping trips	Number of pages
1	Laura	late 20s	F	13.05.2003 Tesco & Iceland (Cosham)	22
2	Nora	early 30s	F	09.05.2003 Iceland & Greengrocer's (Cosham)	17
3	Nigel & Zara	late 30s & late 20s	M F	08.05.2003 Tesco (Cosham)	28
4	Eleanor	mid 30s	F	20.05.2003 Iceland and Tesco (Cosham)	21
5	Joan	mid 30s	F	19.05.2003 Asda (Bedhampton)	18
6	Hilary	mid 40s	F	19.05.2003 Tesco (Havant)	21
7	Paul & Wanda	mid 60s & early 60s	M F	04.06.2003 Waitrose (Waterlooville)	25
8	Sheila	early 50s	F	15.05.2003 Waitrose (Havant)	19

Kitchen visits: List of participants

Transcript ID	Participant's name	Age	Gender	Date and Place of kitchen visits	Number of pages
1	Laura	late 20s	F	11.06.2003 Paulsgrove	36
2	Nora	early 30s	F	07.07.2003 Paulsgrove	20
3	Nigel & Zara	late 30s & late 20s	M F	11.07.03 Paulsgrove	34
4	Eleanor	mid 30s	F	26.06.2003 Paulsgrove	27
5	Joan	mid 30s	F	17.06.2003 Purbrook	20
6	Hilary	mid 40s	F	23.06.2003 Purbrook	20
7	Paul & Wanda	mid 60s & early 60s	M F	07.07.2003 Purbrook	40
8	Sheila	early 50s	F	24.06.03 Purbrook	23

ESRC FOOD SHOPPING PROJECT

Thank you for agreeing to participate in our research on Food Shopping (sponsored by the Economic and Social Research Council).

1. Your age *(please tick the relevant box)*
<20 ( ); 20-30 ( ); 31-40 ( ); 41-50 ( ); 51-60; >60 ( )

2. Your sex male ( ) female ( )

3. Your occupation:………………………………………..

3.- Where you live :……………………………………..

CONSENT

Please sign below to indicate your consent to our using of the observation/interview material (suitably anonymised) in any publications arising from our research (in books and academic journals, conference presentations, etc).

Signed:…………………………………. Date:…………………………….

If you wish to place any restrictions on our use of the data that will collect from you, please make a note of them here:
…………………………………………………………………………………………
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…………………………………………………………………………………………
………………………………………………………………………………………….

THANKS FOR YOUR HELP WITH OUR RESEARCH –WE'RE VERY GRATEFUL

Guide for Kitchen Visit

Conversation in the Kitchen

- Construction of the tree in the household one step behind. Do they have for example a family living in the area?
- How they use the kitchen
- Meal times
- Family stuff/set times?
- Who she is?
- Is food is huge part of her life?
- How people use the food they buy?
- Do people eat in the kitchen? Or in front of the telly?
- Eating/ entertaining

Observations in the Kitchen

- What kind of house environment
- People open fridge and talk about it.
- Vehicle to talk about meaning of food in domestic atmosphere
- It is not an inventory. The fridge is prompting.
- Are they full of ingredients?
- Think about life style/life stage frozen/fresh
- High tech kitchen?
- Full of stuff
- Do they follow recipes?
- Do they have microwave?
- Do they have massive stuff in freezer
- How do they prepare food
- How often do they cook?

Also:
Pictures of kitchens, front doors and neighbourhoods

THE CODING/ANALYSIS PROCESS

Methodological strategy

Within cases

- Grounded Theory approach as opposed to theory-driven approaches (Miles and Huberman, 1994)

Across cases

- Grounded Theory (Glaser and Strauss, 1967)
- Framework Analysis (Ritchie and Spencer, 1994)

The coding process is based on an inductive approach that generates, and saturates categories as opposed to the use of pre-existing categories. The analysis ends connecting the final categories into a coherent theory (story).

The evolution of categories

Explaining the process of developing categories, and producing the final account is not an easy task. Dey's (1993, p.265) graphic is a good representation of how we came to classify and integrate concepts and themes to offer the final story:

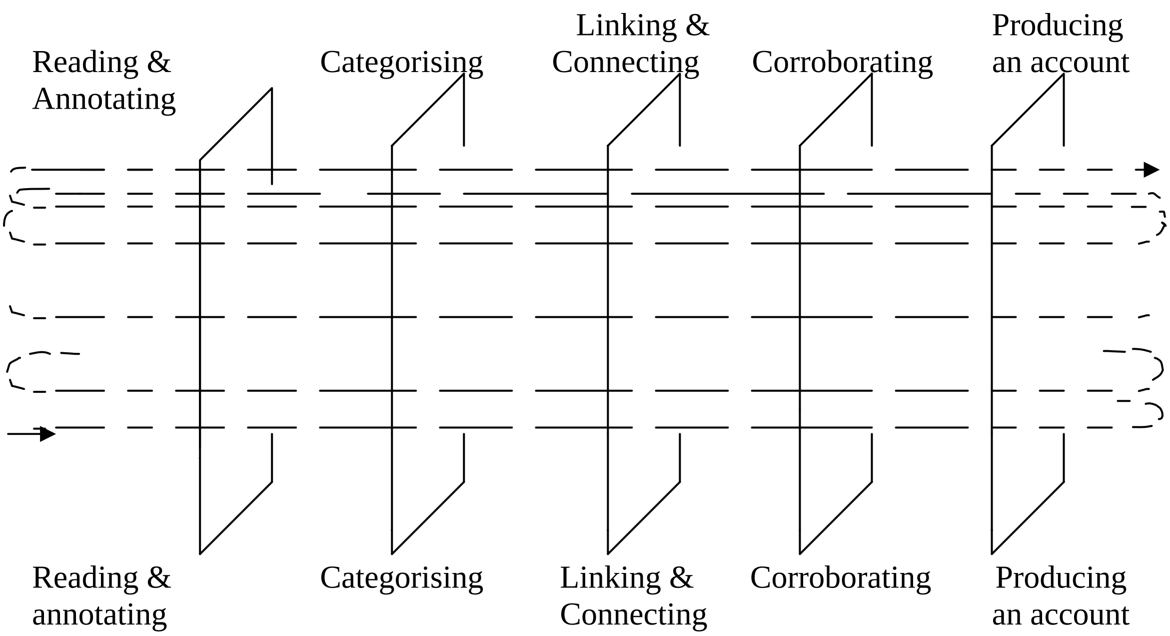

Fig. 1 Analysis as an iterative process

It is important to observe in Dey's graphic that the process of analysis is not a linear process. However in order to understand how we arrived to the highest level of abstraction, we will present the steps that we follow in a logical sequence:

1.- Initial categories and concepts (from focus groups)

- Shopping as a **socially embedded practice**
- Preference for **shopping alone or with friends** as opposed to 'Family shopping'
- More choice than in the past but **choice is locally variable** (limited in Paulsgrove)
- **Price, cost and value vs. quality and freshness**
- **Fresh vs. frozen:** (being a good mother)
- Choice is also about **cultural capital** (especially in Purbrook)
- Choice is justified in terms of **taste, colour and freshness** of food
- **Middle class guilt** (for not using farmers markets, eating organic, reading labels)
- **Habit, routine and brand loyalty** (justified in terms of taste).

2.- Creating working-categories (include previous + shopping trips, diaries, kitchen visits). The development of these categories was based on a more detailed category list.

- Complexity of households
- Shopping and Morality: Frozen food (being a good mother, being a good wife)
- Shopping and gender relations
- Shopping with and shopping for
- Shopping as a routine or festive moment
- Shopping strategies (list, budget, vouchers, browsing, shopping on certain days and times of the week, using hand-held scanners, not walking with a trolley, etc)
- People's classification of food
- Choice between supermarkets (economic vs cultural reasons)
- Choice within supermarkets (economic vs, cultural reasons)
- Identity and store choice
- Kind of choice (too much, too little, enough, different)
- Likes and dislikes (the store environment; the food choice, quality and offers, location, the type of shopping, personal circumstances, local circumstances, convenience, etc)
- Lifestyle and the effect on shopping behaviour (cooking eating and socialising, busy lives, changes of circumstances)

3.- Meta-Themes (linking data)

- Social embeddedness (complex households, weekly routines, busy lives)
- Shopping with/for others (gender, family)
- Morality (and guilt)
- 'Nice shops' as social distinction

- Habit, routine, novelty
- Quality/price
- Fresh vs frozen
- Taste colour, freshness (social judgements)
- Familiarity with the layout/consistency
- Strategies/repertoire
- Convenience (different meanings for different people)

4.- Overarching Themes (making connections)

- Shopping as socially embedded practice
- Shopping as routinised practice
- Shopping practice and the social judgment of taste (distinction)
- Shopping as ‘strategic’ practice

5.- The final story (producing the most coherent account)

- Shopping within and between stores is about: Routines
- Shopping between stores is about: Convenience and Accessibility
- Shopping within stores is about: Value, price/quality

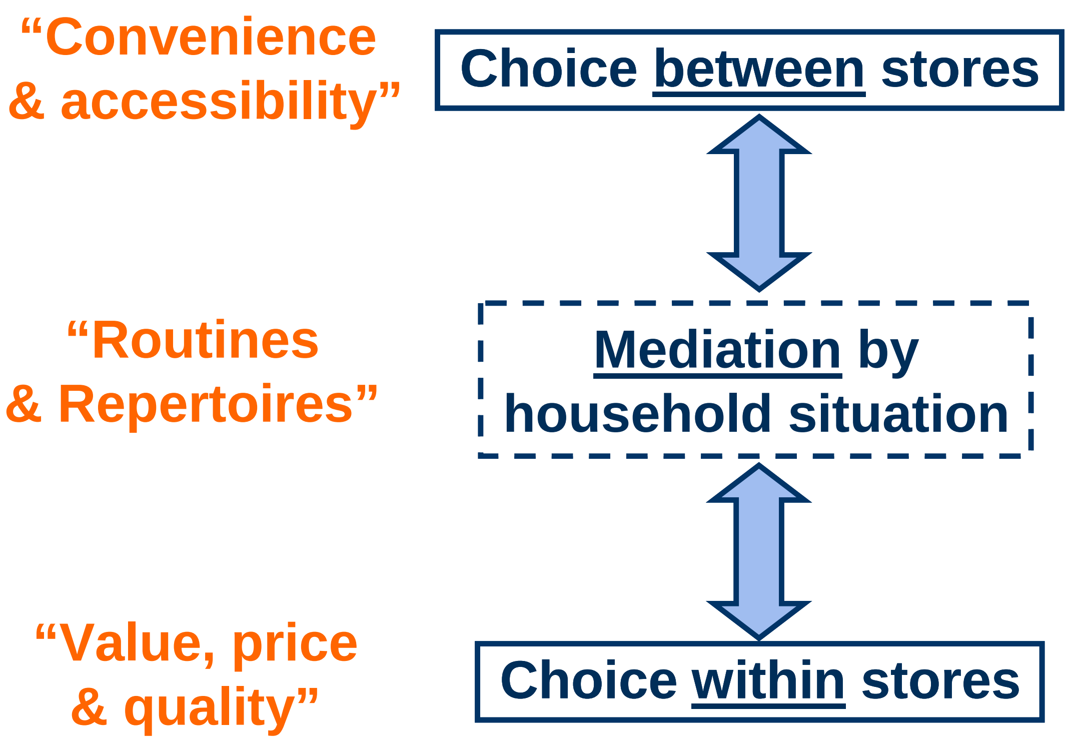

Figure 2 The mediation of store choice decisions by household situation

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Lancaster University Management School

Workshop on

Tuesday 8 June 2004

Canada House,
Trafalgar Square, London

Retail Competition and Consumer Choice

Presenting the findings of a long-term study of the effects of local retail change and the impact on consumer choice at the household level.

Workshop Briefing Note

June 2004

Ian Clarke, AIM and Lancaster University Management School
Peter Jackson, University of Sheffield
Alan Hallsworth, Manchester Metropolitan University
Ronan de Kervenoael, Lancaster University Management School
Rossana Perez del Aguila, University of Sheffield
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E·S·R·C ECONOMIC & SOCIAL RESEARCH COUNCIL

Contents

Executive Summary

This Report addresses the implications of the growth in concentration in food retailing in the UK - resulting from consolidation and small store decline over the long-term - with reference to its impact on consumer choice. The reference point for our study is the UK Competition Commission (2000) conclusion that the degree to which consumers will have adequate choice will depend on *local circumstances*. Our ESRC-funded research addresses this specific issue by exploring changing retail provision between 1980 and 2002 in an 'average' situation (Portsmouth), where we combined extensive, large-scale surveys of shopping behaviour with qualitative studies to provide a richer understanding of different households' uses and experiences of local retail provision.

- The results indicate that increases in competition over the 20+ year period have led to consumers becoming 'choosier' (as their tastes have developed) but also in many respects more constrained (as demanding lifestyles lead to self-imposed impose restrictions). Households have become more dependent on main stores than ever before, but have developed additional repertoires of shops and other coping mechanisms to enable them to fit shopping around domestic commitments. They are also shopping closer to where they live and work and, increasingly, more consumers are shopping alone. Therefore, rather than exercising 'free choice', our research suggests that most households do not make conscious choices but instead have their shopping choices determined by habitual routines and household situations.

Retail Competition and Consumer Choice

- Attitudes to retail change and current levels of choice vary among consumers. Ultimately, the *degree* of choice they have is affected by the relative mobility of the households concerned; their attitude towards grocery shopping; having access to a car; changes to family situations over time; the degree to which a store 'matches' or 'fits into' the routines of each household; income payments; and shopper judgements about the stores they use. While some consumers feel choice is abundant, others feel their choices are physically, economically or socially constrained. Importantly, we conclude that consumers who find it difficult to get to good quality grocery stores are not confined to what the Government has termed 'food deserts'.

- We are conscious that retail planning policy tends to be driven more by changes in retail store formats rather than consumer choice. Based on rigorous research over the last three years, however, we are now able to show how an understanding of the issues surrounding consumer choice might make a contribution to more effective retail planning. Our principal conclusion is that if local choice is to be used as a yardstick for the effectiveness of competition within a particular locality, then regulators and planners will need to find ways of representing the complexity and diversity of choices that we have revealed, which exist *within* as well as *between* neighbourhoods at the micro-level.

- The purpose of the research was to shed light on the ways in which consumer choices are played out and serves to stimulate thinking about how regulation of the sector might be developed, as well as how retailers might address untapped needs. Overleaf, we have highlighted a series of linked key questions as a starting point for fostering debate at the Workshop on 8th June 2004.

10 Key Questions for debate

1. What is the role of competition policy at the local level?

2. How can competition and planning policy be developed to take more of a local perspective?

3. Are planners aware of the distinction consumers are making between theoretical and real choices?

4. Our research shows that some households have more restricted choices than town planners and retailers might think. How can Government promote the development of more local stores to fill gaps in provision being left by the superstores?

5. How can regulators ensure that the needs of less mobile household types are met, irrespective of location?

6. If consumers do not perceive the differences between many of the large retailers, then how can retailers 'reach out' and appeal to residents by understanding household needs better?

7. The lived experience of real choices for most households at the local level is that they are much more self-constrained than previously thought. Should large supermarket operators with a presence in one area be allowed to have a convenience store nearby?

8. Alternatively, if consumers see operators as essentially similar, does it *matter* who operates them?

9. What would be the impact of developing a tighter regulatory control at the local level - guided by consumer experiences of provision - on the profitability of large retail multiples and operators of small convenience stores?

10. What lessons can we draw from other regulatory systems and markets?

1 Introduction

'Consumer choice' has gained growing significance as a way of justifying continued expansion by major grocery retailers in the UK and elsewhere and has become a central feature of the restructuring activity and regulation of the sector. This is evidenced in the fact that the investigation of the activities of the largest grocery retailers by the UK Competition Commission's (2000a; 2000b; 2000c) led them to conclude that "whether or not consumers have adequate choice will depend very much on local circumstances, which will vary widely from area to area" (Competition Commission, 2000). Linked to this concern about the implications of the scale and pace of retail change for consumers has been a call by the Office of Science and Technology for greater understanding of "...the interaction between retail organisations and consumers [which] requires an investigation of the current social context of current consumption patterns and projection of developments for the next few decades...Central to [this]...is the development of an appreciation of changing spatial strategies of retailers and their effects on the store choice repertoires of different consumer groups...a more holistic view of consumer lifestyles and investigation of ways in which types of stores are selected and the patterns of choice and behaviour which affect the consumption of certain goods" (OST, 2000).

The Competition Commission Report identified 175 locations in the UK where levels of choice as a result of retail provision were regarded as concerns (see ‘About Portsmouth’ and ‘About the Research’ boxes). But despite growing concerns over consumer choice, retail planning policy still tends to be driven by changes in retail store formats rather than choice issues *per se*. Based on our ESRC-funded research over the last three years, we argue that there is a need to look in much finer detail at the social conditions within which choice, purchasing and consumption take place.

Our research shows how an understanding of the issues surrounding consumer choice might make a contribution to more effective retail planning. We suggest that the consumer should be used as a yardstick to judge the benefits and disadvantages of the effects of retail competition over the long-term. Our work uses consumer *experiences* of choice at the local level and over the *long-term* (20 years plus) to show that different types of consumers - even within the same locality - can have very different real choices available to them. We therefore suggest that current approaches to identifying geographical 'pockets' of exclusion - so-called 'food deserts' - need to be supplemented by looking at how consumers perceive and make real choices, which are more limited than existing research and policy implies.

Three things make the project unique:

1. **It explores the effects of changing retail provision at the local level over a long period of over 20 years, with reference to the fairly 'average' UK situation in Portsmouth.**
2. **It combines extensive, a large-scale quantitative study of behaviour and attitudes to shopping with deep qualitative insights into how different types of households use and experience retail outlets, so it is relevant to a broad cross-section of the population.**
3. **It shows how 'consumer choice' can be used as a yardstick for measuring the effectiveness of local retail provision.**

This Briefing Report summarises the key findings and implications of our study as a basis for discussion at the Workshop in London on 8th June 2004. Additional details can be found in three papers that accompany this report (see Clarke *et al*, 2004a; 2004b; Jackson *et al*, 2004).

2 Key Results & Observations

The purpose of this section of the Report is to set out the key findings from the four phases of the research project in Portsmouth under three main areas: how grocery shopping behaviour appears to have changed since 1980; how attitudes to retail stores have developed; and the way in which consumers' retail choices are evolving.

About the Research

The research consisted of four consecutive stages.

Phase I - At-Store Interviews. 2500 interviews were conducted at the main food stores in the study area (replicating a survey undertaken in 1980 by Hallsworth, 1988), and focused on exploring the characteristics of shopper groups, shopping travel times and modes, and patterns of shopping *behaviour*.

Phase II - At-Home Attitudinal Survey. The questionnaire was distributed to 2150 homes in four contrasting neighbourhoods. This survey focused on their views on grocery shopping, choice criteria and attitudes to particular stores.

Phase III - Neighbourhood Focus Groups. This involved a series of four focus groups in each of the contrasting neighbourhoods to explore particular aspects of retail choice and to consider inter and intra-neighbourhood variations in perceptions. This phase - which also utilised projective mental mapping techniques to understand issues relating to perceived access and constraints - provided a link between the survey-stages of the research and subsequent in-depth household research.

Phase IV - In-depth Qualitative Household research. This final in-depth stage of the project used a combination of householder shopping diaries, accompanied shopping trips, household interviews and kitchen visits to dig more deeply into the day-to-day shopping habits, practices, motivations and constraints of eight carefully selected households in different domestic circumstances and in two contrasting neighbourhoods. The powerful insights provided were used to draw out cross-cutting issues between different households and explore the impact of different household compositions and routines on how retail provision is experienced.

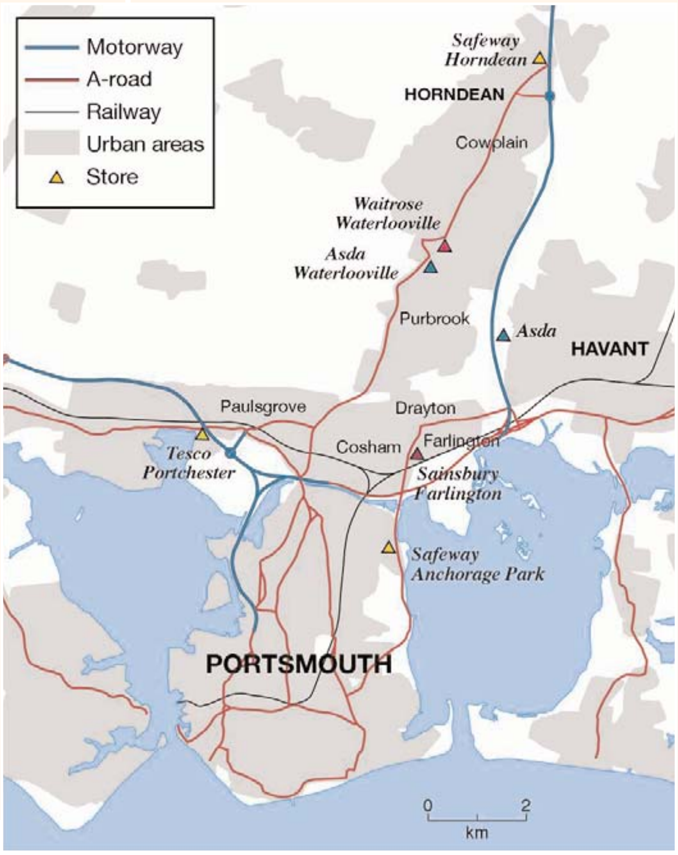
Each phase of the research informed subsequent phases. For example, issues arising from the attitudinal surveys in Phase II were picked up and explored in subsequent qualitative investigations. The phasing approach also helped with sampling: case study households for the qualitative studies in Phase IV being recruited from the focus group participants in Phase III.

About Portsmouth

In terms of the Competition Commission's own measure of local competitiveness the HHI Index, Portsmouth's situation is fairly typical, midway between the extremes of areas with the highest and lowest indices of retail concentration (see UK map overleaf). The Herfindahl-Hirschmann Index is a measure of market concentration, calculated by summing the squares of the market shares of the major retail parties. It is an indicator used by the US competition authorities, whose 1992 guidelines suggest an HHI of less than 1000 indicates a 'unconcentrated' market; a score of 1000-1800 indicates 'moderate concentration' (eg. Sheffield, Lancaster); and over 1800 suggesting 'high concentration' (eg. Uxbridge, Swindon).

In their Report published in 2000, the Competition Commission used a two-stage store-centred isochrone analysis (measuring population levels within different time distances from each store) to examine 'adequacy of choice' in local areas in the context of one-stop grocery shopping. The Commission assumed that catchments with only one or two of the five major retailers present (Tesco, Sainsbury, Asda, Safeway and Morrison) would have 'restricted' choice. A catchment with three such retailers would, in their view, provide 'adequate consumer choice' if they are large enough and of a type (with similar facilities such as car parking) to be effective competitors. Using these criteria, the Commission found 175 local catchments qualifying as areas of potential concern, while "elsewhere there was in broad terms adequate consumer choice" (Competition Commission, 2000, p.28).

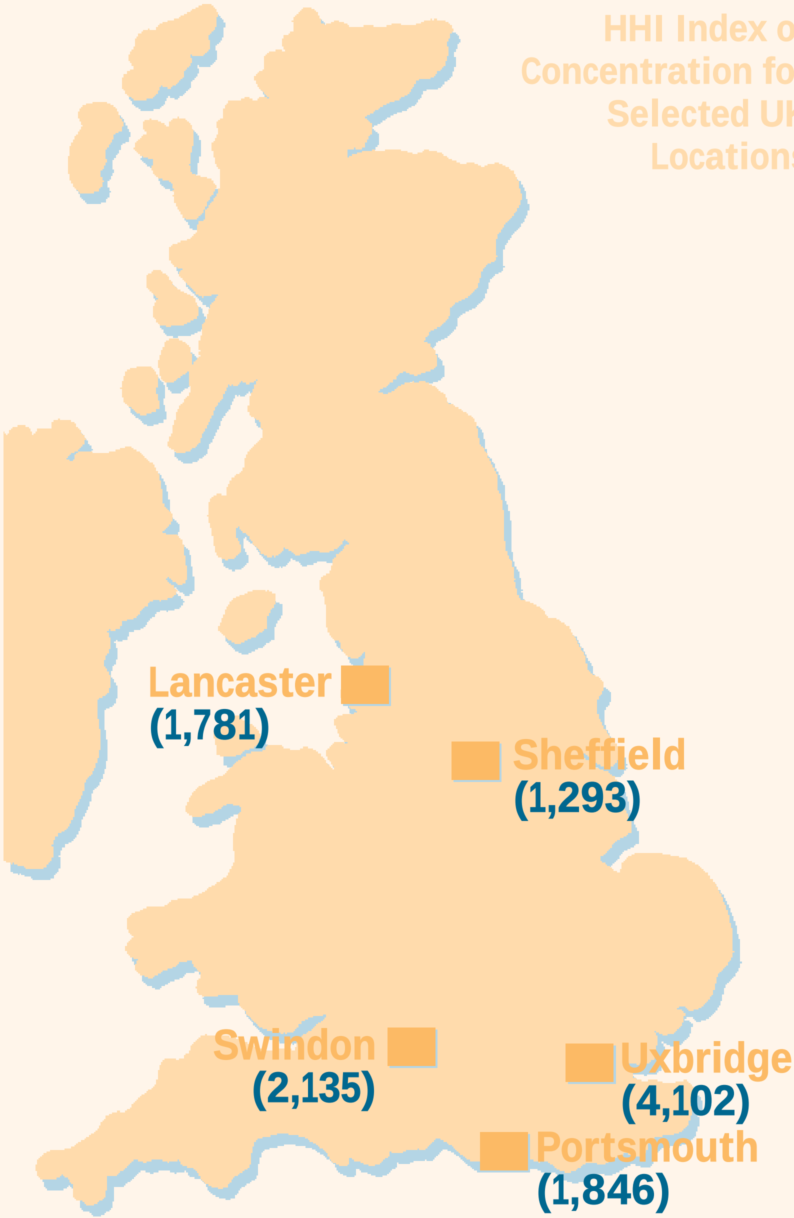
Our research focused on the area of North Portsmouth and Waterlooville. One of the earliest large new stores was Asda, which opened adjacent to Waterlooville town centre. This was followed by the opening of a large Co-op hypermarket (which eventually became part of the Asda group) and a district centre Safeway store at Anchorage Park. Over the next twenty years five additional retail developments arrived - a Safeway district centre at Horndean, a Sainsbury superstore at Farlington and a 50,700 sq ft Tesco Extra hypermarket at Portchester; the conversion and extension of the existing (former Co-op) Asda store to a state-of-the-art 98,796 sq ft Asda-Walmart hypermarket; and a replacement Waitrose supermarket adjacent to Waterlooville town centre.



About Portsmouth

In short, large store provision more than doubled in Portsmouth over the twenty year period to 2002. It is important to note, however, that these developments exclude retail stores on the periphery of our study area which are also accessible to many residents - including other Asda stores in Havant, Fareham and Portsmouth; another Safeway in Portsmouth; additional Sainsbury stores in Portsmouth and Fareham; a Somerfield in Fareham; Tesco stores in Havant, Fareham, Portsmouth and Cosham; and a Waitrose stores in Havant. The area also offers traditional high street supermarkets (Aldi, Iceland, Kwik Save and Lidl) and 26 Co-op Community stores (IGD, 2003).

HHI Index of Concentration for Selected UK Locations



Market data from the Competition Commission (2000) for the wider Portsmouth postcode region showed the dominant retailer in the area to be Tesco (with 28% market share) followed by Sainsbury (19%), ASDA (18%) and Safeway (18%). In theory, therefore, by the time we returned to re-study Portsmouth in 2002, residents in the area had access to some of the largest and most modern multiple food superstores in the country. But did consumers feel that these developments benefited them in terms of enhancing choice? Our study sought to explore how this level of provision translated into perceptions of, and satisfaction with, the potential choices now available.

2a Changes in Grocery Shopping Behaviour

Summary As a result of sweeping changes in store provision at the local level, coupled with significant shifts in household lifestyles, the practice of grocery shopping behaviour has altered in marked ways over the last two decades. Households are, more than ever, dependent on a particular store but have repertoires of shops they use to enable them to 'fit in' food shopping to busier lifestyles. They utilise an array of coping mechanisms to enable them to do this: using the shop that is closest to where they live or work at a particular time; shopping more frequently; shopping alone; and, for some, purchasing via the internet. Not surprisingly, grocery shopping skills appear to have taken on added social importance, such as how to obtain 'good value' products, how to balance speed of shopping against the social value attached to where you shop, and how to trade-off the choices available *within* as well as between stores. To understand and ensure sufficient 'choice' in this new retail environment retailers and policy-makers will need to unpack traditional determinants of store choice to see how and why they mean different things to households.

More grocery shoppers than ever are reliant on a 'main' store for the bulk of their shopping. The research show that many more consumers now have what they regard as a 'main store' - a location where they practice the bulk of their food shopping. This proportion increased from 58% in 1980 to 65% in 2002.

Shoppers are using a larger repertoire of 'secondary' stores. However, despite the supermarket rhetoric of 'one-stop-shopping' and the increase in shoppers having a 'main store', our results suggest that far fewer people are now relying *solely* on one store for *all* their grocery needs. This figure fell substantially from 46% in 1980 to 31% in 2002. The reason for this is that consumers are increasingly fitting food shopping around other events, routines and activities.

Food shopping is being increasingly carried out closer to home and work. In part, this has been facilitated by the increased density of superstore provision.

The proportion of consumers using a main store within 5 minutes of where they live or work has increased from 17% in 1980 to 39% 2002. The increased density of superstores also means there has been a reduction in the proportion of consumers travelling to their main store by car, down from 95% to 89%. In part this can be linked to behaviour to cope with increasingly busy lifestyles, work pressures and household routines, but is also due to changes in the structure of retail provision (e.g. 'district centre' type stores).

There has been a major increase in the proportion of people shopping alone. The increase in the percentage of shoppers doing their grocery shopping on their own / for others increased very substantially, from 43% in 1980 to 72% in 2002. This behaviour change is not confined to particular types of households drawn from contrasting socio-economic groups. We found substantive evidence to suggest that shopping alone is on the increase as another coping mechanism when household circumstances change. The increase in people shopping alone has been facilitated by developments in technology (especially mobile telephones) that enable family members to be virtually-present.

Use of the internet for food shopping is still relatively uncommon. Our research is in-line with larger-scale studies, showing that around 7% of shoppers have used the internet to purchasing their grocery requirements. Clearly, this was not an option in 1980. Our qualitative work appears to suggest that on-line purchasing tends to be used primarily where household routines or other circumstances are particularly restrictive.

People still choose where to do their shopping based on traditional measures, but there is a growing awareness of the social importance of how they shop and what they buy. Across consumer groups as a whole we found the same 'general' factors being quoted as reasons for choosing and rejecting between stores - convenience, price, range, quality, layout, service, among others. However, we also noticed a marked increase in the importance of convenience and choice / range within stores.

Consumers value easy and convenient shopping. Grocery shopping is still seen as something of a social activity and is still 'enjoyed', but with a much stronger emphasis on the need for convenient and easy shopping. This general trend appears to cut across all consumer groups, but with some groups emphasising 'the need for speed', compared to others who feel that proximity and access is more critical.

Seemingly minor accessibility problems have remarkable influence over store choices. Examples include dangerous roads, lack of pedestrian-crossing points, etc. We found evidence that perceptions of accessibility can be significantly enhanced through facilitators such as free bus services, more room, better trolleys, more tills, wider tills etc.

Familiar terms such as 'Convenience' need to be unpacked as they can mean quite different things to different consumers. For example, we found that 'convenience' was something of a catch-all term, meaning for some, the ease with which shopping at a particular store could be combined with other commitments, to others it was about having the opportunity to buy goods in appropriate quantities, being near enough to certain stores, or about being able to shop in environments that were not crowded.

In choosing where to shop, consumers are more consciously aware about where their choice says about them. Consumers' underlying 'cultural' taste also drives choice of stores as well as what they buy within it. Such cultural distinctions are a function of taste, colour and freshness, not just mundane notions of price, convenience and access. 'Cultural' sensitivity is not restricted to the most affluent shoppers.

Concerns about prices are not limited to poorer consumers but linked to a continual trade-off between price and quality of goods. Most consumers will not compromise on quality: they want to ensure decent and proper food for their families at a reasonable price.

Nowadays it is more difficult for consumers to make comparisons between stores because they are fewer and farther between. This has implications for the process of shopping and the criteria that make up a 'good shopper'.

2b Attitudes to Retail Change

Summary: Our study provides insights into attitudes to retail change in four ways. First, at the broadest level, we conducted a statistical analysis to tease out the key dimensions shoppers said influenced their choices of where to shop in 2002 compared to 1980. Second, we identified shoppers' likes and dislikes of the stores they used from the large-scale survey, also in 2002 and 1980. Third, results from the neighbourhood focus groups suggest that consumer attitudes to choice are influenced by their degree of mobility / immobility of the household, and how this interacts with their attitude towards food and food shopping. Finally, our in-depth household studies, conducted over a 12 month period with eight carefully chosen sets of respondents, underlines that how choice is experienced is dependent on the particular household conditions and routines at a point in time.

Taken together, the results emphasise how choices experienced at the local level can only be fully understood through how households mediate potential choices, first between stores, and then within stores. Therefore, if local choice is to be used as a yardstick to judge the effectiveness of retail competition, the challenge to regulators and to retailers is how to assess and retain the complex influences that determine real choices at the level of the household.

Factors influencing store choice

The principal components analysis of the second phase of our survey of household choice underlines that there is some underlying degree of stability in overall attitudes towards food shopping - the importance of price, quality, access, and enjoyment are all still there - but with some subtle and important 'twists'. We see particularly, that people are increasingly prepared to seek out quality offerings and pay more for them, in part because they are more mobile, and in part presumably because local stores are fewer and further between. We also see that they emphasise the utility of good quality retail offerings in terms of helping them to fit shopping in around tight schedules, routines and demands of the family. It is perhaps not surprising then, from this large-scale attitudinal survey, that there is an apparent social 'skill' inherent in food shopping that is valued.

Principal Components Analysis of Store Choice Factors, 1980 and 2002

Factor 1: 'Enjoyment'	Factor 1: 'Small and local'
Factor 2: 'Price'	Factor 2: 'Price'
Factor 3: 'Small and local'	Factor 3: 'Enjoyment
Factor 4: 'Parking'	Factor 4: 'Choice'
Factor 5: 'Sociability'	Factor 5: 'Access'
Factor 6: 'Quality'	Factor 6: 'Quality'

Note: 'Principal components' are the key dimensions of the dataset for each of the years shown. The titles of the components are chosen to reflect the underlying variables which make them up, derived from survey.

Likes and Dislikes about stores

In addition, from the extensive store-based survey, our results show that, many of the things that some customers *like* about each store are mirrored by things that others *dislike* about them. For example, in both 1980 and again in 2002, similar magnitudes of people liked and disliked the size of the outlets they used, the prices of the goods they sold, and the layout of the stores themselves. At a broad level, this indicates a tension in the customer base of the outlets regarding how they feel about the main stores that they utilise.

What customers *liked* about the stores they used (%)

1980		2002	
1. Having 'everything under one roof'	17.2	1. Convenience / location	20.5
2. Internal store layout	16.1	2. Choice / range	15.4
3. Price	14.6	3. Price	13.4
4. Range of choice	10.9	4. Size of store	9.3
5. Ease of parking	9.3	5. Staff	8.6

What customers *disliked* about the stores they used (%)

1980		2002	
1. Range of choice	26.4	1. Layout	15.7
2. Internal layout	21.1	2. Price	12.6
3. Price	13.1	3. Out-of-stocks	12.1
4. Size / spaciousness	11.1	4. Busy	11.4
5. Easy to find	9.4	5. Size of store	8.2

Mobile households

From the results of the community focus groups, consumers with greater mobility and affluence perceived few physical or economic constraints in accessing what is seen as an extensive local choice of superstores. Wider ranges, facilities, opening hours and comfortable shopping environments were acknowledged as having considerably improved the shopping experience - although some felt (particularly the elderly) that the quality of personal service has declined. In the focus groups we found that, even among a fairly homogenous group of affluent neighbours, the degree of satisfaction with choices available varied markedly, some feeling there was too much choice, while for others choice was more limited / non-existent. Frequently, we saw differences in attitude even within the same neighbourhoods and streets, with some households believing choices are abundant whilst others think choice is limited.

For mobile shoppers, superstores serve as venues for both large weekly shops and top-up shopping. They shop mainly at the out-of-town stores and use the same stores for top-up /emergency shopping - sometimes because of a lack of more convenient local options but also sometimes out of choice.

Mobile shoppers have abundant choice of where to shop and can afford to be 'choosy'. For such households, the difference between choosing to use or rejecting a store appear to hinge on subtle differences to do with service, ease of parking, store atmosphere, lack of crowding and spaciousness, and obstacles to quick shopping. They are prepared to seek out quality offerings and pay more for them. Food quality is a bigger issue for them and, in the case of larger families, so too is being able to 'bulk-buy'.

Some mobile shoppers practice wide-scale abrogation of choice. In the more affluent neighbourhoods with access to the widest *potential* store choice, many of these potential choices are not taken-up because of habits or a strong preference for a particular store.

Less mobile households

In the focus groups, we found that elderly and lower-income families (particularly single parent households) who were typically less mobile and dependent on bus services or needing a lift to stores tended to feel more disadvantaged by supermarket developments and the closure of small food stores. They are critical of the limited offer remaining in the High Street and their 'forced dependence' on the supermarkets. Many are aware of low-price stores available in their area but often feel excluded from these options due to perceived restrictions on access (no local link to a bus service, too far to walk, having to take the buggy etc). The relative isolation felt by some residents in Paulsgrove was very evident (with one noting that "*they forget us up here*"). Even in Drayton (a neighbourhoods with high *theoretical* store choice within a given physical distance), significant access problems were experienced by elderly residents.

Less mobile shoppers have to develop inventive strategies for coping with shopping. For example, the limited ability to access potential choices for both the poorer consumers in the disadvantaged area of Paulsgrove and the more elderly residents in Drayton and Stakes required them to find ways get to stores, by catching a lift with a friend or relative, walking one way and catching a taxi back, and so on.

Less mobile shoppers feel disadvantaged by the retail approach of larger superstore formats. Some consumer groups feel the growth in superstores has been accompanied by, for example, less flexibility in pack-sizes (with the elderly and single-parents feeling excluded from superstores and from bargains by their inability to buy in bulk). They also believe that it is less easy for them to shop in such stores because of the tendency to have to rely on cars for access and carrying large volumes of goods.

Some less mobile consumers exclude themselves from shopping in larger stores. Some potential choices are rejected by residents when they feel such stores are not suited to them or their circumstances - in effect a form of self-exclusion based on beliefs or cultural values. The largest format superstores in our study area (particularly the Asda hypermarket and Tesco Extra) were often excluded from the choice sets of some elderly consumers because of the physical walking distances involved and the temptation to spend too much money. Some elderly residents, those living alone and single-mothers, felt that supermarkets *"don't cater for us"*. These groups wish to buy small or single pack sizes, and resent the fact that *"others"* are in a better position to get the best bargains from supermarkets because they can buy bulk-packs.

Less mobile shoppers value small stores but some outlets fail to meet community-needs. In some areas, even where small local shops exist, they are not necessarily meeting the needs of the neighbourhood. Some small stores were criticised heavily. In Paulsgrove the only local grocery store - the Co-op - far from being the saviour to residents in the area, tended to be avoided by some residents - as it was perceived as being expensive, lacking variety and fresh produce, dirty and with poor service. Even in Drayton, where elderly residents depended on the local Co-op, it was not cherished as one might expect but heavily criticised on quality and range, and largely only used because of convenience. Choice in Drayton is on a 'knife edge' for some. Some residents feel that some small stores cater more for the 'drive-through' trade (newspapers, sandwiches and snacks) rather than for local residents. Recent changes in food stores appeared to have excluded 'locals' from their 'own' neighbourhood shops - complaining that many local stores had reduced their variety of stock, focusing more on newspapers, sandwiches and snacks and excluding those who might otherwise use them regularly to buy everyday goods. For example, in referring to the changes in Drayton High Street, one resident noted that *"We now call it the Drayton drive-through takeaway"*.

For the less mobile, attitudes to change go beyond simply the loss of small shops. Many consumers complain about aspects of the 'type' of supermarket that they have access to. What they mean by this they often sell a lower standard of fresh fruit and vegetables, or that they find the lack of specialist food stores restrictive.

Attitudes at the Household level

Within the eight carefully selected households studied in-depth over a 12 month period, a much more complex picture of how choice is experienced is provided. At the most general level, several recurring themes cut across the household studies.

- **Household choices are often portrayed as being made in a 'strategic' sense (being rational in terms of economic choices and between all possible outlets available), but evidence from the household level consistently shows that shopping is a habitual practice where conscious choice is relatively rare. Choice of store is therefore mediated by a range of contextual factors which can best be understood at this level.**
- **Having access to a car either enables or restricts choice respectively.**
- **Changes to family situation affect choices of where to shop and what to buy.**
- **The degree to which a store 'matches' or 'fits into' the routines of each household affects whether or not it will be used.**
- **The timing of income flows / payments into the household often determine when a household shops, and where.**

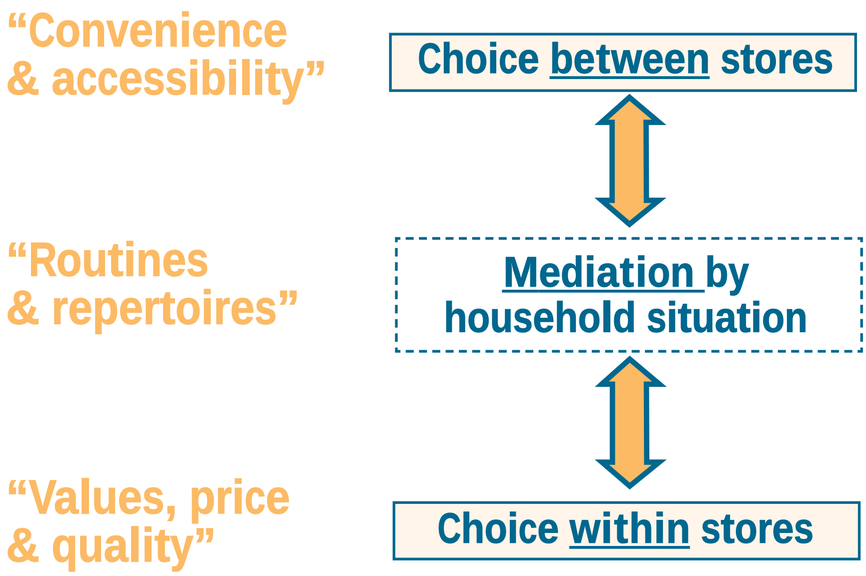
- **Householders make judgements about a number of aspects of each store in the process of deciding where to shop, and these need to be unpacked and understood. For example:**
  - *'Convenience' - interpretations of this range from proximity, fitting-in to routines, quality and freshness of products and size of stores, to cultural preferences for particular stores / retail 'brands'.*
  - *'Value' - interpretations of this focused on price versus quality, with judgements of value raising subjective issues of taste and freshness.*
  - *'Cultural capital' - judgements about how 'nice' and 'pleasant' a store was seen to be were often used as class-coded distinctions about the type of store each household felt most comfortable in and familiar with.*
- **Moral judgements are exercised in the process of shopping and influence choices households make - such as how convenience and technology of stores and their products might influence 'being a good mother' or a 'good wife'.**

Household Case Studies

Analysis of the individual household studies emphasises the difficulty of generalising in terms of how choices are made within 'typical' households. In fact, contrary to previous studies, we believe that such typologies may serve to conceal the real choices made by particular households. From the household studies, we argue that choices are 'made' in three stages:

1. **The household interprets 'convenience and accessibility' to make an initial choice *between* stores;**
2. **A combination of 'value', 'price' and 'quality' are taken together to make choices *within* stores; and**
3. **The 'repertoires and routines' of the household mediate between 1 and 2, affecting their choices *both* within *and* between stores.**

The mediation of store choice decisions by household situation



2b Attitudes to Retail Change

The complexity of these interactions is illustrated by the characteristics of the individual household conditions, their composition, routines, preferences and shopping habits - from the poorer area of Paulsgrove (top row in table) and the more affluent area of Purbrook and environs (bottom row in table). Each case is self-explanatory.

Household Case Studies

Laura (Paulsgrove)
age late 20s

- Household size: 5 (Laura +1 biological child + 2 foster children +boyfriend-not the father of any children)
- 7 year-old biological child, 2 foster children (aged 4 and 19 months)
- Boyfriend (not the father of any children) moved in towards the end of fieldwork
- Shops once a week in Tesco North Harbour (fresh food and tins) and Iceland (frozen)
- Loves shopping, likes to browse
- Likes going shopping with friends, hates shopping with the children 'they drive me insane'
- She doesn't 'buy cheap stuff', she doesn't 'buy value stuff'
- She's a qualified chef (studied at college)

Nora (Paulsgrove)
age early 30s

- Household size: 6 (Nora+husband+ 1 child with husband + 3 children from previous partner)
- 3 year old boy from husband, 3 children from previous partner (15 year old boy, 13 year old girl, and a 10 year old boy).
- Shops once a week in Tesco North Harbour (fresh food and tins), and once a month in Iceland
- Loves shopping and browsing
- Likes shopping with friends, not with the children 'that stresses me...'
- 'I don't look at cheap price'
- She doesn't buy value food

Eleanor, (Paulsgrove)
age mid-30s

- Household size: 5 (Eleanor+ husband+ child (4 year old) with husband+ daughter from previous husband+ daughter's boyfriend)
- Daughter's boyfriend moved in during fieldwork.
- Shops once a week in Tesco (when husband receives weekly salary) and once a week in Iceland or Asda for a treat (when she gets her family credit). Does one big monthly shop in Iceland (when daughter gives her £100, and when she gets her salary from a part-time job). For top ups goes to the local shop, vegetables in the grocery shop and meat from the butcher.
- She doesn't like shopping
- Prefers to go shopping when 'there's no kids', and no adults (make her spend more)
- Writes a list with the prices as a guide 'to know how much I've got to get out of the bank to go shopping'.

Nigel (Late 30s) Zara (Late 20s) (Paulsgrove)

- Household size: 7 (Nigel+ Zara+ 3 children together (ages, 6, 3, 18 months) + 3 children from Zara's previous partner (ages 10 and 8)
- At the end of the fieldwork they were about to divorce
- Shop once a week in Tesco when Nigel gets his disability income, and once a week in Iceland when Zara gets child benefit
- Nigel likes shopping ('I like to get out of the house'). Zara doesn't like shopping especially when the shops are packed ('I get claustrophobia')
- Nigel says he goes 'for the price more', Zara says that she goes for the quality.
- Nigel likes to write a list, and uses a calculator as he shops 'to stick to the budget'
- Zara used to shop in Sainsbury before she met Nigel. She loves cooking and experimenting.

Hilary (Purbrook)
age mid 40s

- Household size: 4, Lives with husband+ 2 children (ages 9 and 15). She's got 2 children at university who come home for holidays.
- Shops in Havant Tesco once a week, in Waitrose Waterlooville for 'something exotic, something a bit different', goes to the butcher, and occasionally in the local store.
- She doesn't mind shopping with the kids but 'my idea of hell is going shopping on a Saturday with my husband'
- She fits in her shopping with her husband's agenda and access to the car.
- She uses a list and buys mostly Tesco's own brand and value lines, with some exceptions. '...we have really branded coffee. One thing I always have is a decent coffee. There's nothing worse than having a cheap coffee'.
- Checks prices per gramme, ignores convenience food
- She likes to cook, studied cookery at college

Sheila (Bedhampton)
age 50s

- Household size: 2 , Sheila + husband
- Works part-time as a check-out operator in Waitrose-Havant
- Shops for 'bits and pieces almost every day' in Waitrose
- Buys 'junk food' in Tesco for 23 year old son (studying at the university).
- Much of her shopping is dictated by her husband and son's needs
- She uses her mobile to communicate with her son when out shopping
- Compares prices per gramme.

Joan (Emsworth)
age mid 30s

- Household size: 4, Joan+husband+ 2 children (boys aged 9 and 11)
- Goes shopping almost every day: 'I think that the only thing I do in my life is shop'.
- Her main store is Asda-Walmart (it's conveniently close to the kids school), but she also uses Tesco-Havant and the local store. Shops occasionally in Waitrose in Havant: 'I like Waitrose for things a little bit different'.
- Buys clothes from George collection at Asda (cheap and fashionable).
- She often meets people she knows in Asda
- Buys convenience food if she's in a bad mood: 'grab something that it's convenient to eat'.

Paul and Wanda (Late 60s) (Purbrook)

- They live on their own. They have two grown-up children,
- Wanda's father used to have a farm. Paul used to be a dairyman (employing 50 roundsmen). They ran a grocery store and a coffee bar and are now into property investment.
- He is a bit of 'foodie' collecting recipe books, vintage wine, cooking on an Aga, making coffee in a Gaggia machine, buying cheese in Neal's Yard and having kippers sent down from Scotland.
- They like shopping in Waitrose. Paul displays Waitrose's food magazine in their kitchen.
- Buy meat at the local butcher, visit a farmer's market in Winchester 3 times a year. Buy coffee from the Monmouth Coffee Co in London.
- They usually have disagreements when shopping together. Paul says: 'Wendy is sensible and I am intelligent'. 'I shop, Wanda advises'.
- They like to buy organic (Paul) and British (Wanda)

We believe that choice is experienced and understood in terms of how it is embedded within each household. This is illustrated in a comparison of two of the cases, those of Hilary in Purbrook and Eleanor in Paulsgrove.

Hilary is aged in her mid-40s, Eleanor in her mid-30s. Both are married with several children, although two of Hilary's four are at University and come home for the holidays, and on closer inspection Eleanor's family includes a child from her previous husband and her daughter's boyfriend also lives there.

Hilary tends to fit in her shopping when she has use of the family car. She does not mind shopping with her two younger children, but apart from that prefers to shop alone without her husband. She uses a combination of stores to satisfy their range of needs, using a smaller Tesco store (in Havant) which she prefers on a weekly basis, the Waitrose in Waterlooville town centre for 'something exotic, something a bit different', and she also goes to the butcher and occasionally to a local store. Hilary and her family have a strong sense of what they prefer, partly influenced by the fact that she studied cookery at college: they buy Tesco's own brand and 'value' lines, and some 'really branded' products, like coffee, noting that 'One thing I always have is a decent coffee. There's nothing worse that having a cheap coffee'.

By contrast, Eleanor does not like shopping, and prefers to go shopping when 'there's no kids' and no adults, since she think they make her spend more. She shops once a week in Tesco, at the time her husband gets his weekly wage, and she gets some items from Iceland or Asda 'for a treat' when she gets her family allowance credit. About once a month she does a shop in Iceland (when her elder daughter gives her £100 to help cover the cost of keeping her and her boyfriend), and when she gets her payment from her own part-time job. She does some top-up shopping at a local store, vegetables in a grocery shop, and meat from a butcher. To help guide her, she keeps a list with prices of different products as a guide, in order to 'know how much I've got to get out of the bank to go shopping'.

These contrasting examples underline just how particular shopping choices are engrained in the habitual practices, rhythms and routines of specific household situations, rather than decisions being consciously 'made'. We conclude that it is crucial to understand choice at this level if it is to be enhanced either through regulation or through retailers using these insights to develop new and innovative ways of meeting consumer needs and increasing choice.

2c The Emerging Nature of 'Choice'

Summary: Changes in shopping behaviour combined with shifts in attitude towards shopping, have led to an emerging concept of 'choice' that is quite different to that which existed twenty years ago. Choice is important to most consumers, it seems, so that they can stay in control as their circumstances alter. Potentially, having choices gives consumers flexibility and options, so they now seem to discern between retail provision that is theoretically available, and 'real' choices. A real choice is not simply about having an accessible store nearby, but is intimately connected to the social and situational circumstances of the household, rather than just its mobility. In short, a choice is real if it is possible within the everyday routine of a household, although the growing physical separation of grocery stores has forced consumers to make trade-offs within as much as between stores. Since as many of our respondents disliked as well as liked stores in which they shop, this suggests to retailers and planners that there is significant scope to enhance retailing in the future by addressing provision that enhances choice at the local level.

*Choice **is** important to consumers.* Consumers regard having a *good choice* of food outlets as important. Few feel that one single store, however large and however accessible, could possibly meet ***all*** of their needs. Having 'choice' is deemed important for all groups. For many, choice affords *control* over what and how they buy, allowing them to feel they are not being 'dictated to'. For consumers on a tight budget, choice enables them to feel that they can *gain* from the resulting competition - to win the best 'deal' by bargaining - so as to reduce the weekly food bill. By contrast, for wealthier residents, choice presents an opportunity for self-expression - allowing them greater freedom to be and do what they want by exercising personal preferences.

Consumers have a demanding and dynamic perspective of 'choice'. Choice is not simply about having a number of food stores within a physical geographic distance. 'Real' choice, for consumers, is about having *flexibility* and options - being able to change behaviour according to circumstances and mood. Choice involves having the option to buy very low priced food if financial circumstances change; the option to buy luxury items and treats whenever one feels the urge; the option to buy healthily or try out a new diet or to buy ethically - if necessary, on a whim; the option to buy different pack sizes - not being forced to buy in packs of a particular size, but being able to customise the purchase to their own requirements; the option to buy in bulk on one day to get the best deal, whilst on another to top-up with forgotten items. Our research shows that consumers' needs are not static, but change from week-to-week, day-to-day and from situation-to-situation. For consumers, having adequate 'choice' is about having the means to satisfy these needs.

Choosing within as well as between stores is important to consumers. While there is a desire for a variety of stores in order to feel that sufficient real choice is available, some consumers refer to choice in the context of variety within one (or a small number of) stores.

This distinction may be a self-imposed restriction (e.g. to save time) but for others it can be a real restriction imposed by a lack of alternatives. Some consumers feel the food superstore has replaced the previous selection of local shops to the extent that choice is limited to *whatever* is available within the nearest large superstore. For these consumers, the *'money saving'* option is not an alternative discount store but the superstore's economy own brand, and the *'special treat'* is whatever branded goods or premium own brands are stocked.

Consumers now see 'choice' as both relative and perceived. Two people living next door to each other can have very different perceptions of the retail choices available, depending on their circumstances, their support network and level of mobility. Possession of a car, a relative with a car, the resources to afford a taxi, a large family, a disabled relative and so on, can dramatically alter the number of stores that are perceived to be accessible. Dietary constraints can equally impact on perceptions of choice. Substantial differences in the number and geographical extent of awareness sets also occur between sub-groups within the same neighbourhood, depending on mobility.

Consumers are increasingly distinguishing between 'provision' and 'real choice'. Whilst neighbours' awareness sets may often exceed 15 stores, only a small proportion of these stores find their way into residents' active usage sets. Within a relatively small neighbourhood with similar demographic characteristics, there can be a wide variation in the nature of choice sets used. It is clear that just *living* in a better-off area does not mean that everyone perceives they have access to a wide choice. For example, the elderly and the less-mobile have much more restricted horizons. Conceivably, a consumer without a car in a relatively affluent area could perceive themselves to be worse off in terms of retail choices than a consumer without a car in a relatively poor area.

Consumers feel their 'real choices' are determined by the circumstances in which they live, and their household situation. Circumstances change rapidly and can be affected by situational factors, individual characteristics and *perceptions* of access. Thus, a theoretical set of food stores existing in real space may not be perceived to offer real choice - a lack of mobility, lack of income, dependent relative or dietary constraint can act as a significant inhibitor to perceived choices. Not all consumers will be aware of all store options, and a lack of direct knowledge or experience of others may lead to further stores being excluded from consideration. It is conceivable that consumers may (by virtue of limited mobility or availability) be limited to only one choice of store and for such cases we should add Hobson's choice to the vocabulary on retail choice. For some consumers, choice sets will not be limited to those available within the locality - stores outside of the area may be visited (on route to other destinations, family trips etc) and the internet may provide a further opportunity to extend real choices.

Real choice is spatially differentiated. Even in a relatively average and small suburban area it is possible to find significant differences in consumer experiences of choice (and the size and extent of choice sets) - both *between* adjacent neighbourhoods and *within* particular neighbourhoods. Choice in some areas (e.g. Cowplain) is clearly in abundance, to the extent that consumers (with the mobility and resources to exploit the choices available) are using quite subtle criteria when deciding where they might shop on a particular occasion. At the other extreme, spatial concentrations of limited choice clearly exist (e.g. Paulsgrove).

'Pockets of disadvantage' can be masked by an 'apparent' abundance of choice. Consumers are experiencing the impact of retail change in different ways, depending on their particular neighbourhood or individual circumstances, and as a result pockets of disadvantage are revealed within neighbourhoods that might on the surface appear relatively advantaged. Groups such as the elderly in Drayton are forced to develop 'coping solutions' to access choices they feel they need.

Choices emerge from the minutiae of everyday routines, moods, and emotions, rather than a planned and mechanistic activity, and can therefore alter quickly. A striking feature of the research study was to see how the dynamics and size of households can actually change over a very short period of time, and have an immediate and significant effect on household grocery consumption. We observed that as members came into or left a household unit (either on a permanent or temporary basis) the choice of store and type of products they bought changed significantly and immediately. Of key importance to patterns of choice and consumption was the 'nature' of relationships within the households and the routines within which they occurred.

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Retail competition and consumer choice: contextualising the "food deserts" debate

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Retail trade, Retailers, Consumer behaviour, Shopping, United Kingdom

Abstract

The "food deserts" debate can be enriched by setting the particular circumstances of food deserts – areas of very limited consumer choice – within a wider context of changing retail provision in other areas. This paper's combined focus on retail competition and consumer choice shifts the emphasis from changing patterns of retail provision towards a more qualitative understanding of how "choice" is actually experienced by consumers at the local level "on the ground". This argument has critical implications for current policy debates where the emphasis on monopolies and mergers at the national level needs to be brought together with the planning and regulation of retail provision at the local, neighbourhood level.

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1 Introduction

One of the underlying strengths of the recent spate of papers on food has been the willingness of the authors to set out the broad policy perspectives. Consider just the first page of the recent special issue of *Urban Studies* article by Wrigley (2002). In it, reference is made to: the National Food Survey; the Nutrition Task Force; standardised mortality rates for heart disease and the Acheson report on inequalities in health; and neighbourhood renewal and physical regeneration. What rapidly emerges is a microcosm of the general policy agenda of Tony Blair's New Labour: a fascinating mix of the interventionist and the *laissez-faire*. What this does is to massively broaden the retail policy debate beyond the usual protagonists. Put simply, it is not possible to set foot in a store without confronting multiple policy agendas. As we have recently argued (Clarke *et al.*, 2003), retail policy *per se* can tend to be seen as a contest of strength between market policymakers - such as the Competition Commission - and planning regulatory bodies - such as the DETR (Department of the Environment, Transport & the Regions). What is needed is a mechanism that cuts across these various arenas so that consistent and genuinely "joined up" policy can be developed. An effective way of doing this, we suggest, is to look at these complex issues in the same way as retailers - in terms of whether or not they are giving consumers "what they want". Consumer experiences of competition ought to be a crucial "anchor point" for the Government's approach to retail policy. Retail policy should reflect a fuller understanding of how different groups of consumers use and experience multiple and independent stores. At the heart of this idea is a more proactive approach to planning, rooted in the experiences of consumers making real retail choices within constantly changing local competitive situations. The key question is whether consumers feel they have sufficient

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choice and, if not, how can policy be used to address such situations?

The aim of this paper is to begin to establish this "anchor point" by sketching out a preliminary conceptual framework for understanding what we mean by "real" consumer choice. Fundamentally, we feel that it is necessary to look at the effects of "competition", first and foremost, in terms of how consumers actually experience different retail outlets. In the first part of the paper, we try to unpack choice in a simple way by looking at what the concept of "choice" actually means, establishing what the benefits of it are, and highlighting why it is on the agenda in food retailing. Effectively, this requires us to begin deconstructing competition in the way consumers experience it: as choices in given locations. This last point is an important one, because although the Competition Commission investigation of the grocery industry, which reported in October 2000, drew attention to "local circumstances" (Competition Commission, 2000) - that is, local competition - we still do not have a way of defining why this is really important. This is precisely the point we start to address in this section by asking how consumers experience competition in given locales. "Real" competition and "real" choice are, we believe, "flip sides of the same coin". In part two of the paper, we reassess retail competition from this perspective. Finally, in the third part of the paper, we use this preliminary framework to revisit the food deserts debate. In this discussion, we call for a wider contextualisation of the notion of the "food desert" which is, we propound, simply one extreme case of retail provision (or, more accurately, very limited provision) within a given locality in space and, critically, in time. We emphasise the need to take into account not only the dynamics of retail competition locally, but also call for work on how retail choice is experienced in areas other than food deserts. In contrast to most research which approaches retail competition via an analysis of changing retail provision, we begin from an analysis of consumer choice, focusing on how changes in retail provision are actually experienced by different groups of consumers. Our analysis considers not just which choices are notionally available (based on such criteria as physical accessibility and price), but also which stores are actually used. In short, the thrust of our paper is that it is not just competition locally that matters. Rather, it is crucial to tease out how and why different groups of consumers exercise choice in some circumstances while abrogating choice in other contexts, foregoing "choices" that are, at least theoretically, available to them.

2 Unpacking choice

At the most basic level, academic marketers have tended to conceive the concept of "choice" as an act of decision-making (Laaksonen, 1993). There is an implicit assumption that choices are not only "available", but also "made". Real situations in given localities are, however, not so simple. We might conceive of particular locations such as so-called food deserts as having "limited retail choice", or even "Hobson's (or no) choice". At the other extreme, locations that have an abundance of outlets might be regarded as having "too much choice" or at least an over-abundance of choice. In retail parlance, these latter locations are termed "saturated", albeit that the definition itself refers more specifically to the tendency towards declining sales and capital returns for each new outlet built in such locations. The reality, then, is that there is a continuum of choice, with some locations abundantly supplied, others less so. We can go further and suggest (as many marketers have) that consumers also need to be aware of the choices that are potentially available to them within a given area. It is not unknown, for example, for consumers to be unaware of some stores, particularly smaller outlets (Potter, 1982). Even if they are aware of alternatives, consumers will need to be able to access them (physically and economically) in order to be able to exercise that aspect of their choice set. Beyond these levels, the concept of choice also implies a preference is being expressed and that evaluations take place between stores. Preferences are only real, however, when consumers have the power to express them (London Economics, 1997). As London Economics pointed out, consumers' power is limited by the size of their purchasing (which is small compared to the retailer's overall turnover), their mobility, and how informed they are of the choices that are available. What influences the latter is that, to be able to make a choice consumers must have both the mental faculty and physical ability to do so. The implication is that alternatives available to, and choices made by, some types of consumers in a given locality may not be available to other groups or, at least they may not be able to take a particular choice. How we approach constrained choice may depend on our perception of what limits choice. The ability to overcome the frictional effects of distance - whether expressed as time or cost barriers will depend on many factors. Some constrained consumers are universally recognized: most notably those with disabilities and who may rely upon others.

'... It has been argued that consumers are not simply making a choice between a pre-existing set of retail locations ... Consumers are actively involved in the constitution of those locations, helping shape the ambience of the outlets they choose and ignoring stores that they consider undesirable for people like themselves...'

This latter condition can easily be shared by the very elderly or the very poor when their situation is exacerbated by poor access to transport. More specific constraints (such as the requirement to shop with small children in tow) were long ago studied by researchers such as Bowlby (1979). To these groups we can add consumers who are too young to drive - in environments where a car is necessary in order to reach retail outlets.

Exercising choice clearly involves more than having the mental capacity and physical ability to do so. For example, accessibility to a particular store is a function of perceived physical distance, tempered by the availability of an appropriate means of transport. Accessibility also involves real or perceived economic access (influenced by relative prices and disposable income) which might lead to self-exclusion (Barratt, 1997). But it is far more, too, involving "social" questions (about childcare and child-friendly transport, for example) and "cultural" questions (about which stores are considered appropriate for different kinds of consumers). Indeed, it has been argued that consumers are not simply making a choice between a pre-existing set of retail locations (Gregson *et al.*, 2002). Consumers are actively involved in the constitution of those locations, helping shape the ambience of the outlets they choose and ignoring stores that they consider undesirable for people like themselves (Crang and Malbon, 1996).

But why is choice important at all to consumers? Again, the literature tends to underplay the benefits of choice within retailing. Put simply, if consumers have genuine choices, then they are requiring retailers to compete against each other, to strive to improve the services they offer. A more intangible benefit of choice is that it can enhance an individual's self-esteem. Having no choice can be disconcerting and demoralizing, whereas ample choice can empower consumers, giving them the opportunity to express themselves in a "democratic" fashion. The most fundamental benefit of having retail choices available, however, is that it promotes a feeling of equitable treatment in society. This argument was central to the British government's White Paper on *Modern Markets, Confident Consumers* (Department of Trade & Industry, 1999) which saw the promotion of knowledgeable and demanding consumers as having a range of benefits in terms of more open and competitive markets and more democratic and active citizenry.

So, why does choice need to be on the food retailing agenda at all? Essentially, we argue that it is a crucial part of the agenda because changes within society are constantly impacting consumer welfare in a relative and differential fashion. We have argued elsewhere (Clarke, 2000) that changes in the geography of retail provision provide an obvious way in which retailers shape food choices, by altering the spatial accessibility of different consumer groups to food supply. Indeed, Wrigley *et al.*'s study of the impact of regeneration of a food desert location by a new Tesco hypermarket at Seacroft in Leeds, outlined in this issue, is one such case in point. We particularly emphasise two important dimensions to such developments so far as the changing choice profile of the locality are concerned. First, Wrigley has demonstrated unequivocally that the perceived choices and actual choices of many residents can be demonstrably improved by retail development. His study also shows, rather more importantly, that such changes in provision can also have a very tangible effect on food consumption patterns, diet and, by implication, health. Second - though not a core concern, is consideration of the wider impacts of the development on retail provision. We would be very surprised if the opening of such a new Tesco hypermarket did not have substantive and discernible effects, as is normally the case, on other food stores in the area, large and small. This is discussed in the Leeds case by reference to trade deflections - for new superstores have a wide catchment area and, whilst bringing welcome provision to a locality, are bound to draw off trade from distant areas. To what extent, therefore, does any new retail development affect consumer choices elsewhere in a negative fashion - albeit that this requires some idea of net benefit? Even more important, we believe, is the extent to which such changes are experienced by different groups of consumers. Overall, who experiences benefits and dis-benefits, and why? Again, Wrigley *et al.*'s study was not directly designed to address such issues, but it does, nonetheless, highlight key points that we wish to make in this paper, which is that choices and the competitive profile that underlie them, are experienced differentially by consumers (Clarke *et al.*, 2003; Competition Commission, 2000; Lumkin *et al.*, 1985; Piacentini *et al.*, 2001). As we have already stressed (Clarke, 2000), the net benefits of changes in the retail geography of localities remain unclear.

The preceding discussion serves to justify and amplify the centrality of local competition to "choice". Indeed, we would go further and emphasise the reverse, that the notion of consumer choice cannot be dis-embedded from an appraisal of competition locally. This is where we differ from traditional economic models of choice, which start from the perspective of isolated individuals making a "free" choice based on complete knowledge and unlimited time available to shop. In such approaches, consumption is reduced to shopping - purchasing decisions - based on a monetary exchange that ignores the socially embedded nature of people's actual shopping practices. Our perspective, by contrast, is to approach shopping as a social practice, rather than seeing each purchase as an individual decision. The crucial distinction, from this perspective, is that most people shop in and for households or families, not individually (Miller *et al.*, 1998). We go further, however, and stress that the concept of "choice" can only be understood holistically when it takes into account the fact that consumption is itself a process that is socially differentiated. The example of "food deserts" makes it clear that not everyone has equal choice. As we emphasised earlier, some consumers are more constrained than others by disposable income, mobility and so on. Beyond the extreme case of "food deserts", cultural capital, reflecting education and "taste", can be as important as economic capital and access. From our perspective, choices are not reducible to the demography of households, but are also related to a wide array of lifestyle and identity issues. This point is reflected in the move by marketers over the last two decades from categorizing people by their class and purchasing power, to demographics and life-stages, and now increasingly to consumption patterns and lifestyle (Campbell, 1995). "Economic" issues of price and proximity to food outlets may, in fact, be relatively unimportant for some households for much of the time - many shopping choices being habitual and not sensitive to minor price variations, for example[1].

From the perspective of shopping as a social activity, therefore, the concept of "choice" is less readily defined. For many shoppers, including those in relatively deprived areas, shopping is as much about "buying an identity" as choosing between specific goods. Choice allows the opportunity to invest in an identity. As Douglas explains, consumption is about investing in the future (Douglas, 1997). Such issues highlight the over-simplicity of most typologies of consumer groups. Identities are shifting and multiple, developed relationally, according to the social context. Consumers are also faced with choices between stores operated by different retailers, between different shop formats of the same retailer, between different locations, and even between different goods within the store (e.g. branded versus own-label goods). Whilst it is possible to model store choice based on some of the most influential factors, such as accessibility, convenience, price, range of goods and services available within the store, in practice, we believe that most consumers work within a relatively limited repertoire and goods within them. That said, sophisticated choice modelling (for example the work of Timmermans 1980; 1981a, b) has attempted to disaggregate choice by person type - though the approach cannot capture the multiple shopper identities that we posit. So, outside of the most extreme "food deserts", many consumers are likely to have a "main store" that they use: they may do their big weekly shop at Sainsbury's, use a local Tesco for top-up shopping every two or three days, buy weekend "treats" at Marks & Spencer, and use specialist outlets for particular goods, like organic bread and fruit. Thus, it is important that as researchers we are conscious of such choice repertoires of stores used by consumers, but even more crucial that we develop a fuller understanding of what social factors make some choices possible and others less so.

'... Food shopping is rooted initially within the home, and starts before the consumer leaves there in terms of planning, dreaming and saving up; goes on within the store as a process of selecting, rejecting and spending (often negotiated with other family members); and is followed-up afterwards with cooking, eating and, in some circumstances, entertaining...'

In terms of the socially-embedded practice of choice, we take issue with existing models that assume that an intellectual repertoire of action choices is carried out. Whilst we have not yet been able to find evidence for this in the literature, there is significant evidence within the "trade" press that "brands inform choices" (so that some people will not bother about new products) and that "shoppers' familiarity with the shop influences choice" (therefore many will not buy new products if they are not in the aisle that they usually browse). Within stores people only consider a fraction of the goods on offer, using a list or relying on routine and habit to eliminate much of what is on sale. Accordingly only a proportion of shopping is actually about purchasing - much of it is also about looking (Gregson *et al.*, 2002) - and the two have very different social relations. Food shopping is rooted initially within the home, and starts before the consumer leaves there in terms of planning, dreaming and saving up; goes on within the store as a process of selecting, rejecting and spending (often negotiated with other family members); and is followed-up afterwards with cooking, eating and, in some circumstances, entertaining. From this richer perspective of the practice of shopping choice, it is possible to see that there are, in fact, very different forms of shopping spaces differentiated for instance, by gender (e.g. DIY shopping tends to be favoured more by male shoppers, charity shops by women). "Choice", from this point of view, may be more about the selection of a shopping space in which the customer feels at ease - "this is my kind of shop" - than anything else, an argument that was raised in the context of north London shoppers' use of the John Lewis department store and Waitrose grocery outlet located within the Brent Cross shopping centre (Miller *et al.*, 1998).

What has been emphasised in social science research on consumption, is that shopping choices are as much related to the rhythms of everyday life and their associated social relations, as about specific trade-offs of store attributes - hence our emphasis on tracking choice back into different kinds of household. Shopping choices are, in short, something to be fitted in with other responsibilities, routines and pleasures. Some people exercise their choice by travelling further or for longer to their preferred store, but others will abrogate choices by sticking closer to home and to what they know - effectively, their choices may be annulled by their situation and outlook, constrained to choices that are familiar, habitual and part of a regular household routine. It is not surprising that the exercise of choice, therefore, implies a relatively high investment in shopping time, consideration and physical effort. For some people, it may be a low priority, a routine that needs to be done quickly so that they can move on to something else. For others, it will be less burdensome and more pleasurable. "Loyalty", that much maligned term associated with choice, may simply be the way many consumers respond to a complex shopping environment, by relying on one store they find comfortable and amenable, as much as being intrinsically attracted to a particular retailer and store. From the perspective of the rhythms of everyday life, therefore, some people will embrace choice to simplify the tasks of food shopping their domestic situation foists upon them; others will be overtly resistant to influence and make choices based on their own alternate beliefs. For this reason, individuals may have quite strong preferences as to which store chain they will patronize. These preferences may be placed under threat when major store chain mergers are proposed (as with the bidding for the Safeway supermarket chain in the UK which was subject to a recent Competition Commission report (2003)).

By way of a summary of the discussion so far, the inextricable linkage between consumer choices and retail provision has been underlined. Whilst the notion of the food desert implies an area that is bereft of choice, we emphasise that choice is locality-specific and there is a need to put the "deserts" debate into the wider context of the degree of competition in a given area. However, the broader notion of potential choices available within a locality to actual sets of choices that consumers use, requires us to grapple with constraints imposed on consumers by the embeddedness of consumption locally, in terms of the stores available, the pressures of social and household conditions, and the influence of consumers being able to act out their social condition as differing cultural "tastes". The discussion draws attention to the factors that make some choices socially possible and others less so, and why certain shopping "spaces" (be they centres or stores) are favoured over others, opening up choices to some and abrogating them for others as part of the rhythms of everyday life.

3 A richer view of retail choice

This richer contextualisation of the effect of retail competition on choice, which our work is calling for (and which we are carrying out empirically), stresses a number of issues.

First, "real" choice has to be located in specific social contexts as well as spatially specific places since, as Fernie notes, "shoppers exhibit different purchasing attitudes and behaviour according to the situation they are in at any specific time" (Fernie, 1998, p. 95). Thus, if choice involves repertoires (particular combinations of stores, goods and locations), should we be thinking, instead, in terms of the "effective" choices experienced by different kinds of household? If people eliminate certain choices - by virtue of the fact that they "would never go" to the food discounter Lidl, or if they think that Marks & Spencer is simply "too expensive", even though they are readily accessible - should we focus on the range of choices as they define and experience them, rather than what is theoretically available? Do they make a choice of a supermarket only because they perceive it to be the best "solution" to their particular set of circumstances or lifestyle?

Second, the antithesis of this perspective, which posits control over choice essentially in the hands of the retailer (Marsden *et al.*, 1998) and what they provide, is the idea that consumers have more control over choice than they are often given credit for. This view suggests that consumers are more in control where they are dictating what is on offer in store. On balance, what we are intimating is that such a case probably overstates the power of the consumer in the process of choice, which, on the one hand, is a function of the retail provision locally and, on the other hand, is affected by household and social conditions. The interaction of changing retail provision and variable consumer agency creates extensive choice for some but severely restricts the range of choice for others. What is clear is that choices are only "real" when we first, take into account the situational conditions of particular consumer groups, and second, see how these influence the choices that these different groups are able to make from the retail competition that is available locally at any given point in time.

Third, one issue that juxtaposes both household influences and retail influences on consumer choices, is the way in which retailers are themselves responding to the increasing lifestyle differences. Some, such as Tesco, see their job as "providing solutions" to people's lifestyle problems, offering different retail formats (e.g. Metro or Extra), and different kinds of goods (e.g. brands, own-label "value" lines and premium "finest" labels). Taken as a whole, how does such market positioning cut across the other criteria that potentially affect choices? Whether or not such positioning appeals to consumers is as much about choice as it is about "price" or physical accessibility. This "comfort factor" with the retail brand, whilst much emphasised by retailers, has been explored only very little by researchers and is central to the reality of consumer choice.

Fourth, the conceptualization we have begun to sketch out as a framework for investigating the reality of choices available to different groups of consumers brings with it some distinct methodological implications. One way of addressing this would be to focus in-depth qualitative research on households within a few selected streets with similar disposable income, and investigate how and why they have different retail repertoires and make different consumption choices. Are these explicable by demographics, household composition or, for example, more by intangible lifestyle differences? Another methodological experiment might be to map all the choices that are theoretically available to specific households (say within a ten minute drive time) and then map their effective choices (where they go now, in the recent past, and where they have at least thought of going). If some stores - which are theoretically "accessible" - are not even considered, then this has distinct consequences for competition policy. Such decisions may in a sense be hidden from researchers when decisions are made for reasons that were perhaps not considered. For example, Ley's work on turf territories arose because individuals clearly would not walk into the territory of other gangs - the boundaries of which were invisible to Ley himself (Ley, 1974).

Whilst the geography of the retail system is a fundamental source of re-ordering the time-geography of consumers' everyday lives (Pred, 1996), we contend that, in a particular locality, "real" choices will, in practice, be abrogated by some households because of their own situation, constraints and local conditions of accessibility. It is useful to conceptualise these two key influences in both space and time by thinking about how the local environment of exchange evolves within streams of macro- and micro-level changes, which links back to our earlier point about the complex interactions between policy arenas. At the macro-level, for instance, it is possible to paint a picture of increasing growth in concentration of provision in UK food retailing as a result of several sets of influences. If we go back to the early 1980s, we saw first an uplift in the volume of strategic new store development by UK supermarket groups, later marginally tempered by the entry of new limited range hard discounters from Europe. A tightening of the regulatory environment, however, occurred from the mid-1990s onwards, with the advent of the "sequential test"[2] as an attempt to constrain development in, or adjacent to, town centres. Since then, we have seen a wave of macro-level influences affecting retail competition locally: regeneration initiatives, format diversification by food retailers, the intensification of use of floorspace, and the advent of 24 hour/seven-day trading. Consumer choice has been directly affected at this broad level by increased pressures to "educate" consumers, developments and improvements in IT, marked increases in personal mobility as a result of the growth in car ownership, health initiatives (e.g. growth of organic markets), and a growing premium being placed on the locality in terms of opportunities for local pricing, local branding, and local sourcing. However, although retail competition may be largely determined at a national (or international) level in terms of changing patterns of provision, it is experienced at a micro or local level in terms of consumer choice.

At the micro-level - the arena within which competition and choice is played out - there has been myriad effects on competitiveness:

- the declining availability of space for development;

- consequent rises in land prices;
- growth and changing household structures affecting demand;
- changes in local labour market structures; and
- growth in crime, and so on.

In parallel with these local pressures, and against the background of macro-level changes, the broad dimensions of choice available to consumers have been marked:

- proliferations (in many cases) of planning permissions leading to a marked increase in the number of large new grocery stores in most locations;
- a resultant accentuation of the competition between the multiples and the declining independent outlets;
- increased variety of how to access different retail brands - through different store formats made available, but also through the increase in virtual access brought about by Web-based provision of most food multiples;
- huge increases in store attractiveness created by the expansion of product ranges possible in-store;
- intensification of price competition locally; and
- overall, a general increase in the quality of retail provision.

4 Contextualising the "food desert" debate

Set against such a backcloth of retail change, it is hard to argue these changes have had anything other than a positive effect on consumer choice. And yet, that is precisely what the "food desert" debate is itself doing, implying that such areas are essentially bereft of choice because of the spatial selectivity of retail development over time. The essence of any mature market (as retailing in the UK surely is) is that its spatial manifestations vary. Though all areas resemble a palimpsest with the present pattern overbuilt on history, it soon becomes obvious that not all areas are, or have been, equally well served, despite similar local conditions (Clarke *et al.*, 1994). Preliminary findings from our own ESRC-funded research project in Portsmouth demonstrate, for the most part, that mobile affluent consumers have ample choice of food stores in an area where no chain has market dominance. However, this is precisely our argument: that the effects of competitive development only really become apparent when we look at the micro-scale. Small wonder that when an ESRC funded research team came to study the topic of food deserts, they headed to an area of Leeds (Seacroft) originally built as a post-war council housing estate (Wrigley *et al.*, 2000-2004). Unserved by the market-leaders, the area had apparently ceased even to offer basic healthy food products. The residents, by implication, were bereft of choice (Whelan *et al.*, 2002; Wrigley, 2002; Wrigley *et al.*, 2002a). In our Portsmouth study, by contrast, which looks at a socially broader-based community over a wider area - we are starting to find evidence of more subtle effects of changes in competition because of an apparent abrogation of choice by those who have it. In short, there are abundant foodstores that the generally-affluent and mobile population could use - but many choose not to.

If we step back a pace or two from the evolutionary system that left parts of Leeds as a "food desert" (Wrigley *et al.*, 2002b), we can see that long-term change in food shopping provision has led to a pattern of fewer but larger stores (Clarke, 2000). Whereas, 50 years ago, the local consumer might shop around on foot for lowest prices among an array of small but proximal stores in their local town, this behavioural pattern no longer generally applies, and not just in so-called food deserts. In our research study area of Portsmouth, the generally good transport (road) links and the much increased availability of private cars means that shoppers have a wide range of stores from which they can choose. Generally, however, our results are showing many "real" choices are abrogated in favour of a store to which they are generally "loyal". The question is, given our earlier emphasis on the importance of the specificity of local social context, why? Our argument in this paper has been to put forward the perspective that changes in choice, over time as well as in space, are only "real" when the household situation is taken into account in terms of whether or not they are able to make choices that are effectively available to them. We suggested, for example, a way of testing this, by looking at how otherwise similar households within a given area have different effective store choice repertoires available to them by virtue of their social embeddedness.

To help answer the preceding question, we can draw off initial findings from the first phase of our Portsmouth study. We can conclude from initial findings that, in respect of this abundantly-stored area, the bulk of customers, seem to be contented, wealthy, mobile middle class consumers who are unprepared to divert greatly from well-established patterns when new retail choices arrive locally. We do not deny that there will be (and are) disadvantaged shoppers, but anyone who has wished to maintain that pattern of shopping-around on foot for lowest prices among an array of small but proximal stores in their local town will almost certainly feel disadvantaged today. More seriously, even 20 years ago in the same study area, we found examples of isolated individuals (often living in generally affluent areas) who had real problems - through age or disability, etc. - in getting to stores (Hallsworth, 1988). In Portsmouth, we do not expect to find a pure Leeds-(Seacroft)-style food desert, as characterised by others (Clarke *et al.*, 2002; Wrigley *et al.*, 2002b) even though the area does have a huge peripheral "Seacroft-style area" (Leigh Park) that was also originally built as a post-war council housing estate. Unlike the Seacroft area of Leeds, existing retailers in Portsmouth (the likes of Tesco, Iceland, Woolworths) have not left the area and in forthcoming research papers, we will be exploring and unpacking the perceptions and experiences of different "levels" of choice within the locality, for contrasting consumer groups.

To return to the point that we started this paper - the intersection of policy arenas that retail provision cuts across - the spatial/territorial nature of retailing is exemplified by recent empirical work in another food desert - New East Manchester. The trading impact of this store - the largest Asda/WalMart in Britain - is felt over a substantial distance and not just within the confines of the Government "New Deal" area in which it is located. Note, too, that a key agenda for the East Manchester New Deal partnership is to attract and retain higher-income households. This immediately begs the question of how one devises policies - including retail policies - that suit the needs of both affluent newcomers and of existing, long-term, poorer residents. Lloyd reports on a local teacher, employed in, but living away from the nearby town of Burnley who refused to return to shop there even "in full daylight on a Saturday" (Lloyd, 2002). If the spending of higher-income families leaches away from established centres then the remaining buying power cannot support the higher tiers of services and a cycle of decline sets in. The New Deal agenda, admirably, is to reverse this, by emphasizing the holistic approach. However, the notion that an area that is selected for special attention must necessarily be populated by the same people who work there is not one supported by Lloyd's example. Such spatial effects cannot be ignored - in New Deal areas or elsewhere. There is, we argue, a finely grained detail in the sphere of shopping choices. This may be ignored or undermined by national-level macro-policies of the "one size fits all" variety. One possibility is that the national scale may not be the right one from which to take decisions that impact differentially on localities.

5 Conclusions

We have argued in this paper that the "food deserts" debate can be enriched by setting the particular circumstances of these areas of very restricted consumer choice within a wider context of changing retail provision in other areas. We have also argued that consumers' actual experience of choice is as important as debates about the range of choices that are theoretically available to them. Consumers' actual choices are shaped by a wide range of social and cultural issues, as well as by economic questions of price/income and geographical questions of physical proximity. Our combined focus on retail competition and consumer choice shifts the emphasis from changing patterns of retail provision towards a more qualitative understanding of how "choice" is actually experienced by consumers at the local level "on the ground". While we are still in the process of collecting the empirical data to support this assertion, we feel this perspective offers the potential to broaden the significance of current debates about the specific circumstances of contemporary "food deserts". Our argument also has a critical impact on current policy debates where the emphasis on monopolies and mergers at the national level needs to be brought together with the planning and regulation of retail provision at the local, neighbourhood level. What might not appear to be a significant reduction in competition at the national or regional scale can clearly be experienced very differently at the local level. Above all, we argue that "real" choice is always located in specific contexts, defined in space and time, and that the experience of choice is always socially and spatially differentiated. We will be reporting on our empirical findings in this respect in forthcoming papers.

Notes

1 This is a new line of argument recently used, for example, by J. Sainsbury's in the battle for Safeway. Sainsbury's case for a successful bid for Safeway in the UK underlined that they will extend choice for consumers since the other bidders are all "high value" supermarkets offering a narrower range (The Telegraph, 14 January 2003), This contrasts with most arguments currently being put forward to the Competition Commission by the larger multiples, which stress the price benefits of given merger alternatives for the consumer.

2 In brief, the sequential test carries a presumption against out of town stores. Proposals for these need to be able to demonstrate that more central locations are not available: either on grounds that they cannot accommodate the size of store or the types of goods to be sold. Increasingly the latter is the criterion being adopted. This ensures that developers do not propose over-sized stores simply to justify their being out of town.

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Real choice in food grocery shopping' in Britain.

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European Retail Digest of December 2002 advised us that "Over the last decade only discounters have been able to achieve significant revenue growth".(ERD December 2002 p.51). The most casual observer of the retail scene in Europe would quickly realise that the author – Dr Axel Tenbusch – was most certainly not writing about Britain. Indeed he compared the situation in Germany, with Britain by noting that grocery prices in the former were on average 20% lower. Interestingly, it was - at least in part – just that sort of price comparison data that sparked the current British debate on the state of our market for food shopping. Soon, however, there were other factors brought into consideration. Market power of supermarket/ superstore operators, prices offered to small local farmers, the apparent permanent global summer time for food, food miles and eco-efficiency all became embroiled. What might be the competing influence of any or all of these factors in the name of better 'choice' for consumers? Are British consumers really being offered better choice compared to what was available in the early 1980s – and might that explain the price differential with Germany and other countries? Or are we simply not comparing like with like? Indeed, as we will shortly argue, can we generalise about Britain – always accepting that the Scottish market IS different?

Consumer demands that are relevant to their conception of choice – such as product diversity and safety - are not new. With increasingly faster changes in British lifestyles, new demands emerge ever more rapidly – to which the food industry responds. As described in Table 1, in Britain (as in most western societies) a large number of profound changes have taken place over the last 20 years. This has considerably reshaped households and thereby their grocery shopping behaviours. Paralleling this, debates on the power and importance of the supermarket chains that provide groceries have increased in significance.

Table 1: Main Changes influencing Western Consumption Patterns

- Declining birth rate	- Internationalisation of diet
- Ageing population	- Meals consumed out of home/ convenience
- Fall in household size	- Concern about food quality/ health
- Increasing female employment	- Concerns about environmental issues/ Food miles
- Increasing income inequality	- Concern about the morality of food production/Third world countries getting poorer
- Larger proportion of time-poor people	- Concern about all the above on the locality/ decline of small shops

In addition to the various points describe in table 1 a number of structural issues have emerged at local level and these may undermine a national vision of choice. Changes have insidiously developed over time as such market changes are played out. We consider that these now need to be addressed as they are clearly influencing the notion of ‘real choice’. People are often described as having a ‘repertoire of meals’ (preferred menus) and a ‘repertoire of stores’ (stores that they are aware exist) that they choose to use or not or to patronise (Marshall and Anderson, 2000). However, shops that are not present anymore or existing ones that are not known due to information asymmetry cannot be considered in such repertoires. Individuals and households face a constantly-changing choice landscape that is ignored when change is dealt with at an abstract level. Fewer and fewer alternatives, if any, to supermarket shopping are now available. For example in 1985 there were over 23,000 “High street” butchers in the UK, by 2000 only 9,721 were left (Blythman, 2003). From a product point of view, since 1970, 60% of UK apple orchards and 50% of pear orchards have disappeared. Is this leading to a reduction in real choice – with imports of exotic fruits as substitutes? (Sustainable Development Commission, 2001). To provide this ever- increasing variety of products available on large store shelves the average supermarket trolley of food has now travelled 3000 miles during delivery: an increase of 50% between 1978 and 1999. This sheds light on the often hidden costs in the distribution system as well as the pressures that may now be put on third world producers (Bark, 2003).

Perhaps confusingly, some see more choice as synonymous with less variety! According to the *Which Wine Guide 2002?* ‘Britons are drinking an increasingly bland range of wines…..supermarkets routinely stock vintages from 20 countries, but the flavours are homogenous and tailored to meet demand of the mass market’ (Kelso, 2001). That same interpretation can be applied to fruits. While the range and variety of non-domestic products is increasing, easy-retailing varieties comprise the bulk of the offer. ‘Welcome to a perfect world in which, in the name of consumer choice and public health, the irregularity and diversity that are part of the natural order have been eliminated to fit ways our large retailers like to do business’ p 20 (Blythman and Newton, 2002).

Moreover, many press articles have recently underlined other areas of apparent unsustainable behaviour. Many have expressed opinions on actions such as loss-leading prices, price flexing, GM food content, hormones/water-stuffed meat, battery eggs and poultry, shelf space pricing (hot spot prices), alleged coercive and abusive business practices, e-auction or e-tender with competing suppliers, lack of local sourcing (i.e. 30 miles radius of a branch), over-riders (upfront payments often for the privilege of being on the retailers' list), out of town location policies etc. Media attention serves to highlight such activities – even if their influence (and even existence) is frequently hard to determine.

While most leading retailers convincingly argue that they give customers what they want (and that they spend a lot of time and money sourcing innovative products), do British consumers really feel that they are benefiting from a vast array of safe, high-quality food?

Though a bleak picture can always be portrayed, a more positive side is also present and is increasingly important. Local-produce initiatives are encouraged; for example Waitrose won the 'local' award this year, while Somerfield now has a 'local logo'. M&S has also demonstrated over the years that innovation leading to better choice is possible with the development of its chilled as opposed to frozen range, flavour-grown vegetables, recycled packaging material (sandwiches in cartons); showing the willingness of retailers to dispel the image described above. The ever-popular 'buy British' campaigns (whatever the motives) are now encouraged and supported by most retailers.

While we cannot answer all of these questions, the remaining sections offer a flavour of an ESRC-funded[1] study on the effects of long-term expansion of modern food superstores in Britain and present some preliminary results. The aim of the project is to explore how retailers' cumulative competitive activities of store development and marketing coupled with changing household situations (lifestyle, affluence, mobility and so on) affect the potential food choices available to consumers at the local level. The research will thus inform business and policy-makers at a time when further consolidation in the industry is expected.

Our project (based in Portsmouth, England, for the pragmatic reason that the same area was surveyed 20 years ago (Hallsworth, 1988)) permits a unique analysis of change over time. This is a period over which Britain has experienced a 'retail revolution' with an ever-increasing concentration of retail power in the hands of the big four supermarket chains (Clarke, 2000; Flavian, Haberberg *et al*, 2002).

The policy context of our work is the recent Competition Commission report (2000) on British retailing which concluded that "whether or not consumers have adequate choice will depend very much on **local** circumstances which will vary widely from area to area" (Competition Commission, 2000)(our emphasis). This local aspect suffuses our project which explicitly examines the local impact of recent retail change: approaching the issue of competition and choice from the perspective of individual consumers and households. This approach is one which the Competition Commission commended (but could not pursue at the time). It is believed that in future the Competition Commission will itself place more emphasis on the local

[1] We gratefully acknowledge funding from the Economic & Social Research Council (ESRC) for the three year research project on which this paper is based (Grant Reference No. R000239531; 'Retail Competition & Consumer Choice: Long-term change and household dynamics').

effects of change. Our project also combines quantitative analysis of large-scale survey data with qualitative analysis of a more ethnographic kind at the household level.

To stress the importance of local factors, we briefly consider some recent academic work that has focused on 'disadvantaged consumers'. This term includes those with no access to private transport and living in areas of low retail provision (so-called 'food deserts') (Wrigley, 2002; Wrigley, Cliff *et al*, 2002). Such research is deliberately focused on clearly-identified, highly-localised, pockets of retail deprivation where the shopping repertoire is extremely limited. The situation in Portsmouth is rather different, with branches of all of the main supermarket chains (Asda/Walmart, Safeway, Sainsbury, Waitrose and Tesco). There are some relatively disadvantaged consumers -- mostly elderly people without access to a car, living in suburban areas with poor access to public transport -- but most consumers have ample choice of (almost equidistant) stores. In these circumstances, explaining people's consumption choices involves a range of other considerations including conventional retailing notions (like accessibility, convenience, range and price of goods) but also more 'cultural' notions (like taste, lifestyle and identity) (Miller, Jackson *et al*, 1998).

Most retail research concentrates on the point of sale with analysis based on the assumption that consumers are isolated individuals with complete knowledge and unlimited time. Our perspective is very different and focuses on *shopping as a socially embedded practice*. Consumption is closely related to subjective notions of identity, involving judgements of taste, quality and value as well as questions of price, accessibility and convenience. Traditional consumer typologies (based on socio-economic or demographic criteria) are of decreasing value, given the complex nature of contemporary households and consumer 'lifestyles'. In practice, this means we are trying to relate people's at-store behaviour to wider social contexts, changing household composition etc.

The survey area:

The first map shows the study areas with the location of stores in the Portsmouth study area. A mix of out of town and town centre provision is present. In phase one of the study a replication of the 1980s questionnaire was conducted - leading to 2500 respondents being surveyed at store in June 2002. The stores' catchment areas, as can be seen, spread over the whole of Portsmouth and following the main road arteries. Our stores are situated North of Portsmouth in an area principally covering the areas and neighbourhoods of Paulsgrove, Wymering, Cosham, Drayton, Farlington, Purbrook, Waterlooville, and Horndean. In total, seven stores were surveyed compared to 3 in the same area in the 1980s.

Some interesting preliminary analysis shows an evolution in shopping habits compared to the 1980 survey as a result of this change in shopping provision. More people are now reaching their "chosen" store by car whilst at the same time they are often living closer to their main store. This apparent contradiction can in part be explained by housing expansion into areas near established stores. In addition, the majority of respondents nowadays shop alone - which questions the positioning of most stores as ‘family stores’ – but which can partly be explained by greater car availability. 80% shop once a week or more - underlining the increasing trend for the main chains to be used for both main and top-up shopping. People have also adapted to the extra services offered by the retailers and shop regularly on Sundays or late evening (even 24 hours in several cases) while using an increasing quantity of extra services such as the petrol station and cafeteria during their trips. The idea of loyalty to a main store is explored and this shows some loyalty to a brand fascia while at the same time demonstrating the regular usage of a repertoire of stores. “Cherry-picking” attitudes, promotion-sensitivity or recognition of product specialisation by certain stores characterise an increasingly well-informed and aware consumer base.

Map 1: Store locations and catchments densities

A second phase of the study was designed to test respondent attitudes to change over time. Map 2 shows the areas surveyed by our postal questionnaire. Whilst routine is an ever-present characteristic in the grocery market (as FMCG are consumed on a regular basis) stability has to be contrasted with household evolution in the local environment. The different neighbourhoods show different sensitivity to the various variables analysed. These include perceptions about the small shop sector, price, shopping enjoyment, access and quality. Again this demonstrates that one over-arching national policy is not necessarily applicable at every local level.

Map 2: Survey areas

A third phase currently being undertaken adopts a more qualitative approach. Households are being investigated using accompanied shopping trips, food shopping diaries, kitchen observations and interview techniques. What is becoming clear from the data is that shopping practices are embedded in people’s social lives and governed by cultural questions of taste, value and quality as much as by economic questions of price. Shopping is normally viewed as a common activity of everyday life, and reasons for choice are not necessarily clear in people’s minds. Shopping is generally dominated by habit, custom and, again, by a rather mechanical routinization. That said, there may be ‘occasional sorties’ to other stores and/or ‘flirting’ with new brands, all fitted in around other activities (children, work, access to transport etc), and organised around weekly rhythms and routines (payment of family credit, pay day, availability of transport etc). Our aim is to discover the meaning of people’s shopping practices, feelings (likes and dislikes) and perceptions (eg. descriptions of food in value-laden terms like treats and rewards, ‘decent’ coffee, junk food, 'freshness', or "a nice salad"). These familiar – but often neglected - terms will also be instructive in our understanding of how real local choice is exhibited.

Conclusions.

In conclusion, let us first return both to Germany and to our vision of "more 'cultural' notions like taste, lifestyle and identity" and the adaptation of consumer to longer opening hours. The latter in particular would stand out as anomalous in Germany where, as Dr Axel Tenbusch pointed out, law on " the price-boundary of the second hand" has but recently been changed. This law is a relative of Britain's Resale Price Maintenance – abolished nearly forty years ago. Shopping hours are a regulatory factor – but also reflect Britain's "long-hours/low-wage/flexible work culture". Arguably, without such retail-market "liberalisation", many workers would be hard pressed to shop at larger out-of-town centres that now dominate the retail landscape. Accordingly, our approach is seeking the broadest possible remit – to identify how long-run changes that are embedded in social and cultural practises can lead to retail landscapes as different as those of Britain and Germany. What we reject is the notion that any one factor in isolation – a change in planning or building law – can explain the range of change. Long-term change can only evolve from a complex of forces covering all the aspects we have discussed – and more that are yet to emerge. As a final tilt at policy agendas consider again our assertion that one over-arching national policy will not be equally applicable in every locality". This observation – by which we stand – suggests a beneficial future role for Regional retail regulation: in contrast to the nationally-based system currently in use.

For more information on our project 'Retail Competition & Consumer Choice: Long term change and household dynamics' please visit our web page at:
http://www.lums2.lancs.ac.uk/rccc

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