Retail Restructuring and Consumer Choice 1:

Long-term local changes in consumer behaviour: Portsmouth, 1980-2002

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Abstract

Over the last two decades, fundamental changes have taken place in the global supply and local structure of provision of British food retailing. Consumer lifestyles have also changed markedly. Despite some important studies of local interactions between new retail developments and consumers, this paper argues that there is a critical need to gauge the *cumulative* effects of these changes on consumer behaviour over longer periods. In this, the first of two papers, we present the main findings of a study of the effects of *long-term* retail change on consumers at the local level. The paper provides an overview of the changing geography of retail provision and patterns of consumption at the local level. It contextualises the Portsmouth study area as a locality that typifies national changes in retail provision and consumer lifestyles; outlines the main findings of two large-scale surveys of food shopping behaviour carried out in 1980 and 2002; and reveals the impacts of retail restructuring on consumer behaviour. Despite significant retail restructuring, the research reveals a surprising degree of behavioural inertia; it also underlines the strengths and limitations of survey research in understanding this phenomenon. The paper ends by problematising our understanding of how consumers experience choice at the local level, emphasising the need for qualitative research – the topic of our complementary second paper.

Key words: Retail restructuring; consumer choice; long-term change; food retailing; Portsmouth

Introduction

This paper confronts the neglected issue of how ongoing retail development over long periods has affected consumer choice at the local level. In commenting on these emerging corporate geographies, we argue that there has been a tendency in existing research to play down what these changes mean for the consumer, as noted by Wrigley (1998a). In order to address this, we attempt to unpack the relationship between these new geographies of retail store development and their impacts on consumer choice to stimulate a stronger connection between debates on the ‘new economic retail geography’ (Wrigley & Lowe, 1996) and changing patterns of consumption and consumer culture (Belk, 1995; Miller, 1995). Connecting these two themes serves to problematise the notion of ‘choice’, emphasising how it has been used rhetorically to suit shifting political agendas and as an increasingly prominent element of government policy over the past 20 years, particularly in relation to food retailing. Thus, we believe that it is important to see ‘consumer choice’ as a contested term that suits a variety of ideological persuasions. To deal with the complexities surrounding the term, we advocate that how different consumers themselves *perceive* and *experience* retail options and how these new, often very large, outlets affect existing retail provision, is central to understanding the ‘real’ benefits of retail development to consumers. This paper, together with our complementary paper that follows (Jackson et al., 2004) summarise the principal results of a major research project in the Portsmouth area over a twenty year period and, as a result, question the simplistic equating of shopping with buying – the exchange of money for goods, which is as much an habitual as a problem-solving activity. In the two papers we contend that ‘real’ consumer choice needs to be explored not just in terms of the normative retail provision in a locality – where choice can be viewed in absolute terms – but also spatially and socially at one and the same time. This is a perspective of choice which is much more complex than has hitherto been portrayed, and our findings underline the need to explore such changes in both quantitative and qualitative terms over a long period.

We set out our first paper in four sections. First, as a backcloth to the paper, we provide an overview of the key features of retail restructuring over the last 20 or more years and interpret the implications for consumer choice. Second, we use a focused appraisal of the only two major published studies to date that have attempted to relate retail development to changes in consumption patterns to underline the type of research that is needed. We use these key works as a vehicle for drawing out the methodological issues that are to be confronted. The third section of the paper contextualises our Portsmouth study area, outlining the way in which local lifestyles and retail provision have changed since 1980 and showing that this pattern is fairly typical of national changes. We outline how we employed large-scale quantitative surveys in 1980 and 2002 as the first stage in assessing how the broad patterns of consumer behaviour have changed over the long-term. In the final section we discuss the insights provided from these initial phases of our research, but also highlight the limitations of such methods in providing a rich understanding of consumer choice. We show that, despite substantial retail change, the key dimensions of store choice have tended to remain relatively stable over a twenty-year period. Consequently, we criticise these dimensions – typically used by food retailers to justify consumer satisfaction – as a means of providing adequate insight into real consumer choice engendered by retail change. The concluding section of the paper calls for alternative methods that will provide richer insights into how consumers experience retail outlets. Then, in our second paper, we show how the qualitative phase of our research with households in Portsmouth serves to problematise taken-for-granted assumptions about what choice *really* means to consumers and what new dimensions of choice need to be emphasised in future research.

Retail Restructuring and Consumer Choice

Over the last 20-30 years, the scale of change in grocery retailing in the UK, as elsewhere, has been driven by competition between, and market concentration towards, a few multiple chains. In general such changes have been heavily influenced by a physical relocation away from established city centre stores to free-standing outlets in off-centre locations, accompanied by fierce rivalry over sites between the current major 'big four' rivals (Tesco, J. Sainsbury, Asda-Walmart and Morrisons/Safeway) (Burt & Sparks, 2003; Clarke, 2000). Indeed, the ongoing moves by regional multiple Morrisons to absorb the larger Safeway chain present an interesting sub-text to our work. Other major developments affecting retail provision include the entry of foreign rivals promoting price competition (e.g. 'hard' discount firms such as Aldi, Netto and Lidl) (Burt & Sparks, 1994) and a massive rise in site acquisition costs as a result of firms having 'sunk' capital into strategic locations to stave off rivals locally (Wrigley, 1994; Wrigley & Lowe, 1996). Huge gains in efficiency and quality were led not only by the economies of scale and scope available from larger off-centre stores, but also by massive investments in IT systems (e.g. EPOS, EDI) (Dawson, 2000). Sector concentration has been fuelled by a combination of 'organic' store expansion, acquisition and merger activity and the creation of new formats (Baden-Fuller, 1985; Sparks, 1993) – activity that has been charted extensively by Wrigley (Wrigley, 1994; 1998b; Wrigley & Lowe, 1996). Central to this restructuring of the sector, therefore, has been a drive to improve the *quality* of retail floorspace (in terms of its age and attractiveness) via investment in existing outlets and new stores. This was a further key to retailers maintaining their local competitiveness (including their return to many high streets), as discussed elsewhere (Langston, Clarke, & Clarke, 1997; 1998).

Even though it is clear that retail outlets provide 'a space where everyday life meets the machinations of capitalism' (Clarke, 1996) we believe that the connections between these two debates remain under-developed, an issue highlighted elsewhere (Miller, Jackson, Thrift, Holbrook, & Rowlands, 1998). How consumers use these stores, and the new knowledge they require in order to do so is, we contend, central to an improved understanding of the impacts of retail change over long periods of time. The globalisation of retailers' supply strategies has served to reinforce their ability to compete in local markets (Clarke, 2000; Cotterill, 1986; Dobson & Waterson, 1996; Marion, Mueller, Cotterill, Geithman, & Schmelzer, 1979) and, coupled with growing national market concentration, these developments have had a fundamental effect on the power of retailers (relative to consumers) in any given locality. Food retailers' large stores now have the potential to draw trade over larger catchment areas as a result of their pricing structures derived from national (and increasingly international) operational economies of scale and buying power (Burt & Sparks, 2003; Guy, 1990). They might thereby drive out other forms of local competition, as evidenced in the decline of small independent chains and stores (Clarke, 2000; Dawson & Kirby, 1980). At the same time market leaders such as Tesco and Sainsbury have also begun a return to more central shopping locations using new convenience store formats (Hallsworth & Bell, 2003) thus further pressurising the independents and smaller chain stores (e.g. Londis, Spar, Coop, Cost Cutter etc). Retailers' own product brands (including non-food areas) have also become a powerful vehicle for them to exert their presence locally and, when retail fascias gain standing as 'brands' in their own right, consumers can effectively 'lock' themselves into a particular retail format, thereby potentially reducing their field of 'choice', or voluntarily abrogating choice.

It is important, therefore, to emphasise that consumer choice is a contested term that suits a variety of ideological persuasions. Du Gay, for example, argued that, 'in an enterprise culture', consumers are regarded as autonomous, self-regulating individuals (DuGay, 1996). It is not surprising, therefore, to see that, in terms of consumer principles, Lawlor describes 'choice' as *the most precious of all consumers' rights* (Lawlor, 1989). The National Consumer Council argues that the principle of free choice is justified economically in terms of market efficiency. By exercising choice, consumers reward those producers who meet their needs most effectively and exercise a powerful sanction against those who do not. Thus, where there is effective competition, consumers' choices will promote efficiency (National Consumer Council, 1979). Choice has also been justified morally in terms of respect for individuals as responsible decision-makers (Straughan, 1992). From this perspective, the opportunity to choose can empower an individual and enhance self-esteem, as well as provide an opportunity for self-expression and the reinforcement of identity. Thus, Straughan argues, 'choice' provides consumers with options, and the opportunity to exercise control over what, where and how they buy and how much they pay: it can enhance democratic feelings in a society by promoting the notion of the equitable availability of facilities and services.

More critically, however, it is possible to view 'choice' as a rhetorical device that can be used to suit shifting political agendas. Consequently, the notion of consumer choice – and inequalities in such choice – has become increasingly prominent in government policy over the past 20 years, particularly in relation to food retailing (Davies, 1999). Much of the initial concern arose from the impact of out-of-town superstores on town centres, but in the late-1990's the issue of choice and access to food stores featured centre-stage in New Labour's attempts to tackle social exclusion and inequalities in health (Social Exclusion Unit, 2000). In 1999 the government set out its commitment to place consumers 'centre-stage' in policy-making in striving to ensure consumers gained a fair deal, greater choice and better information with which to make *'informed choices'* (Department of Trade & Industry, 1999). In 2000, the Competition Commission identified local markets with too few stores or too heavy a reliance on few retail brands, and recommended that consumer choice needed to be *'increased and fostered'* (Competition Commission, 2000). Since 2000, issues relating to retail exclusion, the availability of a wide range of shops, and easy access have also become the main focus for retail planning policy (Raynsford, 2000). From this more critical perspective having 'choices' does not, necessarily, mean consumers personally have more power – instead, agencies acting on behalf of consumers may get more power (Marsden, Flynn, & Harrison, 2000; Marsden & Wrigley, 1995; Marsden & Wrigley, 1996)

Given these debates about what constitutes 'choice', we argue that how different consumers themselves *perceive* and *experience* new retail options and how these new, often very large, outlets affect existing retail provision, is central to understanding the 'real' benefits of retail development to consumers. Consequently, rather than viewing competition as a surrogate for choice – as has tended to be the case in regulatory circles – we reverse this relationship and propose that, since competition is now so complex, consumer choice can be used as a yardstick to judge proposed developments that affect retail competition. In short, how consumers truly experience competition – as reflected in the choices they *feel* they have – ought to provide an important guide to regulators of the sector at the local level. Understanding how local consumer choice is affected by retail developments over long periods is the challenge addressed by our three-year project.

Specifically, our study set out to address four related questions. First, in what ways has the geography of retail provision in our study area (Portsmouth) altered over the last twenty two years? Second, how have such developments affected consumer choice at the local level? Third, to what extent do consumption patterns, measured in terms of purchasing behaviour and perceptions of different forms of grocery provision, vary significantly at the neighbourhood and household level? (And have these perceptions changed over time?). Fourth, how do consumers experience these effects through the choices they have available?

As a starting point, our project took Pred's (1996) lead and attempted to reconnect the study of changing retail geographies with the richer genre of research that emphasizes the socially and culturally embedded nature of consumption. Following Pred, we stress the importance of developing a much fuller understanding of how current retail choices by consumers are constrained or 'routinized' as part of their everyday lives, and how new retail developments work to disrupt such relationships by requiring consumers to reassess existing perceived benefits against new choices they now have available. Do retail developments really lead to a perceived benefit/improvement in consumer choice? We argue the extent to which choices are 'real' for consumers will depend on the ability of different groups of consumers to make these new choices, influenced as they are by social and geographic situation. Making this connection between competition and experiential choice within a locality will provide a counterbalance to the dominant economic models of choice, which reduce consumption to purchasing decisions – monetary exchanges – thereby ignoring the socially-embedded nature of people's actual shopping practices (Fine, Heasman, & Wright, 1996). Rather than starting from the premise that individual consumers are 'isolated' actors, who have 'complete' knowledge, and make choices 'freely' – we pursue an approach to competition grounded in the 'real' choices that consumers make within a particular geographical and social context. This is especially the case when their knowledge about the market is partial since their actual choices are, to a large extent, determined by the constraints that surround their lived experiences of the available retail provision. In short, our perspective is to approach retail competition through the effect it has on the social practice of grocery shopping: on how consumers use stores. Following research in the consumer tradition, we argue that choices emerge from the experience of competition. Potential choices are not, however, necessarily followed through into the decisions individuals make. Arguably, the main reason for this is that people shop in, and for, households and families, rather than as 'individuals'. We stress here that retail competition needs to be addressed through a qualitative understanding of consumers '*in situ'* – and paying more attention to experiential dimensions of grocery shopping (Belk, 1995; Campbell, 1995). From this perspective, for individuals, the reality of consumer choice is less about the 'economics' of shopping – which, for example, tends to privilege price over other aspects of choice – and more to do with the lived experience of consumers and how they interact with the retail outlets that are provided – or which are lost or which have been replaced by businesses who do not exclusively sell food-related products.

Our research questions the unproblematic equating of shopping with buying – the exchange of money for goods – since there is now ample evidence to show that consumption is as much an habitual as a problem-solving activity (Hewer & Campbell, 1997). Indeed, recent work by Warde and others (Gronow & Warde, 2001; Shove & Warde, 1997) has highlighted the routine nature of 'ordinary' (as opposed to 'conspicuous') consumption. While their work focuses on the consumption of utilities (water, coal, gas and electricity), their argument can be extended to encompass the mundane nature of everyday food shopping. Warde argues that ordinary consumption practices are enmeshed in a network of related practices and habits, where notions of comfort, convenience, security and normality are governing concerns (Shove, 2003). From such a perspective, food shopping emerges as a routine practice, deeply embedded within other social practices, infrastructures and socio-technical systems.

Our own recent work (reported in the subsequent paper) confirms that the vast majority of food consumption ‘choices’ are indeed routinized and habitual practices, deeply embedded within the rhythms of family life and sometimes highly constrained – not least by the availability of appropriate transport opportunities.

Methodological Considerations

How then, does the changing geography of retail provision intersect with consumers’ choice at the local level? We begin our argument by comparing two recent studies of retail development and consumer choice at the local level. The studies to which we will refer are the anthropological study of Brent Cross and Wood Green shopping centres in North London (Miller et al., 1998), and the more recent investigation into the effect of retail-led regeneration within a ‘food desert’ in Leeds (Wrigley, Guy, & Lowe, 2002; Wrigley, Warm, & Margetts, 2003; Wrigley, Warm, Margetts, & Lowe, 2004).

The principal difference between the North London and Leeds studies is that the former focused on two well-established sub-regional shopping centres, whereas the latter emphasised the impact of replacing a small and dated community shopping location/parade with a single large and state-of-the-art retail hypermarket. For Miller *et al*, what mattered about the retailing locations of Brent Cross and Wood Green were the role they played in shaping the social identity of the communities they served. They combined traditional questionnaire surveys at the point of sale with focus group discussions in surrounding neighbourhoods and a year-long ethnography of a single street. Using methods from geography and anthropology their aim was to ground “our understanding of contemporary consumption in the lives of ‘ordinary consumers’… letting their voices be heard through transcriptions from our focus groups and ethnographic observations” (Miller et al., 1998 p.ix). By contrast, Wrigley *et al*’s study of the regeneration of a ‘food desert’ in the Seacroft area of Leeds, was on a much larger scale and quantitatively rigorous. It highlighted the causes of a perceived worsening of access to food retail provision in poor neighbourhoods. This important study shed light on consumer perceptions of retail change in respect of alterations to their revealed food consumption patterns (using a food diary method) –

that is to say *diet* before and after a watershed retail development (Wrigley et al., 2003). The respective emphasis of the two studies underlined the importance of exploring more fully both existing *and* new retail provision.

The second key difference between the two studies is the attention given to the process of shopping and the meaning attached to it, in the case of the North London research, compared to the attention given to the tangible outputs of shopping in terms of the products people purchased in the Leeds research. Although the Leeds study included some qualitative fieldwork (in the form of focus groups and diaries), the purpose of this was to 'flesh out' the quantitative insights and elaborate the impact of changes in shopping provision on the particular purchasing patterns of different social groups.

A third major difference between the two studies is reflected in the attention they gave to the *social* and *spatial* situation of consumption: with the North London research privileging social context and the Leeds study giving priority to spatial context. In contrast with Miller *et al*, the collection of papers from the Leeds study placed much greater emphasis on the effect of the spatial context of consumption, drawing attention to how new retail development alters the *accessibility* of shopping opportunities to households and individuals. Clarke *et al*, for example, in background research supporting the Leeds intervention study, attempted to quantify 'patterns of access' to food retailing in two urban areas of Leeds/Bradford and Cardiff using a locally based mapping approach on a city wide model basis, taking into account households from different social classes and quality of retail facilities (Clarke, Eyre, & Guy, 2002). Comparing the two studies, what is interesting – despite their very different methodologies – is the attention given in the North London study to social situation within an implicit spatial emphasis, and attention in the Leeds study to spatial situation with an implicit social emphasis. Neither of the studies, however, attempted to overtly bring together the interplay between social and spatial aspects of retail competition and consumer choice over time. Our conclusion, therefore, is that future empirical research would benefit from looking at how established retail outlets are used and how new retail developments impact on existing patterns of behaviour. It should emphasise both the process and meaning attached by consumers to their shopping experiences as well as the broad situational and behavioural dimensions of shopping that the larger-scale quantitative type of survey is best positioned to elicit. Our research in Portsmouth was designed to capture both sides of this dialectical process.

It is clear from our comparison of these two major studies that they illustrate the benefit of looking at the interactions between the social and spatial contexts of consumption. Whilst we can identify these conceptual dimensions separately, it is evident from both studies that ‘real’ consumer choice is affected by their *inter-relationship*. However, neither study was strictly designed to unravel this link: the ‘food desert’ research underlined the importance of physical and economic access whereas the ethnographic approach gave more nuanced insights into how choices can be differentially perceived and experienced by a range of consumer groups. The latter was possible not least because of the extensive trade “draw” of the two major shopping centres under study. Inevitably, neither of the studies drew attention to *long-term* cumulative change to retail provision resulting from fierce competition at the local scale, although a recent study by Clarke and Guy has begun to examine the development of food deserts in Cardiff over the longer term (Clarke & Guy, 2004). What is missing, however, is research that ascertains how long-term retail change interplays with changes in household dynamics in the localities within which these structural shifts in retail provision were themselves embedded. Again, a combination of approaches would help to provide a fuller understanding of how retail competition is experienced through changes in provision. Our Portsmouth study offers this possibility and provides insights into the role of goods and their social relations, within particular places, as well as highlighting the ramifications for consumers themselves in terms of the function of shopping sites and the ‘distinctions which emerge from the experience of these spaces’ (Miller et al., 1998, p.19).

Food shopping in Portsmouth, 1980-2002

Whilst it was never anticipated that the original Portsmouth surveys, using a methodology piloted in the area from 1979 onwards (Hallsworth, 1988), would be repeated again more than two decades later, the existence of such a large-scale dataset provided us with a unique opportunity. We could revisit the area and replicate the study in order to provide a long-term perspective on the relationship between consumer behaviour and retail provision. The crucial contrast with the Leeds Seacroft study area – which also examined the food superstore market – is that in Portsmouth large store numbers have risen substantially. Like the Leeds team, we have to cope with the fact that store provision has changed – but in a different way. We now illustrate some broad aspects of change in the intervening years.

In terms of lifestyle changes, it is informative to look at some indicators that put our Portsmouth/Havant study area in context. Table 1 shows selected indicators which illustrate that national lifestyle changes experienced since 1981 are closely reflected in Portsmouth – albeit that there are slightly more elderly residents, more families with children and lower levels of car ownership and unemployment – the trends are broadly in line with changes at the national level. Critically however, for the food retail sector, the data also illustrate the huge increases in car ownership levels – especially households owning two or more cars, which have, for the bulk of the population, potentially made free-standing retail outlets much more readily accessible at any time. Portsmouth then, in terms of demographic and lifestyle changes, effectively represents a cross-section of what has come in political circles to be seen as 'Middle England'. A central thesis of our paper, however, is that despite these broad similarities and trends, what really matters is the degree to which local population and lifestyle differences have interacted with the choices that such groups have in particular places. We will intimate later – and show more fully in our second paper – that to understand the full effect of these local differences in social circumstance and spatial situation, it is necessary to look in much greater depth at how household consumption is situated in, and affected by, local circumstance – how choice is embedded within quite different lifestyle situations. To indicate this, Table 2 shows our four study sites within the Portsmouth area using ward area statistics. These range from the upper-middle class areas of Cowplain and Drayton – both with average household incomes of around £30,000 in the 2001 UK Census, through to Stakes and, especially Paulsgrove, which have average incomes almost one third lower on average. Deprivation indices show that Cowplain and Drayton are areas both in the upper quartile relative to other UK localities, whereas Paulsgrove is in the bottom five per cent. By contrast with the original 1980 study, the extension to four sites was possible – and appropriate – to reflect the growth in new stores and to include groups more contrasted in lifestyle than was possible in the original study. Statistics are indicative of general wealth as well as the potential ability or inability of our groups to access free-standing retail outlets. These data show, too, that Portsmouth is not only fairly typical, in demographic and lifestyle terms, of the UK as a whole, but that the study area also exhibits many of the major *differences* in situation experienced among contrasting social groups. The latter may be a legacy of the fact that Portsmouth, as Britain's premier naval dockyard, has long offered a range of manual and semi-skilled job opportunities to residents of the area.

[Insert Tables 1 and 2 about here]

In respect of retail development, over twenty years ago, southern England was facing a retail watershed as food superstores – well established in the north – began to be developed. It is particularly noteworthy that the new Asda-Walmart chain was in the vanguard as it has often been claimed that the south of England has disproportionately fewer Asda stores than elsewhere. This proposition does not hold in the Portsmouth area – it has long had a full range of major national store fascias – another reason why it is an excellent study area. In response to a request for policy-relevant information on the Portsmouth area, a short rolling series of store impact studies followed (e.g. Hallsworth 1981a, 1981b). The original studies covered the behavioural patterns of shoppers using three new superstores – owned by Asda at Waterlooville, the Co-op Hypermarket at Havant, and (somewhat later) Safeway at Anchorage Park – as their use became embedded in the locality from 1980 onwards. In the following twenty years, several additional new stores were opened in the immediate locality of north Portsmouth/Havant. A smaller existing District Centre Tesco store at Cosham was joined in 1995 by a nearby, large Tesco Extra hypermarket store at Portchester (sometimes also referred to as North Harbour), J. Sainsbury developed a free-standing outlet at Farlington (1992), Waitrose relocated from smaller premises in Cowplain to a district-centre store at Waterlooville (2000) and an additional Safeway store was built at Horndean (1995) following the store built at Anchorage Park (1986). In addition, another major change in retail provision occurred with the subsequent Asda purchase of the Co-op Hypermarket, one of the original study stores. Its conversion – by total rebuild - to a new Asda/WalMart store followed WalMart's acquisition of the UK company in June 1999. In terms of store losses we should note that the regional

Co-operative group not only sold off its flagship store but restructured to a convenience format. Thus it downsized many supermarkets (it had once had a supermarket in Waterlooville district centre – as had Tesco: who also left). Finally, the abandoned Waitrose outlet in Cowplain became a Lidl discount outlet.

[Insert Figure 1 about here]

Whilst these changes in retail provision within our study locality represented a very significant overall increase in the number of large stores for local residents to choose from, this broad pattern and increase was far from exceptional – in many respects it was typical of trends in the UK. Market data from the Competition Commission Report of 2000, for example, shows that the current Portsmouth concentration of market within the superstore sector equates roughly to the average in UK terms. In terms of relative market share concentration measured by the Herfindahl-Hirschmann Index[1] for the Portsmouth postcode region is 1845, only slightly less than the UK weighted average for all postcodes of 2135. In terms of the provision of large grocery stores relative to population, Institute for Grocery Distribution statistics permit comparisons of population for our study area in Hampshire, with the South East region as well as the UK as a whole (see Table 3) (Institute for Grocery Distribution, 2000). Historically, the earliest data for Hampshire available from the IGD (1987) shows the County had a slightly higher representation of large grocery stores per head of population (18,100 per store over 5,000 sq. ft.) than the UK (22,600 per store over 5,000 sq.ft.). As a result of the expansion in store numbers similar to those outlined for Portsmouth above, by 2000 Hampshire's profile had become very similar to the UK average profile, particularly in relation to the number of superstores (over 25,000 sq.ft. sales area).

[Insert Table 3 about here]

The first quantitative phase of our research, undertaken in 2002, repeated the principal elements of the 1980 study. This consisted of an exit survey of shoppers leaving the seven stores in the study area, designed to elicit insights into the differences between the behaviour of consumers at each store. We also repeated the smaller at-home survey of selected neighbourhoods in a ‘zone of indifference’ central to the two main original stores. As noted, in 2002, we added two further areas – each at a similar distance from major new stores subsequently developed and offering a wider range of household types. The purpose of the second survey was to elicit how the various stores were perceived by residents. We return to these attributes later in the paper.

The at-store survey consisted of 40 questions: in the studies from 1980, 2,472 questionnaires were completed compared to 2,515 in 2002. On both occasions, customers were questioned by locally-knowledgeable interviewers. The themes included store accessibility and general descriptions of their shopping habits. Surveys in 1980 and 2002 were conducted in a typical trading week at the same time of year – just prior to the summer vacation in June, using accepted industry guidelines on sample design to ensure representation of opening times and spread of trade across the week. Interviewees were selected on a random basis to prevent self-selection. As is normal with such studies – and in line with the earlier 1980 survey – our 2002 survey observed slight biases towards female and older respondents.

The second phase of the quantitative survey conducted a study of attitudes towards stores and grocery shopping behaviour in the study area and was administered in the central part of the study area in June 2002 leading to over 400 responses (out of 2000 questionnaires distributed). This number was larger than in 1980, since, as noted, we could administer additional questionnaires over a wider area to reflect both an increase in store numbers and the increased mobility of residents following rising car ownership over the previous twenty years. In the discussion which follows, we interweave the principal results from both surveys to provide an overview of our findings (see Tables 4 and 5).

[Insert Tables 4 & 5 about here]

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[1] HHI is calculated as the sum of the squares of the market share of the major retail parties in the travel to work catchment area

Comparing the results of the two surveys, what is striking is that there was a general decrease in journey times to stores for most shoppers. This is signified by the marked increase in the proportion of shoppers using a store within 10 minutes of where they live or work, which increased from 49.2 per cent to 71.6 per cent, and the consequent reduction in those shoppers travelling further a field. This finding reflects increased levels of car ownership and suggests that in Portsmouth a far higher proportion of food shopping is now carried out close to where people live or work because of the growth in the number of superstores – provision of new stores is effectively filling in 'gaps'. It implies, too, some degree of 'cannibalisation' of store catchments by new outlets, with the result that we can conclude that the catchment area of each store is inherently more local than it was in 1980, at least in terms of where the core proportions of trade are sourced.[2]. This phenomenon of more localized shopping behaviour is revealing (if not surprising) given the very significant increases in store numbers and personal mobility over the study period. It implies that, for households in most parts of our study area, *prima facie* choice will have increased, judged in terms of inter-retailer availability. From a retail supply perspective this could be interpreted as a problem of floor space over-provision or 'saturation' – yet of course, that there are a large number of locations across the UK with higher HHI indices, suggests that saturation is a more complex phenomenon than this simple statistic implies: an argument that retailers have rehearsed to regulatory authorities in the UK for some time.

What the Portsmouth study area does offer is a clear contrast to the situation found in so-called 'food deserts', like the Seacroft study in Leeds. However, what is unexpected is that the proportion of shoppers travelling to the study stores by car fell from 95 per cent in 1980 to almost 90 per cent in 2003. Whilst this finding runs against the increase in car ownership figures, it reflects the fact that proportionally more people now arrive at the new stores by other means – walking, shopper buses and so on – arguably because there are more stores now closer to residents. Note, too, that the Waitrose relocation itself was to a District Centre which is both closer to homes and bus routes and can encourage short walking trips from other outlets. The

[2] Note that groups such as Hillier Parker provide commercially-available information on the home locations of such core shoppers and we are grateful to them for access to their database for cross-checking.

pattern of having a lower percentage of car owners using district centre stores was established not only in the Asda Waterlooville store study but in the earlier 1979 pilot at a Tesco store in Portsmouth itself. In general, though, the new large superstores in our study area have effectively brought the shoppers ‘closer’ – not only in terms of their geographic accessibility but also through their longer opening hours and all week trading patterns. The findings show also that the proportion of customers undertaking so-called ‘linked’ shopping – coming from or going to the store from other shops – has remained relatively stable, suggesting that the perennial problem of carrying large grocery shopping loads with perishable and chilled goods fits uneasily with non-food shopping routines.

What is more revealing is the change in purchasing behaviour *at* the stores (see Table 5), which demonstrates that the frequency of food shopping has increased markedly, even though stores are now more readily accessible for the allegedly-hegemonic one-stop-shop. The survey data do not indicate precisely why this is the case, so we can only surmise that it may be due to a combination of factors, including more hectic lifestyles, and a greater proportion of food being sold that is ‘fresh’, chilled or frozen rather than dry packaged – thus necessitating more frequent shopping. We might speculate too, that this shift masks other important changes in shopping habits – such as the reduction in the number of small, local stores over the last thirty years. This may have forced customers into using the larger stores more frequently for ‘top-up’ shopping as well as their main primary shop. Indeed, the findings demonstrate that this is the case, with more customers, for example, shopping three times a week having increased from 9 per cent in 1980 to 21 per cent in 2002. This trend has also been noted by the retail planning officer at Havant Borough Council. Table 5, for example, shows that over 65 per cent of customers in the study area see the store at which they were questioned as their ‘main store’, compared to only 58 per cent in 1980. Although it might be initially concluded that this represents a greater ‘loyalty’ of customers towards particular stores, the survey also showed that there was a critical reduction in the proportion of customers using their main store to purchase *all* their food – falling from 46 per cent to 31.2 per cent. Further, more shoppers in the area now buy half to three quarters of their food needs at their main store, but whether this is due to a dissatisfaction with the latter or other reasons – such as an increased tendency to use other specialist outlets and competitor stores ‘in passing’ as a result of increasingly complex working patterns and lifestyles, is hard to gauge from this type of large-scale quantitative survey. Certainly, the very significant increase in the proportion of shoppers shopping alone (up from 42.5 per cent in 1980 to 71.9 per cent in 2002) appears to point towards lifestyle complexity/flexibility as a major factor affecting shopping behaviour; a finding that arguably runs against the rather rhetorical claim of most superstore retailers as being places for 'family' shopping.

In addition to these insights in purchasing behaviour patterns above, our surveys also shed some light on what shoppers like and dislike about the stores they use. These responses – for the three original stores in 1980 and the seven stores in 2003 – were unprompted and Table 6 shows simply the frequency with which each factor was mentioned. Whilst the detailed content is self-explanatory, the main feature is that there is considerable similarity in the qualitative indicators of satisfaction or dissatisfaction with the store between the two surveys, such as store location, layout, ranges, prices, parking facilities, quality of products, staff and so on. Most of these terms are used by the retailers themselves as indicative of degrees of satisfaction / dissatisfaction with the overall 'convenience' of their outlets, but they are arguably so generic as to be relatively meaningless in terms of judging whether or not the consumers themselves feel that the changes in retail provision over the last twenty or more years have increased the choices available to them in real terms.

The results in the 1980s survey were very general, looking at range, price, and service (including parking). Having everything 'under one roof' was the main reason for liking a store, and not having a range of choice was first in the list of dislikes. Strikingly, from the new 2002 cohort, a larger array of details was offered and consumers seem to have acquired a distinctive view on what is considered as a 'good' or 'bad' store. While aspects such as ample parking are now considered as part of the minimum service level, consumers have become more discerning about the minutiae of parking. For example, they would criticize the circulatory system or layout of the parking spaces whilst demanding parking that is 'friendly' in all weathers, and offers special spaces for families and the disabled. Another interesting set of factors resulting from the superstores' increase in power within the grocery shopping system is the 24 hour opening that is recognized as progress but which leads to difficulties such as cluttered aisles while staff are re-stocking and even out of stocks during core shopping periods. Consumers, while being happy about such progress, now seem unwilling to compromise any aspects of their shopping experience. This underlines the new complexity of grocery shopping, not only for retailers, but also for consumers, who are now used to having a large variety of products always available. While the findings seem to show that the majority of consumers believe that choice and variety have indeed increased since 1980, consumers are also now better educated and many stores now acknowledge the tastes of minority groups: products that are gluten free, milk free, sugar free, and so on, as well as 'fair trade' and 'organic' lines are now being expected – and all to be offered with a reasonable choice and variety. While larger shops are evidently appreciated for their easy access, wide aisles and range of food and non-food offers, they also attract different shopper types who do not necessarily mix readily together. It is, for instance, more difficult for customers without a car, or the elderly, to patronize the larger stores. Arguably the most important finding of this phase of our study was that convenience/location was the most important driver for shopping at any given store. Whilst retailers will probably say that they do not find this surprising, what is striking is the remarkable increase from 10 per cent of respondents liking their chosen store because of its 'convenient location' in 1980, to 20.5 per cent liking the store of their choice for the same reason in 2002. These results lead us to conclude that, rather than suggesting a significant increase in loyalty from customers, the increasingly capricious behaviour of shoppers, albeit still around one 'main shop', suggests that retailers seem to be relying on their stores' inherently local spatial monopolies, rather than providing a real differentiation of services to their customers.

Before highlighting the results from the second phase of our survey, it is worth drawing attention to the fact that 7 per cent of our respondents from the Portsmouth area reported that they had used the internet for grocery shopping. Clearly, these options were not available to shoppers in 1980 and it still represents a relatively small proportion of shopping which is in line with market research studies conducted within the sector. Nevertheless, internet-based ordering does offer a new avenue for shoppers to potentially address the social, spatial and temporal constraints on their shopping behaviour. Arguably more interesting, however, is the extent to which internet grocery shopping will grow and how this might impact retailers' store-based delivery strategies in the future. Whilst it was not our intention to look at this emerging aspect of retail provision and consumer choice in this study, we are currently conducting detailed exploratory research with households in the Portsmouth area to address three essential questions that will allow us to develop our understanding of its potential: when and why do consumers shop for groceries using the internet; how does store/internet switching affect spending patterns at-store; and what influence do socio-economic factors and household constraints exert on the process of choosing between different shopping channels? We will outline our findings from this research in a subsequent paper.

The second phase of our survey in June 2002 was principally designed to elicit the factors that residents felt affected their choice of food shopping destination. This attitudinal survey gauged respondents' reactions to statements in respect of their choice of where to shop. The statements were constructed in relation to factors covered in the 1980 survey, but modified to include a small number of new factors raised in the qualitative statements made at the end of the phase one at-store survey. These attitudinal statements were ranked on a 5-point semantic differential scale, with respondents being asked to rate statements such as "I usually try hard to look for bargains". Subsequently, the results were distilled using principal components analysis (the rotation method used varimax with Kaiser normalization) to identify the core determinants of shopping choice. Though the underlying variables were not *all* the same as those used in 1980, this procedure enabled us to undertake a simple comparison with the dimensions that emerged from the original survey. The emergent factors and loadings are compared in Table 7. 'Enjoyment' of food shopping was a dimension of choice common to both surveys, the underlying variables suggesting that some respondents continue to see food shopping as a pleasurable activity, they see it as a means to get them out of the house, yet it is an activity that they like to do relatively quickly. Similarly, the 'Price' factor indicated that respondents in 2003 were continuing to see price comparisons and the search for bargains as part of the shopping experience. A slight change emerged however, in the underlying variable composition of the factors we labelled 'Small and Local'. In the first survey, there was agreement that people preferred smaller shops for friendliness, and that they were worth the extra cost. By 2003, these sentiments were still present but, perhaps because of the decline in the number of small shops, the dimension was characterized more as a wish that they still had small local shops to choose from. Factors labelled 'Parking' in the original survey and ‘Quality’ also emerged in 2003 as core aspects of choice. One major difference, however, was the emergence of a new dimension in the principal components analysis in 2002, labelled ‘Choice’, which described the feeling that there were too many brands in supermarkets and too many own label products, with consequentially little difference between food shops.

Conclusions

What is most surprising in comparing the two surveys in 1980 and 2002 is that, given the very significant changes in retail provision in the Portsmouth study area, we would expect to find that spatial and purchasing behaviour had radically altered. However, whilst some important changes are evident – such as the increased frequency of shopping, the tendency to shop closer to home, and the increased use of a repertoire of outlets – we conclude that, overall, there appears to be a notable degree of *stability* in many other shopping practices over time. Attitudinally, for example, our analysis of the data suggest that most of the underlying factors determining store choice are broadly the same in 2002 as they were over twenty years earlier, with the only other notable new influence being the feeling that the stores in the study area, both new and old alike, now appear to be very similar to each other.

A critical reading of these findings might be that food shopping provision in the Portsmouth area has become more uniform and essentially more ‘bland’ to residents. By far the greatest tendency of residents is to use larger stores to obtain a single main shop, but then to use other large competing outlets to ‘top up’. Rather than displaying ‘free’ choice – and the different attitude to retail provision in our local study sites bears this out – the impression that is created is one of consumers seemingly being ‘locked into’ patterns of behaviour driven by, for many, the increased geographic proximity of new outlets to where they live or work. Rather than suggesting customers as being ‘loyal’ to retailers – as the food retailers themselves would probably describe this – the sentiment that emerges from our findings is that local shopping behaviour is *fitted into* complex lifestyles rather than consumers exerting free choices, unhindered by such contexts. This, of course, mirrors the time-juggling complex lifestyles characterised as flexible and often, too, poorly paid and insecure households. In our study area we can identify those who are money-rich but time poor – and their poorer time-rich counterparts. Such a view is more sceptical of 'real' consumer choice, and what it means. Is choice really, as retailers' rhetoric would lead us to believe, simply about 'giving customers what they want'…expressed as 'convenience', 'cheap prices', 'value for money', 'quality' of products, and so on? Or is it, from shoppers' own perspectives, more deeply rooted in other aspects of their context and situation? Our first study in 1980, for example, came at a time when the death-knell was being sounded for the 'Fordist' social wage with one income supporting a whole household. We would hardly expect the same types of shopping patterns to emerge from the lifestyles of the currently more flexible – and more polarised – income backgrounds of 21st Century Britain.

In many respects, the findings of large scale at-store surveys, such as those we have replicated 20 or more years apart – and which are presented here in this paper – inevitably serve more to problematise the notion of consumer choice, rather than clarify it. They do not, for example, help us to ascertain the *degree* to which consumers are satisfied with the added choice that superstore expansion has brought about. Fortunately, the findings provoke a series of arguably more interesting questions. Why are many shopping practices and opinions seemingly so stable? Is this due to social and domestic constraints prevailing to prevent changes in some purchasing habits (e.g. linked shopping trips)? What are the causes of the major behavioural changes that we have observed? Are they driven by those increasingly complex life and working styles? How do shoppers distinguish between the stores in order to decide where to shop? Is it based on the inherent appeal, facilities, goods, prices and ambience of each store, or is it more to do with the fact that people tend to shop primarily in the one outlet closest to them that also satisfies their basic needs? How do people choose where to shop over and above these basic criteria – criteria which, consumers appear to suggest, are becoming increasingly homogenous across different retail outlets with different stores becoming increasingly similar? And to what degree are these decisions 'free' choices? Going further, if it is the case that choices between stores are to some extent predetermined by social and work routines, switching costs and behavioural inertia, then to what degree do consumers experience choice *within* stores? Indeed, how do shoppers negotiate the choices *between* and *within* different outlets?

Our opening thesis within this paper was that consumer satisfaction with retail change would be evident in the behavioural patterns and attitudes displayed by consumers. However, spatial and purchasing indicators, such as those collected in the first phase of our research, help us to reveal broad changes in behaviour but do comparatively little in helping us to gauge satisfaction with cumulative retail changes that have occurred over the long-term. To understand this, the subsequent phases of our research employed qualitative methods to unpack the way in which very different types of household determine where and how to shop. In our next paper, therefore, we use the results from this phase to further problematise the notion of consumer choice, by looking at how new and existing retail provision are *experienced* at the household level. At the end of the second paper, we review the findings of the project as a whole to reflect on the implications for research agendas that will need to be developed if we are to explore the interplay between retail change and consumer choice in a more meaningful way than hitherto. We also briefly highlight the implications of our findings for policy-makers who are increasingly interested in optimising 'consumer welfare' benefits from free market competition but, more often than not, are bereft of meaningful insights that will enable them to do so effectively.

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Figure 1 – Portsmouth: Location of Surveyed Stores

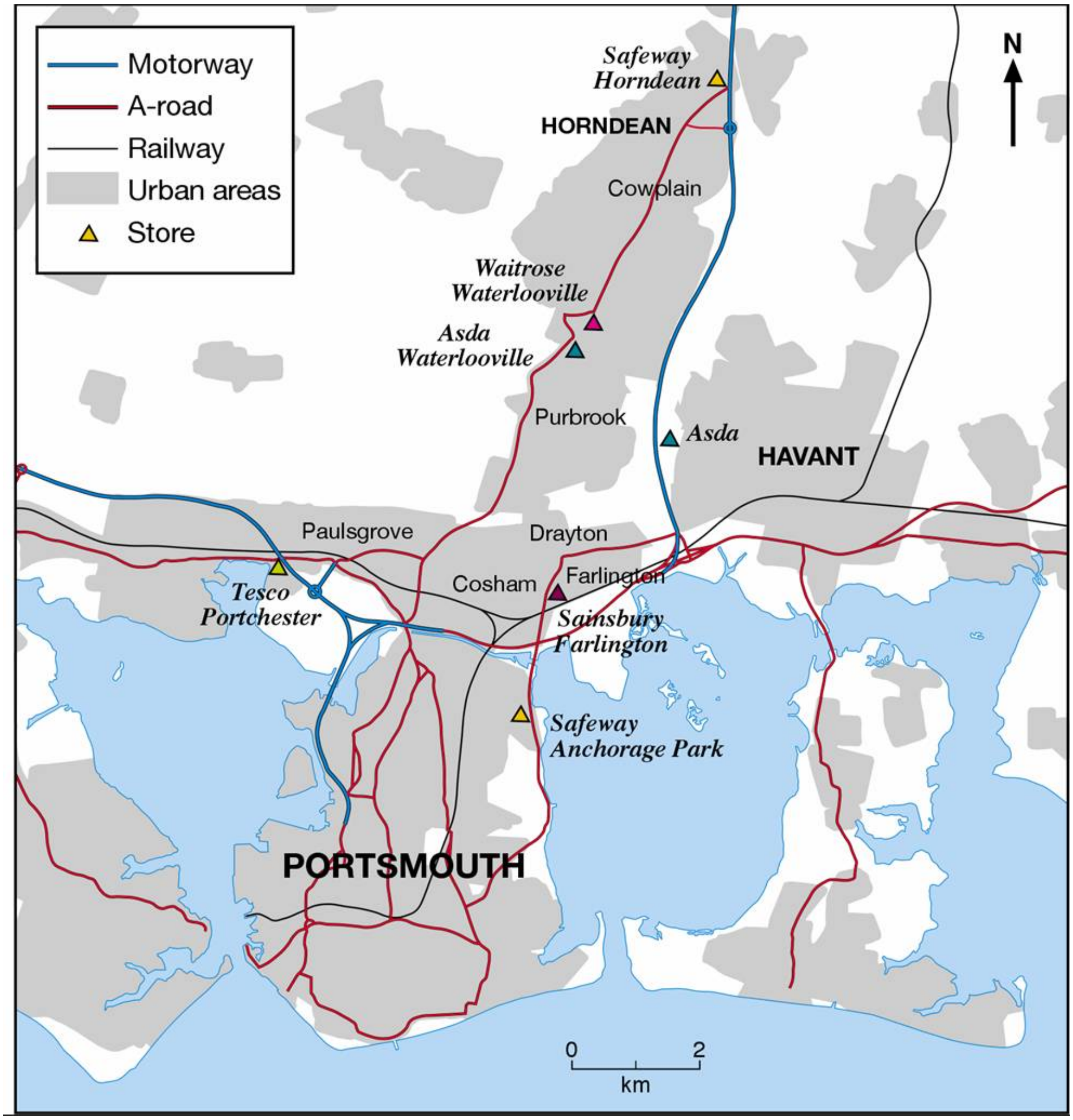

Table 1 – Portsmouth study area population and lifestyle changes compared to UK

	Portsmouth / Havant			**UK Average,**
	1981	1991	**2001**	**2001**
Population	291,449	308,805	**303,550**	**63 millions**
Proportion aged over 75	6.3	7.4	**8.3**	**7.6**
Households with children %	24.9	21.1	**35.8**	**28.7**
				(England & Wales)
One person households %	22.3	27.4	**29.8**	**30.0**
Owner occupied %	58.4	69.1	**69.4**	**68.9**
Unemployment level %	4.9	7.4	**2.9**	**3.4**
2+ car ownership %	11.2	17.6	**27.7**	**29.4**

Source: OPCS (1981, 1991, 2001) http://census.ac.uk/cdu/software/lct/

Table 2 – Small area population / lifestyle statistics for Portsmouth study, 2001

	Paulsgrove	Stakes	Drayton	Cowplain
Proportion aged over 75	6.5	5.3	11.2	7.2
Households with children %	25.8	23.4	18.4	19.3
One person households %	27.5	23.8	24.4	24.0
Owner occupied %	54.7	65.9	89.9	89.8
Unemployment level %	4.3	3.1	1.4	1.6
2+ car ownership %	21.3	33.5	39.7	43.7
Rank of Index of Multiple Deprivation (2000)	956	2554	7077	7346

Source: Office of National Statistics, 2001 Census

Table 3 – Retail provision comparison:

Hampshire compared to South East and UK

	Hampshire	South East	UK
Population (‘000) per store > 25,000 sq ft	49.6	52.8	50.7
Population (‘000) per store (multiples) 3,000-10,000 sq ft	60.6	68.6	48.2
Population (‘000) per Co-op store 3,000-10,000 sq ft	86.2	127.6	83.5

Source: Institute for Grocery Distribution (IGD, 2000)

Table 4 – Spatial shopping behaviour, 1980 versus 2002

	1980 %	2003 %
Shoppers coming from:		
• Home	67.0	67.3
• Work	48.0	40.5
• Other shops	21.0	20.0
• Other destinations	31.0	39.5
Shoppers going to:		
• Home	83.0	81.6
• Work	26.5	26.5
• Other shops	29.5	29.5
• Other destinations	44.0	44.0
Shoppers that had used web-based ordering for groceries	-	7.0
Journey time to store		
• 5 minutes or less	17.0	38.5
• 6-10 minutes	32.2	33.1
• 11-15 minutes	33.4	12.2
• 16-20 minutes	8.7	8.4
• 21-30 minutes	5.1	4.7
• >31 minutes	1.9	3.1
Main transport mode to store		
• Car	95.0	89.5
• Walking	2.5	5.0
• Bus	<0.5	0.7
• Store's own bus	-	0.7
• Cycle	<0.5	0.7
• Train	<0.5	0
• Moped	0.5	0.3
• Other	<0.5	1.5

Source: Portsmouth Surveys, 1980 and 2002

Table 5 – Purchasing behaviour, 1980 versus 2002

	1980 %	2003 %
Frequency of food shopping		
• 3 times a week or more	9.0	21.0
• Twice a week	8.5	19.7
• Once per week	43.5	37.6
• Once a fortnight	11.5	8.4
• Every month	7.0	6.5
• Less than once per month	7.0	5.8
• First time at store	13.5	1.0
• Total	100.0	100.0
Proportion of customers using outlet as main shop		
• Yes	58.0	65.0
• No	29.0	35.0
• Unsure	13.0	-
• Total	100.0	100.0
Size of shopping party		
• Single shopper	42.5	71.9
• Twos	45.5	23.8
• Three	8.5	3.3
• Four	3.5	0.7
• Five +	0	0.3
• Total	100.0	100.0
Proportion of food needs bought at surveyed store		
• All	46.0	31.2
• Half to three quarters	16.0	31.2
• Quarter to half	17.0	14.9
• Less than Quarter	12.0	22.7
• No answer	9	0
• Total	100.0	100.0

Source: Portsmouth Surveys, 1980 and 2002

Table 6 – How shoppers' likes and dislikes have changed, 1980-2002

1980 Likes		2002 Likes	
Under one roof	17.2	Location/convenient	20.5
Internal layout	16.1	Choice/range	15.4
Price	14.6	Price	13.4
Range of choice	10.9	Size	9.3
Ease of parking	9.3	Staff	8.6
Staff and service	7.6	Clean	5.6
Cleanliness	6.9	Quality	5.5
Convenient location	6.6	Layout	5.3
Size or spaciousness	5.2	Parking	4.5
Restaurant	3.1	Offers	4.1
Good easy to find	2.4	Under one roof	2.7
		Open 24hrs	0.8
		Ambience	1.9
		Restaurant/café	1.2
		Non food	1.1

1980 Dislikes		2002 Dislikes	
Range of choice	26.4	Layout	15.7
Internal layout	21.1	Price	12.6
Price	13.1	Out of stock	12.1
Size or spaciousness	11.1	Busy	11.4
Easy to find	9.4	Size	8.2
Staff and services	7.0	Queues	7.4
Ease of parking	5.9	Cluttered/untidy	6.9
Convenient location	2.8	Parking	6.7
Restaurant	2.8	Trolleys	5.4
Under one roof	0.4	Staff	4.5
		Choice	4.4
		Location	1.5
		Too cold	1.2
		Kid/disabled facilities	0.7

Source: Portsmouth Surveys, 1980 and 2002

Note: All figures represent percentage of total respondents

Table 7 – Comparison of attitudinal determinants of food shopping, 1980 -2002: Principal components analyses

Principal Component	Variables	Factor Loading	Principal Component	Variables	Factor Loading
Factor 1: Enjoyment	- Shopping for groceries is usually enjoyable - I like food shopping because it gets me out of the house - Getting food shopping done quickly is very important to me	0.833 0.800 -0.647	Factor 1: Small and Local	- I prefer to shop at the 'small man' type shop - The convenience of local shops is worth the extra it can cost - I find the staff more friendly in small shops	0.701 0.690 0.610
Factor 2: Price	- I usually do a lot of comparing of prices for ordinary food purchases - I usually try hard to look for bargains - When it comes to buying food, price is not important to me	0.820 0.786 -0.677	Factor 2: Price	- When it comes to buying food, price is not important to me - I Usually do a lot of comparing of prices for ordinary food prices - I usually try hard to look for bargains - The way a person shops for the household groceries is a good indication of how capable they are all around	-0.583 0.808 0.797 0.527
Factor 3: Small and local	- I wish I had more small local shops to choose from - I prefer to shop at small shops - The convenience of local shops is worth the extra it can cost - I find the staff more friendly in small shops	0.780 0.771 0.746 0.644	Factor 3: Enjoyment	- Shopping for groceries is usually enjoyable - I like shopping because it gets me out of the house - I find that shopping is a nuisance and I like to get it done as quickly as possible - Getting shopping done quickly is very important to me - When I am shopping I am usually in a hurry - I find shopping for my groceries very tiring - I would prefer to do all my shopping just once a week	0.793 0.716 -0.879 -0.753 -0.664 -0.628 -0.417
Factor 4: Parking	- I try to avoid walking for more than five minutes with my shopping - Given a choice between good shops and good parking facilities, I would choose to shop where there is better parking - I can easily get to any food store I wish in my local area	0.729 0.674 0.528	Factor 4: Sociability	- I usually do my grocery shopping on a journey when I do other errands or other shopping - There's not much difference between shops these days - Going grocery shopping gives you the chance to meet friends and acquaintances	0.613 0586 0431
Factor 5: Sociability	- There are too many brands of the same basic product on offer in large stores - Large food stores have too many own label products - There' s not much difference between food shops these days	0.689 0.682 0.531	Factor 5: Parking	- Given the choice between good shops and good parking facilities I would choose to shop where there is better parking - I try to avoid walking for more than five minutes with a bag of shopping - Chain stores and supermarkets make for better grocery shopping all around	0.715 0.588 0.540
Factor 6 Quality	- Convenience is more important than quality when I do my food shopping - I always try to buy good quality food, even if prices are higher	0.843 -0.504	Factor 6: Quality	- I always try to buy good quality food, even if prices are higher - I don't mind going out of my way to get to better shops	0.783 0.579

Source: Analysis of Portsmouth Surveys, 1980 and 2002