ITEM NO …………

AYRSHIRE JOINT STRUCTURE PLAN AND TRANSPORTATION COMMITTEE
5 SEPTEMBER 2003

Household Shopping Survey 2003

PURPOSE OF REPORT

1 To inform the Committee of preliminary findings from the recently completed survey of shopping patterns in Ayrshire.

BACKGROUND

2 In February of this year the Ayrshire Joint Structure Plan Team in conjunction with the three Ayrshire Councils commissioned a household survey to investigate shopping patterns within Ayrshire. The survey was telephone based and covered 2000 households. The survey investigated where respondents did their shopping for food (convenience) and for four categories of non- food shopping, clothing, furniture, electrical goods and DIY (comparison). For the first time a question was added on the use of the Internet as a mean of shopping. Additional information on household composition, car ownership, expenditure per trip and levels of car ownership was obtained. The survey was compatible with other retail surveys that have been undertaken previously.

AIM OF SURVEY

3 The aim of the survey is to allow shopping patterns in the Structure plan area to be modelled and for appropriate catchments and expenditure flows between community areas to be determined. This information in conjunction with expenditure, floorspace and population estimates allow for a comparison of turnover and expenditure to be made.

KEY FINDINGS OF SURVEY

Convenience Shopping

4 The survey confirms the monopoly of the three main grocery chains on retail expenditure within Ayrshire. 82% of all main food shopping is done within one of these retail stores. Their market share has increased by 7% since 1998. This is equivalent to a loss of expenditure from other retail stores of about £30m.

5 The survey also confirms that most households travel for less than 10 minutes for food shopping. However it is noticeable that in some areas travel distances are significantly higher, for example in the Garnock Valley almost half of households travel for upto 30 minutes for food shopping, reflecting a lack of opportunity within this area. Three quarters of households use a car for food shopping; this is consistent with the previous 1998 survey. However around one quarter of households do not have car access and as a consequence the frequency of vists to town centre locations for food shopping is greater.

6 There is a significant difference between those aged over 65 years and the younger age groups in shopping habits. For example those over 65 years are more likely to walk or take the bus to their main food shop. The survey highlights that 20% of households do their main weekly shop at night. In contrast those of retirement age are more likely to do their food shopping in the morning. The assumption can be made of distinct patterns of movement between towns and shopping centres and modes of transport at different times of the day.

Comparison Shopping

7 Just fewer than 40% of households surveyed stated that Ayr town centre was where the household did most of their clothes shopping. 15% shopped in Glasgow. However this average pattern varied significantly across Ayrshire. Whilst South Ayrshire retained three quarters of local expenditure within their area, North Ayrshire lost almost 30% of local expenditure, approx £24 million to Glasgow or Braehead. In East Ayrshire the expenditure loss is estimated to be £10million to these centres.

8 In contrast to shopping for clothes, expenditure on DIY is largely retained within Ayrshire and centred on a number of large out of centre stores. This in part reflects the flexibility that exists within planning policy. B&Q currently have over 70% of this market in Ayrshire. Electrical goods expenditure is also largely focussed outwith centres and an increasing share is within the stores of the main food retailers.

9 The expenditure on furniture & floorcoverings is spread across a number of stores with no market leader.

Internet Shopping

10 The survey for the first time measured the significance of Internet shopping within Ayrshire. Over 10% of households used the Internet in the month prior to the survey for shopping, predominately for CD/DVD's, books and clothing. However, unlike mail order, where the levels of usage are similar across the age ranges, for those of retirement age only 4.5% have used the Internet for shopping. The proportion of households using mail order was however twice that of Internet use.

CONCLUSIONS

11 The survey has confirmed a number of trends in the retail market within Ayrshire. These are:

- continued loss of expenditure to centres outwith Ayrshire;
- an increasing concentration of food expenditure within three main food chains;
- a dominance of one operator in the DIY sector within Ayrshire; and
- modest use of the internet for shopping.

RECOMMENDATION

12 The Joint Committee note the contents of this report.

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APPENDIX

Key Points of Analysis from the 2003 Household Survey

Main Shop for Food and Groceries	Market Share 1998	Market Share 2003
Safeway	37%	31%
Asda	18.7%	27%
Tesco	18.9%	24%
Others	25.4%	18%

Main Location for Clothes Shopping	% of respondents
Ayr	37
Kilmarnock	18.2
Irvine	13.3
Glasgow	15
Braehead	1.8
Mail Order	2.4
Other	15.6

Clothes Shopping - Changes in Expenditure Flows between 1998 and 2003*	Ayr as Main Shopping location	Kilmarnock as Main Shopping Location	Irvine as Main Shopping Location	Glasgow (including Braehead)
Those surveyed in East Ayrshire Catchment 2003	+4.1	-0.6%	+1.4%	+6.4%
Those surveyed in North Ayrshire Catchment 2003	-4.2%	-0.7%	+3.3%	+14.6%
Those survey in South Ayrshire Catchment 2003	+3.3%	+0.6%	+1.6%	+2.3%

* the percentages are showing a trend of increase or decrease from a comparison of the results of the 1998 and 2003 household surveys

Main Mode of Travel*	All Age Groups Surveyed	Households without use of a Car	Over 65 Years Old	Over 65 Years as a percentage change against the age cohorts surveyed
Car	76.3%	27.4%	64.8%	-15%
Walk	12.0%	33.2%	18.0%	+33%
Bus	9.3%	34%	14.2%	+34%
Other	2.4%	5.4%	2.9%	+17%

* For Food Shopping