Rural grocery shoppers: do their attitudes reflect their actions?

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Keywords

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Abstract

Using a longitudinal research methodology, this research investigated the grocery shopping habits of residents in rural communities in Western Stirlingshire, Scotland. In particular, it attempted to uncover the factors and attitudes that influence customers' store choice decisions and their attitudes towards their local shops. Findings revealed that although respondents held a positive overall view of their local shops, less than one-third purchased a high proportion of their food shopping in local shops. While it is unlikely that local traders will reverse outshoppers' shopping behaviours, with a re-evaluation of their overall offer, they may be able to establish themselves as a reliable supplementary or secondary choice option, thereby maintaining the local shop as a viable function. Recommendations based on offer, service and environment are made to differentiate local shops from the major multiples.

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Introduction

As the economy and society have changed, so retailers have responded and shopping as an activity has altered enormously (Dawson and Broadbridge, 1988). Food retailing is one of the most dynamic and rapidly changing sectors of British industry bearing little comparison with the business that operated 50 years ago. Multiple retail companies now dominate the sector, to the threat and decline of small independent businesses (Verdict, 1996; Dawson, 2000). These independent stores face increased pressure from the multiple retailers' superstores, small store formats (such as the high street Metro stores) and petrol forecourts, and many are being squeezed out of existence altogether (Crewe and Forster, 1993). Even the wholesale symbol groups have been developing their own store portfolio. Independents who "enjoyed" over 60 per cent of the market share in 1950 have seen this market share halve by 1995 to just over 30 per cent (Sparks and Findlay, 2000).

The demise of small shops has different implications upon its existing customers depending upon location and alternative options to shop. The closure of a local neighbourhood shop with a superstore nearby would affect the residents of a local neighbourhood differently compared to the closure of the only shop in a rural community. Various arguments have been made in support of the village shop, arguing they play an important vital role in the community and a vital support network of the village (Smith and Sparks, 1997). However, as the MD of Spar said:

> People may have warm feelings towards the ideal of the village shop, but unless that warm feeling converts to hard cash, we're all going to be in the nostalgia business (*The Grocer*, 1996).

If rural food shops are to survive, it will be vitally important to understand what the residents in a rural community want from their grocery shopping. Only those stores with a clear understanding of their customers' wants and the changes that are occurring within the marketplace can hope to survive by identifying and then satisfying some of those needs more effectively than their competitors.

The small retail shops within the area (Western Stirlingshire) covered by the two survey periods responded to the continuing threat posed by the retail environment in

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varying ways and degrees. The quality of the retail offer of the independent Costcutter store in Killin was recognised when it was voted Village Store of the year by the *Scottish Grocer* magazine in 1997, however, it was subsequently acquired by the Co-operative Group who closed their existing smaller shop in the town. This Co-op policy of providing larger shops was evident when it also consolidated its position in Aberfoyle by extending the store sales area. At the same time the small Webster's shop in Killin was refurbished and a small "garden centre" was added to its offer, although the remaining smaller shops changed little during this time. Meanwhile, Sainsbury opened a new superstore in Stirling, adding a sales area three times the combined area of all the food stores within the survey area.

The aim of this research was to investigate the grocery shopping habits of residents in rural communities in an attempt that a strategy to make small shops more secure might be developed. Lessons which are drawn should be as apposite for differing trading environments ranging from rural communities to urban neighbourhoods.

The objectives of the investigation were to attempt to:

- examine the shopping behaviour of respondents in rural communities;
- identify the factors and attitudes that influence customers' store choice decisions;
- examine local and outshoppers' attitudes to local shops; and
- compare the demographic features of respondents according to their main shopping activity.

Prior research

When discussing independent small shops it is worth noting that those operating in rural communities, such as those involved in the current investigation, may differ considerably in function to those operating in urban locations. For example, those in rural communities may be more likely to provide a social and community function, and rely on the provision of basic general products and services, whereas the independent small shop located in an urban environment may more effectively be operating as a provider of a specialist product or service or as a differentiated offer in some way to the major multiples (e.g. offering non-standardised merchandise).

Independent retailers have increasingly been under threat with the growth of major multiple retailers, but independent small shops operating in rural locations do serve a function whether it be a social and community one, or providing a vital service to certain groups of consumers. This might be through the provision of their total food shopping requirements or via top-up or emergency products. The problems of independent small shops have been documented since the 1970s, but with the increased professionalism of the multiple groups they are arguably under more threat in the new millennium than ever before.

Although independent small shops comprise the majority of all retail businesses in the UK, and have always provided a social as well as economic function to the communities they serve (Davies, 1976; Smith and Sparks, 2000), their share of retail sales has been eroding in favour of the major multiples since the mid-1970s (Guy, 1987). Researchers as early as the 1970s and 1980s recognized the decline of the small independent shop (Davies, 1976; Kirby, 1978; Dawson and Kirby, 1979; Dawson, 1983) and their inability to compete effectively with the multiple retail groups. Kirby (1978), however, argued the place for small shops in the polarisation theory of retail structure, claiming that as shops become larger and more widely spaced, so there re-emerged a need for the small local store, providing it was efficiently organized and conveniently located. Others (Dawson and Kirby, 1979; Davies and Harris, 1990; Howe, 1992; Smith and Sparks, 2000) identified a number of roles for the independent small shop retailer, depending on the individual situation of consumers and the needs and services offered by shops. Previous research has also demonstrated the huge investment small shops require of their owner's time or capital (Kirby, 1978; Bates, 1995; Radder, 1996). Yet many are barely viable (Eliot, 1982; Radder, 1996) owing to a combination of problems including high operating costs (Davies, 1976; Dawson and Kirby, 1979) and other financial problems (Smith and Sparks, 2000), inadequate management (Kirby, 1984, 1985) and lack of understanding of consumer needs and shifts in patterns of

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consumption (Davies, 1976). A low priority to marketing and marketing research observed by Logan (1994, p. 72): "63 per cent of small store retailers surveyed said that they 'just know what customers want'", demonstrates that these problems of successfully identifying and satisfying consumer wants have not been adequately addressed over time. Moreover, small shops have been criticized as becoming complacent in providing superior customer service (Logan, 1994).

Various strategies for the survival of independent small shops (particularly in rural areas) have also been posited since the late 1970s. Most involve some form of consolidating time and resources on the most critical business functions, such as customers and marketing, merchandising, store operations, management, human resources and finance (Logan, 1994). For example, broadening their offer and becoming more multifunctional have been recommended as strategies to increase business in small shops in rural areas (Kirby, 1981; Jussila *et al.*, 1992), providing superior customer service, and becoming more flexible to the unique needs of specific customer groups (Logan, 1994). The benefits of strategic alliances for the independent retailer are also well documented (Porter and Fuller, 1986), and can result in better performance than independent retailers not affiliated with such a group (Reijnders and Verhallen, 1996).

Dawson (1994) and Fernie (1995) discuss the changes in the trading environment in Scotland, which has witnessed the growth of multiple retailers at the expense of the independent and co-operative retailers. Significant economic and social change has altered the ability, perception and behaviour of consumers with regard to shopping and retailing, and many small shops are less able to satisfy such new demands (Smith and Sparks, 2000). The multiples, who have been aggressive in their development of their businesses, have responded to a more mobile and time pressed consumer by providing "a hassle-free and time-efficient" shopping proposition (Wileman, 1993, p. 5). Customers want "high value product, readily available" (Wileman, 1993, p. 6) and they will evaluate the balance of value and time in order to get that. By providing category authority in terms of range and product quality together with clear value/price positioning, the multiples are making grocery shopping, which has been proximity driven, more of a destination format. A further threat on the rural independent shops comes from the major multiple retailers' development of 24-hour trading, small format outlets, convenience-type stores and home shopping. The growth of the convenience offering of the major multiple groups offers mobile consumers (and those with access to the Internet) advantages of choice, price, variety and time at the expense of the more disadvantaged consumer groups. Many customers' groups may use these new forms of outlet to purchase distress or "top-up" items rather than their local independent village shop. Thus the economic viability of the rural independent shop is further eroded as they face increasing difficulties to differentiate themselves from the multiple retailers, and this is arguably of more detriment to the more disadvantaged consumer groupings.

Methodology

The current investigation was a longitudinal piece of research conducted in two phases, three years apart. Both phases involved gathering quantitative data in the form of self-completed consumer questionnaires. Both surveys were conducted with residents of a group of rural communities located within the central region of Scotland. The area of study was Western Stirlingshire, and all eight rural communities within this area were included in the research:

(1) Tyndrum;
(2) Killin;
(3) Crianlarich;
(4) Lochearnhead;
(5) Aberfoyle;
(6) Strathyre;
(7) Gartmore; and
(8) Brig O' Turk.

These areas vary in their population bases, retail development and proximity to a neighbouring town offering a superstore. All the communities, however, were within one hour's driving time of either the major towns of Stirling or Oban, both of which have multiple superstores. All the villages had a grocery shop, some were independent, others had become members of a strategic alliance to provide them with the benefits of being part of a larger group

(Porter and Fuller, 1986; Reijnders and Verhallen, 1996). In addition to providing a consumer co-operative, the two larger villages (Killin and Aberfoyle) also provided a butcher and fruit and vegetable shop, and one had a bakery while the other had a delicatessen.

Using the post code address files, the first postal survey was sent in June 1997 to the population of 1,193 households in Western Stirlingshire. The member of the household most responsible for the household's grocery shopping was asked to complete the questionnaire. The questionnaire explored respondents' grocery shopping behaviour asking various questions such as where, when and with whom they shopped, the total amount they spent per week on groceries, and what proportion, if any, of this was spent in local grocery shops. Derived from previous studies, respondents were also asked to indicate what factors influence their choice of grocery outlet (e.g. Logan, 1994; Schmidt *et al.*, 1994), and their attitudes to grocery shopping generally (Mintel Retail Intelligence, 1996) and local shops specifically (Samli *et al.*, 1983; Lumpkin *et al.*, 1986; Guy, 1990). Demographic data were also collected, including sex, age group, marital status, household composition and household income. From this first survey, 357 questionnaires were returned, providing a response rate of 29.8 per cent.

The second postal survey was conducted three years later in June 2000. The same population of households was chosen for study. However, unlike the first survey, where the entire population was selected for study, owing to financial constraints a sample had to be selected for the second survey. The authors considered this was justified given the response rate to the first questionnaire, and they were careful to ensure that almost half (42 per cent) of the population was sampled for the second survey.

The first survey conducted in June 1997, offered an incentive of a prize draw for completing and returning the questionnaire. Of the 357 returned questionnaires, 260 supplied a name and address for inclusion in the prize draw. This information was utilised for sample selection purposes for the second survey. All those 260 respondents providing a name and address to the first survey were automatically selected for the second survey to enable comparisons over the three-year period. The remaining 240 residents were selected using probability sampling techniques. A random cluster sample from the post code address files was chosen to ensure that all of the eight villages in the population area had a chance to be represented in the final sample. This second survey, conducted in June 2000, achieved 176 responses, a response rate of 35 per cent. It was possible to determine from the questionnaires received that 121 residents had responded to both the surveys.

Analysis

The shopping behaviour of respondents in rural communities

For analysis purposes, respondents were classified as outshoppers or local shoppers depending on where they did their main grocery shopping. Local shoppers were defined as those travelling less than one mile for their main shopping. Outshoppers are defined as those respondents undertaking their primary food shopping activity outside their local shopping area, a definition consistent with others (cf. Jarratt, 2000).

The first step of the analysis was to establish the degree of outshopping and the support for local shops within the study area. Respondents were asked to identify their first and second choice of shop they use for their main grocery shopping. They were also asked whether they use local shops to "top-up" or supplement their main grocery shopping if these shops were not their primary or secondary choice for their main grocery shopping. Table I shows the findings for both the 1997 and 2000 surveys.

The majority of respondents in 2000 (69.9 per cent) undertook their main grocery shopping outside of the community in which they lived. Just 30.1 per cent of respondents to the 2000 survey undertook their main shopping locally and there was little change in this behaviour between the two time periods.

Table I Usage of local shops

	1997		2000	
	No	Per cent	No	Per cent
Primary choice	109	30.5	53	29.9
Secondary choice	60	16.8	38	21.6
Supplementary shop	174	48.7	78	44.2
Not at all	14	3.9	7	4.0
Total	357	100	176	100

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Nearly all the respondents (96 per cent) in both the 1997 and 2000 surveys used local shops, however, but as Table I suggests, when explored further, the usage of these shops by many of the respondents was for "top-up" or distress purchases only. When analysed further, it was found the support for local shops varied according to location. For example, Killin residents demonstrated strongest support for their local shops, with one-third (32.7 per cent) choosing it as their primary choice for their main shop. This compared with one-fifth (20 per cent) of Aberfoyle residents and only 5 per cent of central residents. Rather than the choice of shops available in each location, the relative closeness of the rural communities to the superstores of Stirling and other neighbouring towns seemed to encourage a greater degree of outshopping. These findings were consistent in both survey time periods. A very small minority of respondents had changed their shopping behaviour completely, and this will be explored later.

Factors and attitudes that influence customers' store choice decisions

Factors influencing the choice of outlet

To gain some understanding as to the variables which influence where rural shoppers choose to undertake their main shopping, the respondents were asked to rate the importance of 20 key factors (where one equals very important and five equals very unimportant) when deciding where to conduct their main shopping. Table II shows the findings for both surveys, and shows the relative importance of the attributes as perceived by outshoppers and local shoppers.

Table II shows that both the outshoppers and local shoppers prioritise the same factors as those most important to them when choosing a grocery outlet. In particular, a clean and tidy shop and quality of products sold are primary influential factors for all shoppers in their choice of outlet. In addition, outshoppers rate convenient car parking and a wide range of products as influencing their choice, while local shoppers rate the location and ease of access to the shop and friendly staff as important to them in their choice of outlet. These trends and relative ratings were consistent in the 1997 and 2000 surveys. Some services such as baby changing facilities and a reliable bus service were less considered important to both local and outshoppers. The table suggests that variables of offer and service were of most importance to both outshoppers and local shoppers in influencing their choice of outlet, although environmental variables may also be important. This would classify them as moderate or practical shoppers under Jarratt's (2000) typology based on the relative importance the aspects of shopping offer/product, service and environment to individuals.

The application of t-tests to the 2000 data demonstrated that significant differences between the local and outshoppers were found for five factors (see Table II). As might be expected, outshoppers were significantly more likely than local shoppers to rate convenient car parking ($p = 0.000$), fast checkouts ($p = 0.003$) and the provision of a restaurant or coffee shop ($p = 0.02$) as more likely to influence their choice of outlet. All these factors can be described as those important when selecting the relative differences between superstores rather than choosing between a superstore and a local store. In contrast, local shoppers are significantly more likely than outshoppers to rate the location of the shop ($p = 0.05$) and the opportunity to meet friends/neighbours ($p = 0.002$) as important in their choice of outlet, and this would tend to confirm Smith and Sparks' (1997) assertion that village shops serve a vital function to the community.

Shoppers' attitudes to grocery shopping

Respondents were asked to state their agreement or disagreement with various statements about grocery shopping on a five-point Likert scale (where one equals strongly agree and five equals strongly disagree). Table III shows that although there was some indifference to certain attitudes, in general, respondents agreed with the statements about grocery shopping. Overall, the findings showed that attitudes to shopping were consistent over time for both outshoppers and local shoppers and that both local and outshoppers share agreement over the importance of certain statements over others.

Both local and outshoppers over the two survey periods most strongly agreed on their dislike of queuing, and liking to buy things on special offer, although neither group agreed to always buying the cheapest brands. All the respondents displayed considerable indifference to whether they enjoy grocery shopping or find local shops boring. However,

Table II Mean rating of factors influencing choice of outlet by primary choice of destination

	Outshoppers		Local shoppers		All respondents	
	1997	2000	1997	2000	1997	2000
Clean and tidy shop	1.57	1.62	1.64	1.65	1.59	1.62
Quality of products	1.61	1.56.	1.64	1.71	1.62	1.58
Helpful staff	1.77	n.a	1.67	n.a.	1.73	n.a
Wide range of products	1.66	1.68	1.95	1.90	1.76	1.71
Friendly staff	1.85	1.71	1.64	1.60	1.77	1.69
Convenient car parking ***	1.56	1.53	2.32	2.63	1.79	1.66
Location/easy to get to*	1.97	1.90	1.47	1.54	1.81	1.35
Attractive prices	1.88	1.82	1.89	1.78	1.90	1.81
Fast checkouts**	1.78	1.90	2.24	4.23	1.93	2.21
Fresh food service counter	2.05	2.18	2.28	2.32	2.10	2.20
Longer opening hours	2.30	2.25	2.29	2.30	2.29	2.25
Bright and modern shop	2.42	2.79	2.55	2.24	2.46	2.71
Good own label range	2.51	2.52	2.39	2.50	2.49	2.52
Recycling facilities	2.85	3.04	2.78	2.79	2.83	3.01
Variety of shops present	2.90	2.96	2.84	2.67	2.91	2.92
Customer loyalty cards	2.87	2.88	3.27	2.95	2.99	2.89
Restaurant/coffee shop**	3.06	3.18	3.56	3.84	3.21	3.26
Baby changing rooms/crèches	3.59	3.66	3.56	3.79	3.57	3.68
Opportunity to meet friends/neighbours**	3.84	3.70	3.00	2.91	3.60	3.59
Reliable bus service	3.88	3.76	3.18	3.26	3.67	3.70

Notes: * $p < 0.05$; ** $p < 0.01$; *** $p < 0.00$

local shoppers were slightly less likely than the outshoppers to find local shops boring and to enjoy the experience of grocery shopping, perhaps again reinforcing the social and community function local shops may provide. Further analysis showed that the younger the respondents were the more likely they were to consider their local shops boring.

Outshoppers particularly believed in both the 1997 and 2000 surveys that they need to go to larger stores to get the groceries they want and they combine their shopping trip with another activity. Their desire for range was also more apparent by their lesser important attachment to the rating "saving time is more important than a wider choice" than the local shoppers. Local shoppers were also consistent in their attitudes towards shopping in both the 1997 and 2000 surveys, and they particularly agreed to looking for

Table III Mean rating of shopping attitudes by primary choice of destinations

	Outshoppers		Local shoppers		All respondents	
	1997	2000	1997	2000	1997	2000
I dislike queuing*	1.73	1.59	1.96	2.04	1.82	1.66
I like to buy things on special offers	2.17	1.94	2.34	2.08	2.23	1.96
I look for quality, even if it costs me more	2.23	2.39	2.22	2.08	2.24	2.34
I need to go to larger stores to buy the groceries I want**	1.95	2.03	3.10	2.92	2.31	2.16
I like to find a few new things to buy	2.37	2.36	2.37	2.24	2.37	2.35
I usually combine a shopping trip with another activity**	2.16	2.16	2.91	3.38	2.38	2.32
I prefer to buy well-known brands*	2.59	2.70	2.54	2.26	2.56	2.64
I am willing to pay for "healthy" foods	2.59	2.74	2.71	2.36	2.61	2.69
I tend to buy the same things each time	2.59	2.61	2.69	2.50	2.63	2.60
I like shopping for groceries	3.00	3.00	2.88	2.67	2.96	2.95
I usually/always stick to a list	2.92	2.93	3.00	2.57	2.96	2.87
I find the local shops boring	2.91	2.87	3.42	3.05	3.07	2.89
Saving time is more important than a wider choice	3.52	3.36	3.09	3.05	3.38	3.32
I always buy the cheapest brands	3.83	3.74	3.93	3.61	3.85	3.72

Notes: * $p < 0.0$; ** $p < 0.01$

quality even if it costs more, liking to find few new things to buy and preferring to buy well-known brands.

However, the application of *t*-tests to the 2000 data, showed some significant differences in the ratings between local shoppers and outshoppers. As Table III shows, despite all shoppers' dislike of queues, outshoppers in 2000 were significantly more likely than local shoppers to dislike queuing ($p = 0.032$). Outshoppers were also significantly more likely than local shoppers to need to go to larger stores to buy the groceries they want ($p = 0.000$), and to combine their shopping activity with another activity ($p = 0.000$). However, they were significantly less likely to prefer to buy well-known brands than local shoppers ($p = 0.048$). It is possible this may be attributed to the leverage of the brand strength of the major multiples such as Tesco and Sainsbury.

Attitude to local shops

Respondents were asked to state their level of agreement or disagreement with various statements about local shops (where one equals strongly agree and five equals strongly disagree). Table IV reports the findings, which show consistent trends over time between the outshoppers' and local shoppers' responses. Both local and outshoppers agreed about the convenient and friendly aspect of shopping locally. In fact, many respondents held a positive view of their local shops despite the fact that less than one-third purchased a high proportion of their food shopping in local shops. Range, price and stock-outs were main influences as to why local shops were not used for a main grocery shop and, as a consequence, many respondents were outshoppers for the majority of their food purchases (Table I).

The application of *t*-tests to the 2000 data revealed various significant differences between the outshoppers' and local shoppers' attitudes towards local shops. Outshoppers held a more negative view of local shops (confirming Lumpkin *et al.*, 1986; Guy, 1990), in that they are significantly more likely than local shoppers to consider they carry too small a range ($p = 0.002$) including fresh foodstuffs ($p = 0.06$), are often out of stock ($p = 0.018$) and are too expensive ($p = 0.10$). Local shoppers were significantly more likely than outshoppers to consider that local shops are friendly ($p = 0.00$), perhaps owing to them frequenting them more often and stock what they want ($p = 0.000$), perhaps indicating that local shop keepers cater specifically for their local shoppers rather than trying to encourage new shoppers to their stores.

Although respondents in 2000 think that local shops are easier to nip into for an odd product and are less boring, Table I indicates that there has not been an increase in footfall in local shops for either main shopping or top-up purchases. These changes, together with the different trading conditions of local shops since 1997 (as outlined in the methodology) then, have not had a positive impact in stemming the flow of outshoppers.

Additional service provision

The 2000 survey asked respondents what other services they might consider using in their local grocery store if they were provided. Table V shows the findings. Overall, with the exception of home delivery and the provision of power cards, the outshoppers were more

Table IV Attitudes to local shops

	Outshoppers		Local shoppers		All respondents	
	1997	2000	1997	2000	1997	2000
Local shops are convenient	1.71	1.61	1.45	1.36	1.65	1.57
Local shops are friendly***	2.03	1.99	1.65	1.42	1.90	1.90
Local shops are open when I want***	2.51	2.16	1.84	1.87	2.30	2.12
Local shops stock what I want***	3.20	3.18	2.17	2.09	2.89	3.02
Local shops have too small a range***	2.25	2.28	3.23	3.10	2.55	2.38
Local shops are too expensive*	2.28	2.30	2.96	2.96	2.37	2.40
Local shops don't offer enough fresh foods*	2.40	2.29	3.07	2.77	2.59	2.36
Local shops are often out of stock**	2.53	2.49	2.87	3.10	2.66	2.56
Local shops are boring	2.62	2.87	3.42	3.05	3.07	2.89
Local shops are easy to nip into for odd product	1.82	1.70	1.86	1.76	1.84	1.71

Notes: * $p < 0.10$; ** $p < 0.05$; *** $p < 0.001$

Table V Other services respondents would consider using if provided by their local grocery store (per cent)

	Outshoppers	Local shoppers	Total
Dry cleaning	47.9	33.3	45.7
Video hire	31.0	11.1	27.9
Photocopying	26.0	22.2	25.4
Home delivery	19.1	32.0	21.2
Phone cards	11.7	11.5	11.7
Power cards	7.5	14.8	8.7
Fax	9.6	3.7	8.8

likely to consider using various services from their local grocery store than the local shoppers were. In particular, dry cleaning services were potentially attractive to almost half the respondents. Video hire was popular with one-third of the outshoppers, while photocopying facilities would attract approximately one-quarter of the respondents. Home delivery was attractive to one-fifth of the respondents, particularly the local shoppers. It is perhaps noteworthy that the majority of respondents showed no desire for access to the Internet from their local grocery store. However, outshoppers were significantly more likely than outshoppers to consider using the Internet, especially for the purchase of groceries, fresh foods and clothes. No significant differences, however, were found between local and outshoppers in the desire to use the Internet to purchase books and CDs.

Changing consumer behaviour

A comparison of the shopping behaviour of individual respondents between both survey periods identified that the majority of respondents (86 per cent) maintained consistent shopping behaviours between the two time periods. However, a minority had changed their main shopping behaviour. From the 121 respondents who completed both surveys, six respondents (5 per cent) undertook their main grocery shopping outside of the local area (i.e. were outshoppers) in 1997, but were conducting their main shopping locally in 2000. In contrast, 11 former local shoppers (9 per cent) in 1997, were outshoppers in 2000. Although it is recognised these respondents are in the minority and thus no generalisations can be made from them, it was decided to analyse these two groups of respondents to see if a pattern in their attitudes and behaviours could be established.

Those former outshoppers who now shop locally are more likely to like shopping for groceries now and perceive local shops to be less boring than they did in 1997 and undertook their main shopping outside of the local shopping area. In particular, they are less likely to stick to a list when shopping ($p = 0.008$), less likely to have a need to go to larger stores ($p = 0.05$), and less likely to look for quality even if it costs more. In contrast, the former local shoppers who are now outshoppers are less likely to like shopping for groceries now ($p = 0.028$) but feel the need to have to go to bigger stores ($p = 0.022$). They are also less likely to buy the cheapest available nowadays ($p = 0.032$), although they like buying things on special offer.

These findings *per se* do not suggest a particular dissatisfaction with their former shopping outlet. Rather, they may indicate that for whatever reason, the circumstances of these shoppers have probably changed in some way. Closer analysis revealed that of the former local shoppers all now have access to a car rather than just seven in 1997. This may be one influential reason for changing their habits to outshopping although it should be noted that all the former outshoppers also have access to a car, so car ownership alone cannot be the determining factor in changing their shopping behaviour. Age and gender did not appear to be a determining factor, although nine of the 11 former local shoppers had an annual income of less than £20,000. Employment status also did not necessarily determine where people choose to do their primary shop. Two-thirds of the former outshoppers are in full-time employment compared with just one-quarter of the former local shoppers, one-third of whom are retired. All those respondents who have changed their behaviour (i.e. the former local shoppers and former outshoppers) live in Aberfoyle or Killin. Therefore, it is unlikely that the changes that have occurred in both these villages (an enlarged offer in Aberfoyle and contracted offer in Killin) have significant bearing on the habits and attitudes of local residents to local shopping facilities.

Although some of the changing shopping behaviours of respondents may be attributed to changing personal circumstances, Table VI compares the former local shoppers' in 1997 and the now outshoppers' in 2000 attitudes towards local shops. This may indicate some cause for concern over satisfaction with local

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Table VI Former local shoppers in 1997 and current outshoppers in 2000 attitudes towards local shops

	Former local shoppers[a] 1997	Former local shoppers[a] 2000
Local shops are convenient	1.36	1.40
Local shops stock what I want	2.82	3.44
Local shops are friendly	2.00	2.20
Local shops are expensive	3.09	1.50
Local shops are out of stock	2.82	1.80
Local shops are easy to nip into	1.91	1.64
Local shops are open when I want	2.00	1.56
Local shops stock too small a range	3.00	2.10
Local shops have insufficient fresh foods	2.73	1.90

Note: [a] Former local shoppers are those respondents who identified a local shop as their first choice for their main grocery shopping in 1997 but who identified a superstore as their first choice in 2000

shops. Although former local shoppers continue to consider local shops as convenient, easy to pop into and open when they want, the overall offer was considered to be an issue. They considered local shops in 2000 to be more likely to be out of stock ($p = 0.040$), stock too small a range ($p = 0.064$), including fresh foods ($p = 0.088$), and be too expensive for their main grocery shop ($p = 0.006$). Attitudes towards local shops have hardened much more in former local shoppers compared to the rest of the sample (cf. Table IV), with the more negative criteria evident in 1997 becoming much more distinct in 2000 and perhaps being reinforced with comparison. These shoppers' attitudes to local shops in 2000 were more negative than the outshoppers, and suggest that as soon as circumstances permit, they go to superstores for their shopping. Even those respondents who now shop locally have hardened their attitudes to the local shops considering that they do not stock what they want ($p = 0.035$), are too expensive for all their grocery needs ($p = 0.049$), and carry too small a range ($p = 0.073$), including fresh foods ($p = 0.073$).

Demographic features

Various demographic variables were found to be attributed to shoppers whose first choice of store was a local shop and these were consistent for both the 1997 and 2000 surveys, and confirm previous studies. A profile of local shoppers comprised households with an annual income of less than £10,000; consumers who did not own a car; single person households; respondents over the age of 75; retired or not in full-time employment. Local shoppers were significantly less likely to own a car than outshoppers ($\chi^2 = 31.54$; df = 1; $p = < 0.001$), were more likely to live in single person households and be over the age of 60 ($\chi^2 = 4.82$; df = 1; $p = 0.028$), and in particular over the age of 75.

Determining a profile for the outshoppers was less clear-cut. They were significantly more likely than the local shoppers to have a car, and be younger and married or co-habiting. In comparison to Jarratt (1998, 2000) those with higher levels of income were also likely to adopt outshopping behaviour. Nevertheless, the findings revealed that sex, income levels, marital status and household composition did not have any major bearing on whether people undertook outshopping. Therefore, it was concluded that in comparison to local shoppers, outshoppers are characterised by being a very broad cross-section of the rural community.

Conclusions

This article has explored the grocery shopping behaviour of inhabitants of several rural villages within the central region of Scotland. The general consistency between the 1997 and 2000 findings demonstrates that the quality of the data may be treated as fairly robust. The survey results indicated that the trading future for small rural shops is difficult with the majority of consumers using them for supplementary shopping only. Nevertheless, the relative proximity of alternative shopping facilities and the quality of local shopping provision combine to influence the degree of food outshopping from a community and this explained why some rural areas had a higher preponderance of outshopping than others. As Dawson (2000) speculates, although the

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number of small independent businesses across convenience and specialist sectors is likely to decrease over the next 15 years, their number will remain substantial at over 17,000.

Most rural residents travel to the large superstores outwith the survey area to satisfy their main grocery shopping needs; spending, on average, two-thirds of their total grocery spend in these shops. However, concurring with Smith and Sparks (1997), local shops are seen to provide a vital social and community function, particularly for those undertaking their main shopping locally. Those spending a higher proportion of their spending in local shops were the elderly or financially deprived and those less likely to have access to a car. Their commitment to these shops may be less to do with their "loyalty" but more to do with their lack of means to get to the superstores with their wider choices and cheaper prices. However, these conclusions are not so clear-cut as the research found that former outshoppers who now shop locally all have access to a car.

Rural shops have a restricted catchment in which to operate and a continued loss of custom to outside the area or via e-tailing will inevitably weaken their viability. Independent stores have hitherto had little overall success in developing their grocery sales at the expense of the major multiple superstores. Nevertheless, local co-operative and symbol stores have been identified by rural inhabitants (particularly the less mobile) as the "pantry" of the villages they serve. The trading changes that have taken place over the time period within the survey area have involved intervention by the co-operatives. In one area (Aberfoyle) the store expanded by 50 per cent while the Co-op took over their main rival Killin (as well as in neighbouring communities outwith the survey area), thus decreasing the choice in these villages. Table III showed that respondents in general were less likely to find local shops boring in 2000 than in 1997 and declared they felt less need to go to larger stores to buy the groceries they want, which demonstrates, perhaps, the perceived improvement in the local shops offering since 1997. Independent retailers may consider the benefits to be gained from developing strategic alliances (Porter and Fuller, 1986) to provide assistance in developing the quality of their retail offer. This offers opportunities to maximise the effective use of managers'/owners' time.

To have a chance of survival, local shops need to have the commitment and willingness to cater for the local community, which means focusing attention more closely on local residents' wants and needs. This may mean adopting a more formal method to identifying these expectations (Logan, 1994). Rather than compete directly with the multiples, which could almost result in the further demise of independents due to their relative weak bargaining power in the distribution channel, local shops need to differentiate their overall offerings in some way from the major multiple chains, providing a service and unique position the multiple supermarkets are unable to provide.

Recommendations

Based on the findings from this research, some recommendations may be made regarding local shops' offer, service and environment. Issues relating to offer are important particularly as both groups of respondents wanted a wide range of quality products, whereas the presence of a good own label range was rated much lower. Clearly, local shops are unable to stock as wide a range as superstores, but if they were to extend their range in accordance to local requirements and resolve their stock-out problems, they may attract a larger proportion of their spend from outshoppers. This may be achieved by reducing the level of product duplication, focussing more clearly on a broad yet shallower range. However, this strategy may result in some cannibalisation of existing local trade from other local shops. The effective use of space in satisfying customer wants and needs is more important than the physical dimensions of the shop as was found by one shop twice the size of another in the same village being less likely to be used than the smaller one. Overall, local shops need to scrutinise their product mix, presentation, service and trading environment in relation to their competitors.

Attractive prices are important to all shoppers but the surveys revealed they want value for money rather than buying the cheapest possible brands. Items on special offer are important to both shopper types and could influence the level of individual spend, although care would be required to ensure that overall profitability is not adversely affected. If local shops were able to provide, and effectively advertise, selected items on special offer, this may increase the average transaction value of existing shop users and may also help to increase the footfall into their shops to provide additional sales.

Owing to location and turnover issues, independent retailers may suffer constraints in sourcing some products. However, unlike some of the multiple supermarket chains who often strive to present a standardised corporate image, local shops do have the advantage of being able to source locally. From a product mix perspective, one such way may be to capitalise on selling local produce and organic or specialist foodstuffs as a differentiating factor. This also demonstrates support for local producers that might additionally increase the loyalty of local residents to local shops. If they sold a range of locally-produced speciality foodstuffs they might even attract their own set of outshoppers into the area for them!

With regard to service issues, the attitude of staff can influence choice of grocery outlet for all respondents (see Jarratt, 2000 and Table II), and therefore may provide a differentiating factor for local shops. If served by helpful and friendly staff, customers may feel more loyalty towards using their local shops, even if this is for secondary or supplementary shopping only. Here again, the employment of local residents can be seen as a positive factor for local shops in boosting employment in the local economy. It also contributes to the economic and community function of the local shops (Davies, 1976; Smith and Sparks, 1997).

Although Table IV indicated that respondents do not have a problem with the opening hours of local shops, and that respondents consider local shops to be easier to nip into in 2000, the footfall in local shops has not significantly increased over the time period. Local shops increasingly need to conduct a cost benefit analysis of whether the extension of their opening hours would increase their overall sales sufficiently for this to be a viable option. However, this aspect of convenience once beneficial to local stores only, has been increasingly eroded owing to the extended trading hours of the major multiples and the broadening of their offer at the entrance of superstores.

The results of the 2000 survey indicated some support (particularly by the outshoppers) for the provision of various services by local grocery shops. In addition to the service provision, the local trader may benefit from an increase in trade from impulse/additional purchases being made by their users. These findings would concur with previous research which suggests that local shops should broaden their offer and become multifunctional (Kirby, 1981; Jussila *et al.*, 1992). The identification and selection of appropriate service extensions will be critical. Interestingly, the findings showed little desire from local or outshoppers for access to the Internet from their local grocery store. Whether access to the Internet poses a further future threat to the use of local shops is unclear. If local shops are used by the majority of outshoppers for top-up or distress purposes, perhaps the Internet will be less of a threat to local shops than to the superstores. Much will depend on the perceived convenience and safety of purchasing goods via the Internet. As access becomes increasingly available via the television networks, it is possible that the attitudes and behaviour of local shoppers (whose loyalty to local shops is questioned) may change over time and they may begin to experiment with grocery ordering via the Internet. If this is the case, there may be further cause for concern for the viability of local shops.

Home delivery was a service of particular interest to local shoppers, yet one-fifth of outshoppers would also consider using local shops if a home delivery service was available (see Table V). This is an interesting service provision for local grocery shops to consider and upholds Logan's (1994) argument that small stores must provide superior customer service. It may increase the trade from current outshoppers to local shops, in addition to providing an extra differentiating service to their loyal customers who do the majority of their main shopping in local shops. With the growing provision of Internet retailing and its future penetration being unclear, this home delivery service provision by local shops may assist to halt the exodus of local shoppers to Internet services.

Consumers want clean and tidy shops, a range of quality goods at fair prices, convenient opening hours and served by friendly and helpful staff. By providing a positive evaluation of the local shopping area the moderate shopper as identified by Jarratt (1996, 2000) will increase their shopping area commitment and decrease their outshopping behaviour, while the practical shopper will be influenced by the variety of goods available and some aspects of the shopping service.

It would be naïve to assume that by complying with all these recommendations, local traders would be able to reverse outshoppers' shopping behaviours to any great extent. Outshoppers have experienced the superstores and in comparison to local shoppers, regard their local shops as more boring. Confirming Jarratt's (2000) findings, they also are likely to be combining their outshopping activities with another activity, and therefore not necessarily making a special effort to go outwith the local shopping area to conduct their main grocery shopping.

Breaking established outshopping habits is difficult to do, and local shops may find it hard to re-establish themselves with outshoppers. A more realistic goal would be to aim to decrease the use of superstores and town centre supermarkets for secondary (or even top-up shopping) as was identified by Mintel Retail Intelligence (1996) and Dawson (2000). Improvements in the overall offer can halt the migration of outshoppers and perhaps redefine the local shops' position from supplementary to second choice. Furthermore, if local shops can provide a differentiating and unique overall offer from the supermarkets and be more responsive and innovative to consumer expectations, they may be able to increase the number of trips and proportion of total grocery spend local residents spend in their shops, thus enabling them to compete alongside the supermarkets rather than lose out al together.

The findings from this research identified various avenues for further research. In relation to consumers, it is clear that further investigation into the subject is necessary, particularly in relation to the motives and behaviours of those respondents who have changed their shopping behaviour over the two time periods. However, a more in-depth understanding of the attitudes and behaviours of dedicated local shoppers and outshoppers to grocery shopping facilities is also needed. Research should also be conducted to find out to what extent shoppers now use the major multiples for supplementary or top-up shopping in combination with another activity because of their more convenient opening hours. The authors are currently developing their research by investigating whether the quality of management in small shops in rural areas is up to the challenge of implementing some of the recommendations posed in this article, and what practical constraints are involved.

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