‘Switched’: a singular case of store switching

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Abstract

Purpose: To investigate the levels of store-switching for main food shopping consequent on a change in operator for a major superstore. To account for differences amongst switchers and non-switchers and to confirm/reject previous research findings.

Design/methodology/approach: A two-phase random household postal survey on main food shopping behaviour was conducted in a central Scottish city. The two phases, separated by one year, bracketed the change of a main food store from Safeway to Morrisons. A proportion of respondent households in the two phases (45%) was common and represents matched subjects, allowing investigation of switching behaviour.

Findings: The aggregate switching rate is higher (27.4%) than found in previous UK research, despite the locational/accessibility component being held constant. No aggregate differences between switchers/non-switchers on socio-economic or demographic grounds were found, confirming previous US research. The high level of switching is ascribed to a re-evaluation of store choices/attributes consequent on the store changeover, confirming the notion of a 'trigger' mechanism.

Practical implications: The research has implications for competition authorities, other policy makers and retailers. It reveals the transient nature of a component of store loyalty and the store specific nature of store switching behaviour. Policy makers need to understand the baseline or natural switching rate amongst retailers generally and specifically in their area. Retailers can exploit further the store specific element of switching.

Originality/value: Research on store-switching behaviour over time is rare both generally and specifically in the UK. This research provides evidence of switching rates which can be subject to confirmation/disconfirmation in other circumstances.

Keywords: Switching, retention, food, loyalty, Scotland

Paper type: Research paper

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One would perhaps expect a large research literature on store-switching behaviour given its fundamental importance to retailers, consumers and regulatory authorities. There is a considerable literature on store choice and brand choice generally from both retailer and consumer perspectives. Specific effects of product promotions have been analysed. ‘Loyalty’ generally has been a major research theme. Store-switching behaviour research per se, viewed here as a subsection of store loyalty, however has remained rather limited. As some of the few researchers that have looked at this subject note:

“The temporal aspects of (store-switching) behaviour has remained largely underanalysed” (Popkowski-Leszczyc and Timmermans 1997, p193)

“Research addressing consumer store-switching behaviour is limited … and the need for new knowledge is considerable” (Seiders and Tigert 1997, p227)

“Our research is motivated by the relative absence of work on customer mobility in retail settings” (Rhee and Bell 2002, p234).

This research gap is the context for our paper. Retailer landscapes are transformed by both enabling and competing forces so that store switching matters both to analysts of consumer behaviour and to retail strategists.

Store switching is an increasingly important issue particularly as the competitive environment intensifies. In a highly competitive market increasing market share will necessitate attracting shoppers to switch from competitors. Retailers are anxious to maintain their most loyal and profitable customers but frequently find it hard to ascertain which these are, as there is little information on which other stores their customers also patronise nor who switches their main shop to which other stores. In the UK the regulatory environment involves both authorities determining business

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policy such as the Competition Commission and also the planning authorities who are involved in granting permissions for new stores. Researchers (and regulatory authorities – Competition Commission 2006) have been interested in how new entrants to a market impact on shopping behaviour and particularly on the 'switching' of the main store shop from an existing store to the new entrant. However, the importance of store accessibility has always been difficult to distinguish from other factors in respect of such behaviour.

The situation reported in this paper offers an opportunity to examine store network change where the locational variable remains constant. This is the rather singular case of store switching where the shopper is 'switched' as a new operator takes over an existing store or set of stores. The particular case is that of the Morrisons takeover of Safeway in the UK. Morrisons and Safeway had different customer bases and profiles. What then happens to the shopper base when a new company takes over a store? What switching/retention behaviour is exhibited? How does this relate to existing results from store-switching research?

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This paper is structured into four sections. First, a review of the literature on store-switching is presented and the key dimensions summarised. Secondly, the situation examined in the paper is introduced in terms of the retail network in the study area and the survey methodology. Thirdly the survey results are presented. Finally conclusions are drawn.

Store-Switching Behaviour

Market share is the macro-scale quantification of millions of individual and household decisions about where to shop. Those decisions are generally believed to be related to issues of accessibility, brand loyalty and attitudes to companies and stores. But, given the significance of market share changes over time, it is perhaps peculiar that more academic attention has not been paid to store-switching and store retention behaviour at the local and general level and over longer time periods.

East et al (1995) quote previous commercial research as identifying a store loyalty rate of 72-75% per annum in grocery/food retailing in Great Britain. In their own mail survey they confirmed this level. East et al (2000) usefully extended their previous work and disaggregated and differentiated between First Store Loyalty (FSL) based on the share of spend in the main store, and First Store Retention (FSR) based on the time period the main store remains the main store. They concluded that these concepts are related but that they do not share a common basis. In their survey over 21 months for households across England and Wales, they calculated a FSR rate of 65%, which equates to an annual switching rate of 20%. More recently Mintel (2005) calculated a switching rate of 15% per annum across the United Kingdom, with 13% in Scotland.

One of the key elements in this identified switching behaviour is accessibility. East et al (2000) saw FSR as strongly related to the competitive environment and in particular to new market entrants at the local level. New market entry and its effects on store choice and store switching behaviour was examined in four markets in the USA by Seiders and Tigert (1997). They were interested in how “primary shoppers” (i.e. the main shop frequented) switched under different competitive or new market entry situations. They identified a ‘control’ area with 10% primary store switching despite no new store entry (though noted other commercial research identifying a national 25% baseline). In their ‘non-control’ survey areas they found switching rates of 25% to 55%, depending on the number of new entrants and the competitiveness locally. This focus on new entry has been developed further by Arnold et al (1998) with their market destabilisation (or “market spoiler”) thesis for Wal-Mart (see also Fernie et al 2006). At the heart of this thesis is store-switching behaviour: “major changes in a market (by a new competitive entry) on location/convenience, price, assortment … quality or service might trigger a new review of all alternatives (old and new) by consumers” (Seiders and Tigert 1997, p230, emphasis added).

Support for this level of switching generally has also been presented by Rhee and Bell (2002) who found c75% attachment to the main store in their USA based study. They accounted for this level by the benefits of location (accessibility) and through consumers developing store-specific knowledge (e.g. layout) which they might be reluctant to lose. Switching (or in their terminology “transitioning”) probabilities fell the longer time people had been loyal to a main or primary store. They also noted that there tended to be ‘format loyalty’ in that switchers tended to change to the same formats as their previous main store. “Familiarity” with a store or format was also seen as important by Seiders and Tigert (1997) and Popkowski-Leszczyc and Timmermans (1997).

These various authors account for the levels of switching/retention they identify in a number of ways. Popkowski-Leszczyc and Timmermans (1997), whose study is more about variety-seeking than main store switching, identify the more ‘loyal’ shoppers as having dual employment, being better educated, spending more per trip and taking more time between shopping trips. These latter two elements were also identified by Rhee and Bell (2002), who equated them to ‘shopping style’, and then related this to format loyalty and degrees of ‘stickiness’ with main stores and store types. They did not find any relationship between demographics and ‘transitioning’ probabilities. Demographics were also dismissed as a predictor by East et al (1995), though their later study did find that FSR rates increased with age (East et al 2000).

Seiders and Tigert (1997) noted that switching rates were not constant amongst stores and that different switching motivations could be identified. They saw three types in their study; price, location and variety based switching. At the aggregate level however, they found no differences between switchers and non-switchers on either store choice criteria or demographics. They did note however the importance and significance of ‘familiarity’ for the aggregate non-switchers. They conclude that ‘to understand and diagnose switching behaviour, researchers need to disaggregate switchers by the stores to which they switched’ (p243).

The literature therefore appears to make a number of claims:

a) Switching occurs at a base level of c20-25% per annum, but is dependent on the competitive situation;
b) Accessibility and changes to accessibility are important drivers of switching/retention e.g. new store entry and mobility in the housing market;
c) New market entry acts as a trigger for choice re-evaluation, though major store re-positioning might also act in a similar fashion;
d) There is little discernable difference between switchers and non-switchers in store attribute and patronage terms at the aggregate level.

One basic and common issue raised in these studies is the lack of data on the topic. Any new studies will therefore add to the knowledge base in this area. The first aim of this paper is thus to confirm or not the levels and patterns of main store grocery switching. Secondly, the tenor of most of the work has been around either a general national situation or the alternative of a new entrant to the market in the form of a new store. But what happens if instead the consumers of an existing store are effectively 'switched' en masse by its takeover by another retailer? How does this affect the retention and switching across the network? Investigating these issues is the second aim of the paper.

The Study Situation

a) *Morrisons Takeover of Safeway*

The study situation involves the takeover of the Safeway chain by Morrisons in 2004 in the UK. Following competition authority permission for the takeover, Morrisons set about changing the Safeway stores to trade as Morrisons. In this study therefore, there is new market entry, but the location and accessibility factors are held constant.

The takeover of Safeway by Morrisons was arguably the most significant development in grocery retailing in the UK in recent years. In 2003 Morrisons made a bid for its larger rival Safeway. This stimulated interest from the other major operators. The Competition Commission investigated the competitive issues surrounding these alternative bids and concluded that Morrisons was the only operator that should be cleared to bid for Safeway (Competition Commission 2003). Even then it was subject to a number of divestments (Competition Commission 2005).

Morrisons finally acquired the Safeway chain in March 2004. At the time of the takeover this gave Morrisons a UK market share of 16.1% (IGD, 2005). In some ways it was a poor match as Safeway stores were frequently smaller than the preferred Morrisons' formats but it did permit a spatial expansion of Morrisons into Scotland and other areas where they had previously had limited or no representation (Poole et al 2003).

The period following the takeover was a challenging one for Morrisons as they tried to integrate two parallel company systems and to transform all the Safeway stores to the Morrisons fascia and stock them with Morrisons product ranges. Following the takeover Morrisons embarked on a pricing programme designed to ensure that Safeway and Morrisons products were price comparable. Safeway from the late 1990s had been operating a policy of HI-LO pricing and would have been identified as out-of-line on pricing strategy with many of its competitors. Morrisons' strategy involved an EDLP approach, the effect of which was to lower overall prices, but to remove the temporary deep discount price promotions. By November 2004 Morrisons claimed to have made 13,000 price cuts at Safeway stores representing a lowering of prices by 12-14%. A price survey by Goldman Sachs showed that in 2003 Safeway's pricing was high relative to Asda, Tesco and Sainsbury's but that a year later the price differential had fallen from 16% to 3% (IGD, 2005).

b) The Survey Location

The survey location is the City of Stirling and its surrounding area in central Scotland. The main retail stores in the survey area are shown in Figure 1. There are a number of superstores in the Stirling area, as well as a network of local and convenience stores and some hard discount operators. In Stirling itself there is an old Somerfield store, a small, old (originally 1983) but often remodelled Tesco superstore, a 1993 Safeway on an out-of-town retail park and a modern Sainsbury superstore. Elsewhere in the study area, but not central to the main population are an Asda, a new Tesco Extra and another Safeway.

Take in Figure 1

The survey involved two phases of random household mail survey, one prior to the change to the Stirling Safeway store to Morrisons and a follow-up replicative survey one year later, some six months after the store began trading as Morrisons. The household addresses were provided by CACI and drawn from households within a radius of 20 minutes' drive time from Stirling Railway Station. Phase 1 of the survey (Aug/Sept 2004) yielded 1075 returns (25.4%). Phase 2 of the survey (Aug/Sept 2005) yielded 729 returns of which 45% were matched returns with the first phase (i.e. they had also completed the first survey). Returns were only considered matched if they did not involve any change of address. This minimises the effects of the locational factor and changes in constraints on shopping. Data from both the total survey and the matched set are used generally in the analysis. Discussion of switching uses only the matched set.

c) National Shopper Profiles

It is widely recognised that there are significant variations in retailer patronage according to demographic and lifestyle characteristics (Mintel, 2005). Tesco has a broad appeal being patronised by a wide demographic and social cross section of the population. Morrisons also has a wide appeal but there are a few groups which do not patronise the company including younger shoppers. Morrisons have a stronger presence of the C2 socio-economic group. The demographic and socio-economic profile of Safeway differs from that of Morrisons. In particular, Safeway attracted customers from the more professional groups. In recent times Sainsbury has been regarded as more upmarket than the other operators. Asda remains the most skewed towards the female shopper and the family shopper. The presence of non-food ranges, in particular children's clothing, is thought to contribute to this. As Morrisons does not have an equivalent product offer Asda customers would be expected to be less involved in switching as a result of Morrisons' arrival.

Survey Results

a) Changing Store Profiles between 2004 and 2005

The socio-economic and demographic profiles for 2004 in Stirling for the four main different operators were in line with national figures and tendencies (showing no statistical differences), which gives added confidence about the robustness of the survey base. Table I, based on the total survey, shows the proportions of the two surveys patronising the various stores in the Stirling area. There was a slight fall in those patronising Tesco but an apparent increase in Morrisons by comparison with Safeway. Morrisons gained a higher percentage increase in customers than it did spend. By contrast whilst Tesco lost customer share it gained share of spend. The two surveys differed statistically significantly only in terms of the number of single person households represented. Overall we believe the surveys can be deemed sufficiently comparable. The data in the matched sample showed no statistically significant differences from the baseline sample across the key socio-economic and demographic characteristics. The matched sample showed patronage proportions which were in line with Table I, reflecting the slight decrease in Tesco patronage and the increased Morrisons patronage by comparison with Safeway.

Take in Table I and II

Table II disaggregates the primary shoppers for Safeway (2004) and Morrisons (2005) in terms of demographics and socio-economic characteristics. The most noticeable socio-economic changes are in the decline in professional and managerial groups and the increase in manual groups. These changes reflect a move towards the recognised store profile for Morrisons. Two statistically significant changes were found at the .05 level. The first confirmed the switch from managerial and professional occupations towards manual occupations. The second involved a reduction in car access. The latter perhaps suggests that more car owners switched away from Morrisons.

There are therefore indications that the shopper profile for Morrisons is different from that which characterised Safeway. Clearly store switching behaviour must be contributing to this pattern with both customers leaving and new customers arriving. Some consumers will have switched to Morrisons because of the new retail offer, with others switching away from Morrisons because of aspects of the new offer which do not meet their needs. There would also seem to be general switching behaviour likely across the chains in the market. Unlike other research however accessibility is not part of the causal explanation in this case, as this has effectively been held constant.

b) The Switching/Retention Pattern

The switching/retention matrix for this study is shown in Table III. This is based on data from the matched sample. The overall switching rate is calculated as 27.4% per annum. This is higher than found in earlier UK studies, and more than double the Mintel (2005) figure for Scotland (13%). The table indicates differential rates amongst the main chains with Tesco having the highest retention rate. This might perhaps be expected given its market share and position nationally. It is also tempting to suggest that the Tesco loyalty scheme (Clubcard) has some influence, but this was not a focus of this study and so we can present no evidence to support this. Retention rates of c70% are found for most of the other chains. For Safeway, it suggests that c30% of shoppers switched after the Morrisons changeover at the store. What is also noticeable from the table is the degree of gains and losses amongst all the major chains. To some extent, switching at the margin appears to be almost a 'random' event (see Popkowski-Leszczyc and Timmermans, 1997). However there are dimensions within this. The switchers from Safeway/Morrisons to Tesco were higher spenders (c£77) relative to average Safeway spending levels, but by contrast those switching from Tesco to Morrisons were below average Tesco spenders (c£56).

Take in Table III and IV

Table IV, using the matched sample, provides aggregate data for retention rates by key socio-economic and demographic characteristics. Even for age categories (which previous research had identified as significant) there was no general relationship between age which proved statistically significant when tested using chi square. A range of two way and three way relationships were tested statistically but there were no defining relationships between switching and non-switching at the aggregate level.

These patterns would broadly suggest that at the aggregate level it is difficult to find propensities to switch, confirming the findings of Seiders and Tigert (1997).

Looking at shopping habits, those who shopped more frequently were more inclined to remain loyal. Spend was little differentiated with only a slight tendency towards non-switching by the lowest spenders. Those walking to the store remained more loyal than those taking the bus, but this may reflect constrained choices and access. In terms of differences between switchers and non-switchers, the most important reason for patronising the store showed high loyalty for features such as product range and lower loyalty amongst those who were price conscious.

Reasons for selecting main shopping location showed that for many of those switching, store price was a much more important consideration than location of the store. This was further emphasised by those switching to Morrisons from other stores for whom price was even more important. By contrast those switching away from Morrisons were particularly concerned with the fresh produce offer. This suggests that where a new differentiation amongst stores occurs, based on a clearly defined set of criteria, this will accentuate store switching as argued by Seiders and Tigert (1997). This will occur primarily amongst the group who will benefit most from the specific repositioning which occurs rather than on predisposition based on certain socio-demographic characteristics to switch. The change in offer which Morrisons provided is illustrative of this. The price offer and price based strategy of Morrisons did attract switchers from Tesco and from Sainsbury. Morrisons did lose the professional and managerial groups who no longer felt the store could provide the quality of products they wished to buy.

Conclusions

The subject of store-switching of main food shopping over time appears to be under-researched, despite the fact that it clearly underpins much of the competitive situation in retailing. Market share gains and losses reflect millions of individual and household decisions at the local level. Most research has been interested in the entry of a new store into the market and the impact this has on local market shares and shopping behaviours. One of the issues with this is that it is sometimes difficult to disentangle the impact of location and accessibility from other components of the decision to switch. In this case, the access issue is essentially held constant as the new market entry is through one store changing being taken-over by a competitor. In this case the retail strategy also changed and became more price focused.

This study finds a high level of store-switching, and certainly higher than the other limited UK research levels, though within the range of competitive markets in other studies in the USA. This level is almost certainly a reaction to the changeover of the store from Safeway to Morrisons, which in this case acts as the “trigger” for a re-assessment of store choices and shopping behaviours. No aggregate differences amongst switchers and non-switchers are found, confirming previous research. Demographics and socio-economic characteristics are again found to be poor predictors of switching behaviour. Instead store specific reasons for switching/retention are found reflecting the areas of competency and strategy of the retailers involved. The market leader (Tesco) is found to have the lowest switching rate in this study. There are no specific research findings to explain this, but speculation might include their very successful loyalty card scheme and their high degree of consumer satisfaction which induce “stickiness” to the company/store.

There are a number of implications to be drawn from these results. First, it is clear that switching is both an important part of the food market and is likely to be an ever present component. We do not know the ‘baseline’ level for switching in the UK, Further studies could usefully be undertaken to ascertain this in a range of essentially ‘static’ retail network markets. Secondly, in this case, location has been held constant but a high degree of switching is found, suggesting that competition authorities, planners and retailers need to be more aware of the possibilities for effecting market change and increased competition through store swaps as opposed to new developments. It is unclear whether there would have been more overall switching in the study area if an Asda had been given planning permission to open at the same time as the Safeway changed to Morrisons. Thirdly, there remains much to be done to understand just how retailers can induce higher FSR rates and ‘stickiness’, particularly where there would seem to be some parts of the consumer market that value variety seeking over other components.

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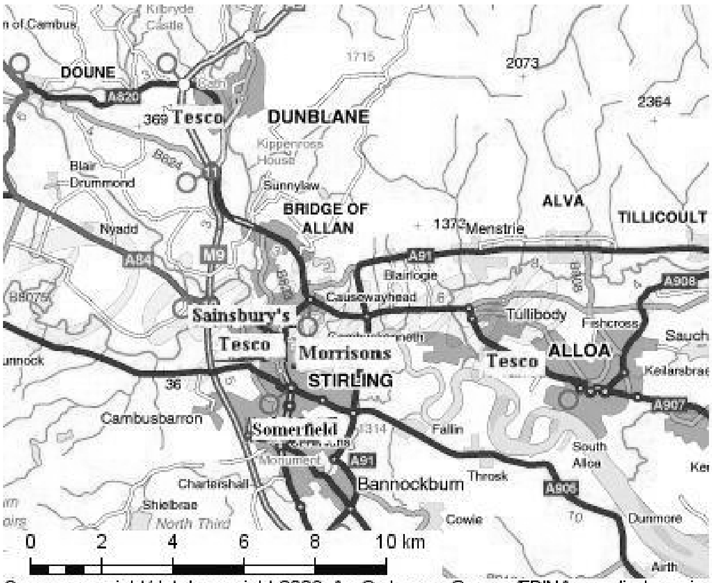

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Table I: Main Shop Visited and Spend, 2004, 2005

	Customers				Spend	
	2004		2005		%	
	No	%	No	%	2004	2005
Safeway	132	13.3	-		13.8	
Tesco	550	55.3	343	49.7	51.7	52.2
Sainsbury	120	12.1	101	14.6	13.1	13.3
Asda	58	5.8	36	5.2	6.6	7.2
Co-op	25	2.5	12	1.7	1.2	0.5
Somerfield	74	7.4	47	6.8	7.4	5.1
Morrisons	-		123	17.8		16.7
Other	35	3.5	28	4.0	6.1	5.1
Total	994	100	690	100	100	100

Table II: Demographic and Socio-economic Profiles, Safeway 2004 and Morrisons 2005

	Safeway	Morrisons
Male	14.0	5.0
Female	86.0	95.0
20-29	2.3	1.6
30-39	6.1	10.7
40-49	19.7	18.0
50-59	23.5	20.5
60-69	22.7	24.6
70+	25.7	24.6
Professional and managerial	34.9	23.8
Manual skilled an non-skilled	18.6	30.4
Retired	41.5	41.8
Unemployed	1.6	3.3
Dual career	36.2	33.3
Car owners	80.3	69.4
No car	19.7	30.6
Family	14.6	13.0
No family	85.4	87.0
Single	19.2	23.0
Couple	57.7	62.3
3+adults	23.2	14.8

Note: all figures are percentages of respondents

Table III: Stirling Retention/Switching Matrix by Store Operator

	Tesco	Sainsbury	Asda	Safeway/ Morrisons	Somerfield	Other
Tesco	82.6	11.9	13.3	14.9	7.4	7.1
Sainsbury	3.0	80.9		10.6	3.7	7.1
Asda	1.8	2.4	73.3		3.7	7.1
Safeway/Morrisons	10.2		13.3	70.2	11.1	
Somerfield	0.6	2.4		2.1	70.3	28.6
Other	1.8	2.4		2.1	3.7	50.0

Highlighted numbers are the proportions of retained shoppers

Table IV: Retention Rates by Socio-economic, Demographic and Shopping Behaviour and Attribute Characteristics

	Retention rate		Retention Rate
(a) Demographics		(c) Shopping Behaviour	
Male	88.9	Spend <£20	83.3
Female	75.6	Spend £20-49	76.8
		Spend £50 and over	76.2
20-29	80.0		
30-39	84.6	Shop twice weekly	84.8
40-49	69.7	Shop once a week	78.6
50-59	78.5		
60-69	75.0	Car	77.7
70+	81.6	Bus	63.2
		Walk	74.2
(b) Socio-Economic		(d) Shopping Attributes	
Professional and managerial	72.8	Near home	79.7
Manual Skilled and non-skilled	77.1	Price	74.2
Retired	76.6	Fresh produce	84.2
Dual Career	78.6	Product range	81.8
Car owners	77.3		
Family	74.6		
No family	77.8		
Single	78.2		
Couple	78.8		
3+adults	72.0		

Note: all figures are percentages of respondents

Figure 1: Main Food Stores Patronised by Respondents in the Survey Area in 2004/5

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