

CAT 18089 Report 2

Understanding Grocery Landscape (GB Only)

Describing
18089 Somerfield Hengrove Way, BS4 1UJ
2 Minute Drive Time (Off-Peak)
In Relation To
South West

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Creation Date: 19 June 2009



Describing **2 Minutes: Example**, , **BS41UJ** in relation to **South West**
Creation Date: **June 19, 2009**

What does this report show?

This report provides a summary of information relevant to today's retailers of Grocery and FMCG products. Providing insights into the local competitive environment through to current and future population numbers, this report provides everything you need to make informed decisions.

What data sources are used?

Grocery Retail Market Share - Grocery Retail Market Shares is a unique database on grocery shopping behaviour. It details where consumers undertake their main and top-up shopping, how much they spend per week, why they choose to shop where they do and how far they travel to their main shop.

Mosaic Grocery - Mosaic Grocery is a behavioural classification system based on shopping behaviour, attitudes to shopping and demographics. It classifies all Great Britain neighbourhoods (postcodes) into 10 distinct types, each of which offers a significantly different mix of challenges and opportunities to the supermarket retailer.

Grocery Store Outlet Locations - Grocery Store Outlet Locations provides information on over 17,000 grocery stores in Great Britain. Built from data supplied to Experian by Retail Locations Ltd, Grocery Store Outlet Locations gives the store name and size as well as its location.

Area Summary

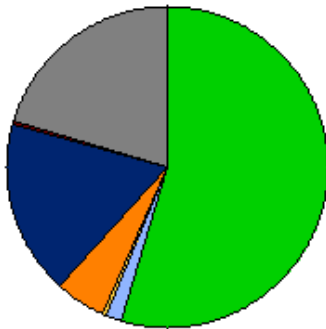
Grocery landscape

Major food retailers	0
Mid size, discount and frozen food retailers	0
Convenience stores	0
Total annual food spend	£2,397,106

Demographics

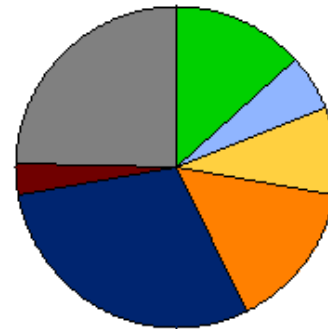
Residential population	2,799
Daytime population (9am-5pm)	2,210
Residential Households	1,103

Market Share Percentages for Area



Asda ■ 54.6%	Morrisons ■ 0.2%	Tesco ■ 17.8%	Other ■ 20.4%
Co-op ■ 1.7%	Sainsburys ■ 5.2%	Waitrose ■ 0.1%	

Market Share Percentages for Base



Asda ■ 13.3%	Morrisons ■ 8.8%	Tesco ■ 29.7%	Other ■ 24.3%
Co-op ■ 5.6%	Sainsburys ■ 15.0%	Waitrose ■ 3.3%	

2 Minutes: Example, , **BS41UJ** has a resident population of **2,799** compared with a daytime population (between the hours of 09:00 - 17:00) of **2,210**, a net change of **-21.03%**. Over the next 10 years, the population for this area is expected to see a change of **6.66%**, with the population forecast to rise to **2,985**.

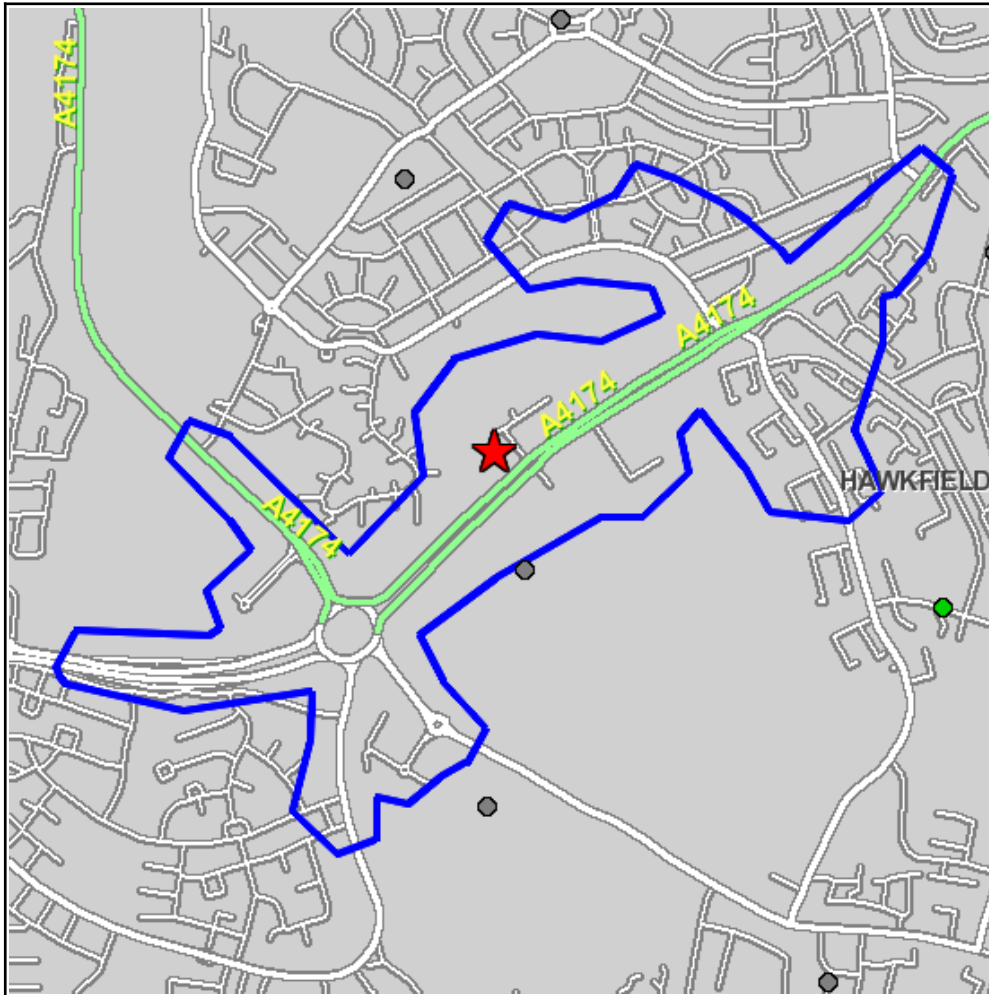
The grocery landscape sees **Asda** with the largest individual market share within **2 Minutes: Example**, , **BS41UJ**, with **54.59%** of grocery spend going to this fascia. This compares to the base selection average for Asda of **13.33%**.



Area Map

Describing **Example, , BS41UJ** in relation to **South West**

Creation Date: 19/06/09



Geography Selection:
Example, , BS41UJ

■ GOAD Centres

Boundary Colour

■ 2 Minute Drive Time (Off-Peak)

Legend

- Asda
- Co-op
- Morrisons
- Sainsburys
- Tesco
- Waitrose
- Other

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Date: 19/06/09



Understanding the Grocery Landscape



Understanding shopping behaviours in the area

The information below is designed to give a flavour as to the differences in attitudes towards, and use of retail supermarkets. Built using lifestyle data sources as well as conventional published statistics, Mosaic Grocery divides the UK's 1.7 million postcodes into just ten categories, each of which offers a significantly different mix of challenges and opportunities to the supermarket retailer. These differences go way beyond product category and brand preferences. Each of the Mosaic Grocery types differs in terms of how its residents trade off price against service, convenience against variety, promotional orientation, pack size preference and attitude towards own brand.

Mosaic Grocery	Households in Area	% Households in Base	% -62	1310
GM01 Luxury and Loyalty	0	0.00	235,848	10.55
GM02 Speciality Singles	0	0.00	67,846	3.03
GM03 Superstore Next Door	133	12.09	329,312	14.73
GM04 Family Basket	5	0.43	285,052	12.75
GM05 Volume and Value	215	19.48	297,846	13.32
GM06 Rural Choice	0	0.00	359,851	16.09
GM07 Mid-Size and Local	0	0.00	307,621	13.76
GM08 Coupons and Competitions	83	7.51	207,853	9.29
GM09 Budget Shoppers	653	59.21	106,090	4.74
GM10 Bare Essentials	14	1.29	39,030	1.75

Chart Explanation - the chart above represents the Index value. This represents the over or under representation of the area selection relative to the base.

Within **2 Minutes** the Mosaic Grocery type **GM09 Budget Shoppers** is most over represented compared with **South West** with an index value of **1,248**. The second most over-represented group is **GM05 Volume and Value** with an index value of **146**. In terms of actual numbers, then **GM09 Budget Shoppers** makes up the largest proportion of all households with **59.21%**.

Understanding the key Mosaic Grocery Types

GM09 Budget Shoppers



- Low income shoppers
- Very price conscious, have strict budgets
- Mixture of families and older age groups
- Often found in industrial areas
- Car ownership is low, so trips are more frequent via public transport
- Typical journey would be, 'bus to store, taxi home'.
- Top-up shopping will be at local discount and freezer stores
- Use coupons and vouchers
- Prefer to buy British

GM05 Volume and Value



- Price conscious consumers
- Use superstores and buy in bulk
- Families with younger children
- Prime target for BOGOF's, multipacks, and own label
- Will travel further in search of a good price
- Use local freezer centres for top-up shopping



Understanding the Grocery Landscape



Understanding the consumer types in the area

Mosaic UK classifies all consumers in the United Kingdom by allocating them to one of 61 Types and 11 Groups. The 11 Groups are shown below as a profile. They provide a summary of the detailed picture painted of UK consumers in terms of their socio-economic and socio-cultural behaviour.

Mosaic UK Groups	Households in Area	%	Households in Base	%	Index
A Symbols of success	0	0.00	150,647	6.74	0
B Happy families	178	16.10	281,665	12.59	128
C Suburban Comfort	72	6.52	336,198	15.03	43
D Ties of Community	163	14.80	327,421	14.64	101
E Urban Intelligence	0	0.00	118,330	5.29	0
F Welfare Borderline	39	3.54	56,727	2.54	140
G Municipal Dependency	133	12.02	61,174	2.74	440
H Blue Collar Enterprise	451	40.91	202,504	9.06	452
I Twilight Subsistence	67	6.12	70,151	3.14	195
J Grey Perspectives	0	0.00	375,551	16.79	0
K Rural Isolation	0	0.00	255,981	11.45	0

Chart Explanation - the chart above represents the Index value. This represents the over or under representation of the area selection relative to the base.

Within **2 Minutes** the Mosaic UK Group **H Blue Collar Enterprise** is most over represented compared with **South West** with an index value of **452**. The second most over-represented group is **G Municipal Dependency** with an index value of **440**. In terms of actual numbers, then **H Blue Collar Enterprise** makes up the largest proportion of all households with **40.91%**.

Understanding the key Mosaic UK Groups

H Blue Collar Enterprise



- Middle aged couples
- Mostly poorly educated
- Council estates
- Small towns
- Exercised right to buy
- Self reliant and capable
- Straight talking
- Like to shop around
- Heavy viewers of TV

G Municipal Dependency



- Families
- Low incomes
- Terraces and semis
- Large council estates
- Outer suburbs
- Large provincial towns
- Old fashioned
- Pay bills at Post Office
- Heavy TV viewing



Understanding the retail expenditure by market share

Food Retail Market Shares helps retailers to evaluate their own and competitors' market share at a local and national level. It also enables manufacturers and distribution companies to target promotions based on relative brand strength. The figures below are based on both primary and top-up shopping expenditure.

Major Supermarkets	Spend in Area	%	Spend in Base	%	0	100	430
Asda	£25,166	54.59	£17,389,048	13.33			
Morrisons	£112	0.24	£11,530,274	8.84			
Sainsburys	£1,892	4.10	£18,993,973	14.56			
Tesco	£8,110	17.59	£37,316,759	28.60	62		
Waitrose	£38	0.08	£4,335,825	3.32			

Mid Size Supermarkets	Spend in Area	%	Spend in Base	%	33	100	284
Marks & Spencer	£3,229	7.00	£3,345,774	2.56			
Somerfield	£1,188	2.58	£7,484,982	5.74			

Discount Retailer	Spend in Area	%	Spend in Base	%	16	100	281
Aldi	£1,757	3.81	£1,847,293	1.42			
Lidl	£420	0.91	£4,110,800	3.15			
Netto	£0	0.00	£0	0.00			

Frozen Foods	Spend in Area	%	Spend in Base	%	50	100	133
Farmfoods	£117	0.25	£615,691	0.47			
Iceland	£965	2.09	£2,099,419	1.61			

Convenience Stores	Spend in Area	%	Spend in Base	%	0	100	493
Budgens	£1,368	2.97	£823,375	0.63			
Co-op	£786	1.70	£7,284,158	5.58			
Costcutter	£41	0.09	£822,882	0.63			
Londis	£63	0.14	£1,215,675	0.93			
Marks & Spencer - Simply Food	£45	0.10	£217,699	0.17	58		
Other	£135	0.29	£8,579,864	6.57			
Sainsburys - Local / Central	£506	1.10	£518,690	0.40			276
Spar	£66	0.14	£582,790	0.45			
Tesco - Express	£95	0.21	£1,379,378	1.06			



Demographics

Age Band	Population in Area	%	Population in Base	%	Index	64	100	143
Under 15	648	23.16	849,500	16.54	140			
Age 15 to 19	186	6.65	331,698	6.46	103			
Age 20 to 24	178	6.35	310,031	6.04	105			
Age 25 to 34	370	13.21	563,954	10.98	120			
Age 35 to 44	399	14.25	741,012	14.43	99			
Age 45 to 54	345	12.32	681,217	13.26	93			
Age 55 to 64	311	11.11	684,164	13.32	83			
Age 65 & Over	362	12.94	974,614	18.98	68			

Family Income	Adults 15+ in Area	%	Adults 15+ in Base	%	Index	43	100	130
£6,999 or less	300	13.95	473,466	11.05	126			
£7,000 to £12,999	384	17.84	673,761	15.72	114			
£13,000 to £19,999	413	19.19	797,594	18.61	103			
£20,000 to £26,999	360	16.76	625,905	14.60	115			
£27,000 to £36,999	365	16.96	694,115	16.19	105			
£37,000 to £49,999	227	10.56	592,269	13.82	76			
£50,000 or over	102	4.74	429,580	10.02	47			

Ethnic Indicator: Origins	Population in Area*	%	Population in Base*	%	Index	-15	100	333
Bangladeshi	2	0.05	6,486	0.13	43			
Black African	14	0.50	8,095	0.16	317			
Black Caribbean	3	0.12	2,401	0.05	248			
Celtic	330	11.78	681,025	13.26	89			
Chinese	6	0.23	13,955	0.27	83			
Eastern European	22	0.79	61,371	1.20	66			
English	2,203	78.69	3,870,053	75.35	104			
Greek / Greek Cypriot	1	0.04	6,058	0.12	30			
Hindu	2	0.07	16,909	0.33	20			
Hispanic	9	0.33	29,601	0.58	57			
Irish	139	4.98	212,081	4.13	121			
Italian	15	0.54	34,643	0.67	81			
Jewish or Armenian	0	0.00	4,774	0.09	0			
Other East Asian	0	0.00	7,100	0.14	0			
Other Muslim	4	0.14	11,455	0.22	64			
Pakistani	3	0.10	18,523	0.36	28			
Sikh	6	0.21	5,268	0.10	209			
Somali	0	0.01	1,991	0.04	25			
Tamil and Sri Lankan	0	0.00	2,627	0.05	0			
Turkish	0	0.01	5,025	0.10	13			
Western European	39	1.41	134,788	2.62	54			
Unclassified	0	0.00	1,961	0.04	0			

Lifestage	Population in Area*	%	Population in Base*	%	Index	18	100	148
Very young family	7	0.68	13,122	0.64	107			
Very young single	30	2.77	55,660	2.71	102			
Very young homesharers	3	0.27	6,896	0.34	80			
Young family	78	7.11	102,114	4.97	143			
Young single	83	7.61	125,279	6.10	125			
Young homesharers	8	0.74	32,094	1.56	47			
Mature family	136	12.39	228,636	11.12	111			
Mature singles	90	8.25	142,221	6.92	119			
Mature homesharers	13	1.19	40,044	1.95	61			
Older family	255	23.27	475,651	23.14	101			
Older single	118	10.76	217,378	10.58	102			
Older homesharers	14	1.25	57,333	2.79	45			
Elderly family	130	11.84	265,962	12.94	91			
Elderly single	125	11.43	264,127	12.85	89			
Elderly homesharers	5	0.42	24,657	1.20	35			
Unknown	1	0.05	4,237	0.21	24			

* Note: Population counts are based on Experian's Consumer Segmentation Database containing approximately 96% of the UK population of voting age.



Understanding the Grocery Landscape

Data Explanation Page - **Mosaic Grocery**



Mosaic Grocery is a behavioural classification system based on shopping behaviour, attitudes to shopping and demographics. It classifies all Great Britain neighbourhoods (postcodes) into 10 distinct types, each of which offers a significantly different mix of challenges and opportunities to the supermarket retailer. These differences go way beyond product category and brand preferences. Each of the Mosaic Grocery types differs in terms of how its residents trade off price against service, convenience against variety, promotional orientation, pack size preference and attitude towards own brand.

A Mosaic Grocery type has been assigned to each postcode in Great Britain as the result of a cluster analysis using the following data sources:

- Person and household demographics.
- Grocery retail market shares.
- Grocery store outlet locations.
- Census 2001 census variables.
- Lifestyle data - attitudes to shopping.
- Household and population estimates.

Cluster analysis results have then been assessed against these data sources, plus others such as Newspaper Readership (modelled from Experian Lifestyle Survey responses) and EFS market expenditure, to allow each Mosaic Grocery type to be accurately named and richly described.

Mosaic Grocery has been updated for the UK 2006 Update by applying the original cluster analysis results to updated data sources.

Mosaic Grocery is available as:

A postcode directory, i.e. postcodes and corresponding Mosaic Grocery type.
At OA and Postal Sector level as counts of households by each Mosaic Grocery type.



Understanding the Grocery Landscape

Data Explanation Page - **Household & Population Estimates**



Household and Population Estimates provide 2006 estimates of households and population (i.e. residents). The population estimates are split by age, by gender and by residence type. Household and Population Estimates are useful for assessing local area demand for products and services targeted at particular age ranges and/or genders.

Household and Population Estimates are available at postcode, Output Area (OA) and Postal Sector levels:

Postcode estimates. Key counts are available at postcode level, which is a very low level of geography containing, on average, 15 households.

OA and Postal Sector estimates. These are fully compatible with the postcode estimates and provide more detailed splits of the population by age (20 bands), by gender (2 bands), and by residence type (2 bands), providing 80 bands in total. Household and Population Estimates are created using a wide variety of small area data sources to estimate and track household and population change over time, including 2001 Census results, Postal Address File (PAF), lifestyle data and Experian's UK Consumer Dynamics Database (UKCDD).

The estimates take account of changing postal geography and are also calibrated to Local Authority District (LAD) targets based on the most recently available government household and population estimates and projections. They also take account of people and households that were not recorded in the 2001 Census (under-enumeration). They are updated annually to allow for changes in housing stock and population changes due to births, deaths, migration, and the ageing of the population.

Household and Population Estimates for all levels agree with the Joint Industry Committee for Population Standards (JICPOPs) Postal Sector and Administrative District (i.e. LAD and Unitary Authority (UA)) estimates.



Overview

Lifestage is a household level demographic segmentation that shows the combined stage of life and family status.

Methodology

Lifestage is derived by analysing the combination of adults living at a household and the age of the individuals.

Lifestage has the following bands:

Band	Description	Household %	Age
0	Very young family	3.28	18-25
1	Very young single	1.11	18-25
2	Very young homesharers	0.46	18-25
3	Young family	6.02	26-35
4	Young single	7.19	26-35
5	Young homesharers	1.48	26-35
6	Mature family	9.05	36-45
7	Mature singles	8.63	36-45
8	Mature homesharers	1.78	36-45
9	Older family	20.07	46-65
10	Older single	7.27	46-65
11	Older homesharers	1.68	46-65
12	Elderly family	13.13	66+
13	Elderly single	12.72	66+
14	Elderly homesharers	1.29	66+
U	Unknown	4.83	Any

Dominant values have been calculated for all UK postcodes. The most frequently occurring class in each postcode has been allocated as the dominant value for the Lifestage variable.



MOSAIC ORIGINS - CLASSIFYING AND ANALYSING PEOPLE BY THEIR FAMILY ROOTS

Mosaic Origins

Mosaic Origins classifies people according to the part of the world from which their forebears are most likely to have originated. Every person is placed into one of 21 Coarse Origins Groups, which may be decided 'onomastically' (i.e. by type of name), or by religion, language or geography.

It must be noted that on no occasion are the origins of an individual known; they are simply estimated with varying degrees of confidence. Any application that relies on the accuracy of this must be treated with extreme caution. It may be quite legitimate to say that 30% of people in a geographic area share a particular origin; however, extending that assumption to each of the individuals concerned is something that can only be done if the consequences of error are negligible.

Who may use it and how may they use it?

Mosaic Origins has applications in the public, private and charity sectors. Applications include:

Finding difficult to reach target groups

- Sampling ethnic minorities
- Finding and quantifying members of ethnic minorities
- Targeted communications

Details of how the classification works

In order to code people, Mosaic Origins makes use of a table, which contains information on over 590,000 family names and over 190,000 personal names. Each of these names has been examined in such a way as to identify the Origins type to which it is most likely to belong. This evaluation makes use of a number of criteria including the Origins codes of the surnames held by bearers of each personal name, and vice versa; the geographical concentration of the name both within and between countries; the Mosaic codes in which the names is mostly found; and the appearance of diagnostic letter sequences (e.g. van at the start of a family name indicating Dutch origin).

This evaluation also establishes the confidence with which we can say a particular name belongs to a particular Origins type.

Looking at the codes associated with both the personal name and the family name, and taking into account the confidence level of each, Mosaic Origins identifies the Origins type to which each person's name is most likely to belong.

The level of accuracy varies from one Origins type to another. Mosaic Origins achieves accuracy rates in excess of 90% in identifying South Asians and Muslims, and 70% in identifying Black Africans, Greeks, Armenians and people from East and South East Europe. It achieves accuracy rates of 50% with Hispanics. Lower accuracy rates are achieved with people of Nordic or French origin, with Jews and Black Caribbeans.

As would be expected the system is more accurate when coding names to a general category, such as South Asians or Greeks Orthodox, than to specific sub-categories, such as Sri Lankans or Greek Cypriots.

It is also very important to note that we are assessing the origin of names, not people.

Understanding the origin of the names of a group of people (eg the population in a geographic area) allows inferences to be made about them that can help organisations tailor service delivery to meet the needs of minority groups. For most applications this is ethically acceptable, but there are clearly occasions where it would not be so. In particular, to proactively target individuals on the basis of the Origins type of their name is unacceptable.



Grocery Retail Market Shares is a unique database on grocery shopping behaviour. It details where consumers undertake their main and top-up shopping, how much they spend per week, why they choose to shop where they do and how far they travel to their main shop. An indication of consumer's preference for organic shopping and internet shopping is also available.

Grocery Retail Market Shares helps retailers to evaluate their own and competitors' market share at a local and national level. It enables manufacturers and distribution companies to target promotions.

The following information is available for each area:

- Household shop by fascia.
- Household spend by fascia.
- Shopping behaviour (including organic shopping and internet grocery shopping).
- Summary shop and spend (by 20 coarse fascia).
- Dominance data.

You can also view the following on maps at OA and postal sector level:

- Average weekly spend per household.
- Dominant fascias.
- Shopping behaviour.

The data is also available within Micromarketer, or can be supplied as a separate database. Reports can also be provided on a bureau basis.