

dti

SUNDAY SHOPPING

National Statistics: Sunday
shopping module for DTI

December 2005 - January
2006

JULY 2006

URN 06/1345

Introduction

At present the Sunday Trading Act 1994 prohibits large shops from opening for more than 6 continuous hours¹ on a Sunday between 10am and 6pm. Large shops are classified as shops which have an internal floor space greater than 280 square metres used for the purpose of displaying goods for resale. Small shops can trade without restrictions on a Sunday².

The Department of Trade and Industry (DTI) is currently reviewing the Sunday trading restriction and as a part of the review commissioned the Office for National Statistics (ONS) to conduct a survey of consumers. The purpose of the survey was to gain a better understanding of how consumers would alter their shopping behaviour if large shops were allowed to open for longer than 6 continual hours on a Sunday. The survey distinguished between food and non-food shopping by asking individuals how they would change their shopping behaviour at supermarkets and at other large shops (excluding supermarkets).

This report summarises the methodology and key results from the survey.

Methodology

The Sunday trading module comprised of seven questions (see annex) and was asked as part of the December 2005-January 2006 ONS Omnibus Survey.

The December 2005 survey had a response rate of 65%³ and yielded a sample size of approximately 1,050 adults aged 16 or over, who were interviewed as part of the National Statistics omnibus survey. Interviews were held in private households and were mainly held on weekdays; around 5% of the interviews were conducted at the weekend. The Omnibus Survey uses the Postcode Address File (PAF) of “small users” as its sampling frame. The PAF is known to have higher coverage of private households than any other available frame. A new sample of 67 postal sectors is selected for each month and is stratified by region. The postal sectors are selected with probability proportionate to size and, within each sector, 30 addresses (delivery points) are selected randomly. The ONS have weighted the data up to the population and all figures in this report refer to weighted data.

Frequency of Sunday shopping

Around 5.6 million adults aged over 16 (out of a possible 41.9 million adults) shop at supermarkets every Sunday and 2.8 million shop at other large shops every Sunday. 53% of the individuals who shop at a large shop also shop at a supermarket on

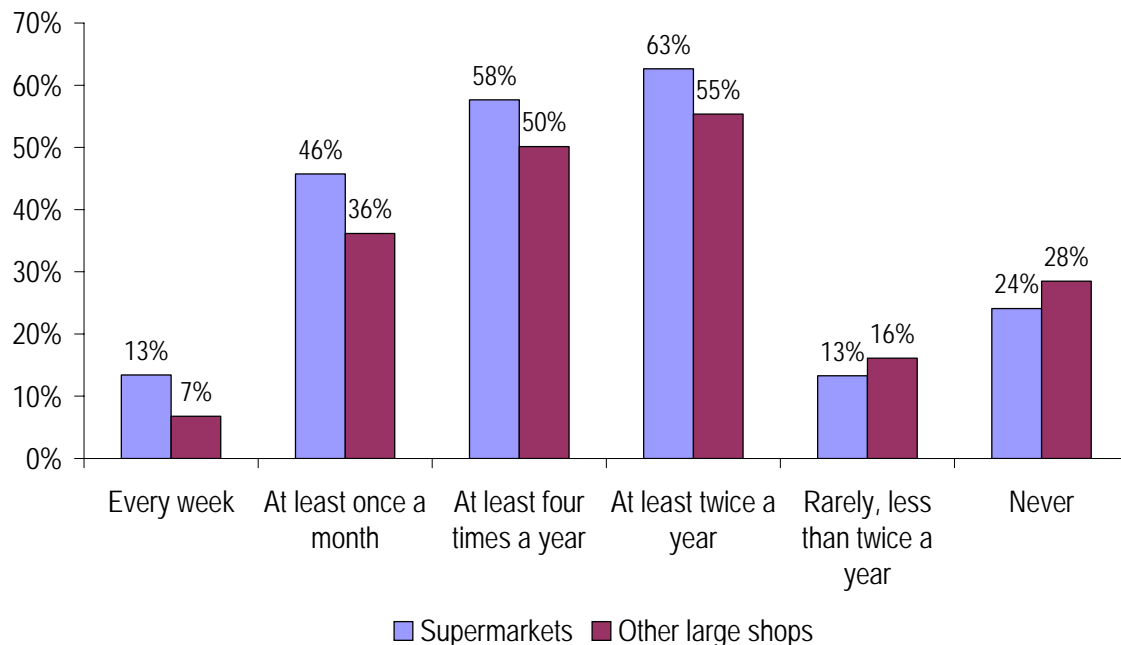
¹ For the purpose of serving customers

² Small shops are defined as shops that have an internal floor space (used for the purpose of displaying goods) that is less than 280 Square metres.

³ This response rate is for the entire omnibus survey (including responses from Scotland). The PAF contains some ineligible addresses (about 9-10%) as some addresses will be for business or empty properties. The response rate is calculated after removing any ineligible addresses that may have been originally selected.

Sundays; this represents around 1.5 million people. 6.9 million people make at least one shopping trip to a large shop every Sunday. Over one third of individuals shop at least once a month on a Sunday (46% at supermarkets and 36% at other large shops). It is estimated that 10.1 million people never shop at a supermarket on a Sunday and 11.9 million never shop at other large shops on Sundays.

1. Frequency of Sunday Shopping



Source: National Statistics Omnibus survey, Dec 2005 -Jan 2006

Profile of Sunday shoppers

Men shop more frequently at supermarkets compared to women, 18% of men shop at a supermarket every Sunday compared to only 9% of women⁴. This difference is smaller and in fact not statistically significant for other large shops.

Table 1: Frequency of shopping for males and females at supermarkets on a Sunday

Frequency of shopping	Males	Females	All
Every week	18%	9%	13%
At least once a month	49%	43%	46%
At least four times a year	59%	56%	58%
At least twice a year	64%	61%	63%
Rarely, less than twice a year	12%	15%	13%
Never	24%	25%	24%
Base	20.4 million	21.5 million	41.9 million

Source: National Statistics Omnibus survey, Dec 2005 -Jan 2006

⁴ This difference is statistically significant at the 95% level (t-stat = 4.92).

Table 2: Frequency of shopping for males and females at other large shops on a Sunday

Frequency of shopping	Males	Females	All
Every week	8%	6%	7%
At least once a month	36%	36%	36%
At least four times a year	51%	49%	50%
At least twice a year	56%	54%	55%
Rarely, less than twice a year	16%	16%	16%
Never	28%	29%	28%
Base	20.4 million	21.5 million	41.9 million

Source: National Statistics Omnibus survey, Dec 2005 -Jan 2006

The results suggest that the propensity to shop on a Sunday declines with age (excluding 16-24 year olds). 55% of adults aged over 75 never shop at a supermarket on a Sunday compared to only 12% of 25-44 year olds⁵. 75% of adults aged over 75 never shop at large shops (excluding supermarkets) on Sundays.

Table 3: How often do consumers shops at a supermarket on a Sunday by age

Frequency of shopping	Respondent's age						Total
	16 to 24	25 to 44	45 to 54	55 to 64	65 to 74	75 and over	
Every week	10%	19%	20%	6%	7%	3%	13%
At least once a month	47%	61%	56%	34%	23%	11%	46%
At least four times a year	55%	75%	69%	46%	36%	18%	58%
At least twice a year	59%	78%	76%	53%	41%	24%	63%
Rarely, less than twice a year	5%	10%	10%	19%	24%	21%	13%
Never	35%	12%	14%	28%	35%	55%	24%
Base	6.2 million	14.8 million	6.6 million	6.4 million	4.3 million	3.6 million	41.9 million

Source: National Statistics Omnibus survey, Dec 2005 -Jan 2006

Table 4: How often do consumers shops at other large shops (excluding supermarkets) on a Sunday by age

Frequency of shopping	Respondent's age						Total
	16 to 24	25 to 44	45 to 54	55 to 64	65 to 74	75 and over	
Every week	14%	9%	3%	3%	5%	3%	7%
At least once a month	49%	46%	38%	28%	18%	6%	36%
At least four times a year	60%	61%	56%	42%	34%	9%	50%
At least twice a year	64%	69%	59%	46%	40%	13%	55%
Rarely, less than twice a year	8%	18%	16%	21%	16%	12%	16%
Never	28%	13%	24%	32%	45%	75%	28%
Base	6.2 million	14.8 million	6.6 million	6.4 million	4.3 million	3.6 million	41.9 million

Source: National Statistics Omnibus survey, Dec 2005 -Jan 2006

⁵ This difference is statistically significant at the 95% level (t stat = -10.12).

Parents with dependent children⁶ are more likely to shop at large shops (excluding supermarkets) on a Sunday compared to individuals with no dependent children. 45% of parents with dependent children shop at other large shops at least once a month compared to 32% of people without any dependent children⁷. 51% of parents with dependent children shop at least once a month on a Sunday at supermarkets compared to 43% of individuals with no dependent children⁸.

49% of full-time employees shop at a supermarket on Sundays at least once a month compared to 39% of part-time employees. 37% of full-time employees shop at least once a month on a Sunday at other large shops compared to 30% of part-time employees. Individuals in employment⁹ are more likely to shop on a Sunday compared to economically inactive individuals. 33% of economically inactive individuals never shop on a Sunday at a supermarket compared to 18% in employment¹⁰. 42% of economically inactive individuals never shop on a Sunday at other large shops compared to 19% in employment¹¹. The results suggest that managerial and professional occupations and intermediate occupations shop more frequently at both supermarkets and other large shops compared to routine and manual occupations.

Actively practising Christians tend to shop less often on Sundays compared to non-practising Christians. Around half of actively practising Christians either rarely shop¹² or never shop on a Sunday at supermarkets compared to just over a third of non-practising Christians¹³. 56% of actively practising Christians either rarely shop¹⁴ or never shop on a Sunday at other large shops (this represents around 13% of adults) compared to 44% of non-practising Christians (representing around 24% of all adults)¹⁵. Due to sample size it is not possible to comment on individuals belonging to other religions.

⁶ A dependent child is defined as a child aged under 16 or aged 16 – 18, never married and not a foster child.

⁷ This difference is statistically significant at the 95% level (t-stat = 1.98)

⁸ This difference is not statistically significant at the 95% level (t-stat = 1.39)

⁹ In employment or unpaid family worker.

¹⁰ This difference is statistically significant at the 95% level (t-stat = -2.80)

¹¹ This difference is statistically significant at the 95% level (t-stat = -4.57)

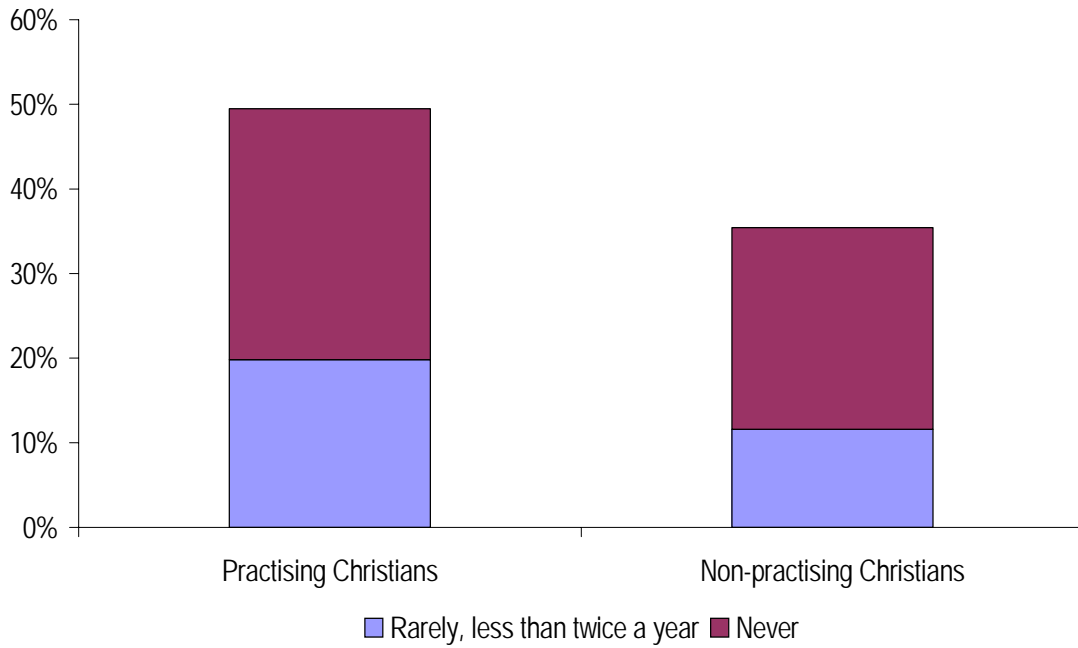
¹² Rarely shopping on a Sunday was defined as less than twice a year.

¹³ This difference is statistically significant at the 95% level (t-stat = 2.17)

¹⁴ Rarely shopping on a Sunday was defined as less than twice a year.

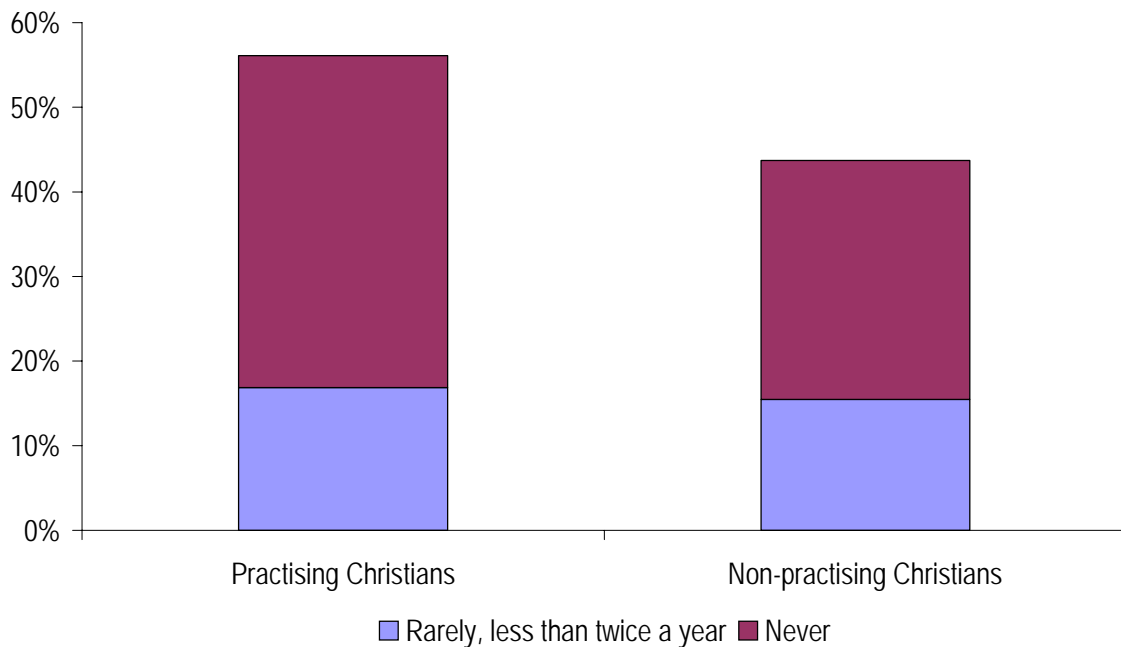
¹⁵ This difference is statistically significant at the 95% level (t-stat = 2.04)

2. Comparison of shopping behaviour at supermarkets between practising and non-practising Christians on a Sunday



Source: National Statistics Omnibus survey, Dec 2005 -Jan 2006

3. Comparison of shopping behaviour at other large shops (excluding supermarkets) between practising and non-practising Christians on a Sunday



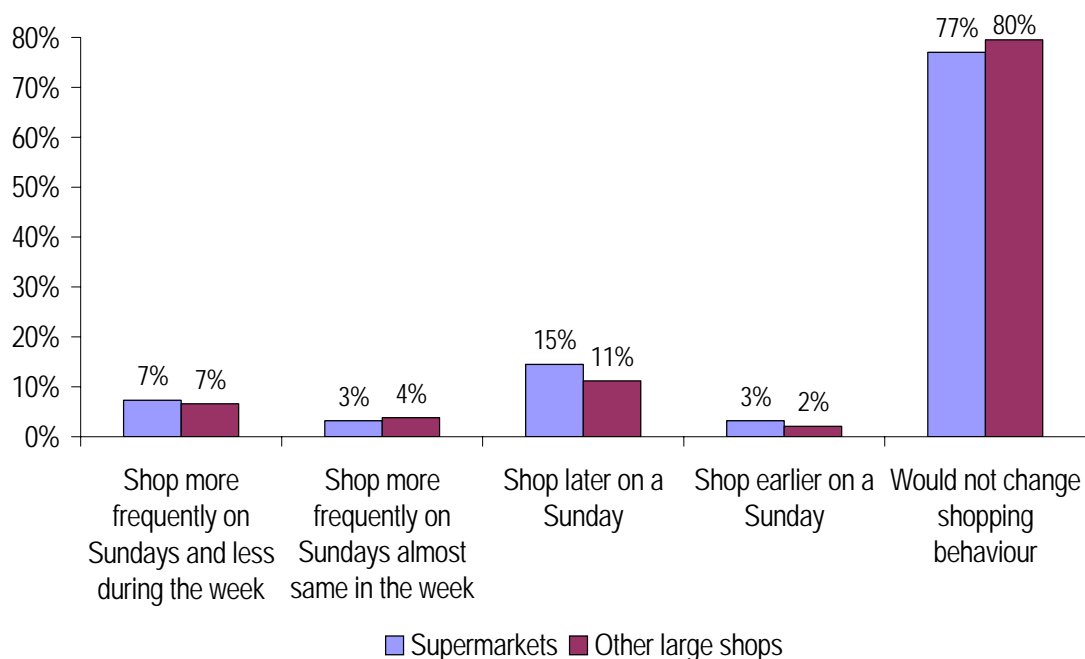
Source: National Statistics Omnibus survey, Dec 2005 -Jan 2006

Predicted change in shopping behaviour

Individuals were asked how they would change their shopping behaviour at supermarkets and other large shops if Sunday opening hours were extended. 77% of individuals believe that they would not change their current shopping behaviour at supermarkets. 79.5% would not change their shopping behaviour at other large shops. Of those who would alter their behaviour the majority of people would prefer to shop later on a Sunday. 15% of individuals would shop later on a Sunday at a supermarket; this represents around 6.1 million adults. 11% would like to shop later at other large shops. A small proportion of individuals would welcome an opportunity to shop earlier on a Sunday (3% at a supermarket and 2.1% at other large shops).

Individuals were also asked how their frequency of shopping would change on Sundays and during the week. 7% of people thought that they would shop more frequently on Sundays and less frequently during the week at all types of large shops. 3% of people would shop more frequently on Sundays and almost the same in the week at supermarkets, 4% of people would shop more frequently on Sundays and almost the same in the week at other large shops.

4. How consumers would change their shopping behaviour if Sunday trading hours were extended



Source: National Statistics Omnibus survey, Dec 2005 -Jan 2006

Factors affecting change in behaviour

The predicted change in behaviour between men and women is broadly similar especially for supermarket shopping. Men are slightly more likely to shop more frequently on Sundays and almost the same during the week compared to women at

large shops (excluding supermarkets)¹⁶. Men are also less likely to shop more frequently on Sundays and less during the week compared to women at large shops (excluding supermarkets)¹⁷. 5% of men would shop more frequently on Sundays and less during the week compared to 8% of women at large shops (excluding supermarkets).

Individuals aged over 55 are least likely to change their shopping behaviour. Over 90% of individuals aged over 55 will not change their shopping behaviour if opening hours were extended. 16-24 year olds are most likely to change their shopping patterns. 28% of 16-24 year olds said that they would shop later on a Sunday at supermarkets, 23% of 16-24 year olds would shop later at other large shops.

Economically inactive individuals are less likely to change their shopping behaviour compared to those in employment. 85% of economically inactive individuals would not change their shopping behaviour compared to 72% of those in employment at supermarkets. 85% of economically inactive individuals would not change their shopping behaviour at other large shops (excluding supermarkets) compared to 77% of those in employment.

Actively practising Christians are less likely to change their shopping behaviour at supermarkets compared to non-practising Christians. 88% of practising Christians would not change their shopping behaviour at supermarkets compared to 78% of non-practising Christians¹⁸. There is no statistically significant difference for the predicted change in behaviour at other large shops.

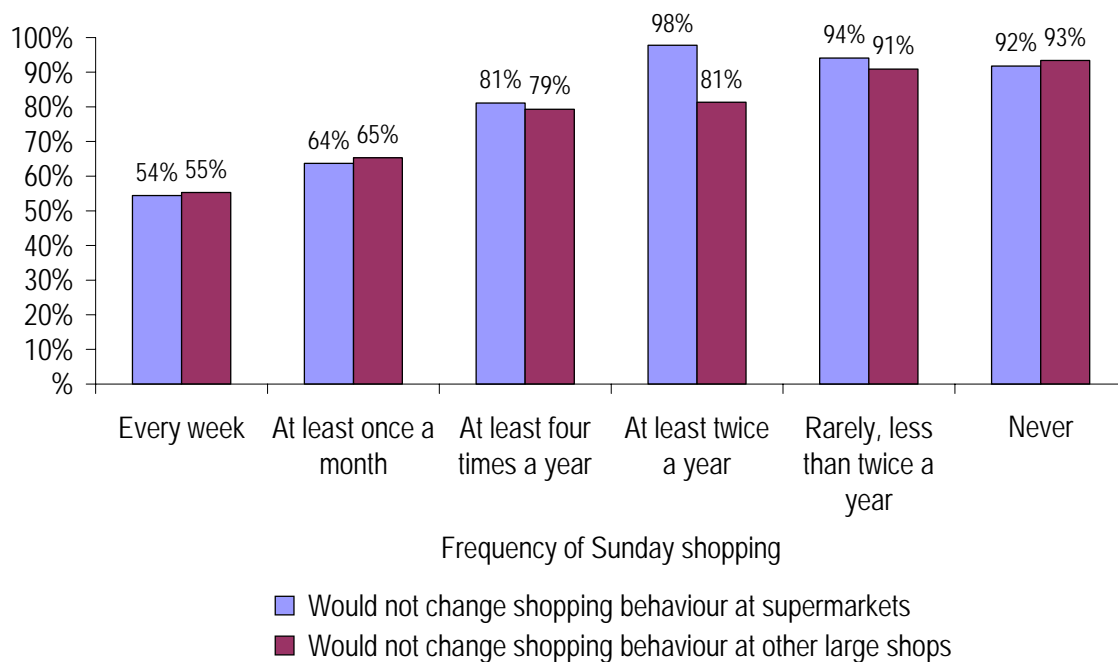
The graph below shows that the percentage of consumers who would not change their shopping behaviour rises as the respondent's current frequency of Sunday shopping declines.

¹⁶ This difference is statistically significant at the 90% level (t-stat = 1.67).

¹⁷ This difference is statistically significant at the 90% level (t-stat = -1.86).

¹⁸ This difference is statistically significant at the 95% level (t-stat = 2.56)

5. Percentage of consumers who would not change their shopping behaviour plotted against current frequency of Sunday shopping



Source: National Statistics Omnibus survey, Dec 2005 - Jan 2006

Conclusion

Whilst recognising that actual behaviour in the event of removing Sunday Shopping restrictions may be different to that predicted in this survey, the results suggest that the majority of people (especially older people) will not change their shopping behaviour as a result, although a significant minority say they would take the opportunity to shop later on a Sunday.

Annex One: Survey questions

NATIONAL STATISTICS OMNIBUS SURVEY - December 2005

Module MAG Sunday Trading for DTI

ASK ALWAYS :

Intro1

The following few questions are from the Department of Trade and Industry who would like to hear your views on Sunday shopping. As you are probably aware, larger shops (i.e. those with an internal sales area over 280 square metres - about the size of a tennis court) are only permitted to open for 6 hours on a Sunday but in future this might be increased. For example, some shops may stay open for as long as they do on other days of the week. We are interested in your opinion on this.

(1) Continue Press <1> to continue

ASK ALWAYS :

MAG_2

On average, how often do you shop at a supermarket on a Sunday...

Code first that applies

- (1) Every every week?
 - (2) Month at least once a month?
 - (3) Four at least four times a year?
 - (4) Twice at least twice a year?
 - (5) Less rarely, less than twice a year?
 - (6) Never never?
-

ASK ALWAYS :

MAG_3

On average, how often do you shop at a large shop (excluding supermarkets) on a Sunday...

Code first that applies

- (1) Every every week?
- (2) Month at least once a month?
- (3) Four at least four times a year?
- (4) Twice at least twice a year?
- (5) Less rarely, less than twice a year?
- (6) Never never?

ASK ALWAYS :

MAG_4M

SHOWCARD X1

How would you change your shopping behaviour at supermarkets if Sunday opening hours were extended?

Please code up to three responses

SET [3] OF

- (1) Fres Shop more frequently on Sundays and less during the week
- (2) Lesss Shop more frequently on Sundays but almost the same during the week
- (3) Later Shop later on a Sunday
- (4) Early Shop earlier on a Sunday
- (5) Chang Would not change shopping behaviour
- (6) Other Other (Please specify)
- (7) Dontk Don't know Spontaneous only)

WARN IF: Fres IN MAG_4M
NOT (IN(Lesss, MAG_4M))

The respondent cannot shop both more frequently and less frequently on a Sunday. Please amend.

WARN IF: Dontk IN MAG_4M
MAG_4M.CARDINAL = 1

You cannot use 'Don't know' alongside other codes. Please amend.

WARN IF: Chang IN MAG_4M
MAG_4M.CARDINAL = 1

You cannot use 'would not change shopping behaviour' alongside other codes. Please amend.

ASK IF: Other IN MAG_4M

Spec4M

Interviewer, please record other change of behaviour.

STRING[255]

ASK ALWAYS :

MAG_5M

SHOWCARD X1

How would you change your shopping behaviour at large shops (excluding supermarkets) if Sunday opening hours were extended?

Please code up to three responses

SET [3] OF

- (1) Fres Shop more frequently on Sundays and less during the week
- (2) Lesss Shop more frequently on Sundays but almost the same during the week
- (3) Later Shop later on a Sunday
- (4) Early Shop earlier on a Sunday
- (5) Chang Would not change shopping behaviour
- (6) Other Other (Please specify)
- (7) Dontk Don't know Spontaneous only)

WARN IF: *Fres IN MAG_5M*
NOT (IN(Lesss, MAG_5M))

The respondent cannot shop both more frequently and less frequently on a Sunday. Please amend.

WARN IF: *Chang IN MAG_5M*
MAG_5M.CARDINAL = 1

You cannot use 'would not change shopping behaviour' alongside other codes. Please amend.

WARN IF: *Dontk IN MAG_5M*
MAG_5M.CARDINAL = 1

You cannot use 'Don't know' alongside other codes. Please amend.

ASK IF: *Other IN MAG_5M*

Spec5M

Interviewer, please record other change of behaviour.

STRING[255]

ASK IF: *QILO.DVILO3a = InEmp*

MAG_6

Within your regular or normal pattern of work do you work on Sundays...

INTERVIEWER: Respondents who work seasonally on Sundays e.g shop workers who work on Sunday in December only should be coded as 'Seasonally - at certain times of the year'.

Code first that applies

- | | | |
|-----|-------|--|
| (1) | Every | every week? |
| (2) | Seaso | seasonally - at certain times of the year? |
| (3) | Month | at least once a month? |
| (4) | Four | at least four times a year? |
| (5) | Twic | at least twice a year? |
| (6) | Rare | rarely? |
| (7) | Neve | never? |

ASK ALWAYS:

MAG_7

N X2

What is your religion even if you are not currently practising?

Prompt as necessary

- | | | |
|-----|-------|--------------------|
| (1) | Chris | Christian |
| (2) | Buddh | Buddhist |
| (3) | Hind | Hindu |
| (4) | Jewis | Jewish |
| (5) | Musli | Muslim |
| (6) | Sikh | Sikh |
| (7) | Other | Any other religion |
| (8) | None | No religion at all |

ASK IF: MAG_7 <> None

MAG_8

Do you consider that you are actively practising your religion?

- | | | |
|-----|-----|-----|
| (1) | Yes | Yes |
| (2) | No | No |