

AYRSHIRE JOINT STRUCTURE PLAN & TRANSPORTATION COMMITTEE
6 SEPTEMBER 2002

Household Shopping Survey

PURPOSE OF REPORT

- 1 To advise the Committee on the steps being taken to commission a survey on retail shopping patterns within Ayrshire.

BACKGROUND

- 2 The Committee will recall that as part of the work to prepare a Joint Structure Plan for Ayrshire a survey of households was undertaken in 1998 to determine the shopping patterns within Ayrshire. This information is now five years old and a number of retail proposals have been built within and out-with the Ayrshire area since then, such as Braehead, Renfrew. These proposals are likely to have influenced previous shopping patterns. It is also clear that the validity of any assessment of future retail proposals within Ayrshire and their likely impact on existing retail business will depend on the quality, comprehensiveness and accuracy of data on shopping patterns that is held. The commissioning of a household shopping is considered to be vital component in reviewing strategic policy on retailing within Ayrshire.

AIM OF SURVEY

- 3 The aim of the survey will be similar to that undertaken in 1998 and will therefore seek to examine to investigate:
 - household shopping patterns for, food and grocery shopping, clothes and footwear, chemists goods, DIY, electrical goods and furniture and carpets;
 - mode of travel to shops;
 - average expenditure per visit;

- household composition, car ownership; and
- the extent that other centres such as Glasgow City Centre and Braehead draw expenditure from Ayrshire.

SAMPLE

- 4 While the return from the previous survey in 1998 was high it was not at the level previous surveys had attained. This was attributed to a resistance of households to return this form of questionnaire, in part due to the growth in direct mailing during the 1990's. The experience gained from the previous survey and the likely diminishing return that may be gained from a future postal questionnaire has required a reconsideration of the approach that was previously adopted. It is therefore proposed that the future survey will be telephone based and cover around 2500 households. (This scale of interview would be necessary if the output was to be valid below council level and for groupings of postcode sectors).

PREVIOUS SURVEYS & OUTPUT

- 5 It is intended that the survey will allow compatibility with the other retail surveys that have previously been undertaken covering the Ayrshire area. These include the survey commissioned by the Joint Committee in 1998 and surveys carried out by Strathclyde Regional Council in 1987 and 1991. This will allow changes over time to be monitored (eg change in travel patterns). Output would be in the form of a report by local authority area and be GIS compatible.

COSTS

- 6 Discussions have been held with a number of market research/ telephone interview agencies. While final costs would depend on the length of the telephone interview and the sample taken costs should be in the order of £15,000. These costs would require to be met equally by the three local authorities.
- 7 In line with previous experience it would be expected that a proportion of the cost could be returned over a period of time from fees charged to consultants for the purchase of the data.
- 8 On its completion the survey will provide the most comprehensive information of retail patterns in Ayrshire and because of this, consultants will be required to give considerable weight to it in the production of future retail impact assessments.

RECOMMENDATION

- 9 The Joint Committee note the contents of this report and:
- a) support the commissioning of a survey of retail patterns in Ayrshire; and
 - b) pass the report to the three Councils for further discussion.

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