Report No 359/96

ANGUS COUNCIL

PLANNING AND TRANSPORT POLICY COMMITTEE 6 JUNE 1996

SUBJECT: HOUSEHOLD SURVEY OF SHOPPERS IN THE FORMER TAYSIDE REGION

REPORT BY DIRECTOR OF PLANNING, TRANSPORT & ECONOMIC DEVELOPMENT

**Abstract: This report outlines the context for and progress to date on a Household Survey of Shoppers in Tayside and North Fife, carried out by consultants initially on behalf of Tayside Regional Council, Angus District Council and City of Dundee District Council. Survey work has been completed and a research report made available. Additional analysis and data will be forwarded by the consultants in due course which will establish an up-to-date and relevant information base to assist in both future development plan production and assessment of development proposals by Angus Council.**

## 1 RECOMMENDATION

It is recommended that the Committee -

i. note that the household interview survey of shopping patterns in Tayside and North Fife has now been completed in line with the agreed brief, and a report of the broad findings has been compiled by the consultants;

ii. note that all of the base data will be forwarded by the consultants, in order that more detailed analysis of the survey results can be undertaken by this Council.

iii. note the main findings of the survey to date as summarised in this Report.

iv. agree that the survey findings and more detailed analysis be taken into account, as appropriate, in relevant Forward Planning and Development Control activities in Angus.

## 2 INTRODUCTION

2.1 The maintenance of up to date information on various aspects of retailing is important in the formulation and review of development plan policy and assessing relevant planning applications. With work currently underway on the preparation of an Angus Local Plan and recent applications submitted for significant retail development, it is important that data available on shopping patterns and retail expenditure is up-to-date and relevant, in order to make informed decisions. This is reinforced by the terms of the recently published National Planning Policy Guideline on Retailing (NPPG8) which emphasises the need to ensure that data is comprehensive and accurate and up to date as possible including data on expenditure patterns and consumer attitudes.

2.2 This Report outlines the context for the study, together with details of the study brief, objectives and principal findings. The Report also gives a commentary on the main findings.

2.3 A copy of the Research Report (which includes details of the questionnaire, sample framework, results etc) together with a copy of the Executive summary is available for reference at the Members Lounge, The Cross, Forfar

## 3 DEVELOPMENT PLAN CONTEXT

3.1 Retailing is a dynamic sector of the economy where it is essential to monitor changes. Increases in consumer expenditure and car ownership have led to increases in new retail floorspace particularly at out of centre locations, where goods previously associated with town centres are being sold e.g. household, D.I.Y. and electrical goods. The potential trade diversion which can result from such developments has implications for the vitality and viability of town centres.

3.2 From an environmental point of view town centres are seen as playing an important role in reducing the number of car journeys, by offering a wide variety of goods and services in an attractive and accessible location capable of being purchased on a single trip.

3.3 For these reasons, increasing importance is being placed on maintaining healthy and vibrant town centres. This is recognised by the finalised version of the NPPG on Retailing which introduces a 'sequential approach' on the siting of new retail development, and dictates that town centre sites remain the key choice, with edge of centre and out of centre sites remaining an option only when no suitable site is available. An important medium by which this can be achieved is the local plan. In partnership with other agencies, local authorities should assess the role of town centres and the scope for change, renewal and diversification. In this way the development plan acts as a catalyst to help guide development to appropriate locations.

3.4 The NPPG also emphasises the need for local plan retail policies to be based on up to date information and factual assessment of retail developments and trends. Both qualitative and quantitative data will help to ensure that development plan proposals are properly informed.

3.5 The information gained from the household survey provides a snapshot of contemporary retail patterns in Angus. This coupled with other retail information gathered on a routine basis will allow more detailed analysis, providing an up to date resource base from which a wide range of retail issues can be assessed.

## 4 SURVEY BACKGROUND AND BRIEF

4.1 In order to supplement nationally published information on retailing, the former local authorities in Tayside collected and assessed information on various aspects of retailing including floorspace data together with specific surveys of shoppers at particular locations such as retail parks. However, the last major widescale study of retailing conducted in Tayside was carried out by the consultants Hillier Parker on behalf of the former Regional Council in 1985 - entitled "Tayside Shopping for the

Future". Much of the information from that study is now dated when assessing contemporary shopping patterns.

4.2 In April 1995 Tayside Regional Council agreed to commission a household retail survey and sought the interest of the relevant District Councils in contributing to the study.

4.3 In May 1995 Angus District Council agreed to participate in and contribute towards the survey as did City of Dundee District Council.

4.4 A study brief was agreed by the contributing Councils to address the following fundamental aims:

- to identify retail expenditure patterns, shopper behaviour and shopper characteristics within the study area; and

- to explore shoppers' perceptions of the strengths and weaknesses of key shopping centres and other major shopping provision within the study area.

4.5 Within these broadly stated objectives, a number of specific issues were highlighted for investigation:

- The level and destination of household convenience and comparison expenditure, including type of shopping centres/stores used, area of residence and type of goods purchased.

- Behaviour of shoppers in the study area eg frequency of shopping trips, distance travelled, mode of travel, and amount spent,

- Characteristics of shoppers eg age, gender, household composition, car ownership, employment status, socio-economic group, and housing tenure.

- The catchment areas of the principal shopping locations (Dundee, Perth and Arbroath) and the particular roles they perform.

- The frequency of and reasons for shopping trips to centres outwith Tayside eg Edinburgh, Glasgow, Aberdeen, Stirling and towns of South Fife.

- The types of goods for which respondents would shop in smaller towns (particularly the Angus burghs) and the catchment areas and roles of these towns.

- The balance between in town and out of centre shopping for both food and non food shopping.

- Shopping pattern of rural households

4.6 The survey results and further analysis are designed to provide up-to-date information as a valuable input to:

- structure and local plan preparation, monitoring and review;

- town centre management;
- the consideration of current and future retail development proposals and related retail impact assessments;
- the formulation of measures to safeguard and enhance the role of Tayside shopping centres and other major shopping provision and to address factors perceived as inhibiting their attractiveness;
- identifying the nature and extent of the influence of competing centres outwith Tayside as a step towards deriving measures to offset or reverse outflows of retail expenditure; and
- clarifying the role of rural shopping provision and considering additional measures which could complement support for village shops.

4.7 The main survey was conducted using a total of 1,516 face to face interviews, with the interviewees being drawn from a random sample of households across Tayside and North Fife was structured to ensure statistical reliability in different planning areas. A further total of 675 'booster' interviews were allocated to the various planning areas to ensure greater statistical reliability of any analysis for these sub-areas in isolation. This more detailed localised data is awaited from the consultants and will be the subject of further assessment in due course. The sample framework is shown in Appendix 1.

## 5 PRELIMINARY FINDINGS

5.1 As this retail survey was commissioned by the previous Tayside Region, City of Dundee and Angus District Councils, the geographical areas used as the basis for data analysis do not correspond to the new Council areas eg Monifieth and rural areas of the previous Dundee District are included in 'Dundee' results. However, the base information will allow aggregation of data for the new Angus Council area. Future analysis will therefore be undertaken on this basis. Although useful indicators the preliminary findings are exactly that and it would be premature to draw more detailed area conclusions until further analysis and cross tabulations have been undertaken from the base data and the additional booster samples.

### Grocery Shopping

5.2 The majority of the sample (72%) undertook a main shopping trip on a weekly basis, although this was often supplemented by other food purchases during the week, and the Angus results generally reflect this pattern.

5.3 In comparison to other age groups, elderly persons tend to shop more frequently (2 to 3 times per week) use more local shops, use public transport more often or walk to the shops.

5.4 Proportionately large supermarkets were the most popular for main grocery shopping, reflecting no doubt the provision of this type of facility in the Tayside area. However local, neighbourhood stores still provide a very useful service.

5.5 Mobile shops were of very little strength, while groceries purchased at petrol station shops was of increasing significance.

5.6 Although value for money and good selection/choice were important, the primary reason for using particular stores was convenience.

5.7 This point is reinforced by the fact that a third of all respondents walk to shops.

5.8 Car borne shopping is generally important (52%) particularly in rural locations with travel by bus less at circa 12%.

**Clothing and footwear**

5.9 Purchases of clothing and footwear items were less frequent than grocery shopping with only 43% of respondents purchasing every 2/3 months or more often.

5.10 Younger people (16-44 age group) tended to buy clothes or footwear more frequently than the elderly - 80% frequency at least once a month. This reflects the requirement of both changing fashion and family needs.

5.11 Although Dundee and Perth were particularly important centres, because of the range of shops available, local retail centres were also important.

5.12 As with grocery shopping, convenience and greater choice were the most common reason for using specific locations.

5.13 Town centre shopping remains particularly important (94%) for these type of goods, reflecting the planning policy, which has restricted the siting of these types of stores, at retail parks or out of town centres. Mail order usage was noticeable at 3%.

**Electrical Goods and Domestic Appliances**

5.14 Not surprisingly given the nature of these type of goods, purchases were less frequent, with 58% of interviewees claiming to make such purchases less than once a year.

5.15 Dundee and Perth were both major purchasing locations, but local areas still retain a more than useful function.

5.16 Town centre shopping remains important (63%) although retail parks played a significant role (26%). Again this is reflective of changing consumer patterns, and also the importance of planning policy in dealing with the locational aspects of 'white goods' ranges and stores.

5.17 It should also be noted that retail parks are currently only located in Dundee or Perth.

**Furniture, Soft Furnishings and Floor Coverings**

5.18 In line with the pattern of electrical goods 60% of respondents indicated that the frequency of purchases of furniture etc was less than once per year. This, of course, reflects the type of goods, which are more long term in nature.

5.19 Convenience and variety of choice were again high on the agenda of shoppers.

5.20 Dundee (43%) and Perth (23%) were cited as the most popular destinations, although local area shopping had some relevance.

5.21 The majority of the sample still shopped in town centres most often (59%). However, over a quarter had visited retail parks, again reflecting the increasing importance of this type of facility.

**DIY and Household Goods**

5.22 Frequency of purchase for this group was slightly higher than the previous two product groups - just over half of all respondents, having made a purchase at least once per year.

5.23 Younger age groups were more active in this product sector.

5.24 Dundee was a particularly important centre (47%) for this type of goods, reflecting the importance of the two retail parks in the city. Perth was also highlighted as important (21%).

5.25 Convenience was an important factor, as was availability of choice.

5.26 Retail parks were the dominant venue (45%) with town centres slightly less important at 40%.

5.27 Initial findings suggest that North Angus - Brechin/Montrose - was more likely to use town centre locations; with South Angus - the Forfar/Kirriemuir area - likely to use retail parks at Dundee or at Perth.

**Leisure Goods**

5.28 Patterns for purchasing leisure goods were similar to those of clothing and footwear, with 46% of interviewees making purchases at least every 2/3 months.

5.29 Younger age groups -both 16-29 and 30-44 - were more frequent purchasers.

5.30 Dundee (42%) and Perth (22%) were the most frequently visited towns, with local shops still generally important.

5.31 Convenience and choice were yet again the principle determining factors.

5.32 Town centre shopping was particularly dominant, although mail order shopping was noticeable.

**Mode of Transport**

5.33 In terms of the mode of travel to town centres, cars (40%) were most popular, followed by buses (34%) and walking (23%).

5.34 With regard to travel to superstores, the motor car is the most common mode of transport (51%) with usage of bus (16%) or walking (17%), at a lower level than for town centres.

5.35 In terms of retail parks the car was the most common mode of transport at 55%.

5.36 Just under a quarter of respondents said they didn't use retail parks.

## 6 COMMENTARY

6.1 The completed survey provides important data sets on shopping patterns in Tayside. The requirement for current data is highlighted in the recently published National Planning Policy Guideline No.8 - Retailing. The present market research study together with other background retailing information and studies already held will provide a useful basis for guiding policy formulation, in the form of structure and local plans, as well as assessment of development proposals.

6.2 The information base will therefore be of significance in preparation of the Angus Local Plan, and development proposals.

6.3 From the survey results it is evident that shopping patterns across the former Tayside Region vary by both goods type and geographical area.

6.4 Dundee is perceived as the primary shopping destination in Tayside particularly for durable goods. Perth is also an important centre, although the geographical position is reflected in variation of catchment power. In addition to local shoppers, Dundee in particular attracts shoppers from Angus and North Fife. It is also recognised that a proportion of shopping trips are made outwith the Tayside area to large centres such as Aberdeen, Edinburgh, Stirling and Glasgow.

6.5 While the convenience of local shops is generally recognised as an important factor, throughout the shopping survey, the range and quality of shops in both Dundee and Perth is a major factor in influencing the choice of shopping location. It is important that the quality and range of shopping is maintained and enhanced in the Angus town centres recognising that this serves not only those towns but also the surrounding rural hinterland. There are many factors which affect retail location and development but planning policy can contribute significantly by being positive and proactive in this area, a matter which will be considered in the context of the Angus Local plan.

6.6 Town centres continue to be the main shopping destinations for purchases of most durable goods, although as a consequence of planning policy, and the siting of retail parks this type of shopping is now having some influence on shoppers choice of destination.

6.7 Planning policy in Tayside and Angus has restricted the type of goods that can be sold, from out of centre locations mainly focusing on DIY goods, some electrical products and furniture. Retail parks are currently located in both Dundee and Perth. Development at the former Giddings Lewis site in Arbroath will see the first edge of centre durable shopping (DIY store) in Angus and this will address some of the leakage of this type of expenditure to Dundee.

6.8 It is clear from the study that there is a perceived scope for improvement in range and quality of shopping in Angus, and that the attractiveness of town centres, ease of parking etc are important attributes from the shoppers' perspective. There is opportunity through the planning system to make a positive contribution to the shopping experience in Angus, while ensuring that physical fabric, heritage and the existing economy is safeguarded. In addition, there is scope for town centre management groups to focus on particular issues. The survey therefore provides a useful input to future planning and market analyses.

## 7 FINANCIAL IMPLICATIONS

7.1 There are no immediate financial implications resulting from this Report.

## 8 CONSULTATION

8.1 The Director of Law and Administration and the Director of Finance have been consulted in the preparation of this report.

## 9 CONCLUSION

9.1 The information obtained from this retail survey will provide a valuable data base which will aid policy formulation and decision making on future retail issues. With preparation of the Angus Local Plan underway and applications for major retailing proposals continuing to be submitted for consideration by the Council, it is essential that up to date information of shopping patterns affecting the Angus area is maintained.

9.2 The survey highlights the drawing power of both Dundee and Perth in a regional context, where both provide a range and quality of shopping. While the emerging importance of retail parks is also noted (albeit for a restricted type of goods - DIY, electrical and furniture goods), town centres continue to provide the focus of the shopping experience. The Angus towns provide essentially for local shopping, and the planning system has therefore an important role to play in trying to improve the opportunity for enhancement of Angus shopping centres, both through development plan policy and a proactive role in development proposals and town centre management.

## NOTE

The following background papers, as defined by Section 50D of the Local Government (Scotland) Act 1973, (other than any containing confidential or exempt information) were relied on to any material extent in preparing the above Report.

"Household Survey of Shoppers in Tayside and North Fife"
Draft Research Report - March 1996 - Market Research U.K. Group

AA/GDP/RA/rj

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27 May 1996

## APPENDIX 1

### HOUSEHOLD SURVEY OF SHOPPERS IN TAYSIDE AND NORTH FIFE

### SAMPLE FRAMEWORK

| AREA | ACHIEVED SAMPLE | BOOSTER SAMPLE | TOTAL NO. OF INTERVIEWS |
|---|---|---|---|
| Arbroath/Carnoustie | 117 | 118 | 235 |
| Forfar/Kirriemuir | 102 | 136 | 238 |
| Montrose/Brechin | 83 | 152 | 235 |
| Dundee | 595 | - | 595 |
| Perth | 228 | - | 228 |
| Kinross/Strathearn/Highland | 142 | 62 | 204 |
| Eastern | 47 | 153 | 200 |
| North East Fife | 185 | 54 | 239 |
| **TOTAL** | 1516 | 675 | 2191 |

Source: Market Research Scotland, May 1996