



City of
Greater Geraldton
a vibrant future



POST-TRIAL COMMUNITY SURVEY EXTENDED RETAIL TRADING HOURS



JULY 2018



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SUMMARY OF RESULTS

- Close to 63% of the respondents support continuation of the extended trading hours for general retail shops in the City of Greater Geraldton. Approximately 32% would prefer to revert to the previous hours.
- While men are the strongest supporters of the extended hours, both men and women were in favour at approximately 66% and 60% respectively.
- Younger age groups support continuation of the extended trading hours by around 71-72%. The 60 and over age group does not show majority support for continuation of the extended hours at just over 45%. However, there is not a majority in this age group in favour of reverting back to the previous hours either. Around 7% of the 60 and over age group would prefer a third option or didn't know.
- All Wards support extended hours. The Tarcoola Ward has the highest proportion of supporters at around 71%. The weakest support is in the Willcock Ward at just over 56%.
- Just over half of the survey respondents (53.5%) reported that the extended trading hours influenced their shopping habits.
- The gender of the respondents made very little difference to whether or not the extended trading hours influenced their shopping habits.
- Respondents in the 60+ indicated significantly less influence on their shopping habits than all other age groups. The age group which indicated the most influence on their shopping habits was 30-34.
- Mirroring their preferences with regard to trading hours, the residents of the Willcock Ward were the least influenced in their shopping habits, and the residents of the Tarcoola Ward were the most influenced.
- The most significant ways that shopping habits were influenced by the extended trading hours were shopping within the extra hours enabled by the trial (approximately 90%), increased local expenditure (approximately 30%) and more centrally located shopping (approximately 30%).

INTRODUCTION

In September 2017, the Western Australia State Government agreed to a trial to extend trading hours for General Retail Shops in the City of Greater Geraldton. The trial enabled Geraldton to come into line with hours permitted for larger retailers in Perth. Smaller and specialty retailers already had unrestricted trading hours, so the trial made no difference to when they were permitted to trade. The trial enabled the larger retailers including Coles and Woolworths supermarkets to trade on weekends and public holidays, and to extend their opening times during the week as follows:

8.00 am – 9.00 pm on Monday, Tuesday, Wednesday Thursday and Friday;

8.00 am – 5.00 pm on Saturday;

11.00 am – 5.00 pm on Sunday;

11.00 am – 5.00 pm on public holidays;

Closed on Christmas Day, Good Friday and ANZAC Day.

All shops remained able to choose their actual opening times within the range of permissible hours.

The City of Greater Geraldton is required to assess the trial. As part of that assessment, a telephone survey of 400 community members across all suburbs was undertaken by research company Thinkfield, with representative age, gender and Ward profiles (see appendix 1). The survey sample was statistically valid, which means the results can be relied upon to reflect the views of the whole community.

OVERVIEW OF SURVEY

The survey asked what trading hours the participants preferred, giving a choice of continuing the trial hours, reverting to the previous hours, or some other preference.

It also asked whether or not the extended trading hours influenced the participants' shopping habits and, if so, how.

The overall results have been provided, as well as the results broken down by age, gender and Ward.

SURVEY RESULTS

Preferred trading hours

As shown in figure 1 below, close to 63% of the respondents support continuation of the extended trading hours for general retail shops in the City of Greater Geraldton. Approximately 32% would prefer to revert to the previous hours.

Figure 1: Total Respondent Response to Preferred Trading Hours

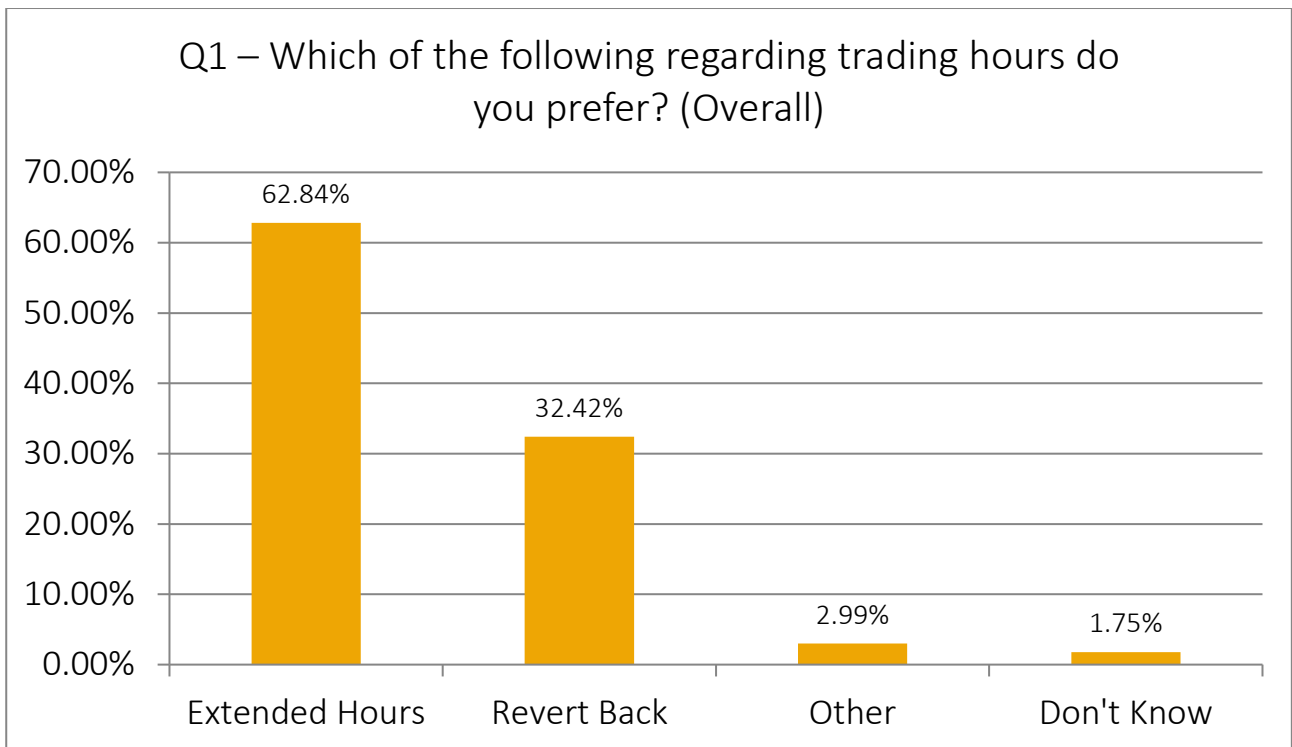


Figure 2 shows that while men are the strongest supporters of the extended hours, both men and women were in favour at approximately 66% and 60% respectively.

Figure 2: Response to Preferred Trading Hours by Gender

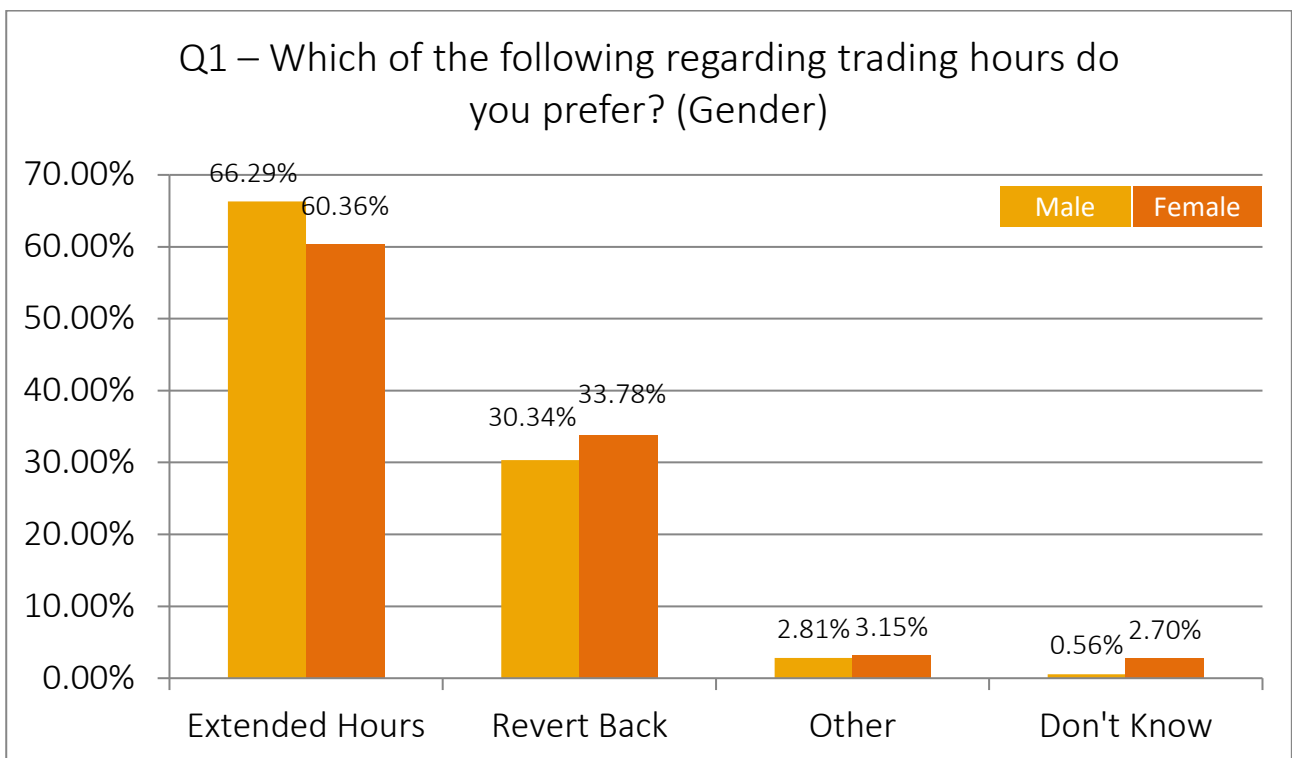


Figure 3 shows that the younger age groups support continuation of the extended trading hours by around 71-72%. The 60 and over age group does not show majority support for continuation of the extended hours at just over 45%. However, there is not a majority in this age group in favour of reverting back to the previous hours either. Around 7% of the 60 and over age group would prefer a third option or didn't know.

Figure 3: Response to Preferred Trading Hours by Age Group

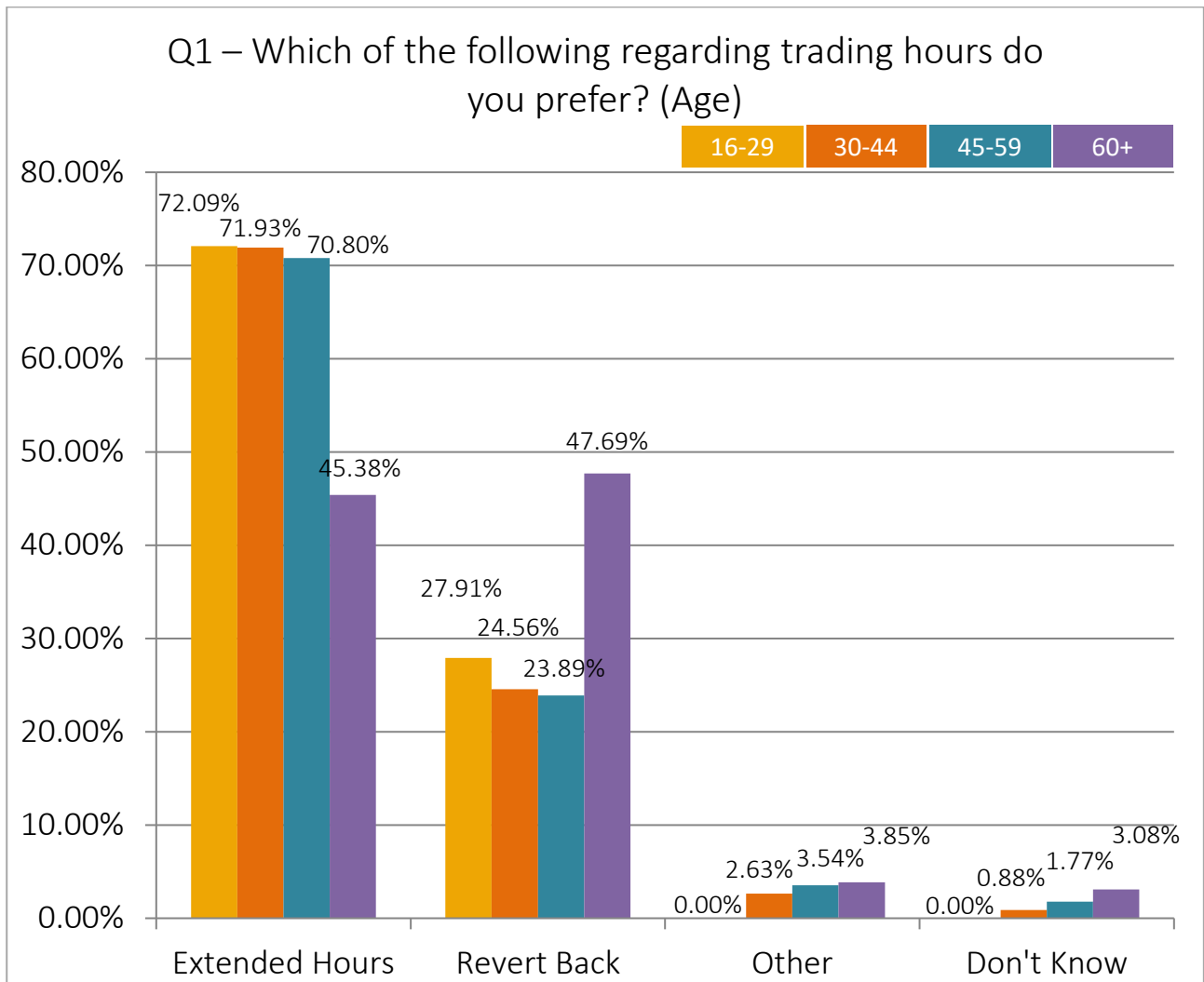
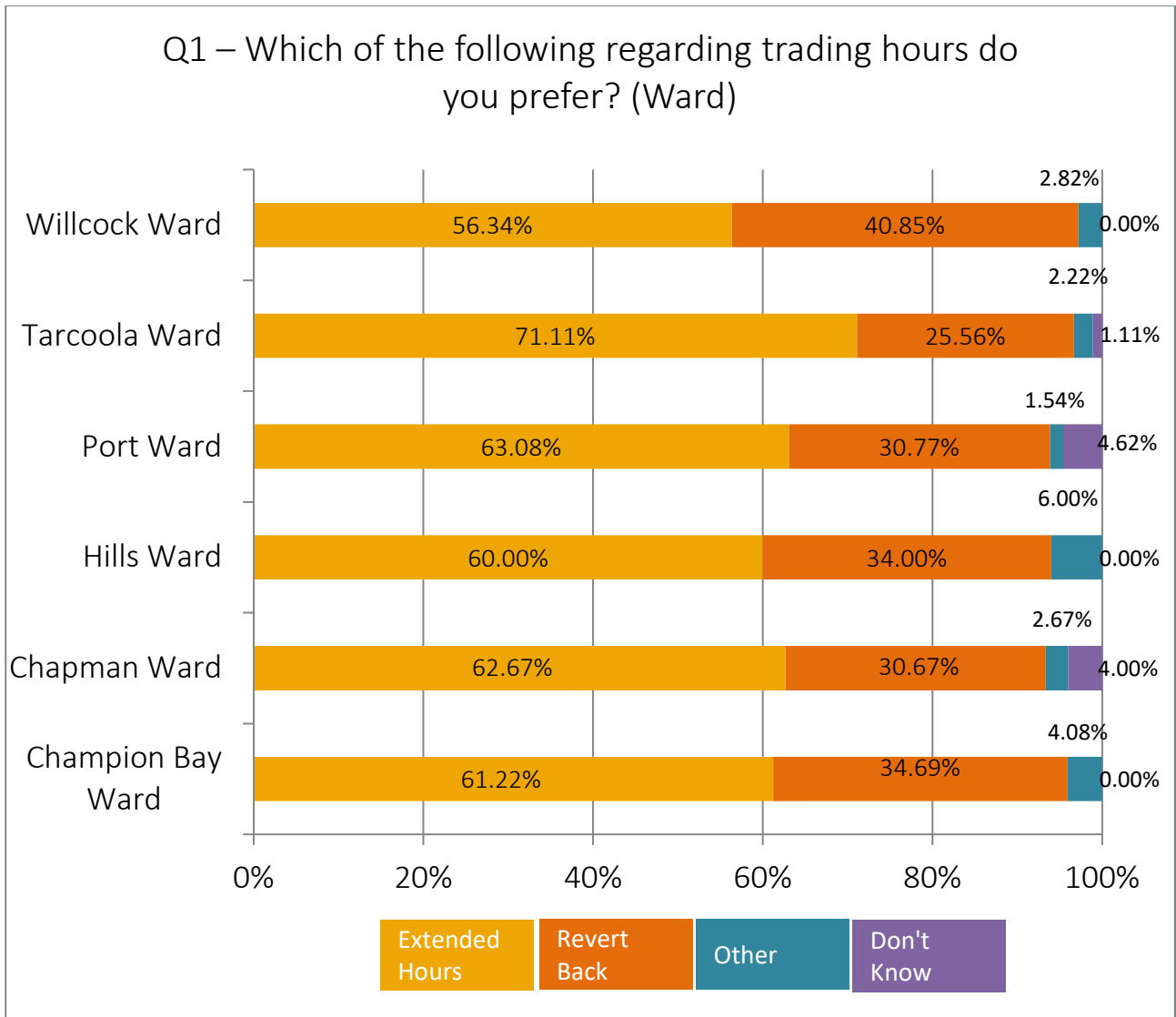


Figure 4 shows that all Wards support extended hours. The Tarcoola Ward has the highest proportion of supporters at around 71%. The weakest support is in the Willcock Ward at just over 56%.

Figure 4: Response to Preferred Trading Hours by Locality



Influence of trading hours on shopping habits

As shown in figure 5 below, just over half of the survey respondents (53.5%) reported that the extended trading hours influenced their shopping habits.

Figure 5: Total Respondent Response to Influence of Trading Hours on Shopping Habits

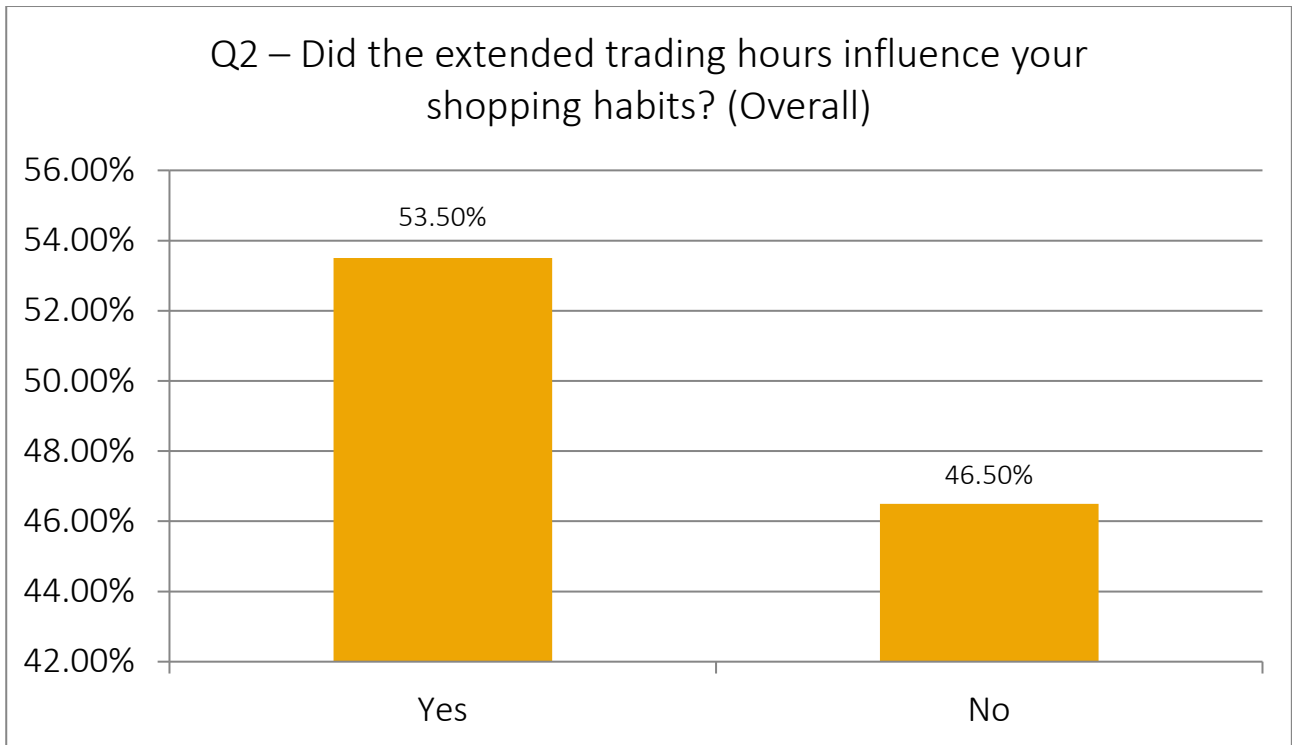
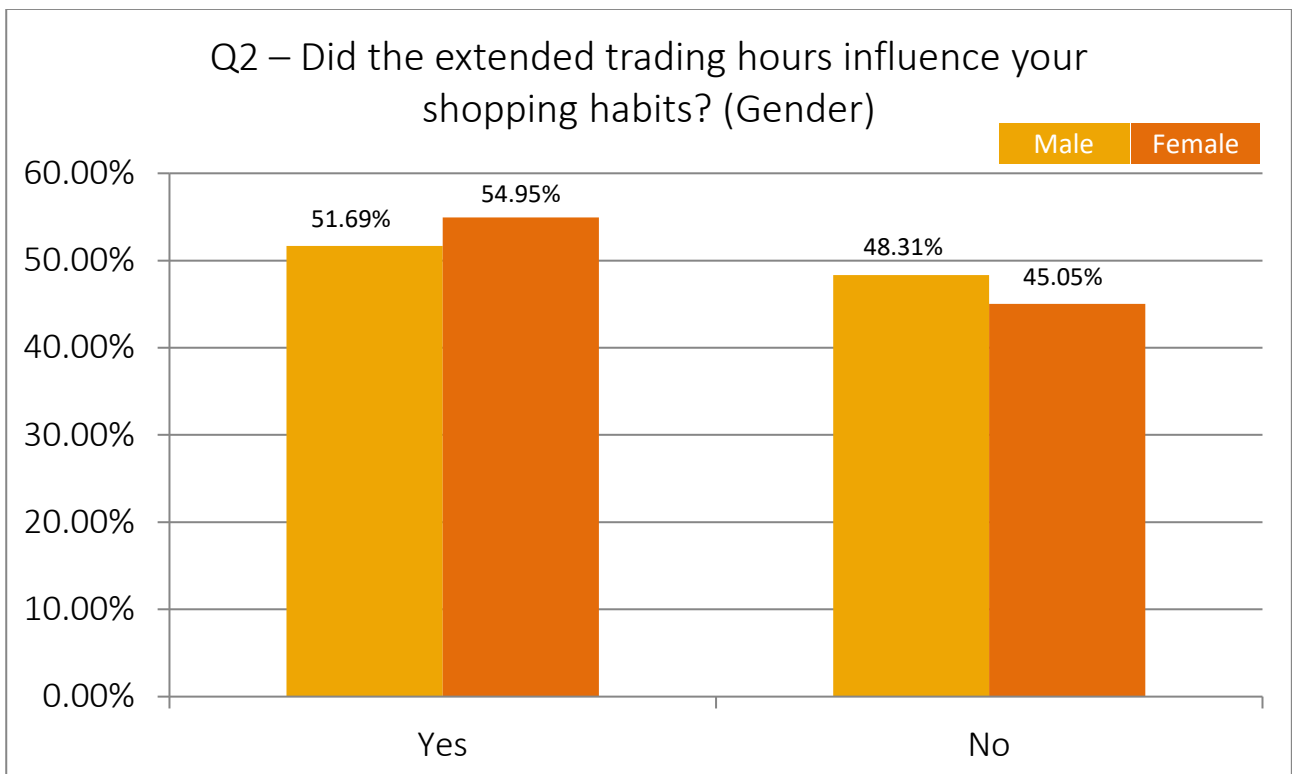


Figure 6 shows that the gender of the respondents made very little difference to whether or not the extended trading hours influenced their shopping habits.

Figure 6: Response to Influence of Trading Hours on Shopping Habits by Gender



As shown in Figure 7, respondents in the 60+ indicated significantly less influence on their shopping habits than all other age groups. The age group which indicated the most influence on their shopping habits was 30-34.

Figure 7: Response to Influence of Trading Hours on Shopping Habits by Age

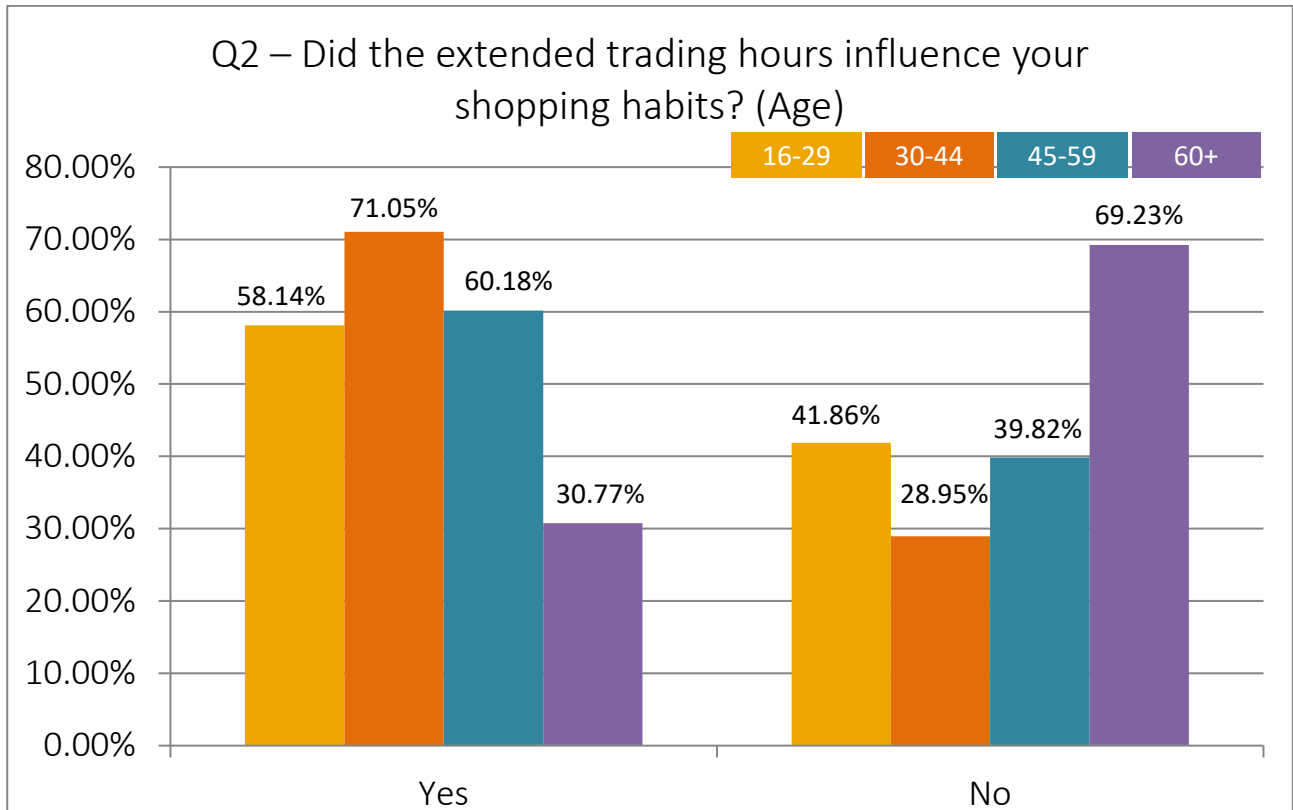
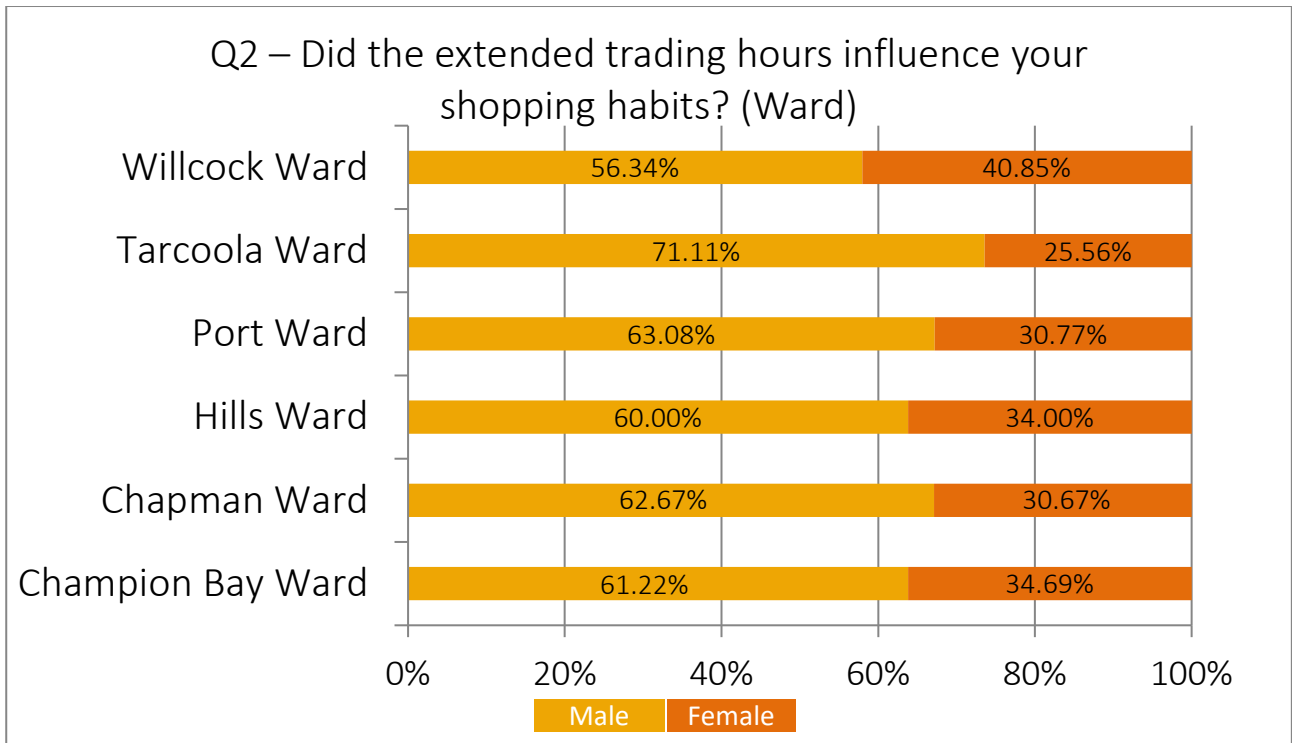


Figure 8 shows that the residents of the Willcock Ward were the least influenced in their shopping habits, and the residents of the Tarcoola Ward were the most influenced. This mirrors their preferences with regard to trading hours.

Figure 8: Response to Influence of Trading Hours on Shopping Habits by Ward



In what ways did the extended trading hours influence shopping habits?

Where respondents indicated that the trial had influenced their shopping habits, they also described specifically what the influence was, as shown in table 1. The most significant factors were shopping within the extra hours enabled by the trial, increased local expenditure and more centrally located shopping. Note that respondents were able to identify more than one factor, so the responses do not add to 100%. The order of magnitude of the responses did not vary significantly by gender, age or Ward.

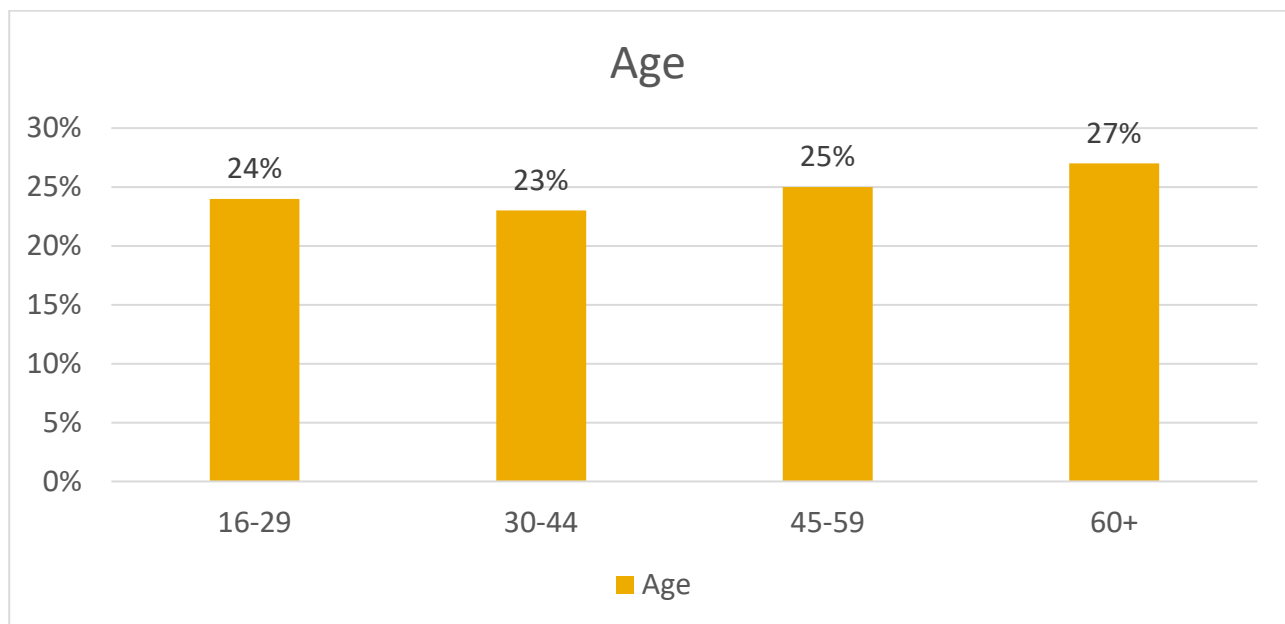
Table 1: Ways the extended trading hours influenced shopping habits

Factor	Percentage (tbc)
Some of all shopping was within the extra hours enabled by the trial	89.86%
Spent more money locally overall	30.41%
Some or all shopping was in a more central location	30.41%
Spent less money online during the period	10.60%
Spent less money locally overall	5.53%
Some or all shopping was in a less central shopping location	3.23%

APPENDIX 1: SURVEY RESPONDENT DEMOGRAPHICS

The survey was conducted using a structured sample of the City of Greater Geraldton community. The sample was then fine-tuned to ensure statistically valid representation across gender and age profiles and all Wards). The following charts show the distribution of age, gender and ward groups.

Figure 5: Survey Respondent Age Group



n = 400

Figure 6: Survey Respondent Gender

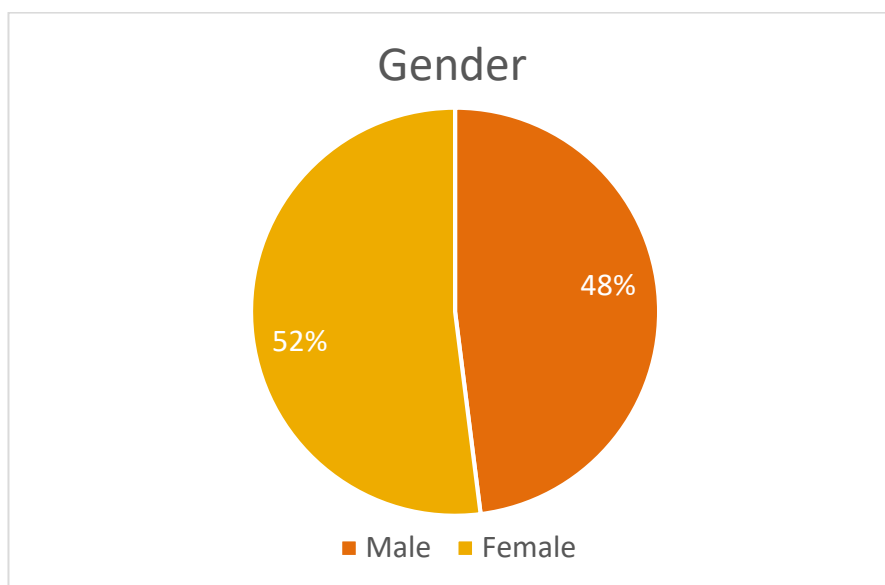
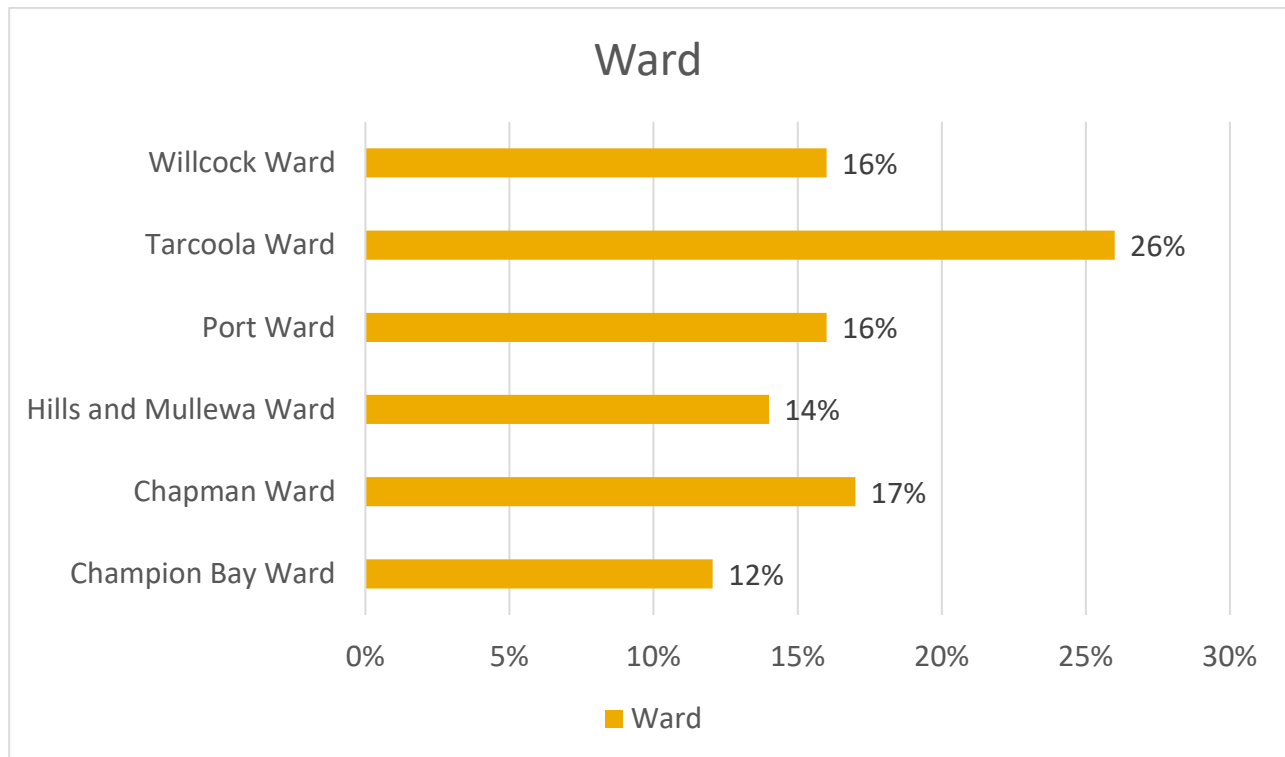


Figure 7: Survey Respondent Ward



APPENDIX 2: SURVEY QUESTIONNAIRE

Introduction

Good [Afternoon/evening], my name is [insert name] from Thinkfield Research Services, an independent market research company. Today we are conducting research on behalf of the City of Greater Geraldton about the extend trading hours for General Retail Shops in the City of Greater Geraldton that has been trialled since August last year. The Council is now seeking the community's feedback on the trial.

Do you have a few minutes to answer some short questions?

All the information you provide will remain anonymous and will be used for research purposes only.

If the answer is "yes", proceed with questions below.

If the answer is "no", politely thank the person and discontinue.

The information you provide will form part of a collective survey. Federal Privacy laws protect the confidentiality of any comments you make in relation to this survey. Your responses will be used solely for research purposes and while we prefer you to answer all questions in the survey, you do not have to.

Screener

1. First, just a few questions about you to ensure that we have interviewed a good cross-section of people. Can I please check that you actually live in the City of Greater Geraldton, the area that the City of Greater Geraldton is responsible for, and your specific locality?

Can I please confirm your suburb?

Suburb to be categorised into the following ward boundaries

- Champion Bay Ward
- Chapman Ward
- Port Ward
- Tarcoola Ward
- Willcock Ward
- Hills Ward
- Mullewa Ward
- Other (*Please Specify Ward or Street*)
- Not in City of Greater Geraldton (*CLOSE*)
- Don't know (*DO NOT READ*) (*CLOSE*)

2. Which of the following age groups do you belong to? Please stop me when I reach the correct one.

READ OUT, ONE ANSWER ONLY

- 16 to 19
- 20 to 24
- 25 to 29
- 30 to 34
- 35 to 39
- 40 to 44
- 45 to 49
- 50 to 54
- 55 to 59
- 60 +
- Refused (*DO NOT READ*)

3. Record gender

- Male
- Female
- Other

Main Survey

The Minister for Commerce agreed to a trial to extend trading hours for General Retail Shops in the City of Greater Geraldton to come into line with hours permitted for larger retailers in Perth. Smaller and specialty retailers already had unrestricted trading hours, so the trial made no difference to when they were permitted to trade. The trial enabled the larger retailers including Coles and Woolworths supermarkets to trade on weekends and public holidays, and to extend their opening times during the week as follows:

- 8.00 am – 9.00 pm on Monday, Tuesday, Wednesday Thursday and Friday;
- 8.00 am – 5.00 pm on Saturday;
- 11.00 am – 5.00 pm on Sunday;
- 11.00 am – 5.00 pm on public holidays;
- Closed on Christmas Day, Good Friday and ANZAC Day.

All shops are able to choose their actual opening times within the range of permissible hours.

4. Which of the following options regarding trading hours do you prefer?

1	The extended trading hours for the larger general retailers on weekends, public holidays and weekdays, as trialled, should become permanent
2	Revert to the previous restricted trading hours for the larger general retailers

97	Other (Please Specify)
98	Don't know (DO NOT READ) (CLOSE)

5. Did the extended trading hours influence your shopping habits?

1	Yes
2	No

6. [If yes] Please describe in what ways the trial hours have influenced your shopping behaviours.
(Multiple response)

(Interviewers probe for hours/location/online/spending)

(Interviewers note that other changes have happened at the same time – eg a new shopping centre has opened. The trial may have affected their use of the new centre, so still probe.)

1	Some or all shopping was within the extra hours enabled by the trial
2	Some or all shopping was in a more central location
3	Some or all shopping was in a less central shopping location
4	Spent more money online during the period
5	Spent less money online during the period
6	Spent more money locally overall
7	Spent less money locally overall
8	Other specify
9	Don't know (DO NOT READ OUT)

VALIDATION TO BE CONFIRMED BY MR AGENCY.

Thank you for your time. That completes the actual survey, but in case my supervisor needs to check my work could I please have your name and a contact number. **These details are only for our checking procedures. Apart from the checking process, you will not be contacted again after this survey, nor will your name be recorded on any database.**

NAME _____ TELEPHONE NO _____

INTERVIEWER NAME _____ INT NO _____

I hereby certify that these interviews are accurate and complete, taken in accordance with my instructions and the ICC/ESOMAR international code.

INTERVIEWERS SIGNATURE _____ DATE _____