APPENDIX 3d

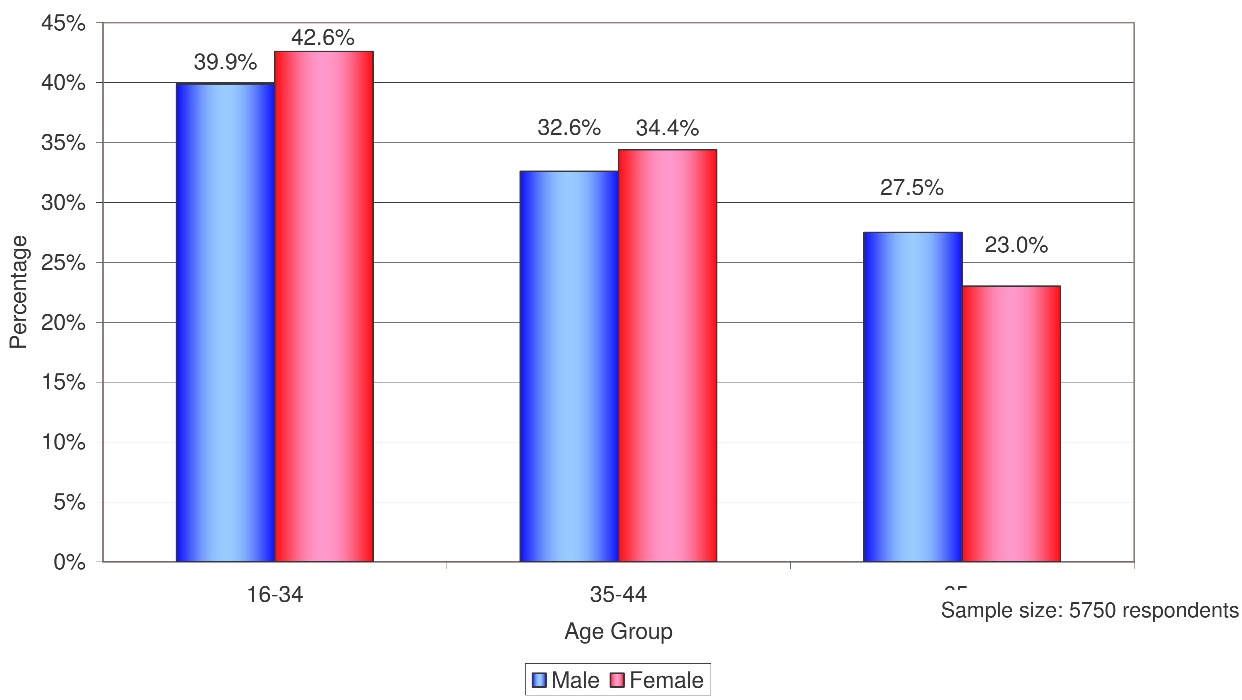
Key Results

GDA RETAIL STRATEGY UPDATE – HOUSEHOLD TELEPHONE SURVEY
KEY RESULTS

INTRODUCTION

- The household survey was carried out between October 15th and October 22nd 2007.
- A total of 5000 interviews were targeted over the 28 zones. A top-up sample of 750 young people, to reflect Dublin's young population, was also collected during the same time period using a street survey.
- An overall sample of 5750 was collected, of which 1696 (29.5%) were male and 4054 (70.5%) were female.
- This sample comprised of 2415 (42%)16 to 34 year olds, 1944 people (33.8%) 35 to 54 year olds, and 1392 (24.2%) 55+ year olds (see **Figure 1**). This is very much in line with the age profile of the survey area as a whole, giving validity to the results.

Figure 1 – Age Groupings by Gender



- The working status of the chief wage earner in the majority of households was full/part time employed (76.1%). Of the rest, 18.8% of people were retired and 3.6% were unemployed.

COMPARISON GOODS SHOPPING

- Most respondents main reason for choosing their main comparison goods centre was because it was close to / convenient for them. This was true for both non-bulky (53.2%) and bulky (53.8%) comparison goods.(see **Figure 2** overleaf).

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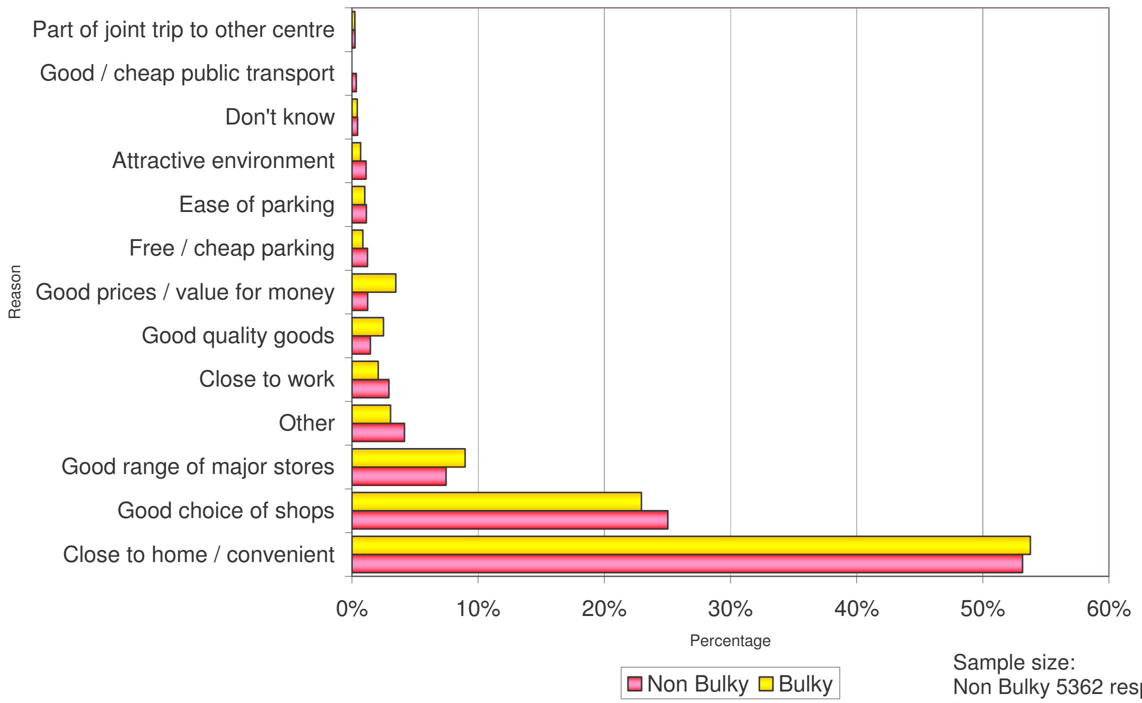
- *"Good prices / value for money"* was particularly important in relation to bulky comparison goods centres (3.5% compared to 1.2% for non-bulky). This could be because of their higher purchase price.
- Conversely, a *"good choice of shops"* was more important as a reason for choosing a non-bulky (25%) to a bulky (22.9%) comparison goods centre.

Figure 2 – Reason for Choosing Main Comparison Goods Centre: Non-Bulky vs Bulky



Sample size:
Non Bulky 5362 respondents
Bulky 4517 respondents

- **Figure 4** and **Figure 5** overleaf show that for both non-bulky and bulky comparison goods the most popular mode of transport for shopping is the car. However, there is a relatively large difference (11.9%) between the two with a higher percentage of people visiting bulky comparison goods centres (85.2%) by car compared to non-bulky goods centres (73.3%). This could be due to the more frequent out of centre locations of bulky comparison goods retailing and/or the need to transport bulky goods home.
- Another difference between the goods types can be seen when all forms of public transport are added together (bus, LUAS, DART, train). The combined total for these modes of travel for non-bulky comparison goods is 14.7%, while for bulky goods it is just 6.4% (a difference of 8.3%). This again could highlight the differing locations of the retailing facilities.

Figure 4 – Normal Mode of Transport to Main Non-Bulky Comparison Goods Centre

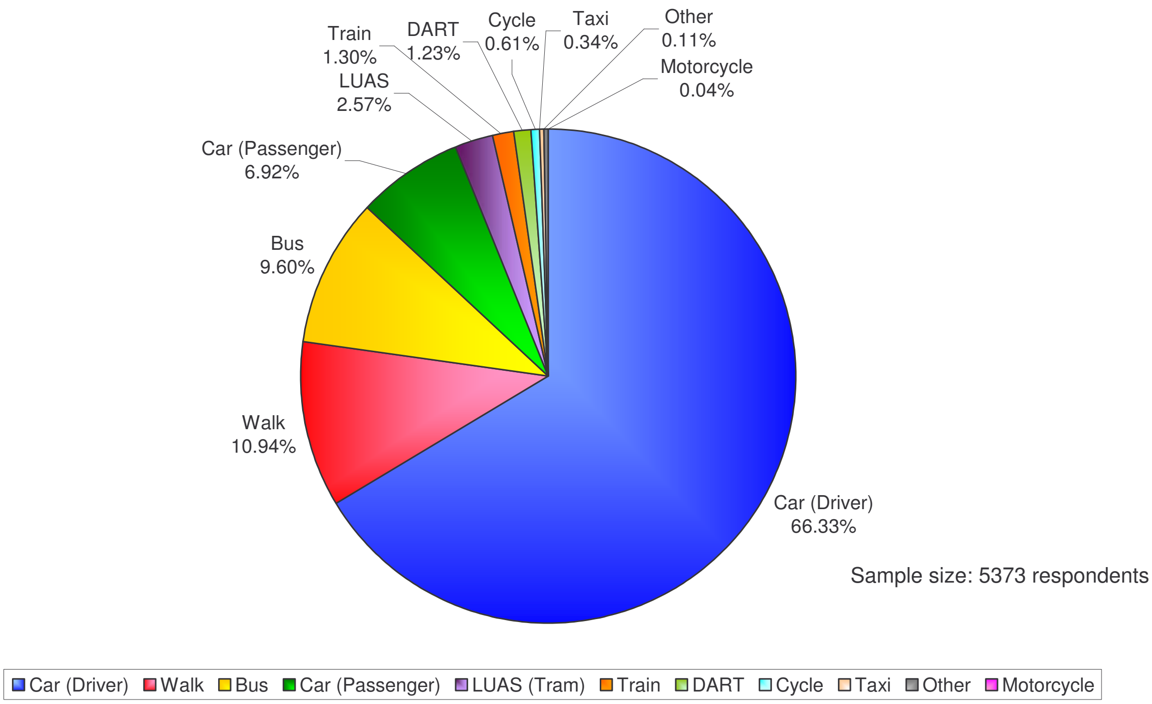
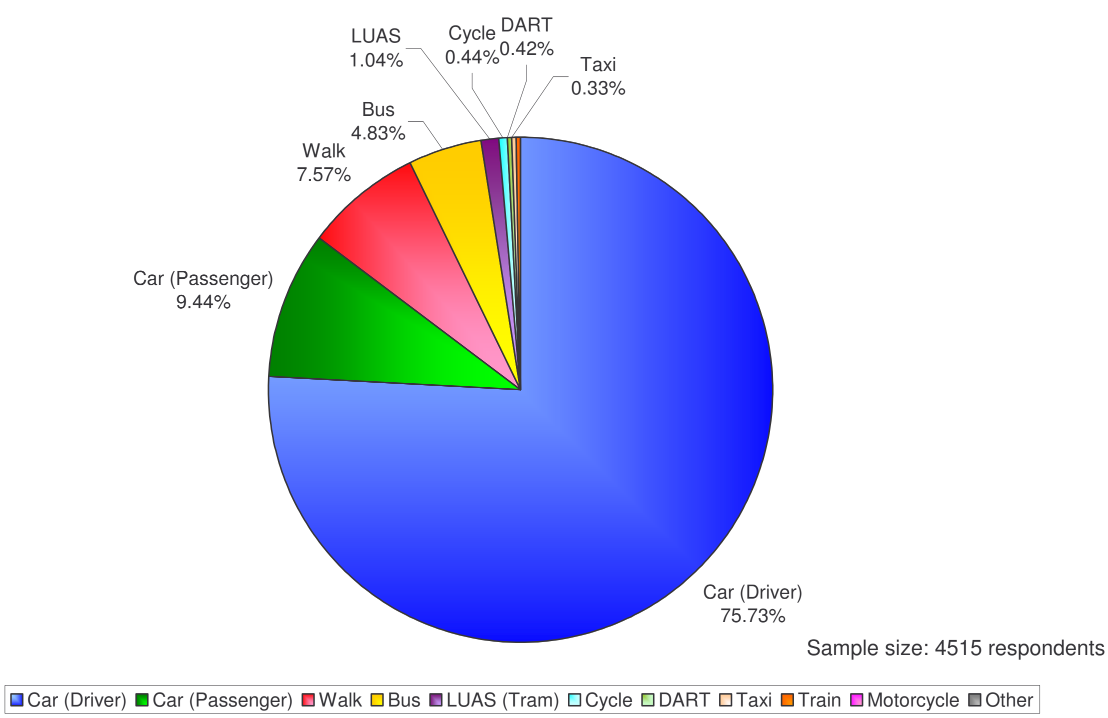
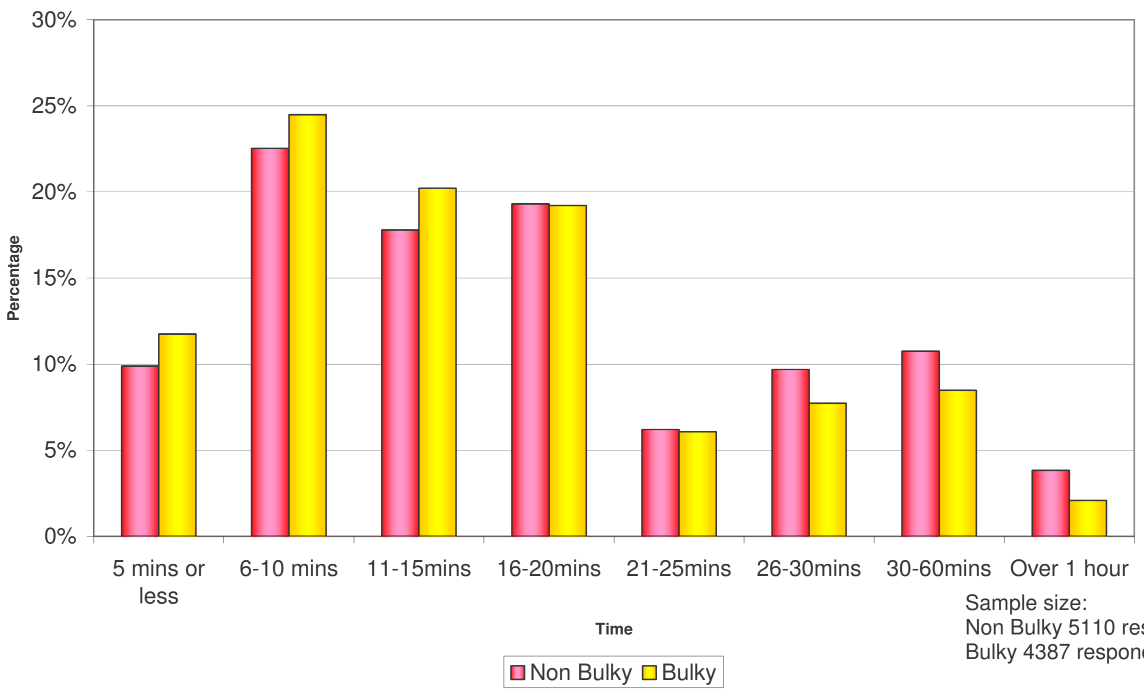


Figure 5 – Normal Mode of Transport to Main Bulky Comparison Goods Centre



- Linked into the issue of transport mode is the origin of respondents trips to their main centre. For both categories of comparison goods the vast majority, 95.3% for non-bulky and 97.5% for bulky goods, started their trips from home.
- Slightly more people started their trips from work if they were visiting their main non-bulky centre (4.4% compared to 2.5% for bulky).
- The length of most peoples journeys to their main centres for both non-bulky and bulky comparison goods were between 6 and 10 minutes (22.5% and 24.5% respectively) (see **Figure 6**).
- When comparing the categories of goods, it can be seen (**Figure 6**), that there are differences. The majority of bulky comparison goods journey times are under 15 minutes (56.4%), while 49.8% of non-bulky goods trips have a journey time of over 15 minutes.
- In terms of average length of journey, there is just a 3 minute difference between the goods categories with 33 minutes for non-bulky goods and 30 minutes for bulky goods.

Figure 6 – Length of Journey from to Main Centre from Home for Non-Bulky vs Bulky Comparison Goods

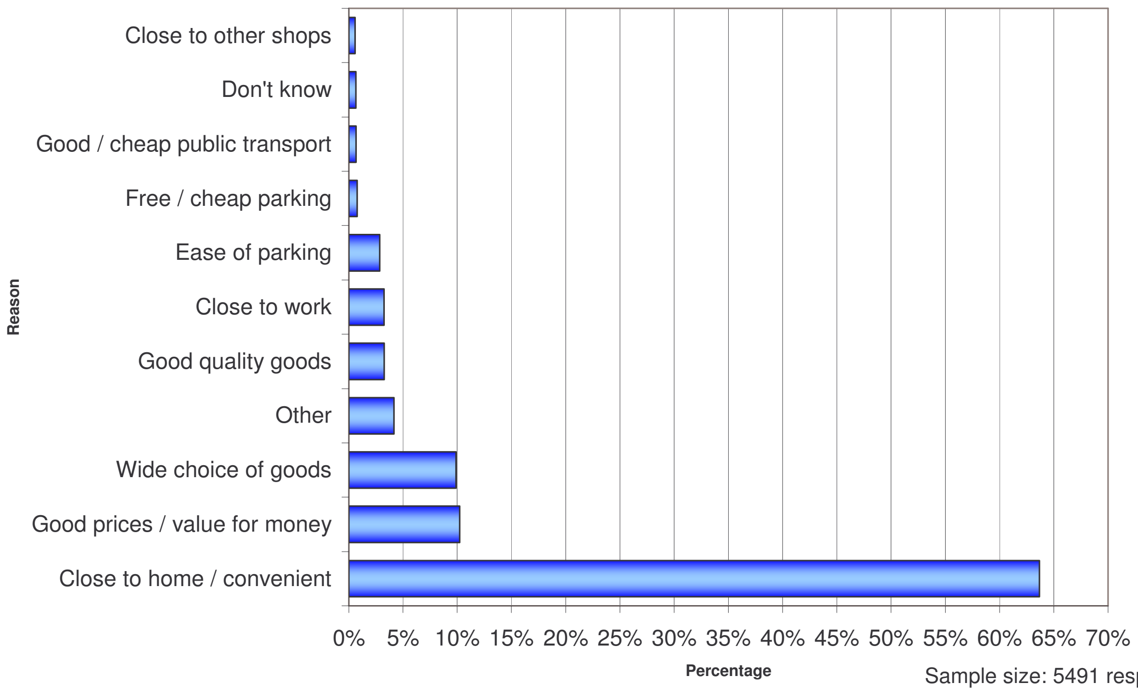


Sample size:
Non Bulky 5110 respondents
Bulky 4387 respondents

CONVENIENCE GOODS SHOPPING

- As for comparison goods, the majority of respondents (63.7%) said that the main reason for visiting their main food store was because it was *"close to home / convenient"* (see **Figure 7**).
- Price of goods appeared to be a more important than for comparison goods, with 10.2% stating this as their main reason, compared to an average of 2.4% for combined comparison goods.

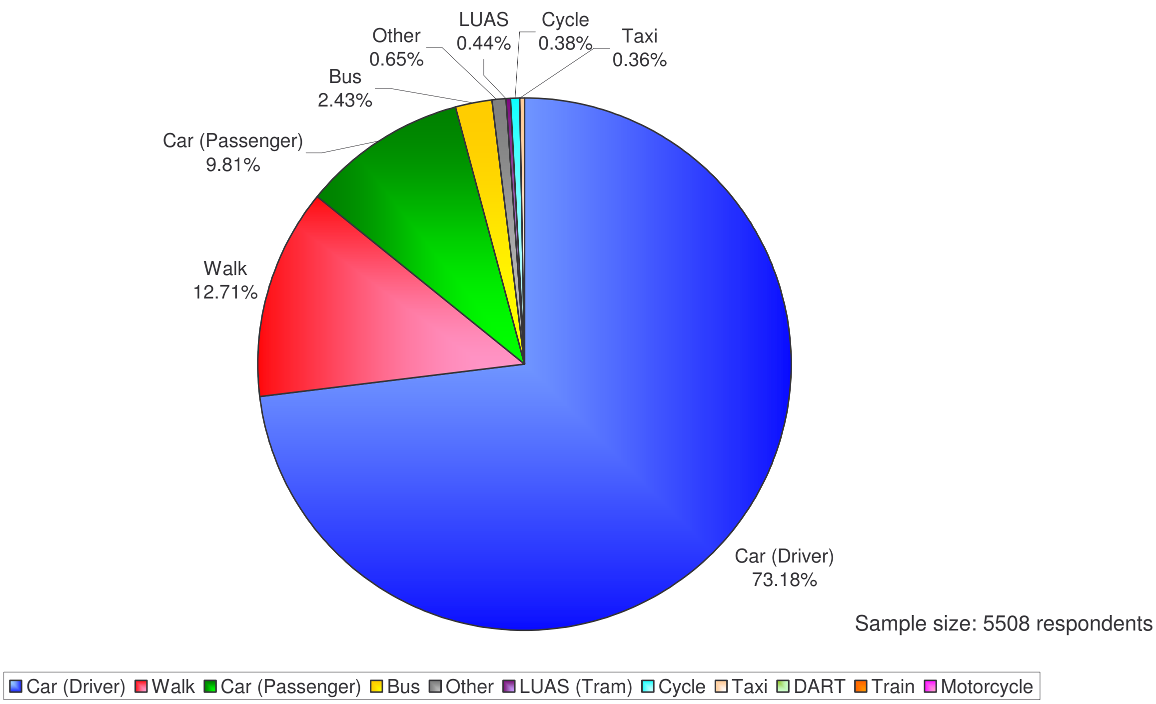
Figure 7 – Reason for Choosing Main Convenience Centre



Sample size: 5491 respondents

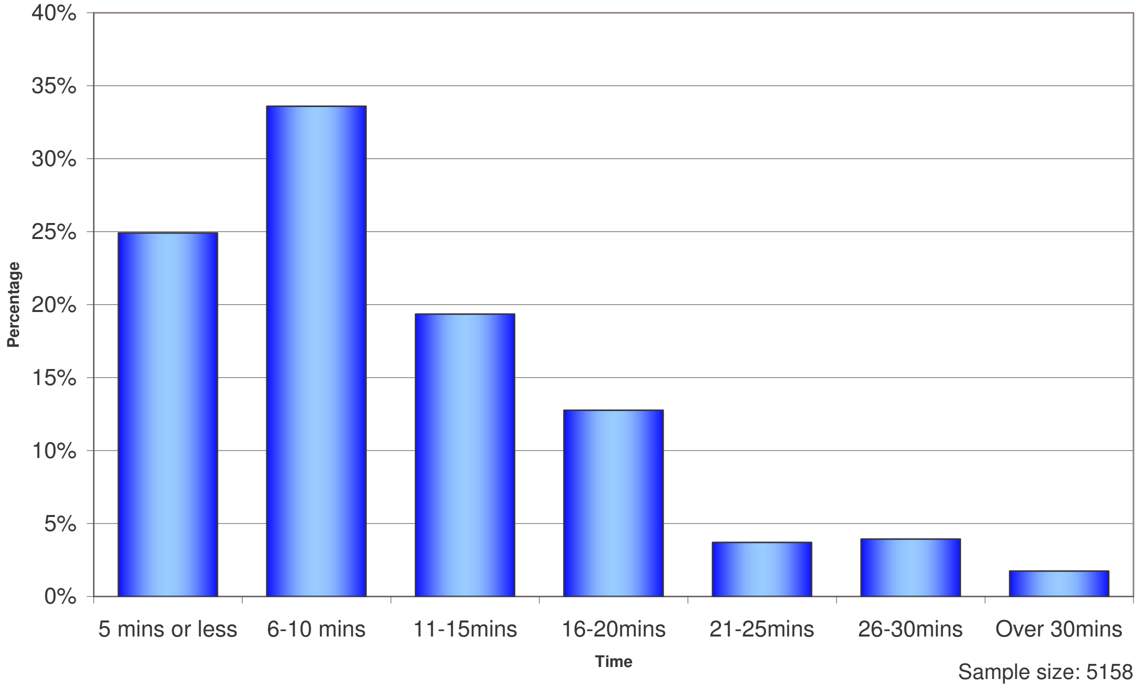
- Driving a car was by far the most popular mode of transport for convenience goods shoppers, accounting for 73.2% of the total (see **Figure 8** overleaf).
- Contrasted with comparison goods shopping, perhaps the most noticeable difference was between the amount of people who catch the bus to their main centres. For combined comparison goods the figure was 7.2%, whereas for convenience goods it was just 2.4%.

Figure 8 – Normal Mode of Transport to Main Convenience Goods Centre



- The vast majority of respondents (94.1%) started their journey to their main convenience store from home. This was similar to comparison goods shopping.
- The most popular length of journey was 6-10 minutes (33.6%) followed by 5 minutes or less with 24.9% (see **Figure 9** overleaf).
- The mean journey length is 21 minutes, over 10 minutes less than the average for comparison goods shopping as a whole.
- Overall, shorter journey lengths for convenience goods shopping were more common than for comparison goods. 77.9% of convenience journey times were 15 minutes or under, while 53.3% of combined comparison goods trips had the same length of journey.

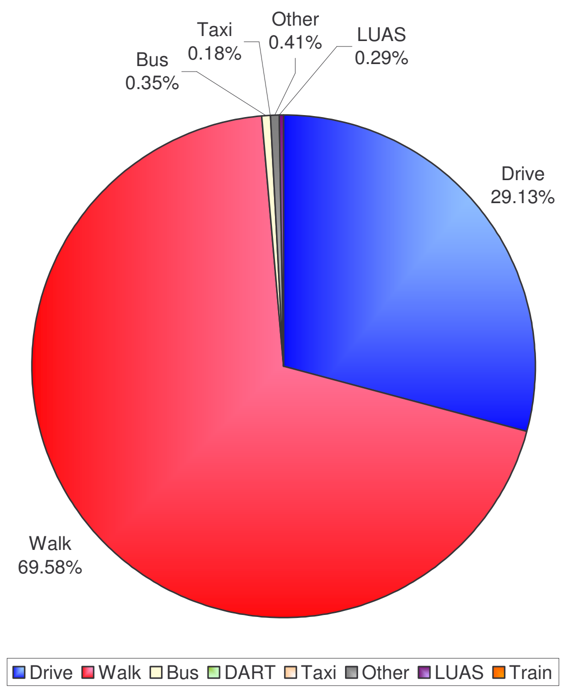
Figure 9 – Normal Length of Journey from to Main Centre from Home for Convenience Goods



Sample size: 5158 respondents

- When asked whether respondents ever combined convenience goods shopping with other shopping (i.e. linked trips) 31.3% said that they did.
- Of these 31.3%, the majority (69.6%) stated that their normal mode of transport to other shops or service outlets was walking (see **Figure 10**). A further 29.1% drove to the other shopping, leaving a 1.2% travelling by other means.

Figure 10 – Normal Mode of Transport to Other Shop / Service Outlet



Sample size: 1695 respondents

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- The types of other shops or services visited by respondents when doing convenience goods shopping are listed in **Table 1** below.
- *"Clothing"*, *"Chemist Goods"* and *"Specialist Foods Shops"* were the most common responses with 13.4%, 12.5% and 10.6% respectively.
- It appears consumers mainly combine convenience goods shopping with non-bulky comparison goods shopping.

Table 1 – Type of Other Shop / Service Outlet Visited

REASON	NUMBER	PERCENT
Clothing	583	13.4%
Chemist Goods	546	12.5%
Specialist Food Shops	465	10.6%
Post Office	374	8.6%
Newsagent / Confectioner / Tobacconist	323	7.4%
Footwear	300	6.9%
Other	231	5.3%
Department / Variety Shop	223	5.1%
Financial Outlets	210	4.8%
DIY / Hardware / Garden Products	199	4.6%
Leisure Goods	182	4.2%
Catering Services	175	4.0%
Health and Beauty Services	124	2.8%
Electrical Goods	101	2.3%
Jewellery	83	1.9%
Household Textiles / Soft Furnishings	63	1.4%
Leisure Services	55	1.3%
Carpets / Furniture	54	1.2%
Charity Shop	45	1.0%
Various	18	0.4%
Professional Services	13	0.3%
TOTAL	**4367**	**100.0%**