Plymouth City Centre Company

Shoppers Perception Survey

September 2008

connect with
Marketing Means

tel: 01364 654485 • fax: 01364 654664
email: anna-marie@marketingmeans.co.uk • web: www.marketingmeans.co.uk

Summary & conclusion

Marketing Means conducted a telephone survey amongst a stratified random sample of residents within the potential catchment area for Plymouth as a shopping centre as defined by a study conducted for P&O in 2005. The catchment area is divided into five zones (0 to 4) based on their proximity and accessibility to Plymouth (see map page)

The sample for this exercise was a stratified 'random digit dialling sample'. This means that completely random numbers were generated for dialling proportional to postcodes.

The key points that have emerged from this study are:

- Distance and transport remain the biggest limits on Plymouth's potential to attract people from further a field. Plymouth must be perceived as offering significantly more than its rivals to motivate shoppers to choose the City over the shopping centre nearest / easiest for them to access.

  The new Drake Circus shopping centre, and / or the BID improvements have increased the proportion of people who are willing to shop in the City Centre from a (estimated) 15 mile zone around Plymouth. There has, however, been little impact from either of these projects in attracting shoppers from areas further away from Plymouth. Truro remains a popular destination for those in the western areas of Cornwall, and Exeter's own investments in the Princesshay shopping centre have meant that it has improved its own ratings, and remains popular in South Devon. (See Section 3)

- The BID is addressing the correct issues with regards the perceptions of Plymouth with shoppers. There have been improvements in both ratings of aspects and perceptions of improvements in the areas identified by the BID such as quality and range of shops and ease of getting around, as well as cleanliness, attractiveness and safety. (Sections 4 to 8).

Contents

Appendices with tables are to be found in a separate document.

1.0 Introduction / Background

1.1 The research issue

The Plymouth City Centre Business Improvement District (BID) was established in April 2005 with the aim of increasing footfall and sales in the City Centre, particularly attracting higher spending 'A, B and C_1' shoppers.

The BID, managed by the Plymouth City Centre Company, has with the businesses in the area, identified and set up projects to improve priority areas:

- A Better Promoted City Centre
- A Cleaner City Centre
- A More Attractive City Centre
- A Safer City Centre
- A More Welcoming City Centre

The project has now been running for three years, and it is essential that the progress is monitored. This questionnaire was originally conducted in 2006 with this being the second time that it has been run, with only minor modifications to the script and questions.

1.2 Research objectives

The key research objectives were to:

- Establish who currently considers Plymouth City Centre their main shopping centre for major purchases
- Compare the results with the baseline set of perception indicators identified in the previous survey to measure progress over the period of the BID term
- Compare and contrast Plymouth City Centre with its competitors
- Determine why people choose to shop or not shop in Plymouth
- Establish what would motivate non-users or low frequency users to choose Plymouth City Centre for their major shopping trip more often.

1.3 Method

Marketing Means conducted a telephone survey amongst a stratified random sample of residents within the potential catchment area for Plymouth as a shopping centre as defined by a study conducted for P&O in 2005. The catchment area is divided into five zones (0 to 4) based on their proximity and accessibility to Plymouth (see map over)

The sample for this exercise was a stratified 'random digit dialling sample'. This means that completely random numbers were generated for dialling proportional to postcodes, with an over sample of those in the zones nearer to Plymouth; this avoids non-listed telephone numbers which minimises bias compared to other sources which are telephone directories.

The survey was completed using Computer Assisted Telephone Interviewing (CATI) to remove the need for data entry, and reduce the possibility of routing problems.

Plymouth Catchment Area Zones *(as per P&O study)*

2.0 Notes

2.1 Acknowledgements

Marketing Means would like to thank Patrick Knight for his help with this project.

2.2 Authors and publication

Marketing Means wrote this report in August / September 2008.

Any press release or publication of the findings of this survey requires the approval of the author / Marketing Means. Approval would only be refused if it were felt that it was inaccurate or a misrepresentation.

2.3 About reading this report

Confidence intervals

The overall confidence interval for this survey is **+/- 4% at 95%.**

A confidence interval is a measure of how reliable the results from the sample are compared to the wider population. For example, this survey is +/-4% @ 95%. This means that any proportion given could in reality be 4% higher or lower in the wider population. If, for example, a question give a percentage of 65%, that the true figure for the population may be anything between 61% and 69%, 95% of the time.

The calculation is:

$$\left(\text{Square root of } \frac{(\%\ \text{category1} \times \%\ \text{category2})}{\text{Number who answered the question}}\right) \times 1.96$$ [1]

Rounding

Figures for graphs have been rounded and may not add up to 100%.

1 The constant for 95%

3.0 Main centre for major purchases

3.1 Town or city considered to be main centre

Q1 "Firstly, where do you consider your main shopping town or city for major purchases to be?"

- Half of those interviewed (49%) said that they considered 'Plymouth' to be their main shopping centre for major purchases (49% in 2006).
- The second most popular category was the combined category of 'Small / Market towns' 29% (27% in 2008) which included towns such as Newton Abbot or Launceston.
- 'Truro' had 9.5% (12% - 2006) of the shoppers overall in the catchment area considered, 'Exeter' 6.8% (10% -2006) and 'Torquay' 2.7% (2% -2006).
- There were also 2.5% (2% -2006) who used the Internet as their 'main shopping centre'.

Overall, there have been no significant changes as to where people shop since the 2006 survey.

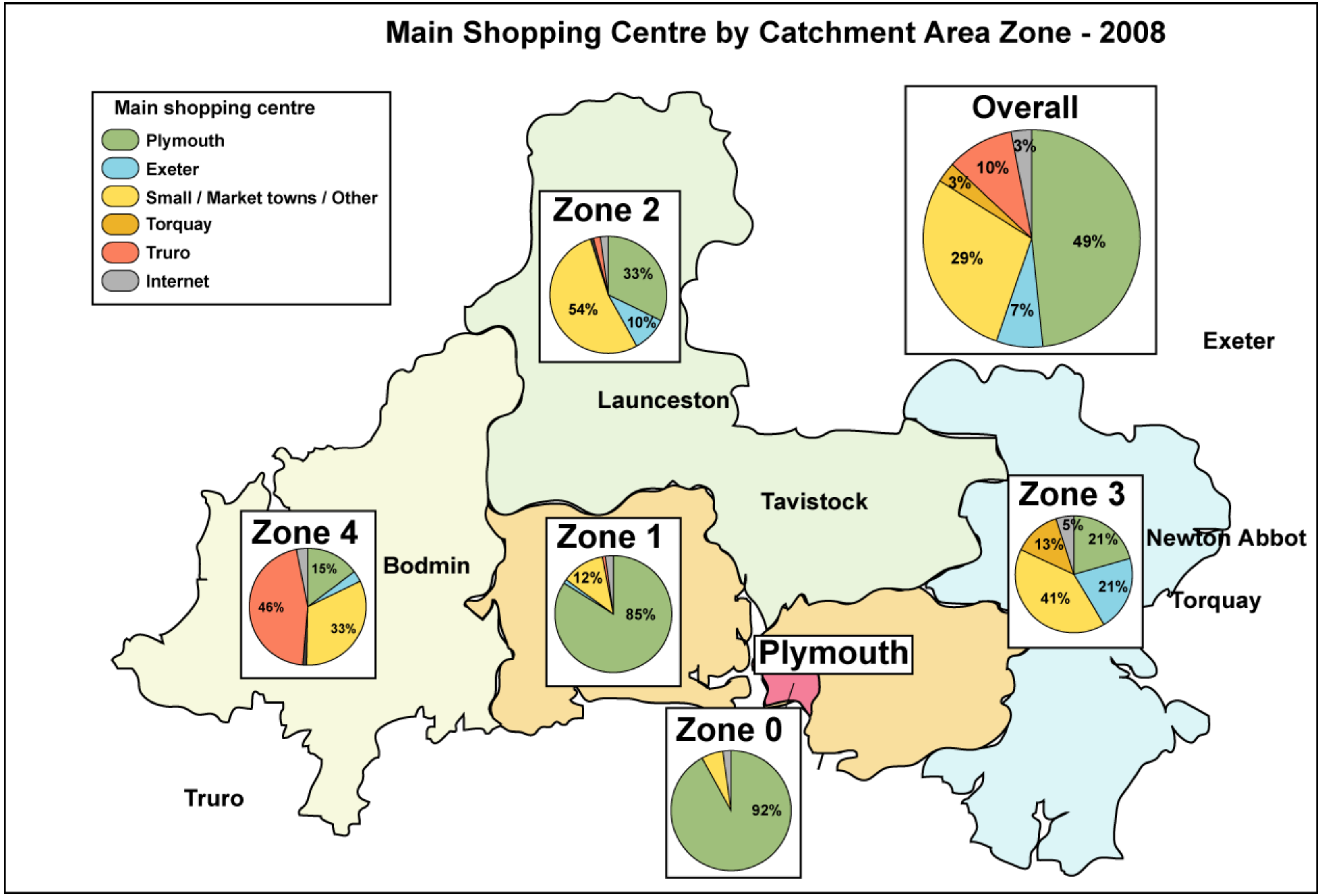
3.1.1 Differences

By Zone

There were significant differences in the use of Plymouth as respondents main shopping centre by the Zone lived in *(See Map 1: Page 7).*

- Virtually all respondents (92%) from Zone 0 (Plymouth City) said that they used Plymouth City Centre for their major shopping trips (same as 2006).
- This only decreases to 85% in Zone 1 (Plympton, West Devon, South East Cornwall, and parts of the South Hams), which is a significant increase from the 2006 survey where just over two-thirds (69%) shopped in Plymouth.
- Zone 2 (North Cornwall and West Devon areas) had one-third (33%) saying Plymouth was their main centre, compared to 38% in 2006.
- Zone 3 (Teignbridge and the eastern part of the South Hams) had a fifth (21%) who said that Plymouth was their main centre (no change from 2006).
- 15% Zone 4 (Restormel and western North Cornwall) saying so (a similar proportion to 2006 – 13%).

So more people from the zone 1 area are being attracted to saying that Plymouth is their main shopping centre but there have been no significant changes in the zones further out.


Main Shopping Centre by Catchment Area Zone - 2008
Main shopping centre
Plymouth
Exeter
Small / Market towns / Other
Torquay
Truro
Internet
Overall
3%
10%
3%
29%
49%
7%
Zone 2
33%
54%
10%
Zone 4
15%
46%
33%
Zone 1
12%
85%
Zone 3
5%
13%
21%
41%
21%
Zone 0
92%
Exeter
Launceston
Tavistock
Bodmin
Newton Abbot
Torquay
Plymouth
Truro

By gender
There were no significant differences by gender.

By age group
There were, however, significant differences by age group and these are similar to the previous findings.

- The younger the age group a respondent was in, the more likely they were to use either 'Plymouth' or 'Exeter' as their major shopping centre.

- The older the respondent, the more likely they are to say that a Small / Market town / Other is their main shopping centre.

This may be partly accounted because younger age groups live in slightly more urbanised areas.

This, however, does not explain why people who are in the next age group (35 to 54) are more likely than the 55 to 74 year olds to use 'Plymouth' or 'Exeter', and much more likely than the 75 and over group.

(Full tables: Appendix 1, Table 1)

3.2 Frequency of using the major shopping centre

Q2 “And roughly how frequently do you shop in [main shopping centre]?”

- Just over a third of respondents said they used their main shopping centre daily (6%) weekly (39%). This is slightly more frequently than reported in the 2006 survey (4% and 31% respectively).
- A further 13% aid they used their shopping centre fortnightly
- 20% saying they go to their shopping centre at least monthly and another 15% who said they go every few months.

Differences

- Respondents who said that ‘Small / Market towns / Other’ was their main shopping centre were more likely than all other groups (49%) to say they went weekly
- ‘Plymouth’ users were also more likely than users of the other cities to say they go at least weekly.

(Full tables: Appendix 1, Table 2)

4.0 Rating of aspects of shopping centres

4.1 Rating of aspects of shopping centres

"How do you rate the pedestrianised shopping area of Plymouth City Centre on a scale of 'very good' to 'very poor' for the following aspects:"

"How do you rate [main shopping centre] on a scale of 'very good' to 'very poor', the following aspects?"

Both Plymouth City Centre and the other shopping centres were rated on 8 aspects (listed in the table below) that have an influence on people's decision to use a particular shopping centre. Respondents who used Plymouth as a secondary shopping centre also rated it, and their ratings are listed separately. The changes from the 2006 survey are shown in brackets (there were 14 aspects rated in the previous survey)

	Visited Plymouth Shopping Centre (within last year)			Visited Other Centre
	Total (Plymouth)	Plymouth First Choice	Plymouth visited (not first choice)	Other Town First Choice
		% Very good / Good	% Very good / Good	% Very good / Good
Range of shops	301	196	105	211
	70%	68% (nc)	73% (+5%)	70% (nc)
Quality of shops (brands)	294	188	106	219
	69%	66% (+3%)	73% (+12%)	73% (+3%)
Cleanliness	304	207	97	228
	71%	72% (+10%)	67% (+15%)	81% (+10%)
Feeling of safety	305	214	91	243
	71%	75% (+14%)	63% (+22%)	81% (+4%)
Other attractions and entertainment outside the pedestrianised shopping area (e.g. parks, theatres, cinemas and sports facilities)	255	173	82	136
	59%	61% (+4%)	57% (nc)	48% (+17%)
Public conveniences	148	101	47	105
	34%	35% (+20%)	32% (+10%)	37% (+8%)
Ease of getting around	326	226	100	212
	76%	79% (+11%)	69% (+16%)	74% (+6%)
Quality of car parking	197	131	66	153
	46%	46% (+27%)	45% (+16%)	54% (+13%)

- Both Plymouth and other shopping centres have seen an increase in most of their ratings since the previous survey, although Plymouth has seen generally greater improvements overall, and particularly with regards to the aspects that it scored poorly on previously (cleanliness, feeling of safety, public conveniences, ease of getting around, quality of car parking), all of which can be seen to have seen significant rises in the past two years

- It is also notable that those for whom Plymouth is not their main shopping centre are more likely than previously to rate Plymouth better on cleanliness and feelings of safety, with their figures becoming more in line with those who use Plymouth more regularly. On other factors such as the range and quality of shops, secondary users have started rating Plymouth higher than regular users.

- Plymouth still trails other centres on cleanliness, feelings of safety and car parking, although the gap is now narrower than previously. It has also lost some of its advantage over other towns and cities in the aspect of 'other attractions' although this may be partly due to a rewording of that particular aspect.

(Full tables: Appendix 1, Table 3)

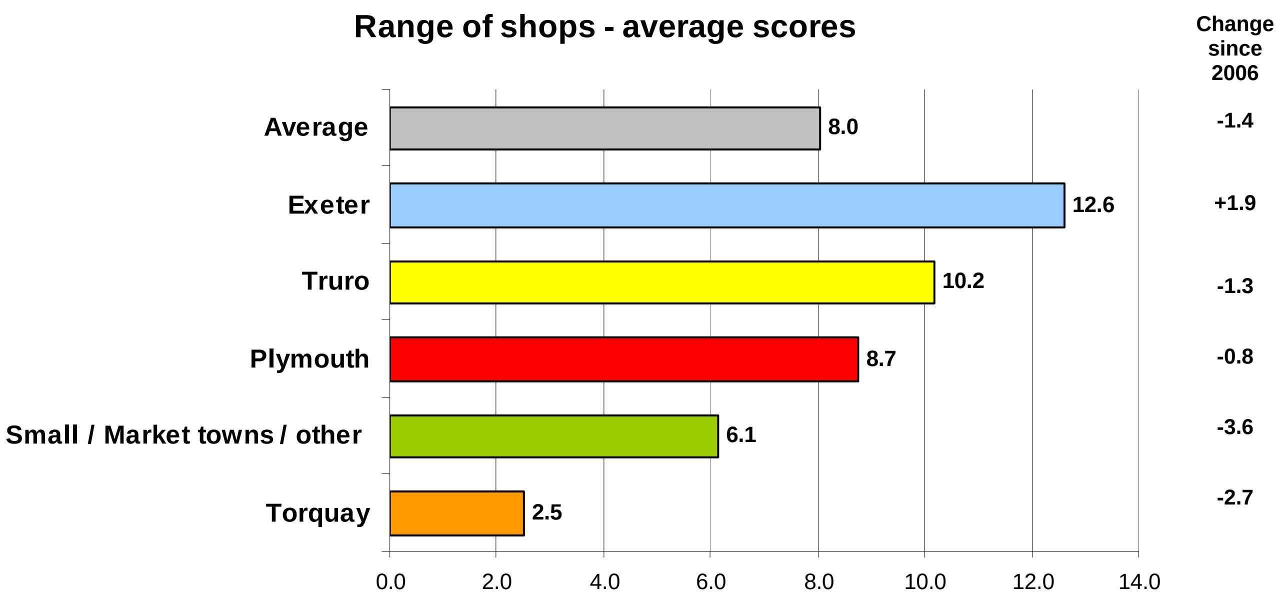
10.1 Comparative 'average scores' for aspects of the main shopping centre used

To further explore attitudes to the aspects, a 'scoring system' was devised in order to give a way of comparing the ratings given for each of the cities / towns nominated as the primary shopping centre, and an average score was then computed for each of the aspects. Additionally, from these 'average scores', an 'overall average' was also computed. A combined 'average score' is also given for each aspect as a bench mark. *Only 'first choices' were used when calculating Plymouth's score.*

The scoring system used was:
'Very good' = +20 'Good'=+10 'OK'=0 'Poor'= -10 'Very poor'= -20. The maximum average for each aspect is, therefore, +20 (all respondents rating as 'very good') and the minimum average is -20 (all respondents rating as 'very poor').

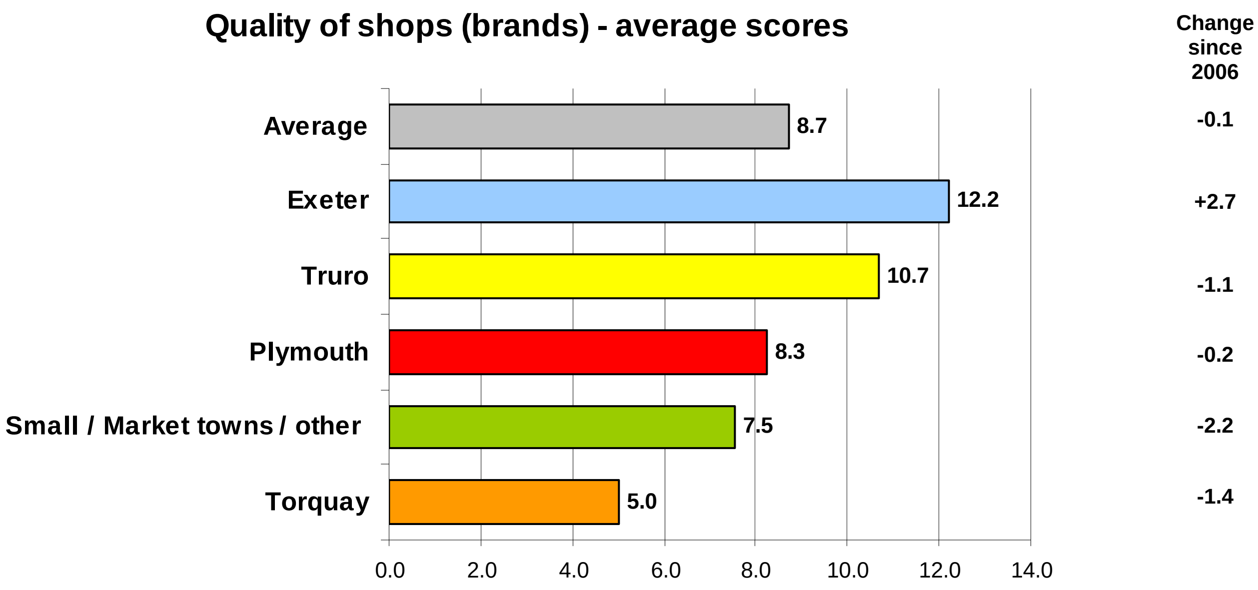
a) Range of shops

'Plymouth' came 3rd out of 5 in its average score for range of shops, behind 'Truro' and 'Exeter' an improvement of one place since the previous survey. Plymouth had a slightly higher than the average score, which was pulled lower by 'Torquay' which received significantly lower ratings than all the other shopping centres.



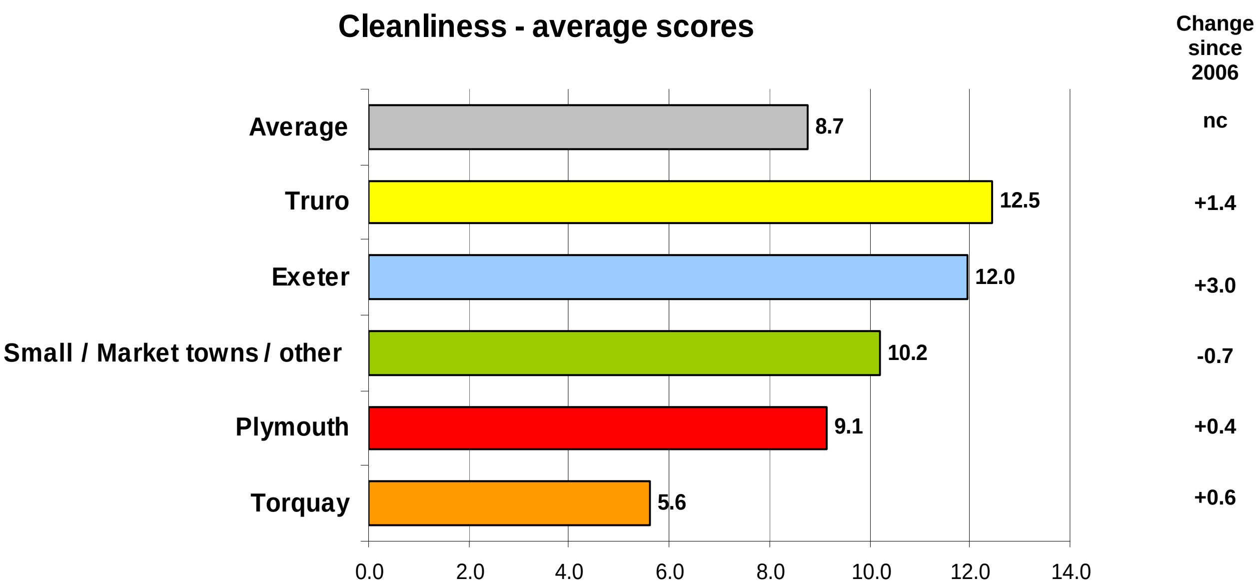
b) Quality of shops

Again 'Plymouth' came 3rd out of 5 in its average score for the quality of shops, behind 'Truro' and 'Exeter' although again it had a significantly higher than average score.



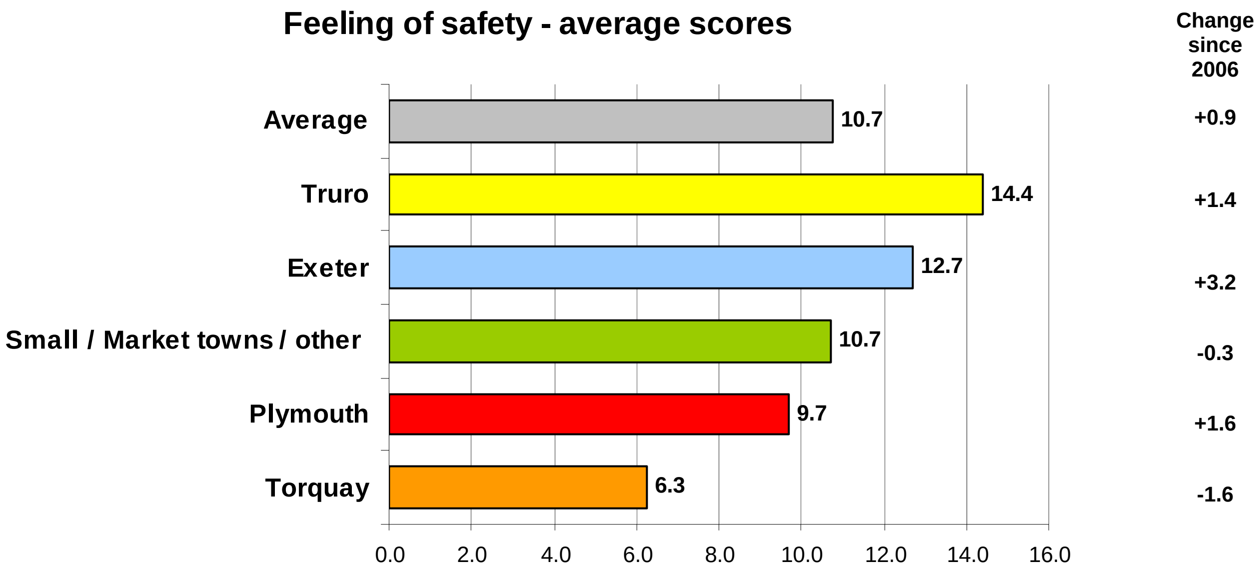
c) Cleanliness

'Plymouth' came 4th out of 5 in its average score for cleanliness, behind 'Truro', 'Exeter' and 'Small / Market towns / Other'. Plymouth's score was slightly higher than the average score, which again was pulled lower by 'Torquay' which received significantly lower ratings than all the other shopping centres.



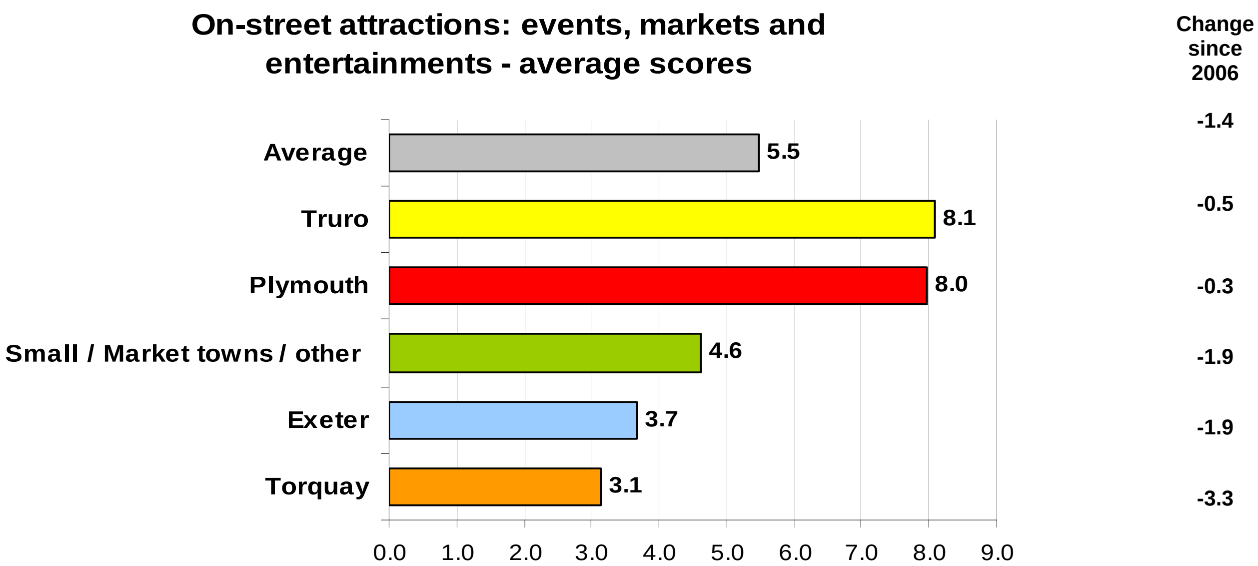
d) Feeling of safety

Following the previous pattern, 'Plymouth' came 4th out of 5 in its average score for feeling of safety, behind 'Truro', 'Exeter' and 'Small / Market towns / Other'. Plymouth's score was lower than the average score, but had increased significantly at above the average rate.



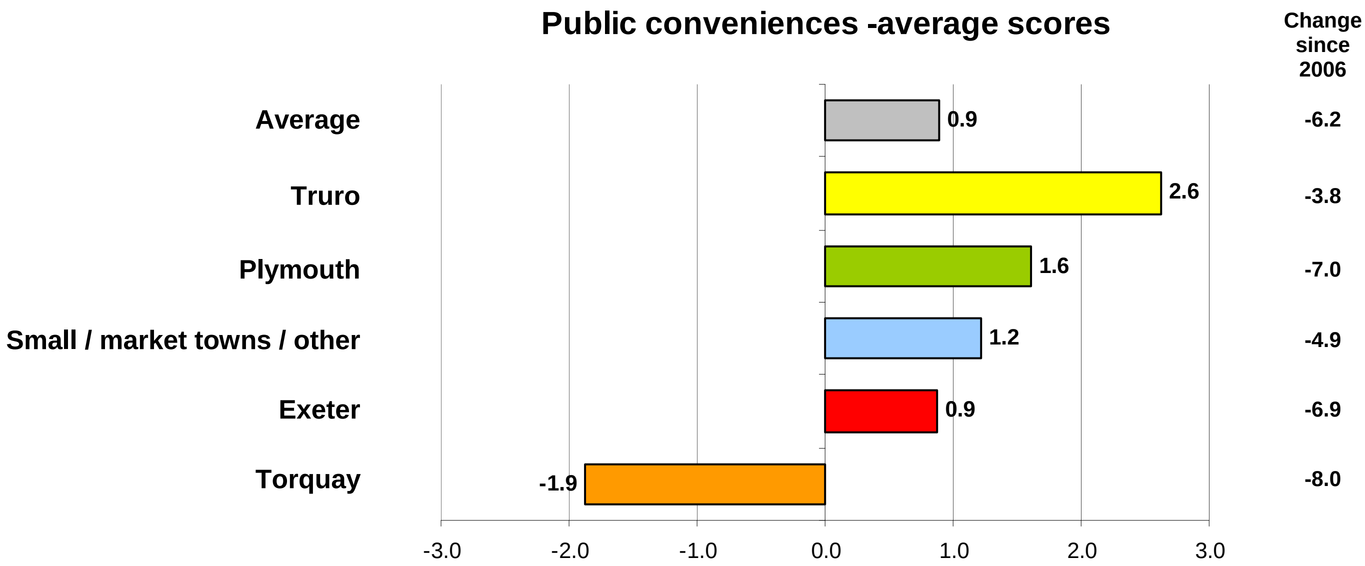
e) On-street attractions: events, markets and entertainments

'Plymouth' came 2nd out of 5 in its average score for on-street attractions, just behind 'Truro'. Plymouth's score was significantly higher than the average score. 'Torquay' and 'Exeter' received the lowest ratings, significantly lower than 'Plymouth'.



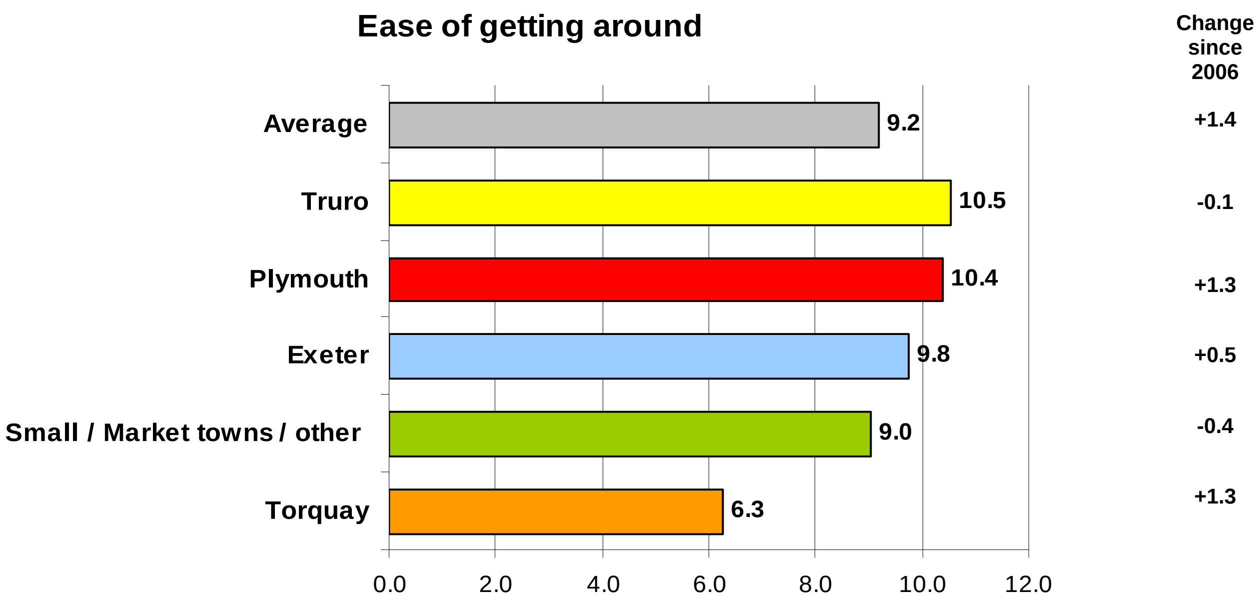
f) Public conveniences

'Plymouth' came 4th out of 5 in its average score for public conveniences, two places lower than its previous score. There have, however been large changes in the scores received by all towns with regards to this aspect.

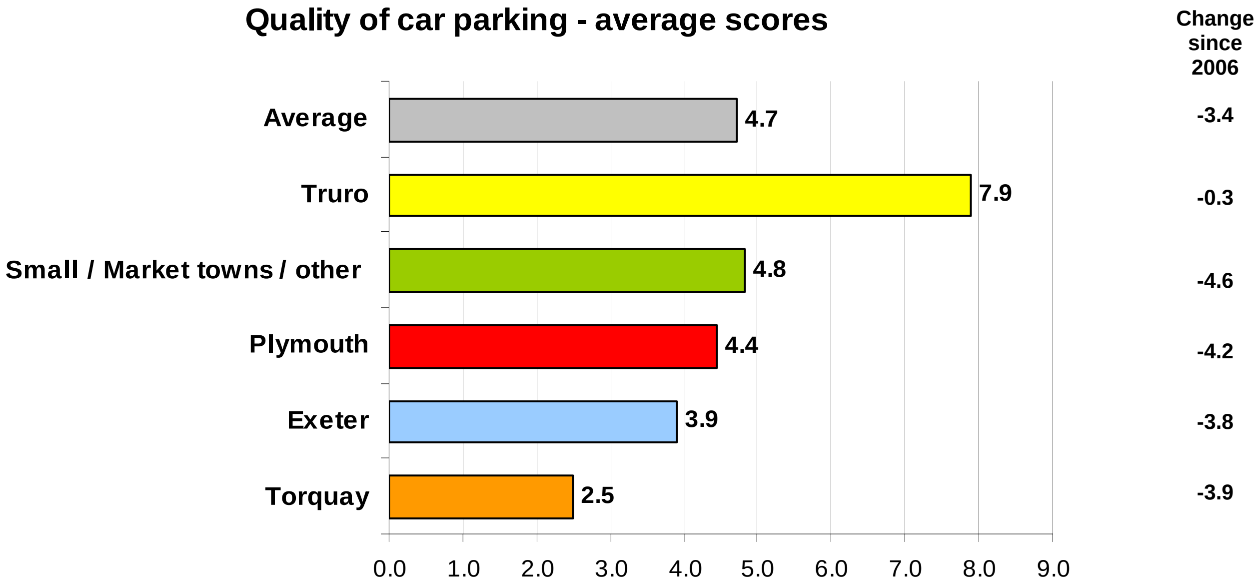


g) Ease of getting around

'Plymouth' came 2nd out of 5 in its average score for ease of getting around, an improvement of 2 places. 'Truro' topped this category, and 'Torquay' again received significantly lower ratings than the other towns and cities, although also had significant improvements from the previous survey.



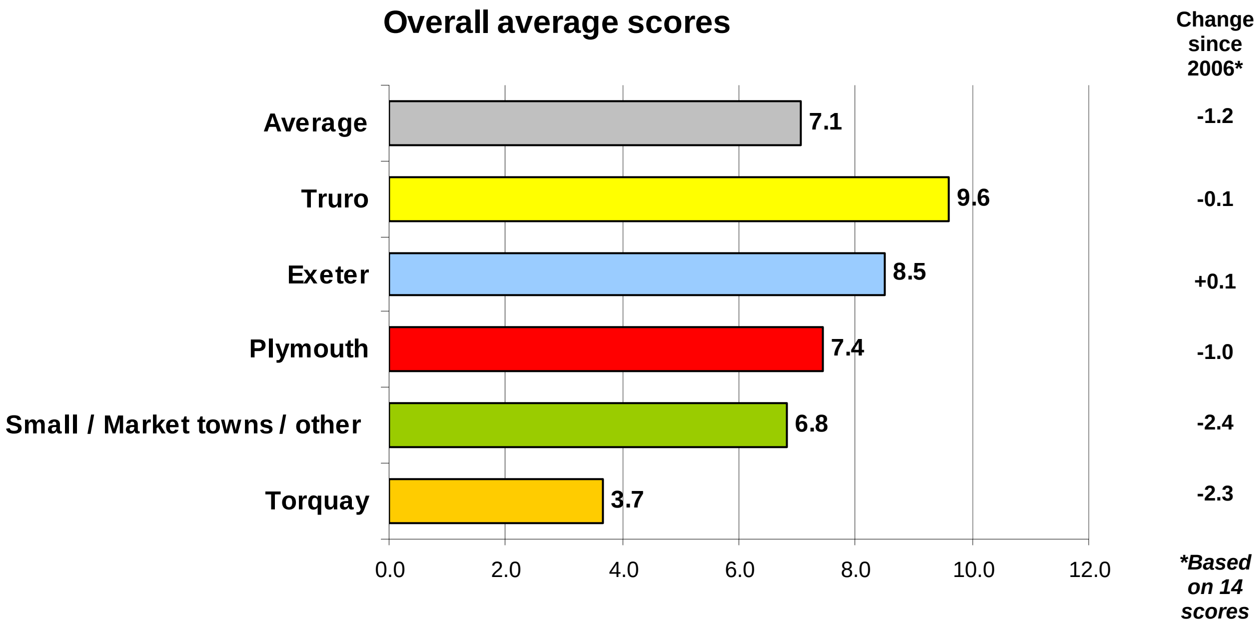
h) Quality of car parking
'Plymouth' came 3rd out of 5 in its average score for overall atmosphere, behind 'Truro' and 'Small / Market towns / Other'. All towns had a reduction in their rating scores on this aspect, although Truro has moved to the top of the list because it had the smallest fall. Again Torquay's score was substantially lower than any of the other towns or cities. Plymouth's score was marginally below the overall average.



Overall average score
Overall, Plymouth's average score for all 8 categories was 7.4, marginally lower than in the previous survey. However, this was based on 6 fewer categories, so the average may be impacted by this. However, the relative stability of Truro and Exeter's overall scores must be noted.

Plymouth has improved its position overall from 4th in 2006 to 3rd in 2008. This is mainly due to a significant drop in the scores achieved by the 'Small / Market towns / other' category. Torquay has also seen a significant fall, although much of that is probably concerned with the large fall in ratings for public conveniences.

Plymouth has seen improvements in some of its previously weak areas of cleanliness, feelings of safety and ease of getting around.



Summary table of Plymouth's rankings		
	Rank (out of 5)	Change since 2006
A) Range of shops	3rd	+1
B) Quality of shops	3rd	+1
C) Cleanliness	4th	nc
D) Feeling of safety	4th	nc
E) On-street attractions	2nd	nc
F) Public conveniences	4th	-2
G) Ease of getting around	2nd	+2
H) Quality of Car Parking	3rd	-1
Overall 'average score'	3rd	+1

4.2 Most important aspects for choosing shopping centre

Q4 "And which three of the elements listed above are most important to you in choosing to use [main shopping centre] for your shopping?"
The most frequent answer to this question was 'range of shops' with 51% saying this was the most important aspect in choosing their shopping centre.

The second most important aspect was 'quality of shops' (18%) followed closely by 'ease of getting around' (17%).

The four most important aspects remain the same as the previous survey, although 'quality of car parking' and 'ease of getting around' have swapped places. This is despite the way that this was determined having changed slightly from a 'three most important aspects' to a 'most important aspect' choice.

As can be seen from the table below, Plymouth is ranked third overall of cities / towns in the potential catchment area for three of the four most important aspects, including the two most important. Plymouth has improved its rankings in three of the most important aspects ('range of shops' +1; 'quality of shops' +1; 'ease of getting around' +2) and has lost one place in 'quality of car parking'. On the less important aspects it has retained approximately the same ranking as in the 2006 survey.

Rank of Plymouth City Centre Aspect Ratings (compared to other South West towns / cities) Arranged by Importance of Aspect in choosing shopping centre

Order of importance	% Most important aspect	Rank
1 Range of shops	51%	3rd
2 Quality of shops (brands)	18%	3rd
3 Ease of getting around	17%	2nd
4 Quality of car parking	9%	3rd
5 Feeling of safety	3%	4th
6 Cleanliness	1%	4th
7 Public conveniences	1%	4th
8 On street attractions	0%	2nd

Differences
Men were more likely than women to say that range of shops (55% vs. 49%) and quality of shops (24% vs. 16%) are the most important aspects. Women were more likely to say ease of getting around (19% vs. 14%) and quality of car parking (10% vs. 5%) were important factors.

Younger age groups were more concerned with shops whereas older age groups were more concerned with ease of getting around.

There were no differences by zone or socio-economic group.

(Full tables: Appendix 1, Table 4)

4.3 Any other reason why shopping centre is chosen

Q5 "Is there any other reason why you chose to shop in [main shopping centre]?"

Three quarters of respondents (76%) said that their main shopping centre was easier to get to than anywhere else. This is a slight increase from the previous survey when 63% of respondents said that. However the overall pattern has not changed.

(Full tables: Appendix 1, Table 5)

4.4 Usual form of transport

Q6 "What is your main form of transport when you go shopping in {Q1} ?

Three-quarters (75%) of respondents use a car to get to their main shopping centre, with 11% going by bus and 9% walking.

Differences
Respondents from Zone 0 (Plymouth City) were far more likely than other respondents to say that they use the bus (29%), with respondents in Zone 1 being the most likely to say that they would use a car (88%).

As is normally seen, women are more likely than men to say that they use a bus (13% vs. 6%).

(Full tables: Appendix 1, Table 6)

4.5 Ease of getting to shopping centre

Q6 "What is your main form of transport when you go shopping in {Q1} ?

44% of respondents said they find getting to their main shopping centre very easy, with 49% saying that it is easy.

(Full tables: Appendix 1, Table 6)

5.0 Visiting Plymouth

5.1 Whether visited Plymouth City Centre within the last 12 months

Q8 "In the past 12 months have you visited…

a) **The pedestrianised shopping area of Plymouth City?**
b) **The new Drake's Circus development?"**

There was little difference in the answers of respondents, with 72% of respondents saying they had visited the pedestrianised area of Plymouth City and 71% having visited Drake's Circus.

This question was asked in the previous survey simply as *"have you visited the pedestrianised shopping area of Plymouth City Centre within the last 12 months?"* with 61% of respondents saying that they had. This means that there has been a significant 11% to 12% increase in the number of people who have visited.

Differences
Respondents in the age groups under 45 were more likely than those in older respondents to have visited both parts of Plymouth.

Those in Zones 0 (93%) and Zone1 (90%) were the most likely to have visited both parts of Plymouth, with those in Zone 4 being the least likely.

The largest increases in the proportion of respondents saying that they have visited Plymouth have occurred in Zone 1 (+8%) and Zone 2 (+19%). Numbers of visitors from Zones 3 (+2%) appear to have remained approximately the same and visitors from Zone 4 (-8%) appear to have declined somewhat.

(Full tables: Appendix 1, Table 8)

5.1 Frequency of visiting Plymouth City Centre

Q9 "If yes, how frequently do you go to the pedestrianised shopping centre of Plymouth City Centre?

The most frequent answer was 'at least every few months' (25%) followed by 'at least weekly' (18%).

Differences
The only differences seen were by zone, with those in Zone 0 being far more likely to visit the city centre weekly than others.

(Full tables: Appendix 1, Table 9)

6.0 Those who don't (regularly) visit Plymouth

6.1 Likelihood of visiting Plymouth City Centre in the next

Q10 "If no, how likely are you to visit the pedestrianised shopping area of Plymouth City Centre this year?" [2]

68% of those who had not visited the pedestrianised shopping centre said they were very likely to do so in this year, with a further 21% saying they were fairly likely.

Differences
Again, the only differences seen were by zone, with those in Zone 3 and Zone 4 being far less likely to say they would visit.

(Full tables: Appendix 1, Table 10)

6.2 Reasons for not (regularly) visiting Plymouth

Q11 "What are your main reasons for not (regularly) shopping in the pedestrianised shopping area of Plymouth City Centre?"

Q12 "Out of the reasons given, which would you say is most important?

The most common reasons given for not visiting Plymouth were that the respondent it was too far away which was considered the most important by 57%, they did not have time and or need to go there (10%) and they do not like it (9%).

The reasons for not visiting Plymouth have stayed the same from the previous survey, with the numbers saying they do not like the city remaining stable from 2006 (nc)

(Full tables: Appendix 1, Tables 11 and 12)

6.3 Things that would encourage more usage of Plymouth as a shopping centre

Q13 "What would encourage you to use the pedestrianised shopping area of Plymouth more for major shopping trips.

The most common suggestion from respondents was reduction of parking costs and improvement of parking facilities in the city (+2%). There was a slight reduction who said that nothing would encourage them to visit Plymouth as it was too far away (25%), down 5% from the previous survey. Most of these respondents were located in Zones 2, 3 and 4.

(Full tables: Appendix 1, Tables 13)

[2] Coded from open answers

7.0 People who use Plymouth (at all)

7.1 Most important aspect for choosing to shop in Plymouth

Q15 "Which of these elements is most important to you in choosing Plymouth for your shopping?"

55% of respondents who chose Plymouth said it was the range of shops that was most important to them, with 16% saying it was the quality of shops and 13% saying it was the ease of getting around.

Differences
Respondents who visited from the further away Zones (3 and 4) were more likely to say the range of shops, whereas those who lived nearer the City Centre were more likely to say that the 'ease of getting around' was the most important aspect.

(Full tables: Appendix 1, Table 15)

7.2 Most important aspect for improvement of Plymouth City Centre pedestrianised shopping area

Q16 "Which of these elements do you think needs most improvement in the pedestrianised shopping area of Plymouth City Centre?"

29% of respondents who chose Plymouth said public conveniences were in most need of improvement (+16%) with 21% saying that the quality of car parking needs improving (-6%). 12% said range of shops (-1%) and 11% said cleanliness.

Differences
There were no significant differences by demographic groups with regards to this question.

(Full tables: Appendix 1, Table 16)

8.0 BID related questions

8.1 Whether aspects of Plymouth City Centre have got better or worse

Q20 "Please say whether you think the following aspects of Plymouth City Centre have got better, worse or stayed the same in the last 3 years?"

- All four aspects asked about had a greater number of respondents saying that they had got better than worse..

- With over a half 'attractiveness' (58%; +25% from 2006) is the aspect that received the highest proportion of respondents saying that they thought it had improved, followed by (54%; +21% from 2006), 'cleanliness'.

- However, 'attractiveness' also had the highest proportion of respondents who thought it had 'got worse' (12%).

- The lowest net rating (improved – got worse) was for 'feeling of safety' (+26%), largely because most respondents thought it had 'stayed the same'. However this was still a large increase from 2006 (+22%)

(Full tables: Appendix 1, Table 20)

8.2 Perception of Plymouth City Centre in the last 12 months

Q21 "Overall would you say the pedestrianised shopping area of Plymouth City Centre has got better , worse or stayed the same in the last three years?"

61% of respondents to this question think that Plymouth City Centre has improved over the last 3 years (+31%) with 32% thinking it has stayed the same (-27%) and 7% thinking it has got worse (-4%).

Differences
There are no significant differences by any of the demographic groups with regards to this question.

9.0 Marked up Questionnaire

Name, login or ID of respondent

100.0%

Shoppers perceptions of Plymouth CC

Main Centre for Major Purchases

Firstly, where do you currently consider your main shopping town or city for major purchases to be?

PROMPT - if necessary: i.e. clothes, entertainment, electrical goods etc. NOT everyday shopping like food etc.

50.2%	Plymouth	Go to Q8	3.3%	Barnstaple
6.8%	Exeter		9.5%	Truro
4.5%	Newton Abbot		1.7%	St Austell
2.7%	Torquay		2.5%	The internet / mailorder
2.0%	Totnes		0.0%	Never go to major towns (end survey)
3.0%	Launceston		10.5%	Other
3.3%	Tavistock			

Other (write in)

100.0%

And roughly how frequently do you shop in (on) Firstly, where do you currently consider your main shoppi...?

Daily	At least weekly	At least every couple of weeks	At least monthly	At least every few months	At least twice a year	Once a year
5.7%	38.8%	13.0%	20.4%	15.4%	6.0%	0.7%

People who use another Shopping Centre

Rating of other shopping centres

How do you rate Firstly, where do you currently consider your <u>main</u> shoppi... on a scale of [read scale] for the following aspects:

	Very good	Good	Ok	Poor	Very poor	D/K
Range of shops	27.4%	43.1%	19.7%	4.3%	4.0%	1.3%
Quality of shops (brands)	28.1%	45.2%	17.7%	4.0%	2.3%	2.7%
Cleanliness	32.7%	47.5%	15.5%	1.8%	1.1%	1.4%
Feeling of safety	42.5%	38.8%	12.4%	2.3%	1.3%	2.7%
On-street attractions: events, markets and entertainments	18.0%	29.9%	20.8%	6.3%	3.9%	21.1%
Public conveniences	11.3%	25.7%	25.4%	16.5%	7.0%	14.1%
Ease of getting around	28.2%	46.5%	17.3%	4.9%	1.8%	1.4%
Quality of car parking	19.4%	34.5%	22.5%	12.3%	3.9%	7.4%

And which of these elements is MOST important to you in choosing to use Firstly, where do you currently consider your <u>main</u> shoppi... for your shopping?

- 50.5% **Range of Shops**
- 18.4% **Quality of shops**
- 1.0% **Cleanliness**
- 3.0% **Feeling of safety**
- 0.0% **On-street attractions**
- 1.0% **Public conveniences**
- 17.4% **Ease of getting around**
- 8.7% **Quality of car parking**

Is there any other reason why you choose to shop inFirstly, where do you currently consider your <u>main</u> shoppi...?

- 5.4% **Work there or near by**
- 76.3% **Easier to get to than other towns or cities / Live there**
- 4.7% <u>Have family there or near by</u>
- 7.4% **Not sure**
- 6.4% **Go there for other reasons i.e leisure/ social**

What is your main form of transport when you go shopping in Firstly, where do you currently consider your <u>main</u> shoppi... ?

- 11.3% **Bus**
- 2.5% **Train**
- 75.0% **Car**
- 2.1% **Park & Ride**
- 0.0% **Moped / motorcycle**
- 8.8% **Walking**
- 0.4% **Cycle**

On a scale of [read scale] could you tell me how easy you find getting to Firstly, where do you currently consider your <u>main</u> shoppi... to go shopping?

Very easy	Easy	Hard	Very hard
44.0%	49.3%	5.3%	1.4%

Visiting Plymouth

In the last 12 months have you visited:

	Yes	No	Cannot remember
The pedestrianised shopping area of Plymouth City?	71.7%	28.3%	0.0%
The new Drake Circus development	71.0%	29.0%	0.0%

(If yes)

Roughly how frequently do you go to the pedestrianised shopping area of Plymouth City Centre?

Daily	At least weekly	At least every couple of weeks	At least monthly	At least every few months	At least twice a year	Once a year
3.2%	17.9%	11.6%	19.0%	24.8%	10.9%	12.5%

(If no)

How likely are you to visit the pedestrianised shopping area of Plymouth City Centre this year?

Very likely	Fairly likely	Not very likely	Not at all likely
68.2%	21.1%	8.1%	2.6%

Those who don't (regularly)visit Plymouth

If 'No' (question 5) or 'Yes' but *less than* 'At least monthly'

What are your main reasons for not (regularly) shopping in the pedestrianised shopping area of Plymouth City Centre?

Prompt for more than one answer

1...	100.0%
2	100.0%
3	100.0%

And which one of the above is the most important reason for not (regularly) shopping in the pedestrianised shopping area of Plymouth City Centre?

1...	100.0%

What would encourage you to use the pedestrianised shopping area of Plymouth City Centre (more) for major shopping trips?

Prompt for more than one answer

1...	100.0%
2	100.0%
3	100.0%

People who use Plymouth (at all)

Only those who have** never been **would** not **answer this section

How do you rate the pedestrianised shopping area of Plymouth City Centre on a scale of [read scale] for the following aspects:

	Very good	Good	Ok	Poor	Very poor	D/K
Range of shops	28.5%	41.3%	23.2%	3.9%	0.9%	2.1%
Quality of shops (brands)	27.6%	40.6%	24.1%	4.4%	0.7%	2.6%
Cleanliness	28.8%	41.8%	20.0%	6.5%	1.6%	1.4%
Feeling of safety	26.0%	44.8%	20.2%	5.6%	1.4%	2.1%
Other attractions and entertainment outside the pedestrianised shopping area (e.g. parks, theatres, cinemas and sports facilities)	28.1%	31.1%	15.3%	4.2%	1.4%	20.0%
Public conveniences	12.3%	22.0%	20.6%	14.6%	10.7%	19.7%
Ease of getting around	25.8%	49.9%	17.9%	4.2%	0.9%	1.4%
Quality of car parking	17.2%	28.5%	24.1%	9.0%	5.1%	16.0%

And which of these elements is MOST important to you in choosing to use Plymouth for your shopping?

55.5% **Range of Shops**
16.0% **Quality of shops**
2.1% **Cleanliness**
4.2% **Feeling of safety**
0.9% **On-street attractions**
0.0% **Public conveniences**
13.5% **Ease of getting around**
7.9% **Quality of car parking**

And which of these elements do you think needs most improvement in the pedestrianised shopping area of Plymouth City Centre?

12.3% **Range of Shops**
8.6% **Quality of shops**
11.1% **Cleanliness**
4.9% **Feeling of safety**
5.6% **On-street attractions**
28.5% **Public conveniences**
8.1% **Ease of getting around**
20.9% **Quality of car parking**

What is your main form of transport when you go shopping in Plymouth?

18.8% **Bus**
3.2% **Train**
64.5% **Car**
5.6% **Park & Ride**
0.2% **Moped / motorcycle**
7.2% **Walking**
0.5% **Cycle**

On a scale of [read scale] could you tell me how easy you find getting to Plymouth to go shopping?

Very easy	Easy	Hard	Very hard
36.2%	52.9%	9.7%	1.2%

Is there any other reason why you choose to shop in Plymouth?

8.6% **Work there near by**
79.4% **Easier to get to than other towns / cities**
12.1% **Have family there / near by**

On your last trip to the shops in Plymouth City Centre, how much did you spend in total?

16.9% Under £20
16.7% £20 to £39
20.2% £40 to £59
9.7% £60 to £79
8.6% £80 to £99
10.4% £100 to £149
5.8% £150 to £199
5.6% £200 to £299
6.0% £300 or more

BID related questions

Please say whether you think the following aspects of Plymouth City Centre have got better, worse or stayed the same in the last 3 years?

	Better	Stayed the same	Worse
The cleanliness of the City Centre	54.1%	38.1%	7.9%
The attractiveness of the City Centre	58.0%	29.7%	12.3%
The feeling of safety of the City Centre	34.8%	56.1%	9.0%
The publicity of the City Centre	48.5%	46.2%	5.3%

And overall, would you say the pedestrianised shopping area of Plymouth City Centre has got better, worse or stayed the same in the last 3 years?

Better	Stayed the same	Worse
61.0%	32.0%	7.0%

Demographic questions

Finally, I just need to collect some information about yourself to ensure we are speaking to a cross section of the population.

RECORD GENDER - DO NOT ASK

29.0% Male
71.0% Female

So firstly, which of the following age bands do you fall into?
READ OUT

6.7% 16 - 24
7.8% 25 - 34
16.6% 35 - 44
14.6% 45 - 54
24.5% 55 - 64
16.3% 65 - 74
12.5% 75+
1.0% Refused

What is the working status of the chief wage earner in your household?
PROBE AS PER PRE-CODES
SINGLE CODE

49.8% Working full time
8.8% Working part time
0.7% Student
37.3% Retired
1.8% Unemployed
0.7% House wife/husband
1.0% (Refused)

And what is their occupation?
Please write in key occupation first (e.g. driver - bus, rather than bus driver)
If retired record previous occupation
If unemployed for less than 6 months record previous occupation
If widowed check late husbands previous occupation

100.0%

And what is the approximate yearly income of your household?
PROBE AS PER PRE-CODES
SINGLE CODE

10.6%	**Under £10,000**	4.2%	**£30,000 to £34,999**
9.8%	**£10,000 to £14,999**	3.2%	**£35,000 to £39,999**
7.7%	**£15,000 to £19,999**	13.0%	**£40,000 or over**
8.2%	**£20,000 to £24,999**	37.6%	**(Refused)**
5.8%	**£25,000 to £29,999**		

Do you have any children below the age of 16 living in your household?

21.0% **Yes** 79.0% **No**

Thank you very much for taking the time to complete the survey, please be assured that all details are confidential and you will not be individually identified.
Just to confirm, my name is (INSERT NAME), and I have been calling from Marketing Means, an independent market research company.
Marketing Means can be contacted on freephone number: 0800 849 4019

100.0% **NULL**