

PRELIMINARY REPORT

***RETAIL TRADING HOURS
COMMUNITY SURVEY***

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Prepared for the WA Department of Premier and Cabinet

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BACKGROUND AND OBJECTIVES

This research was designed to investigate the community's attitudes toward extensions to the hours that shops are open in the metropolitan area. This preliminary report contains top-line results from the recently completed survey.

Methodology

A metro-wide telephone survey was conducted to provide a quantitative assessment of the views of people throughout the Perth metropolitan area toward the issues surrounding changes to shop trading hours in the Perth metro area.

General Community Survey

Telephone surveys were conducted with 755 residents across the Perth metropolitan area.

Data collection took place July 14 –August 5, 2008.

The data presented in the report has been weighted by age and gender to conform to ABS figures from the 2006 census.

Notes on the presentation of the data:

Computer rounding produces tables that add up to 100% +/- 0.1%.

Where differences between groups are described as 'significant', this means that there is a statistically significant difference at the 0.05 level of confidence.

SUMMARY OF THE SURVEY FINDINGS

Attitudes toward Current Shop Trading Hours

Respondents were asked “Are there any changes that you would like to see to the hours that shops are open at the moment?”

- Overall 49.8% would like to see changes to the hours that shops are open.
- 48.8% did not have any changes that they would like to see, and 1.4% were unsure.

Are there any changes that you would like to see to the hours that shops are open at the moment?

	Total % (755)	Male	Female	18-34 yrs	35-54	55 plus
Yes	49.8	50.3	49.4	*62.3	52.9	32.9
No	48.8	48.3	49.3	36.8	45.5	65.4
Unsure	1.4	1.4	1.3	0.9	1.6	1.7

* Difference is statistically significant at the 0.001 level of confidence

- Among people aged 54 years or less 57.1% would like to see changes to the hours that shops are open at the moment.

Satisfaction with the Current Hours Shops are Open

Respondents were asked:

On a scale from 0 to 10, how satisfied are you with the current hours that shops are open, where 10 is very satisfied and zero is very dissatisfied?

The average rating of satisfaction with the current hours that shops are open, on a scale from 0 to 10 is 6.5 out of 10.

Across the age groups the percentages who are dissatisfied with the current hours that shops are open are:

	Rating of 5 or less	Rating of 6 or less
18-34 years	37%	51%
35-54 years	37%	47%
55 plus	24%	30%

Those who are dissatisfied say that they find it difficult to get to the shops at the moment because of the hours they work and/or family commitments.

Examples of comments people made included:

- "Working people cannot get shopping done with the current rules "
- "As a working parent I can't always make a 6.00p.m. shop finish – they need to cater more for people who work and help out working mums and working families. By the time I stop work and pick up my kids it's nearly 6.00p.m."

Current use of Sunday Trading

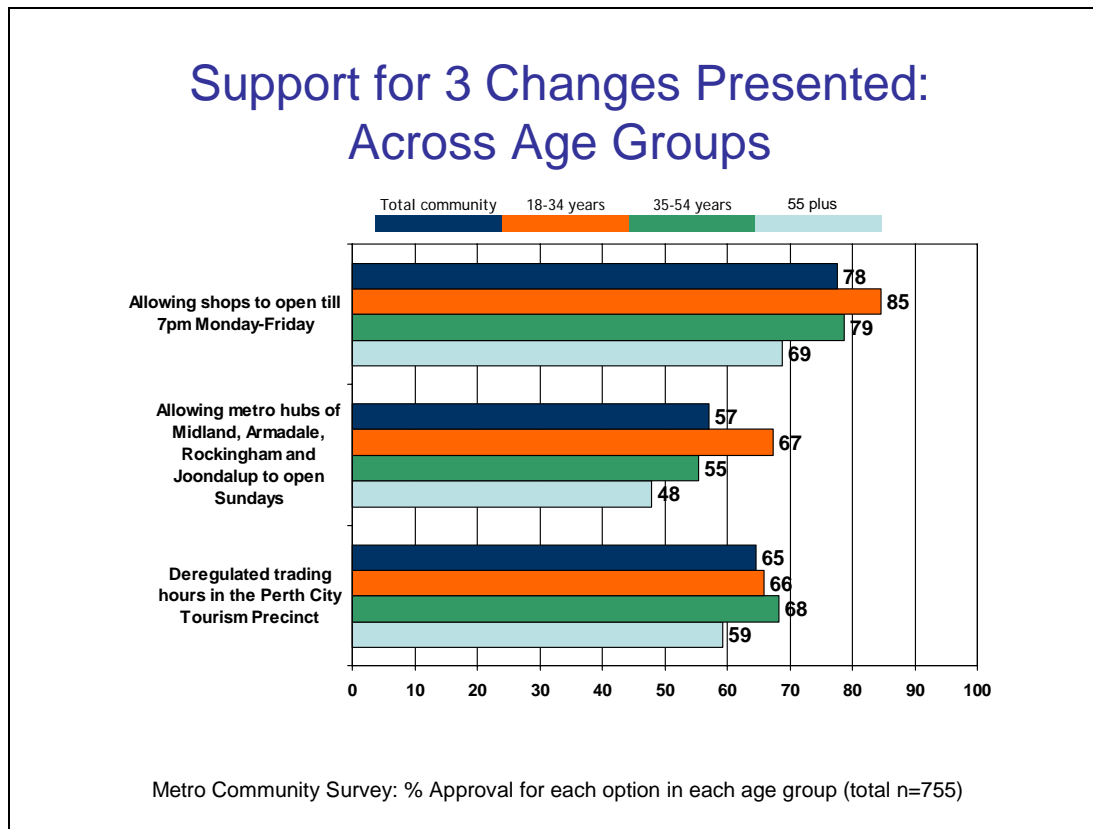
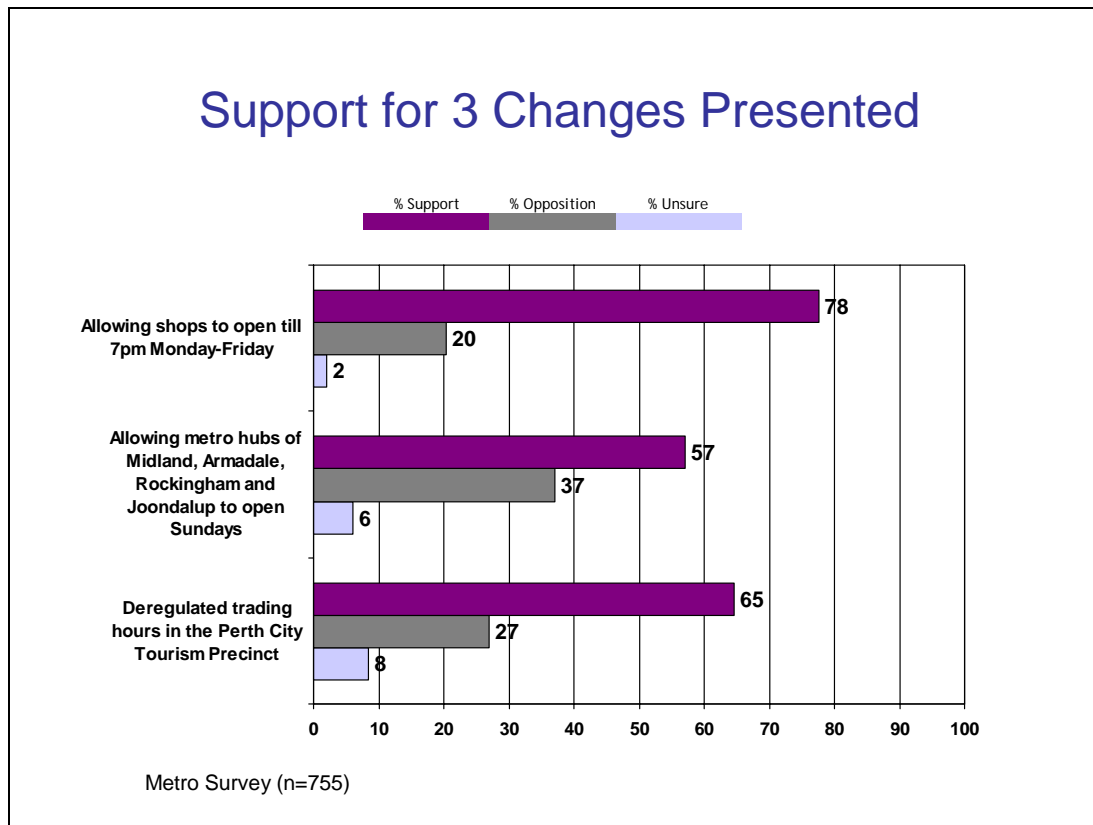
Respondents were asked:

How often do you currently shop on Sunday for groceries, clothes or household items?

- Overall 45.2% of respondents shop on Sundays for groceries, clothes, or household items once per month or more - including 22% who shop for these items on Sundays most weeks or every week.
- 37.8% very rarely or never shop on Sundays for groceries, clothes, or household items, and 16.5% do so occasionally.

Frequency of Shopping on Sunday	Total % (755)	Male	Female	18-34 yrs	35-54	55 plus
Very rarely	37.8	39.3	36.4	30.0	35.0	50.3
Occasionally	16.5	15.3	17.7	18.9	14.2	16.6
About once a month	10.7	11.9	9.5	13.8	10.5	7.4
2-3 times a month	12.5	10.7	14.3	13.7	14.3	8.6
Most weeks or every week	22.0	22.4	21.7	23.6	25.4	16.4
Other – shops are not open	0.5	0.4	0.4	-	0.6	0.7

Testing of Options



Allowing all shops to open till 7pm Monday to Friday

Respondents were asked:

The hours that shops can be open varies from place to place and depends on what kind of shop it is. Can you tell me whether you strongly disapprove, disapprove, or approve or strongly approve, of the following possible changes to shop trading hours?

The first one is to allow all shops to open till 7pm Monday to Friday, if they want to. Currently they are allowed to stay open till 6pm. Would you strongly disapprove, disapprove, approve, or strongly approve of allowing shops to stay open till 7pm - Monday to Friday?

- ◆ 77.6% approve of allowing shops to stay open till 7pm Monday to Friday, 20.4% disapprove and 2% are unsure
- ◆ Approval ranges from 68.8% among those aged 55 years and over to 84.6% among those aged 18-34 years.

Shops to remain open till 7pm Monday to Friday	Total % (755)	Male	Female	18-34 yrs	35-54	55 plus
Strongly disapprove	6.4	6.8	6.0	5.9	4.6	8.8
Disapprove	14.0	14.3	13.7	8.8	14.5	19.1
Total disapproval	20.4	21.1	19.7	14.7	19.1	27.9
Approve	46.3	44.0	48.4	42.7	45.7	50.5
Strongly approve	31.4	32.5	30.2	42.0	33.0	18.3
Total approval	77.6	76.5	78.6	*84.6	78.7	68.8
Unsure/ neither	2.0	2.4	1.7	0.7	2.2	3.3

* Difference is statistically significant at the 0.001 level of confidence

Main reasons for support for 7pm Monday to Friday:

- Convenient for working people after work 50.1
- Flexibility, choice, convenience, less pressure on Saturdays 22.0
- Let shop keepers choose, opportunities for business 9.9
- Nothing wrong with it, unconcerned 4.7
- More convenient for families 4.1
- Have it elsewhere 2.2

Main reasons for opposition to 7pm Monday to Friday:

- Hours are adequate, should not change 9.9
- Staff have to work too long, they have families too 6.2
- Disadvantages small business, Coles and Woolies will dominate 2.6
- Disruption of family life, parents should be home 2.4

Note multiple responses were allowed for the reasons given above (responses may add to more than 100%)

Allowing the Outer Metro Centres of Joondalup, Midland, Rockingham and Armadale to open on Sundays

Respondents were asked:

Would you strongly disapprove, disapprove, approve, or strongly approve of allowing shops in the metro hubs of Joondalup, Midland, Rockingham and Armadale to open on Sundays - 11am to 5pm?

- ◆ 57% approve of allowing the metro hubs of Joondalup, Midland, Rockingham and Armadale to open on Sundays, and 37% disapprove with 6% unsure.
- ◆ Among those who said they disapprove, 9% said that they wanted all shops to be open (or the shops near them). These people were not opposed to Sunday trading in general.

Outer Metro Centres allowed to open 11am-5pm Sunday

	Total % (755)	Male	Female	18-34 yrs	35-54	55 plus
Strongly disapprove	12.8	12.5	13.0	8.2	13.2	17.2
Disapprove	24.2	26.6	21.9	19.5	25.1	28.0
Total disapproval	37.0	39.1	35.0	27.7	38.3	45.2
Approve	40.6	40.8	40.5	47.9	36.9	37.2
Strongly approve	16.3	15.6	17.0	19.4	18.4	10.6
Total approval	57.0	56.4	57.5	*67.3	55.4	47.9
Unsure/ neither	6.0	4.5	7.5	5.0	6.4	6.9

* Difference is statistically significant at the 0.001 level of confidence

Main reasons for support for outer metro centres opening Sundays:

- Sunday more convenient, takes pressure off Saturday, more choice of area (19.2%)
- Good for people in those areas (11%)
- Convenient for workers (9.3%)
- Good but all should be allowed to open (8.1%)
- Let shop keepers choose, opportunities for business (3.7%)
- Nothing wrong with it, unconcerned (3.1%)
- More convenient for families (2.5%)

Main reasons for opposition to outer metro centres opening Sundays:

- Should all be open, I want them all open (or shops near me) (9%)
- Sunday is a family day, sport (8.2%)
- Hours are adequate, should not change (8.2%)
- All or nothing, unfair (6.3%)
- People in retail have to work too long (6.3%)
- Disadvantages small business, balance is right now (2.1%)

Note multiple responses were allowed for the reasons given above (responses may add to more than 100%)

Deregulating Shopping Hours in the Perth City Tourist Precinct

Respondents were asked:

Currently the Perth City area is allowed to open on Friday nights till 9pm and on Sundays from 11am till 5pm. A third idea is to deregulate shopping hours in the Perth City tourist precinct so shops can open at any time they choose.

Would you strongly disapprove, disapprove, approve, or strongly approve of allowing shops in the Perth City tourist precinct to open whenever they choose to?

- ◆ 64.6% approve of allowing shops in the Perth City tourist precinct to open whenever they choose to, 27% disapprove, and 8.4% are unsure.
- ◆ This proposal gets its highest level of support from people in the 35-54 year age group (68%).

Deregulating shopping hours in the Perth City Tourist Precinct

	Total % (755)	Male	Female	18-34 yrs	35-54	55 plus
Strongly disapprove	7.9	7.5	8.3	6.5	6.0	12.0
Disapprove	19.1	18.8	19.3	18.0	18.0	21.6
Total disapproval	27.0	26.3	27.7	24.5	24.0	33.6
Approve	41.1	40.1	42.0	41.2	39.9	43.1
Strongly approve	23.5	24.5	22.5	24.6	28.3	16.2
Total approval	64.6	64.6	64.5	65.8	68.2	*59.3
Unsure/ neither	8.4	9.1	7.8	9.7	7.8	7.1

** Difference is statistically significant at the 0.05 level of confidence*

Main reasons for support for deregulating shopping hours in the Perth City tourist precinct:

- Good for tourism, better night life, bring more life to the City (32.8%)
- Flexibility, choice, convenience, reduces time pressures (14%)
- Let shop keepers choose, opportunities for business (14%)
- Have it elsewhere (5.6%)
- Convenient for workers (2.3%)

Main reasons for opposition to deregulating shopping hours in the Perth City Tourist precinct:

- Hours are adequate, should not change (6.4%)
- People in retail have to work too long (4.5%)
- Confusion on opening and closing times (4.4%)
- Family problems for small business (2.6%)
- Disadvantages small business, balance is right now (2.5%)
- Doesn't bother me (1.6%)
- Crime, security for shoppers and workers (1.4%)
- Against Sunday trading (0.7%)

Note multiple responses were allowed for the reasons given above (responses may add to more than 100%)

Views on being able to purchase furniture and electrical goods on Sundays

Respondents were asked to rate the importance of 'being able to buy furniture and electrical items on a Sunday to take some of the pressure off Saturday for busy families'.

Rating from 0-10	Being able to buy furniture and electrical items on a Sunday to take some of the pressure off Saturday for busy families %
0	12.2
1	4.3
2	5.0
3	2.8
4	1.8
5	9.1
Total 0-5	35.1
6	6.2
7	11.5
8	15.9
9	7.4
10	23.8
Total 6-10	64.9
Av. Rating	6.2

A total of 64.9% rate the importance of being able to buy furniture and electrical items on a Sunday at 6 or more out of 10, including 31.2% who see it as very important and give it a rating of 9 or 10 out of 10.

Attitudes towards Changes to Shopping Hours:

Attitudes towards Changes to Shopping Hours	% Agreement
Some changes to shop opening hours are a good idea to help Perth keep up with the changes in people's working hours	81%
Extended shop trading hours are better for tourism	80%
Our current rules on when shops can open are too complicated and we need to make them more simple	71%
We need to extend shop trading hours to give people more flexibility and choice	70%
We need to change our shopping hours to make Perth more vibrant	64%
Every other city in Australia has extended shopping hours and Perth needs to move with the times	64%
Protecting smaller shops from bigger retailers is more important than allowing people a wider choice of shopping hours	53%
There should be no changes to trading hours in W.A. as the referendum in 2005 rejected changes to shop trading hours	29%
There shouldn't be any changes to shop trading hours	28%

There is a high level of agreement that some changes to shopping hours are a good idea to help Perth keep up with changes in people's working hours.

There is also a high level of agreement that extended shopping hours are better for tourism.

A majority (53%) agree that protecting smaller shops from bigger retailers is more important than allowing people a wider choice of shopping hours.

Only 3 out of 10 respondents believe that there should be no changes to trading hours because the referendum in 2005 rejected changes to shop trading hours.

Concerns about Extending Shop Trading Hours

Respondents were asked: “What would be your main concerns about extending the hours that shops are able to open?”

Main concerns about extending the hours shops are able to open:

- No concerns	33.4
- Staff have to work too long	22.0
- Disadvantages small business, big stores will dominate	21.5
- Disruption of family life, community events	14.0
- Prices will rise	6.4
- Difficult to get staff	4.8
- Crime, security for shoppers and workers, louts	4.3
- Hours are adequate, should not change	4.2
- Sunday is a day of rest, church	2.7
- Should all be allowed to open when they want, not forced to open either	1.6
- Exploitation of young staff	1.3

Note multiple responses were allowed (responses may add up to more than 100%)

Ratings of the Importance of various issues:

Ratings of the Importance of various issues	Average rating on a scale from 0-10
Respondents were asked to rate the importance of each of these issues on a scale from 0 to 10	Average rating
Ensuring that small shops don't have to open on Sundays if they don't want to	8.1
Ensuring that store workers don't have to work on Sundays if they don't want to	7.8
Protecting the interests of small business	7.5
Keeping Sundays as a day when most shops are shut	4.7

The main concerns that people have about extensions to trading hours are:

- Ensuring that small shops are not forced to open on Sundays
- Ensuring that store workers do not have to work on Sundays (or long hours) if they don't want to
- Ensuring that small business is not disadvantaged