Ivybridge Aldi proposals – Survey of General Public

Summary Report on survey results (v0.3 – 4th March 2020)

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For: South Ham District Council

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1. Research Aims and Objectives

South Hams District Council commissioned Marketing Means to conduct a survey to investigate public opinion regarding the proposed plans for a new Aldi supermarket to be built on part of a current car park site in central Ivybridge.

2. Method

2.1 Postal Approach

Marketing Means' primary research method was a postal survey using an 12-page consultation document/questionnaire, the first four pages of which presented the background to the Aldi development proposals and links to further information, the central four pages giving visual plans of the development in the context of existing buildings in central Ivybridge, and the final four pages setting out the survey questions.

Marketing Means printed and posted the questionnaire to 2,000 households in January 2020, 1,000 in Ivybridge and 1,000 across five surrounding wards. We selected a representative sample of addresses across each area after stratification of the relevant Postcode Address File lists of residential addresses by postcode and property number.

All non-responders were sent a reminder letter and another copy of the questionnaire in February 2020, leading to **802** postal responses being received by the deadline of 24th February 2020.

2.2 Online approach

All households that received a postal survey invitation were also given a web-link and unique passcode to submit their responses in an online copy of the questionnaire. In practice, a further 59 responses were received by this method, giving a total of 861 responses that were known to be from the original sample of 2,000 households, a very respectable survey response rate of 43%.

The online questionnaire, hosted by Marketing Means, was also available for anyone to complete via an open web-link at the South Hams District Council website, publicised from mid-January 2020. This version was cookie-protected to reduce the likelihood of multiple submissions from a single IP address.

In addition to reaching a wider audience outside the 2,000 households selected for the postal survey, we believe that it was inevitable that a significant proportion of those households, especially those with younger residents likely to be regularly viewing social media posts, chose to take part via this 'open' online method, and that this displaced some of the responses that would otherwise have been made by post or the passcode-protected online version.

The 'open' online version succeeded in drawing even more responses than the postal version, **1,097** in total from people claiming to live in Ivybridge or elsewhere in the South Hams.

2.3 Combining the datasets

Responses to the original address-linked postal sample were intended to be analysed completely separately to responses from the 'open' online, given the different methods used and the possibility of unknown duplication within the online data and between online responses and postal responses.

The demographic profiles of the two samples, however, showed markedly different age profiles. While the age profile for the postal sample was very much older than that of the most recent available population estimates for the area in consideration (see the table below), the age profile of the open online sample was lacking the oldest respondents while over-representing the younger age-groups. As age is often a key differentiator of views on topics such as local planning and development, we felt it important to avoid bias on that measure in either survey sample.

Age group	National Statistics Mid-Year Population Estimates	Postal survey results profile	Online 'open' survey results profile
16-34	21%	5%	20%
35-44	12%	8%	19%
45-64	38%	38%	41%
65+	29%	45%	18%

Given those differences, but also being satisfied that the general profile of results from each survey did not differ greatly, we felt that combining the results from the postal and online surveys would give a more representative sample of views that would either sample in isolation. For this report, we have therefore combined the datasets, and weighted them (a) by age and gender to the population profile of adults aged 16+ across Ivybridge and separately across the five surrounding wards, as well as (b) correcting the overall balance of the proportions living in Ivybridge to those living elsewhere.

2.4 Reporting of quantitative results

'Valid' responses
Unless otherwise stated, the results are given as a percentage of the total overall valid responses, with the small proportion or blank, 'Not stated', and 'Don't know' responses excluded so as not to skew the findings.

Rounding
The percentage figures quoted in most of the charts and tables in the report have been rounded either up or down to the nearest whole number value. In some cases of questions requiring one answer only, these rounded values do not therefore total exactly 100%, although the underlying figures will in fact total 100%.

Single and multi-coded questions
Some questions asked were 'single-coded' requiring one answer only, e.g. a Yes/No response, or a level of agreement. Others were multi-coded, e.g. where a respondent does their top-up food shopping, and likely to record more than one answer per respondent. While the percentages selecting each option for a single-coded question total 100%, responses to multi-coded questions will usually add to well over 100%.

Significance testing and "*Statistically significant differences*"

All of the % results quoted in this report, and calculated for the different sub-groups of respondents as set out in detail in the accompanying cross-tabulations, have been subjected to significance testing, based on two-sided tests with significance level .05 (i.e. 95% confidence level).

The **Confidence Level** tells us how sure we can be of a result. It is given as a percentage, representing how often the true percentage of the population who would pick a particular answer lies within the confidence interval. The 95% confidence level means we can be 95% certain; the 99% confidence level means we can be 99% certain. Most market research reports, including this one, use the 95% confidence level.

The **Confidence Interval** (often referred to as the 'margin of error') is the ± figure often shown in the small print of published results from surveys or opinion polls quoted in the media. For example, if the confidence interval is ±4% and a particular answer is given by 55% of a sample, we can be "sure" to some extent (see next paragraph) that if we had asked the question of the entire relevant population then between 51% and 59% would have given that answer.

When we put the Confidence Level and the Confidence Interval together, we can say using the example above that we are "95% confident" that the true percentage results for the population would lie between 51% and 59%.

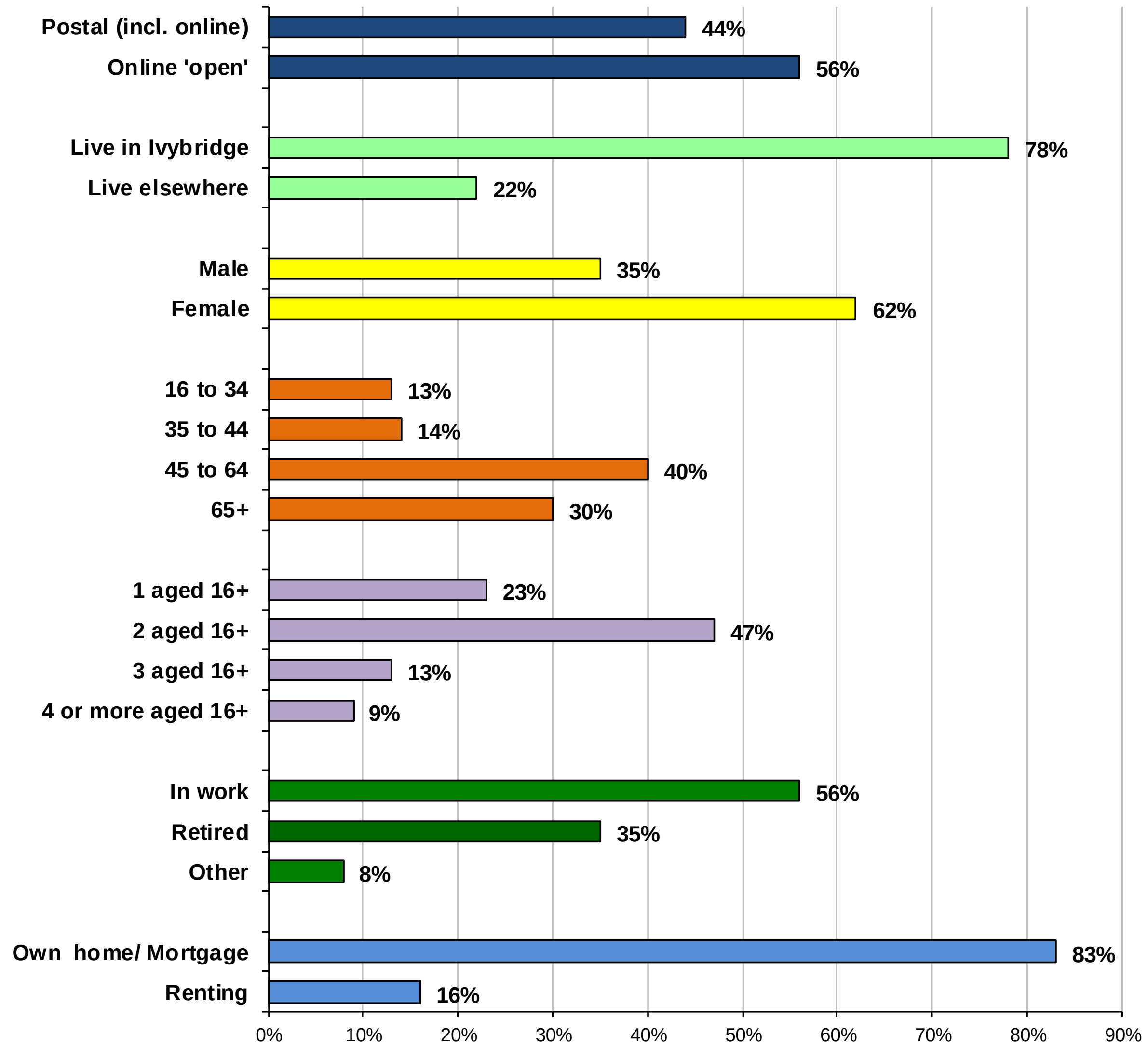
N.B. Quoted Confidence Intervals almost invariably refer to a situation where close to 50% of a sample has given a particular answer. In practice, where a result is much higher or lower than 50%, the Confidence Interval on that result is reduced (e.g. for a sample of 1,215, the 95% Confidence Interval is ±2.8% for a 50% result, but reduces to ±1.7% for a 10% result).

3. Survey Results

The two charts that follow summarise the profile of respondents and the proportion of responses through different modes and from different areas, as well as the effect of weighting on the demographic profiles.

First, we present the unweighted overall survey profile.

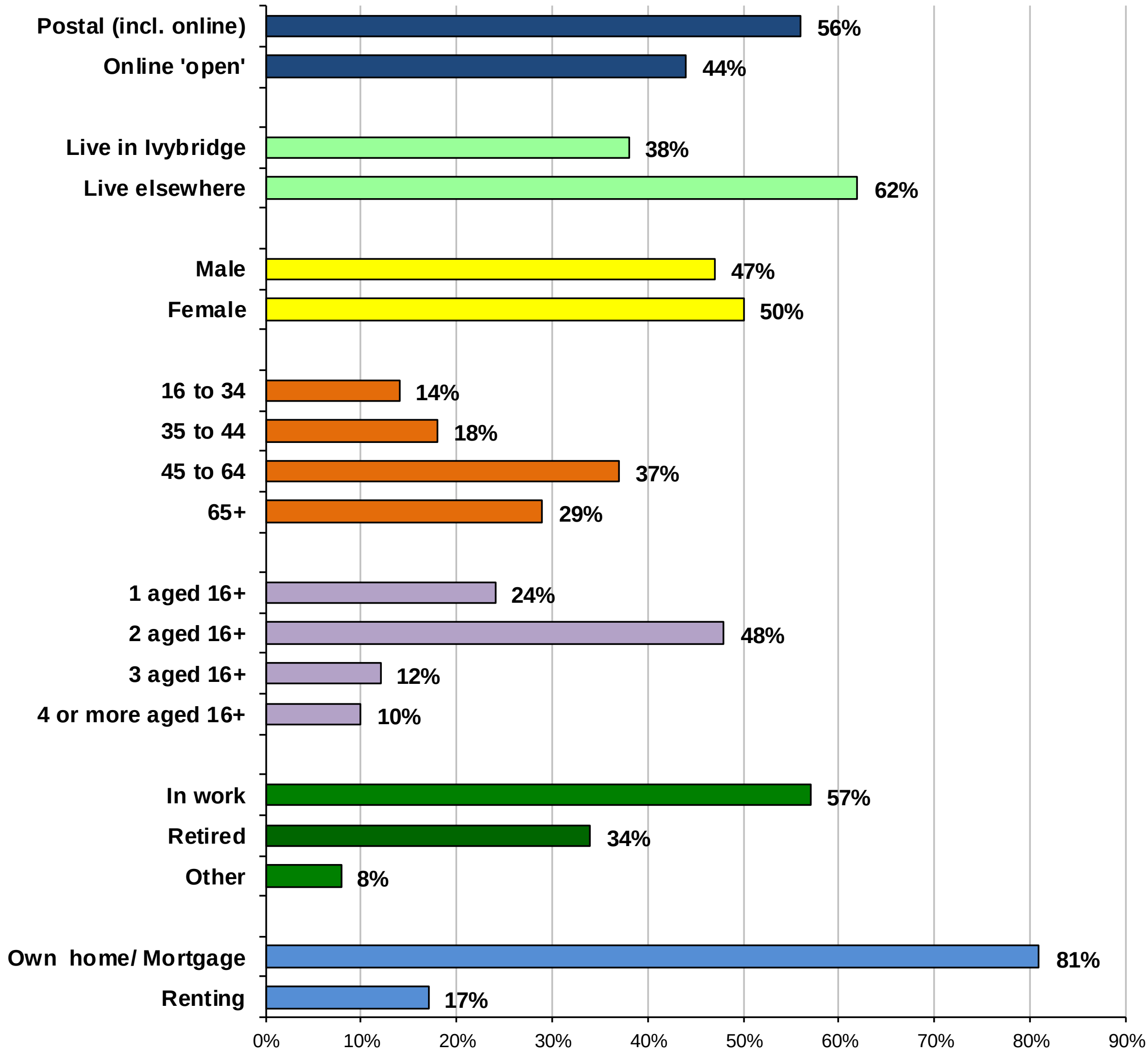
Demographics – Unweighted



Source: Marketing Means 2020 Base: All respondents (1,958) - unweighted profile

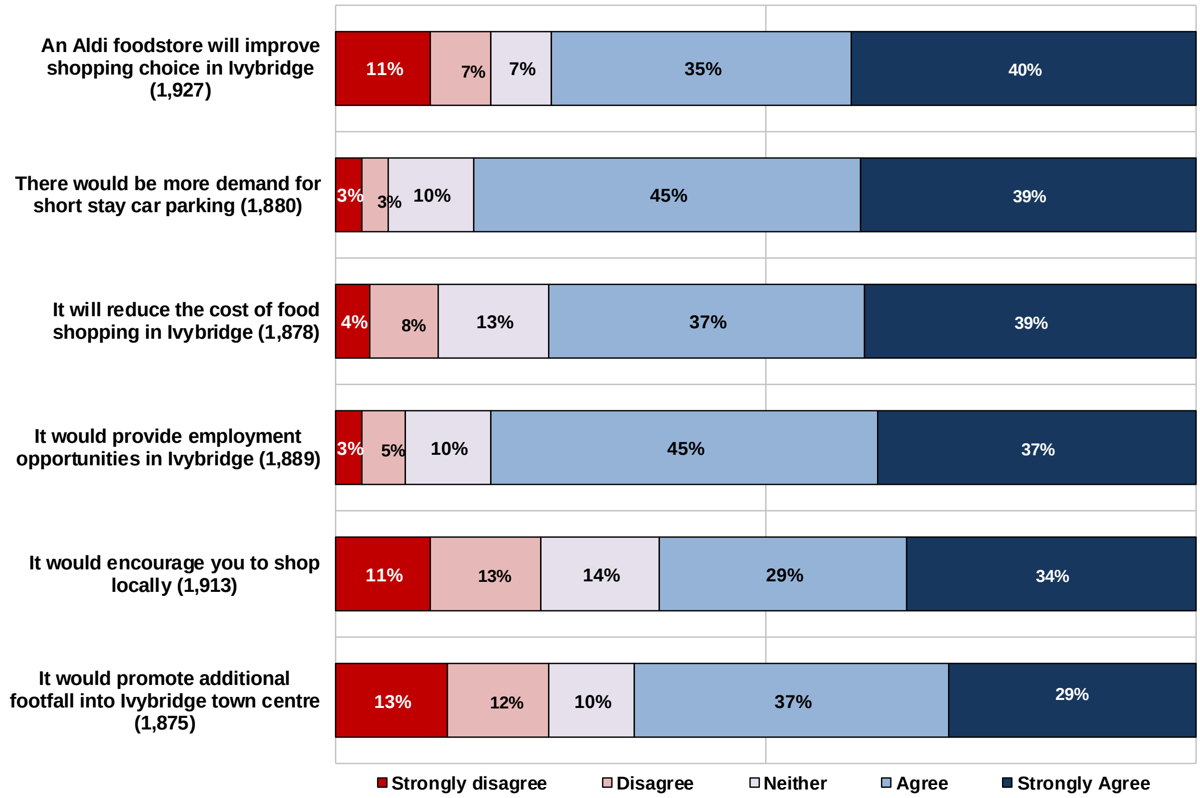
The chart below shows the same data but now weighted to the correct age and gender profile for Ivybridge and the five surrounding wards.

Demographics – Weighted to population profile of Ivybridge and surrounding wards



Source: Marketing Means 2020 Base: All respondents (1,958) - weighted profile

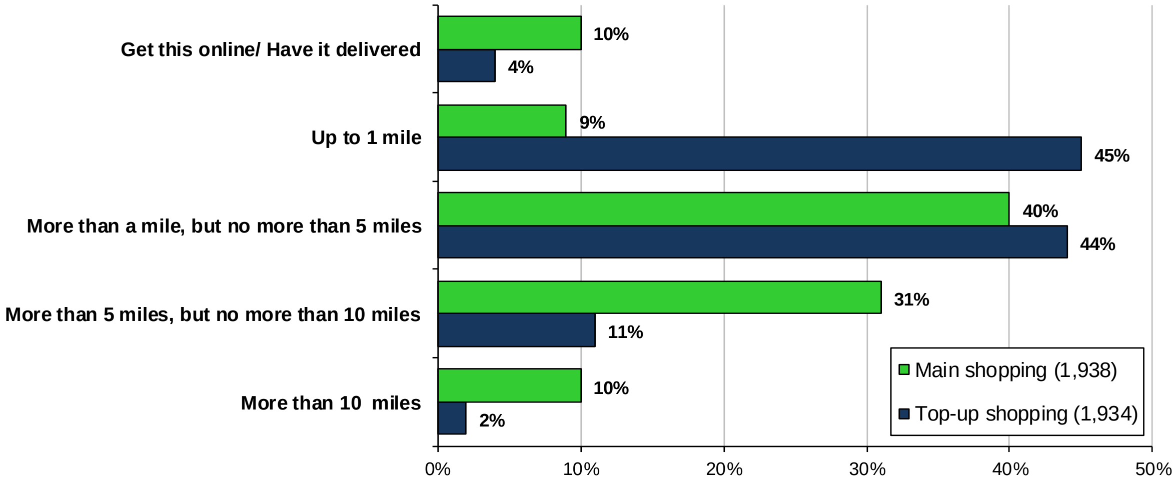
Q2a-f. Having read the information on the previous pages, how much do you agree or disagree with each of the statements below:



Source: Marketing Means 2020 Base: All respondents who expressed an opinion (number noted next to each statement)

- All of the six statements relating to the impact of the Aldi development were agreed with by the majority of respondents.
- The highest levels of agreement (more than 80% of respondents) were for the statements relating to greater resultant demand for short-stay parking, and providing employment opportunities in Ivybridge.
- Well over 60% of respondents agreed that a new Aldi store would encourage them to shop locally and would promote additional footfall into the town centre.

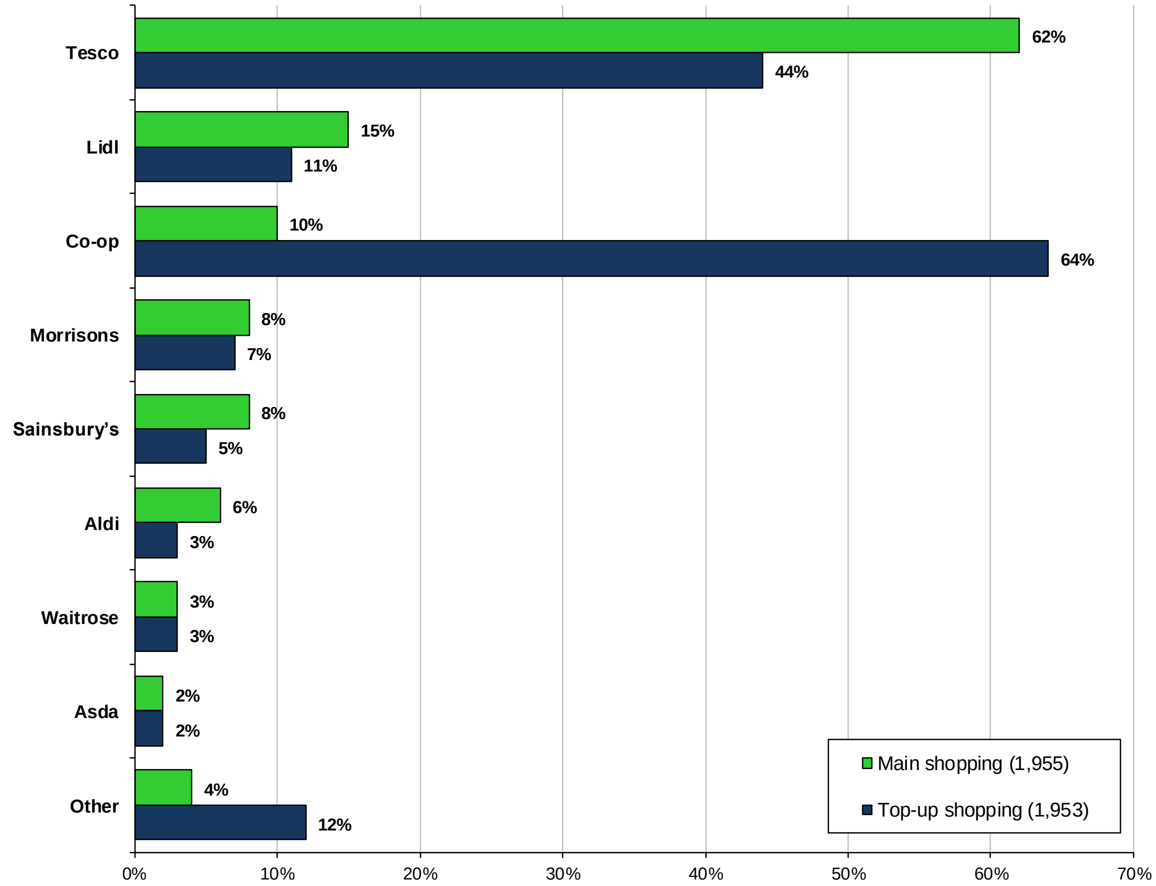
Q3. How far do you usually travel to do (i) your main food shopping, and (ii) any top-up food shopping throughout the week:



Source: Marketing Means 2020 Base: All respondents who gave an answer

- The great majority of respondents currently travel more than a mile for their main food shopping (81% overall, with 10% travelling >10 miles). Just under one in 10 (9%) currently travel no more than a mile, significantly higher among Ivybridge residents (15%) than those elsewhere (6%).
- Only 10% currently do their main food shopping online or have it delivered.
  - Among those who have their main food shopping online or have it delivered, nearly two-thirds (64%) have all or most of their shopping delivered, while 29% reported that this was about “half and half”.
- Top-up food shopping showed a slightly different pattern with nearly half (45%) travelling no more than a mile, and this was significantly higher among Ivybridge residents at 63%. A further 44% of all respondents travelled no more than 5 miles for their top-up shop.

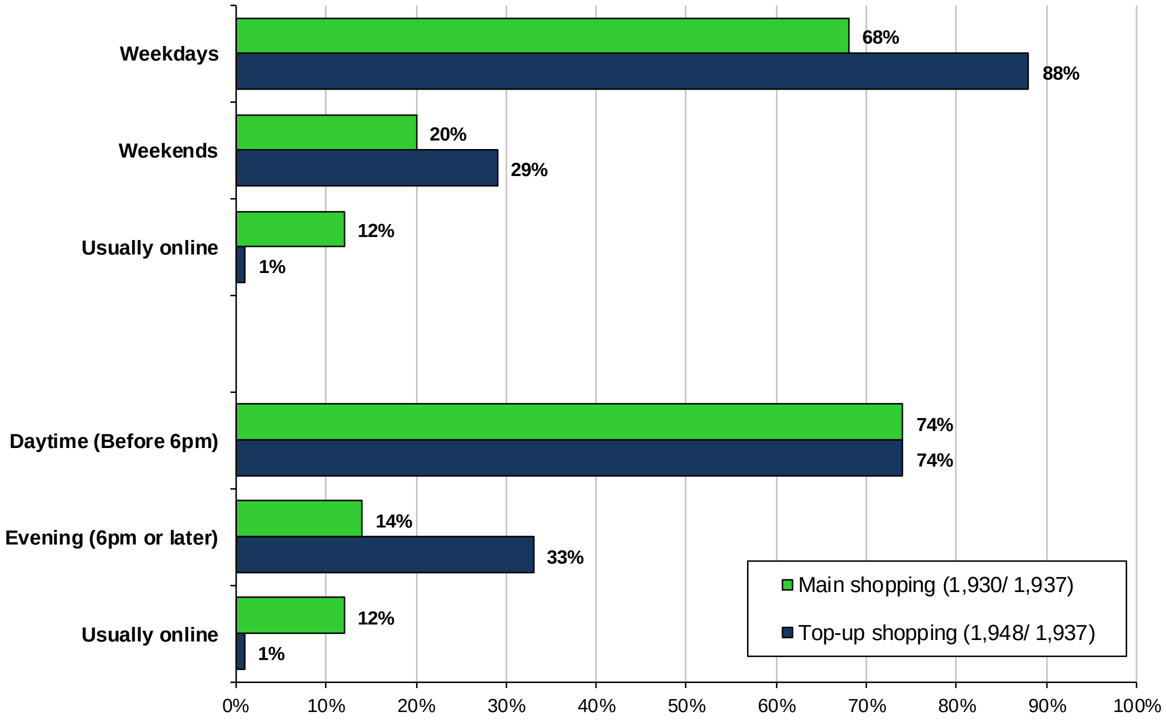
Q5a/b. Which of these does your household USUALLY use for the [(i) main/ (ii) top-up] food shopping (regardless of whether that's in-store or online)?:



Source: Marketing Means 2020 Base: All respondents who gave an answer

- Tesco was by far the most likely choice for the main shop, used by 62%, with only Lidl (15%) and Co-op (10%) of the others attracting as many as one in 10 shoppers.
  - Most respondents (64%) use Co-op for their top-up shopping, though Tesco also attracts a significant amount of top-up shoppers (44%).
- Using Tesco for top-up shopping was significantly more likely for Ivybridge residents than those elsewhere (55% vs 37% respectively), likely due to the Tesco Express store in central Ivybridge.
- Both of these questions have responses that add to >100%. This is because many respondents, especially for top-up shopping, named two or more retailers as their likely preferences.

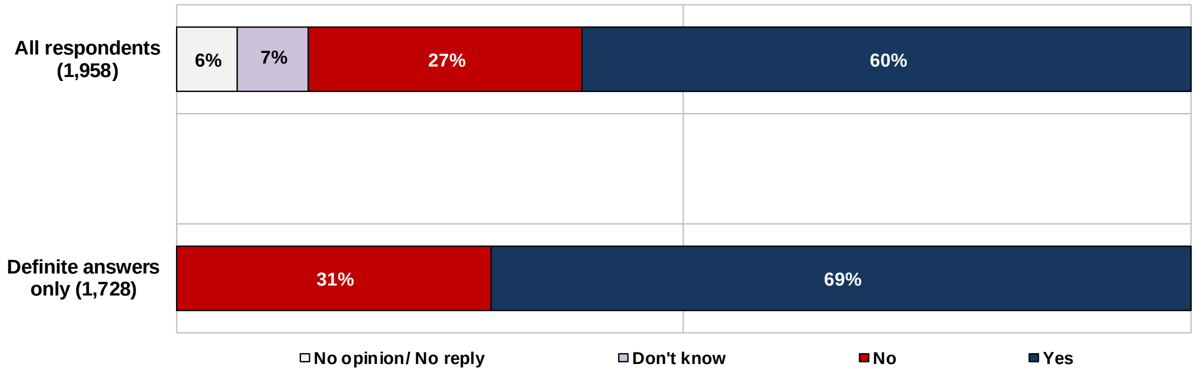
Q6a/b. When do you usually do the [(i) main, (ii) top-up] household food shopping??



Source: Marketing Means 2020 Base: All respondents who gave an answer

- Just over two-thirds (68%) do their main food shopping on weekdays, with three-quarters (74%) doing so in the daytime.
- Top-up shopping was also most likely on weekdays (88% doing so then), and while 74% did top-up shopping by daytime, 33% did so in the evenings.

Q7. Overall, would you like to see an Aldi on the proposed site in Ivybridge?

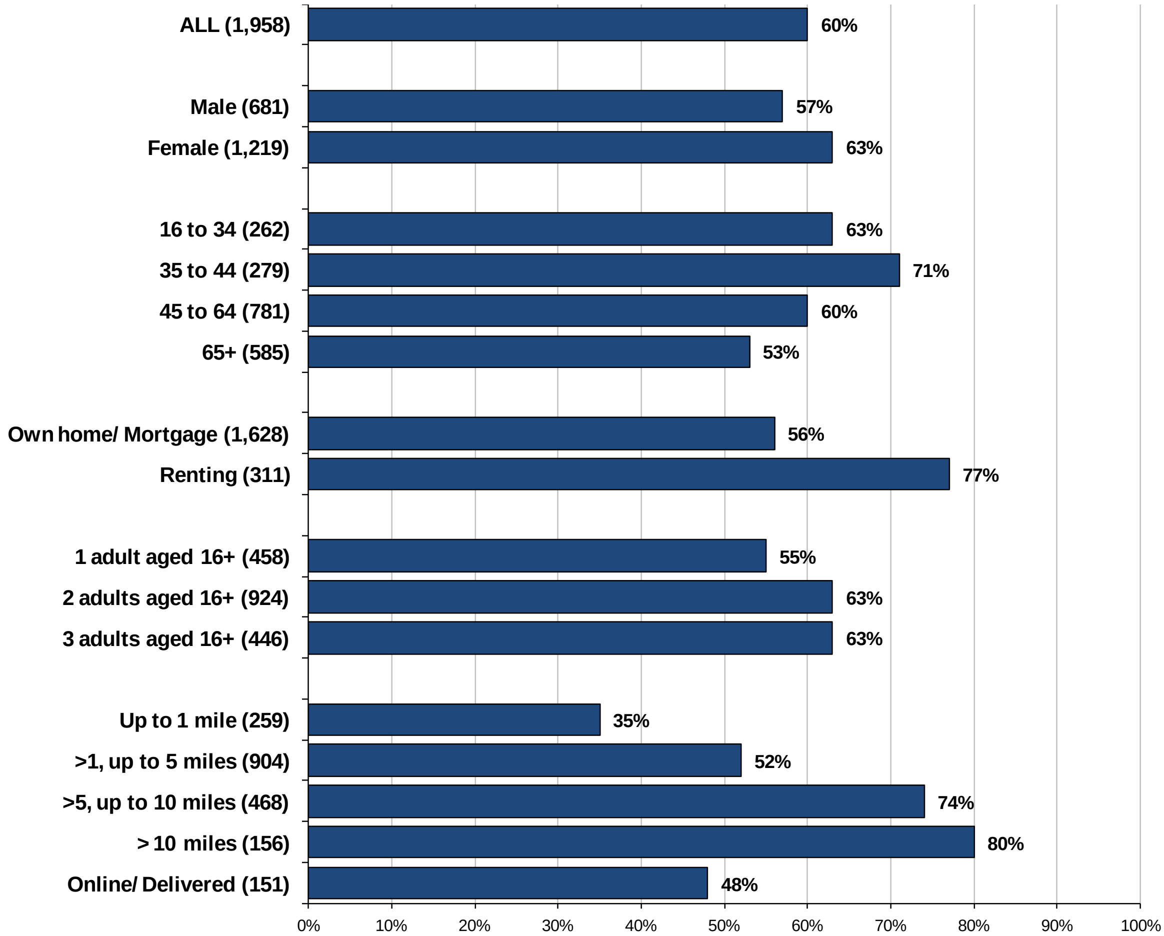


Source: Marketing Means 2020 Base: (i) All respondents/ (ii) All who gave a definite answer

- Overall, 60% of respondents stated that they would like to see an Aldi on the proposed Ivybridge site, with only 27% disagreeing, though 13% gave no definite view.
- Among only those who expressed a view, 69% supported the development.

The chart below show statistically significant differences among <u>all</u> respondents in the proportion answering Yes, they would like to see an Aldi on the proposed site.

Q7. Overall, would you like to see an Aldi on the proposed site in Ivybridge? – SIGNIFICANT DIFFERENCES BETWEEN SUB-GROUPS – ALL RESPONDENTS

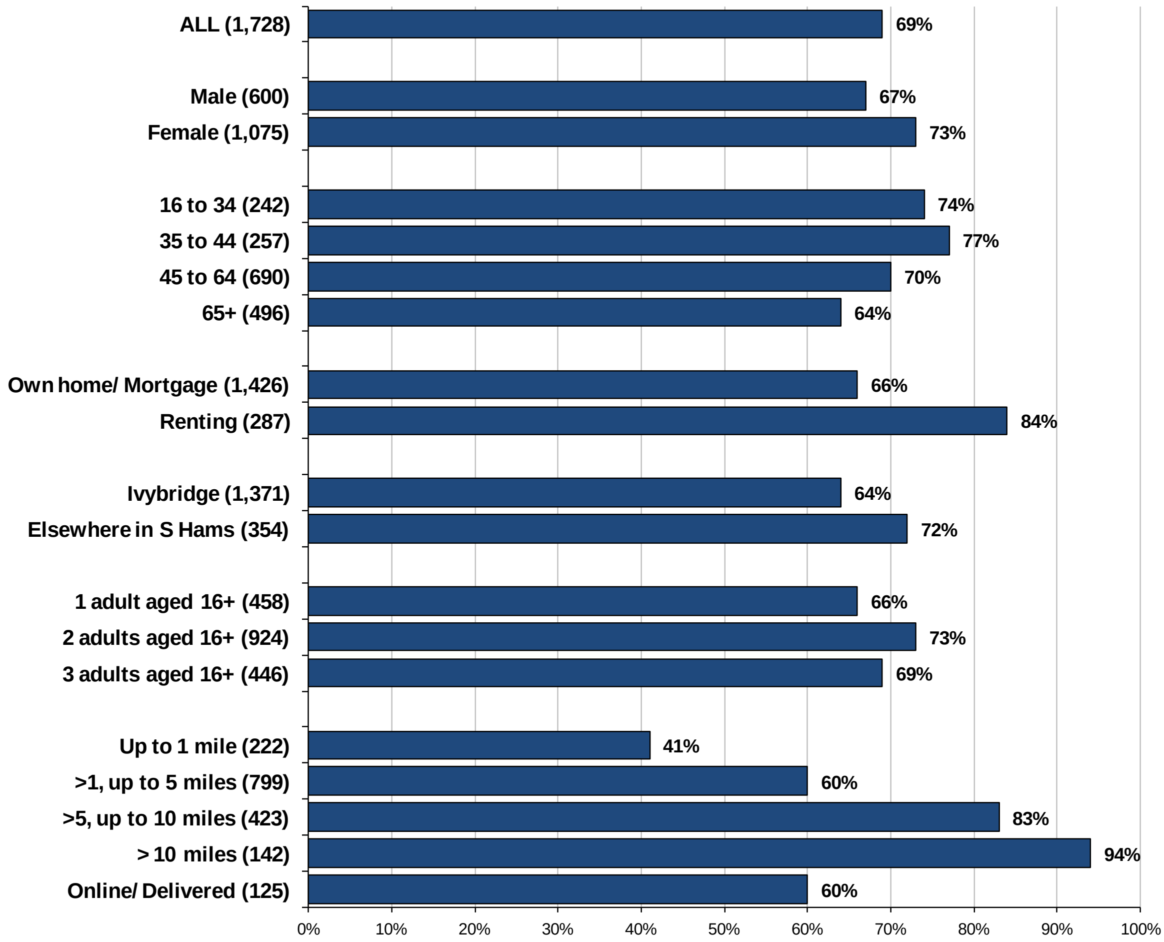


Source: Marketing Means 2020 Base: All respondents

- The sub-groups showing significantly higher support for Aldi on the proposed site were:
  - Females (63%)
  - Those aged 35-44 (71%), while support was only 53% among those aged 65+
  - People living in rented property (77%)
  - People in households with more than one adult (63%)
  - People travelling greater distances for their <u>main</u> shop (74% of those travelling more than 5, up to 10 miles, and 80% of those travelling >10 miles.

The chart below shows, similarly, the statistically significant differences among only those respondents who gave a definite Yes or No answer in the proportion answering Yes, they would like to see an Aldi on the proposed site.

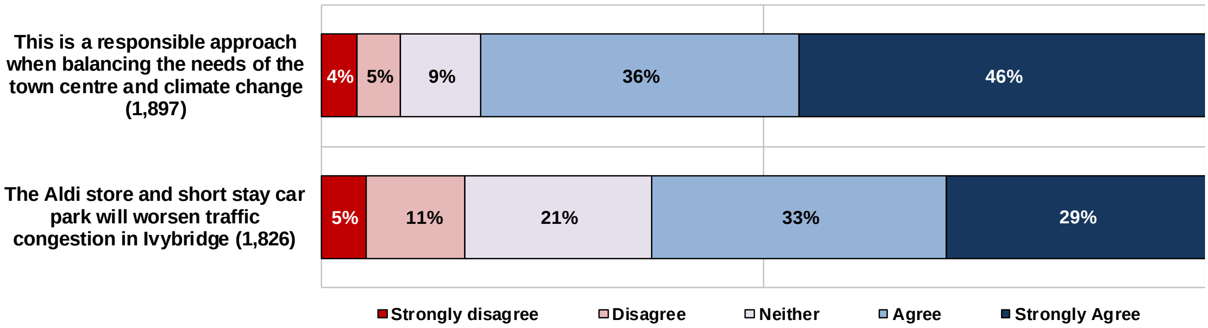
Q7. Overall, would you like to see an Aldi on the proposed site in Ivybridge? – SIGNIFICANT DIFFERENCES BETWEEN SUB-GROUPS –RESPONDENTS WHO EXPRESSED A YES/NO VIEW



Source: Marketing Means 2020 Base: All respondents who gave a definite answer

- The sub-groups showing significantly higher support for Aldi on the proposed site were:
  - Females (73%)
  - Those aged 35-44 (77%), while support was only 64% among those aged 65+
  - People living outside Ivybridge (72%, vs 64% of those in Ivybridge)
  - People living in rented property (84%)
  - People in households with two adults (73%)
  - People travelling greater distances for their main shop (83% of those travelling more than 5, up to 10 miles, and 94% of those travelling >10 miles.

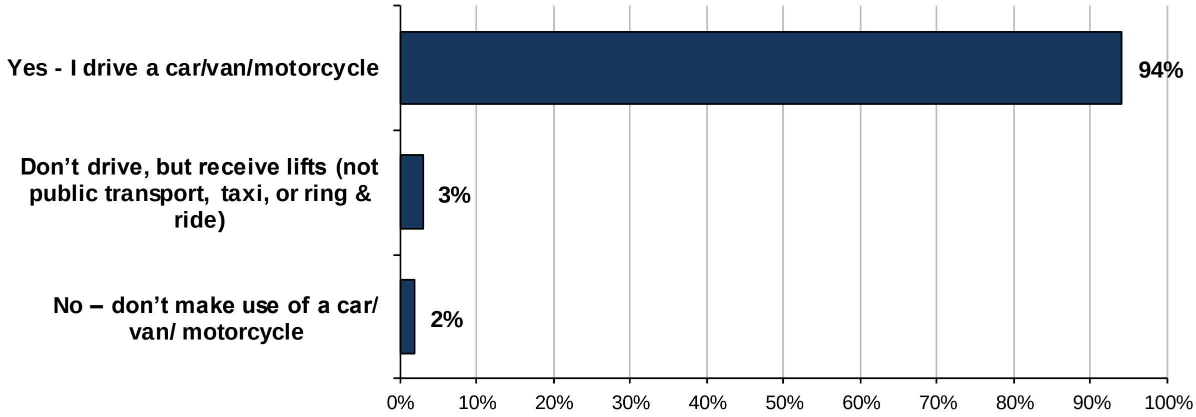
Q8/Q9. South Hams District Council aims to ensure that any new local shopping development is carbon-neutral and brings improvements to cycle and pedestrian links to the site.
How much would you agree or disagree that:



Source: Marketing Means 2020 Base: All respondents who expressed an opinion

- More than 80% agreed that the approach outlined for any new local shopping developments was responsible. A clear majority of 62% also agreed that the Aldi development would worsen traffic congestion in Ivybridge.

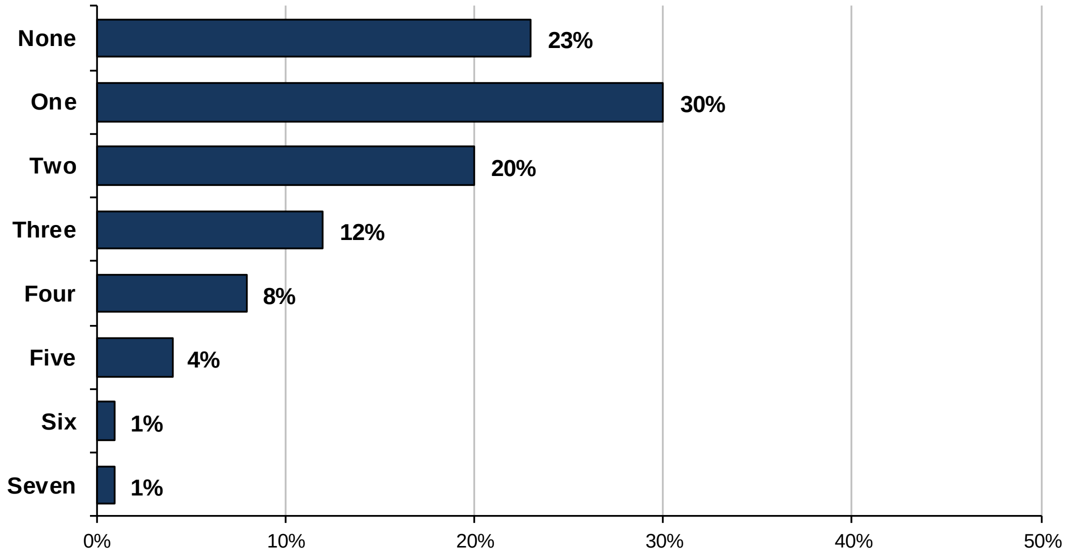
Q11 Do you drive a car/van/motorcycle or do you receive lifts from someone else who drives a private vehicle?



Source: Marketing Means 2020 Base: All who gave an answer (1,946)

- The vast majority of respondents (94%) claimed to drive a car, van or motorcycle. Combined with those who sometimes received a lift in a private vehicle, this group went on to answer a series of questions relating to parking in Ivybridge.

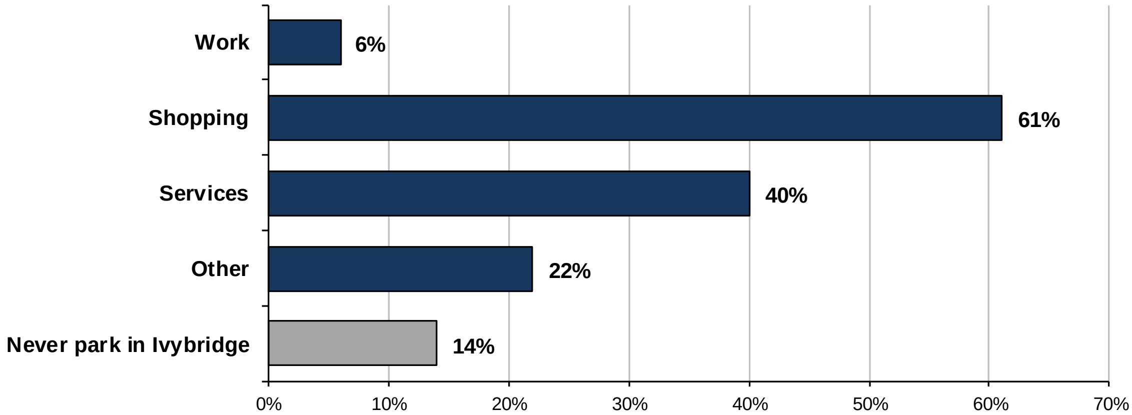
Q12. In a typical week, how many times do you park in Ivybridge town centre?



Source: Marketing Means 2020 Base: All w ho use a car/van as driver or passenger, and gave an answ er(1,863)

- Less than a quarter (23%) of those using a private vehicle do not park in Ivybridge town centre in a typical week. Half of all respondents using a vehicle park there one or two days a week with 27% parking there on three or more days.

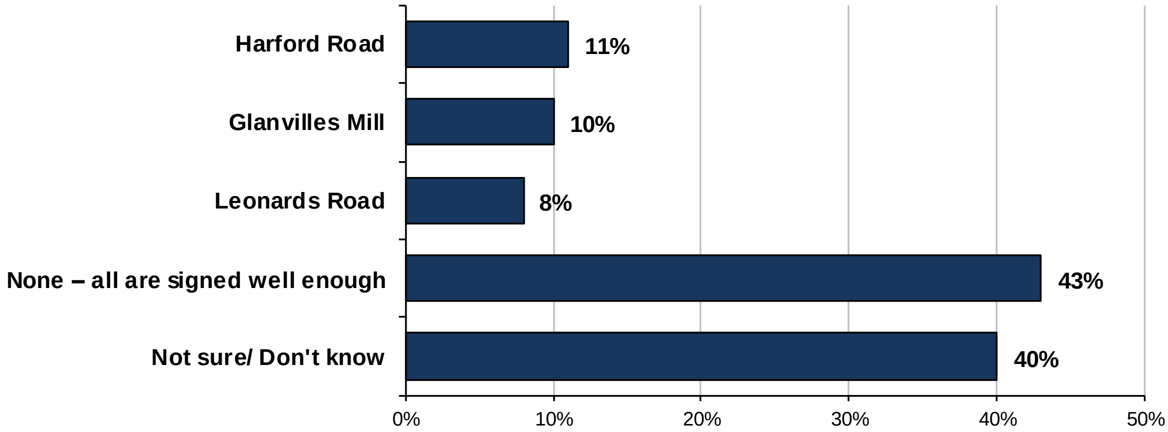
Q13. Why do you park in Ivybridge town centre?



Source: Marketing Means 2020 Base: All w ho use a car/van as driver or passenger and gave an answ er (1,862)

- Shopping was the most likely reason for parking in the town centre, given by most respondents who use a private vehicle (61%). Services are the next most likely reason, giving by 40%, while only 6% park in the town centre to work in Ivybridge.

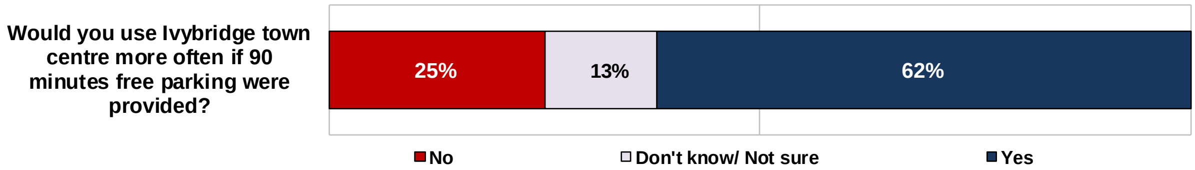
Q14. Which, if any, of Ivybridge's car parks need better signage to help drivers find them?



Source: Marketing Means 2020 Base: All who use a car/van as driver or passenger, and gave an answer (1,850)

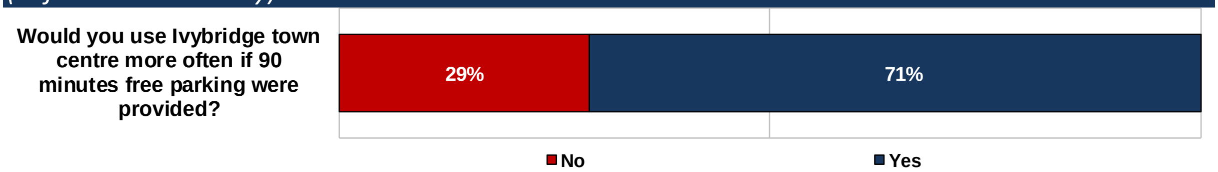
- Most respondents felt either that all of the central car parks are signed well enough (43%) or didn't feel able to give an answer (40%).

Q15. Would you use Ivybridge town centre more often if 90 minutes free parking were provided?



Source: Marketing Means 2020 Base: All who use a car/van as driver or passenger, and gave an answer (1,864)

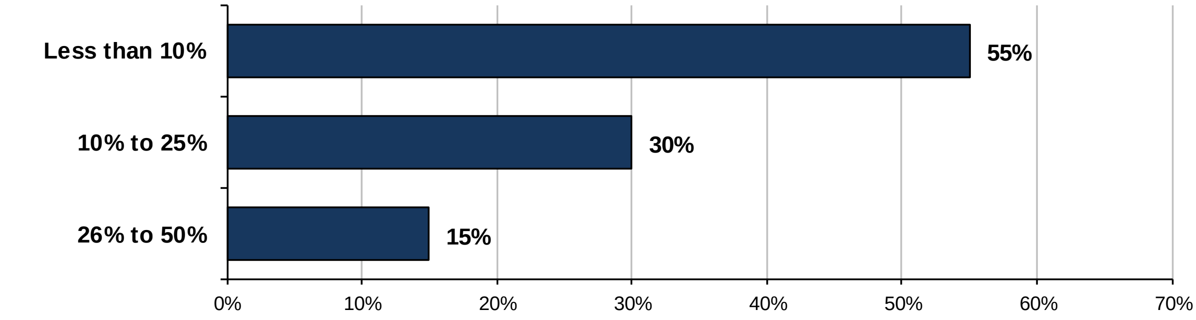
Q15. Would you use Ivybridge town centre more often if 90 minutes free parking were provided? *(definite answers only)*



Source: Marketing Means 2020 Base: All who use a car/van as driver or passenger, and gave a definite answer (1623)

- Most respondents who use a vehicle stated that they would use the town centre more often of 90 minutes' free parking were provided (62% overall, rising to 71% of those who gave a definite answer).

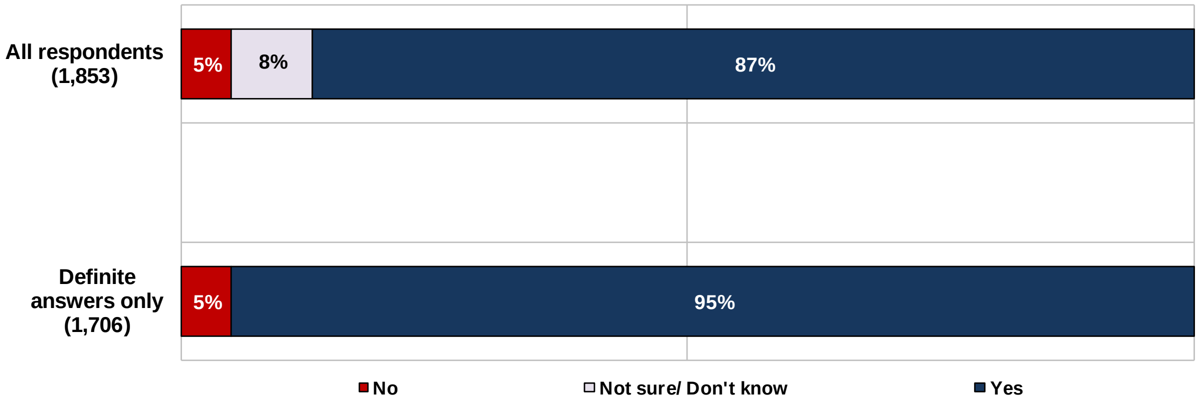
Q16. What percentage of long-stay parking bays in Ivybridge town centre do you think should be allocated to permit parking only?



Source: Marketing Means 2020 Base: All who use a car/van as driver or passenger, and gave an opinion (1,169)

- It should be noted that well over a third (38%) of respondent who used a private vehicle were unable or unwilling to answer this question. Among those who did, just over half (55%) felt that <10% of the long-stay parking bays in Ivybridge should be allocated for permit parking only.

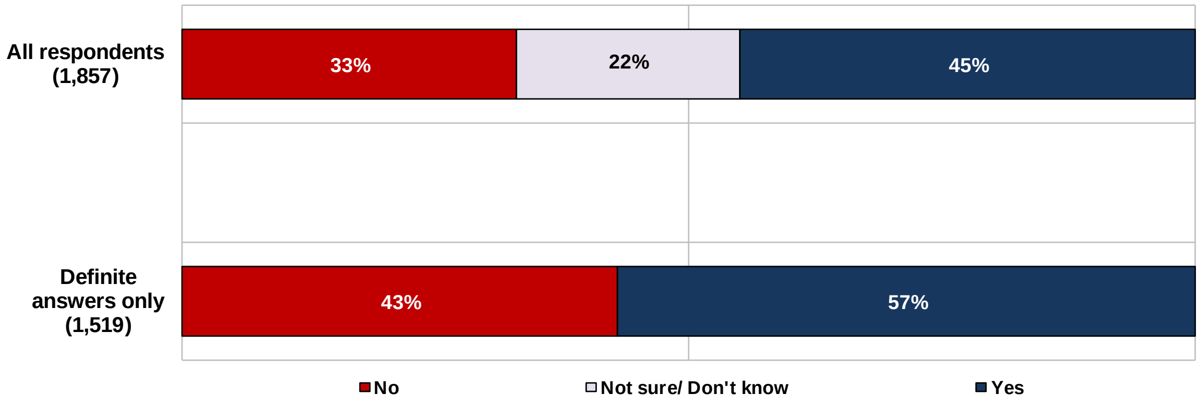
Q17_1 - Should South Hams District Council develop a parking strategy that supports short-stay shoppers and visitors?



Source: Marketing Means 2020 Base: All who use a car/van as driver or passenger and gave an answer

- The vast majority of respondents who use a private vehicle (95% of those who expressed a view) agreed that South Hams District Council should develop a parking strategy that supports short stay shoppers and visitors.

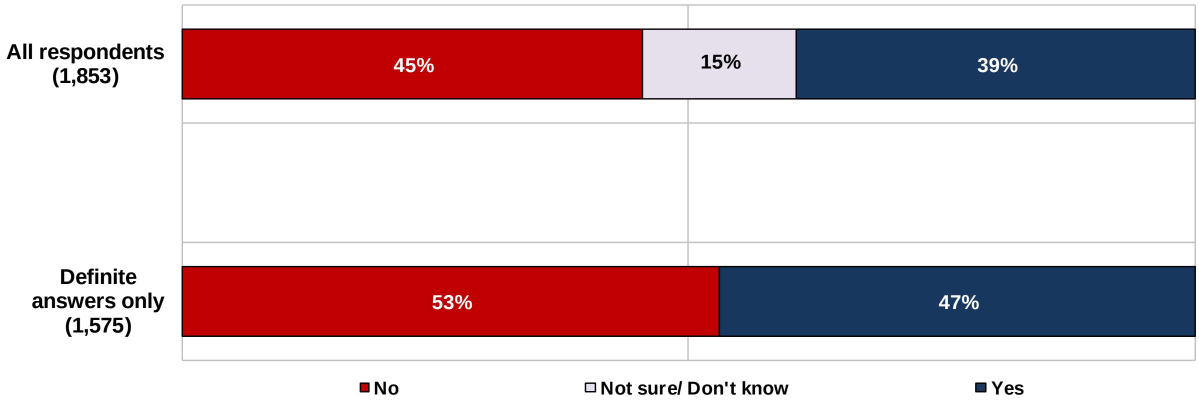
Q17_2. Should people who work in Ivybridge be encouraged to park further out of the town centre, leaving town centre parking more readily available for short-stay visits (maximum of four hours)?



Source: Marketing Means 2020 Base: All who use a car/van as driver or passenger and gave an answer

- Among only those vehicle-users who expressed a view, the majority 57% felt that people who work in Ivybridge should be encouraged to park further out of the town centre, though it should be noted that 22% of respondents could not give a definite answer.

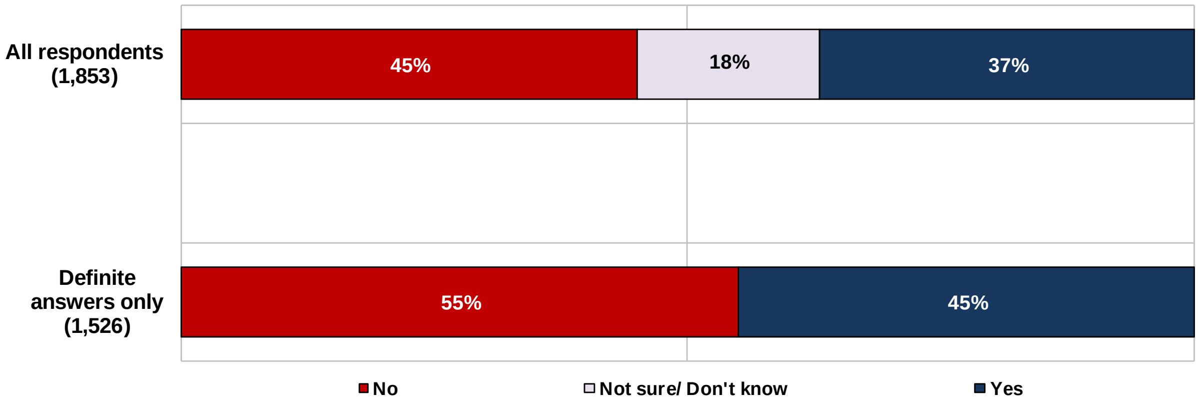
Q17_3. If reduced-cost parking was available 5-10 minutes' walk away from the town centre, would you use it?



Source: Marketing Means 2020 Base: All who use a car/van as driver or passenger and gave an answer

- There was a moderate likelihood of vehicle users making use of reduced-cost parking 5-10 minutes' walk from the town centre, with nearly half (47%) of those expressing a view saying that they would do so.

Q17_4. Would you support an increase in the cost of town centre long-stay parking if there was a cheaper option further out of town (5-10 minutes' walk)?



Source: Marketing Means 2020 Base: All who use a car/van as driver or passenger and gave an answer

- Most respondents who were vehicle users (55% of those who expressed a view) would not support an increased cost for town centre long-stay parking of a cheaper option existed 5-10 minutes' walk from the town centre.