

2003 SHETLAND SHOPPING SURVEY



SHETLAND ISLANDS COUNCIL

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1: INTRODUCTION

- 1.1** This report is a follow up to the ‘**1994 Commercial Development Working Paper Number 2 – Shopping Questionnaire Supplement**’. This Paper was produced following a detailed questionnaire survey that was undertaken in the summer/early autumn of 1993.
- 1.2** The report has been initiated to enable a continuous review of the policies and proposals contained within the Shetland Structure Plan and Shetland Local Plan and to stimulate discussion on the issues facing retailing in Shetland. The Shetland Local Plan contains detailed policies, which aim to protect and enhance the vitality and viability of Lerwick town centre, rural shops and provide convenient access to shops for non-car owners. This report intends to use the findings of the questionnaire to help monitor the effectiveness of these policies, as well as providing up to date information on the consumer habits and views of Shetland’s population.
- 1.3** Since the previous survey was published in 1994, there have been some major developments with retailing in Shetland:
- The Toll Clock Shopping Centre has been expanded.
 - Prestos, now Safeway, obtained planning permission in 1995 to build a supermarket in Lerwick, and subsequently closed their premises in Commercial Street.
 - The introduction of a new supermarket had an impact upon the Town Centre with a loss of food shops and butchers.
 - Some large retail units have continued to spread into the peripheral areas of Lerwick, for example the Lerwick Building Centre.
 - In November 2003 McKays opened a clothes shop in Lerwick, providing a total of 494 square meters of retail floor space. The McKays building was previously occupied by Westside Fisherman, and prior to that by the Co-op.
 - Other changes since the previous survey have included the introduction of Boot’s, and the relocation of Hydro Electric from Market Street to Commercial Street.

- In recent years a number of rural shops have closed down due to a variety of factors such as declining populations, increased mobility and stricter health legislation.
- The Lerwick Town Centre Management Group was founded in 1995 with the principal aim of revitalising Lerwick town centre and achieving a higher standard of town centre management. Their wider goals, as outlined in the Lerwick Town Centre Action Plan, include stimulating the local economy, promoting the town centre and improving competitiveness.
- The continued growth of the internet now provides an attractive alternative shopping medium.

1.4 It is the intention of the Planning Service to follow up this report with a separate survey that will contain interviews with retailers, retail bodies and action groups. It is also intended to interview rural shopkeepers. The information will be collated with the findings of this report and recommendations will be made.

2: INTRODUCTION TO THE 2003 SHOPPING SURVEY

- 2.1** During the autumn of 2003, the Planning Service conducted a questionnaire survey at four main shopping locations in Lerwick. The chosen locations were the Town Centre, the Toll Clock Shopping Centre, Safeway and the Co-op Supermarkets. Four hundred interviews were undertaken, which represents approximately 5% of Shetland's households.
- 2.2** The survey contained 24 questions ranging from where people purchase their main and minor grocery shopping to questions on local shops, car parking, and the adequacy of shopping facilities in Lerwick. A question on where people purchase non-grocery shopping items was also included to assess the market performance and shopping habits of Shetland's shops and population. Many of the questions were open ended to allow for free unstructured comments and views.
- 2.3** Prior to the main survey being carried out, a small pilot survey was undertaken to check the format of the questionnaire, its questions and the time taken to complete. Following the pilot survey minor amendments were made and a copy of the questionnaire and guidance notes that were used can be found in Appendix 1.
- 2.4** The survey was carried out during the month of November 2003, at different times of the day and different days of the week in order to ensure that the sample would be as random as possible. Whilst the survey gives a good indication of the views of Shetland residents, three points should be noted that were also highlighted in the 1993 survey.
- The survey was carried out on weekdays only.
 - The survey may have been biased to those who live or work in Lerwick.
 - A more representative sample would have been achieved if people were interviewed at home, but this was not possible due to staff time and cost implications.
- 2.5** As was the case with the 1993 survey, and to ensure that results could be compared and analysed, it was necessary to divide Shetland up into four areas (see Appendix 2). These areas were drawn up by using distance from Lerwick as the main criterion, the reason being that the majority of questions centred around the adequacy of Lerwick as a shopping centre.

2.6 Facts about the survey

2.6.1 400 people were interviewed compared to 420 in the previous survey. To ensure that a representative account was given the following numbers of questionnaires were asked at the following locations:

150 in the Town Centre, 100 at the Toll Clock, 75 at both Safeways and the Co-op supermarkets.

2.6.2 The majority of those questioned were in the 20-39 & 40-59 age groups. The amount of people questioned by age group is shown below and compared to the previous survey:

	0-19	20-39	40-59	60+
	29 (7%)	165 (41%)	131 (33%)	75 (19%)
<i>Previous</i>	11%	42%	36%	11%

2.6.3 Only 13% of the previous survey total consisted of males. A greater number of males were therefore interviewed in 2003 to give a more representative view:

	Male	Female
	129 (32%)	271 (68%)
<i>Previous</i>	13%	87%

2.6.4 The four areas chosen for the survey were:

Area 1 – Lerwick

Area 2 - East & Central Mainland (including Bressay and the area immediately surrounding Lerwick including Whiteness & Weisdale, Scalloway, Gulberwick, Quarff and Cunningsburgh.

Area 3 – North Central & South Mainland (including Nesting, Voe and the rest of the South Mainland)

Area 4 – Rest of Shetland

The ratio of people questioned by home address was again similar in number to the previous survey. This time a greater number of people living outwith Lerwick were questioned as shown on the table below:

	AREA 1	AREA 2	AREA 3	AREA 4
	183 (46%)	84 (21%)	66 (17%)	67 (17%)
<i>Previous</i>	55%	16%	15%	14%

3. ANALYSIS OF THE SURVEY

3.1 Reasons for being in town on the survey date

The results show that the main reason for being on town of the day of the interview was for a multi purpose trip. This demonstrates that the town is used for a number of purposes including grocery/non grocery shopping and social/leisure visits.

Table 1: Main reason for visit to town

Multi-purpose trip	128 (32%)
Employment	114 (28%)
Grocery shopping	66 (17%)
Non-grocery shopping	51 (13%)
Other	41 (10%)

3.1.2 Employment was the second most popular reason though this was not surprising as the survey was undertaken during the working week (Monday to Friday). People who lived outwith Lerwick made up the highest percentage.

3.1.3 When the most popular reasons are displayed alongside home address it can be seen that distance from the town was a factor on the multi purpose trip, with frequency increasing for areas outside Lerwick. There were a high number of people in town for employment reasons, which again demonstrates Lerwick's importance as a major employment centre. It was noted that a low percentage of people were in Lerwick for grocery/non grocery shopping alone, apart from its own residents.

Table 2: Main reasons by location

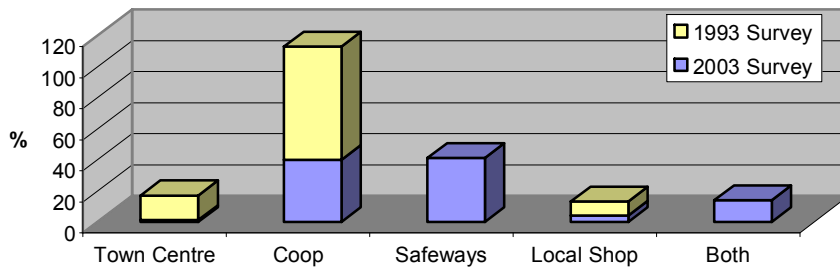
Multi-purpose trip			
Area1	Area2	Area3	Area4
51 (16%)	24 (29%)	27(41%)	26 (39%)
Employment			
Area1	Area2	Area3	Area4
29 (16%)	35 (42%)	27 (41%)	23 (34%)
Grocery Shopping			
Area1	Area2	Area3	Area4
46 (25%)	11 (13%)	4 (6%)	5 (7%)
Non Grocery Shopping			
Area1	Area2	Area3	Area4
37 (20%)	7 (8%)	2 (3%)	5 (7%)

4. GROCERY SHOPPING

Interviewees were asked to choose where they purchased their main grocery shopping. Figure 1 shows that the Co-op (40%) and Safeway (41%) enjoy an equal share of main grocery shopping trips when analysed against the total interviewed. A number of interviewees (14%) also shopped at both of the supermarkets. Only 1 person used the town centre for grocery shopping, whilst 16 (4%) used their local shop.

- 4.1** When compared to the 1993 survey, Figure 1 shows that the Town Centre is no longer considered to be a destination for main grocery shopping, whilst the amount of people using local shops has fallen slightly. These declines could be contributed in part to the addition of a new supermarket, and the closure of Presto's and butchers on Commercial Street.

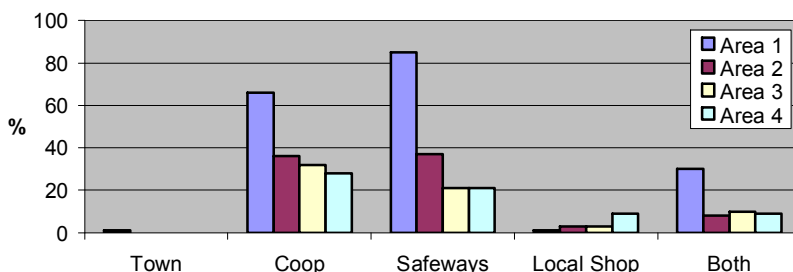
Figure 1 - Purchase of main grocery shopping



- 4.1.1** When the main shopping destination is analysed by home address (see Figure 2), it can be seen by that Safeway is the most popular choice for people who live in Lerwick and Area 2, whilst the Co-op is the most popular choice with residents of Areas 3 and 4. Residents of Lerwick were found to use both supermarkets more frequently than anywhere else. This can be attributed to accessibility.

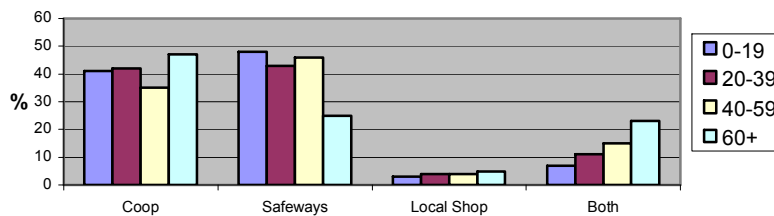
- 4.1.2** It was discovered that people from the south of Shetland were more likely to shop at Safeway whereas those from the north, west and outer isles were more likely to use the Co-op. This demonstrates that the chosen location of the main grocery shop was primarily determined by convenience.

Figure 2 - Main grocery shopping destination by home address



4.1.3 A greater percentage (46%) of 40-59 year olds stated that Safeway was their preferred choice, whilst double the amount of 60+ year olds preferred to shop at the Co-op. It may be presumed that as the Co-op has been trading for a longer period of time and has built up a loyalty base with its older customers. The older age groups have traditionally shopped there, and continue to do so.

Figure 3 - Main grocery shopping by age

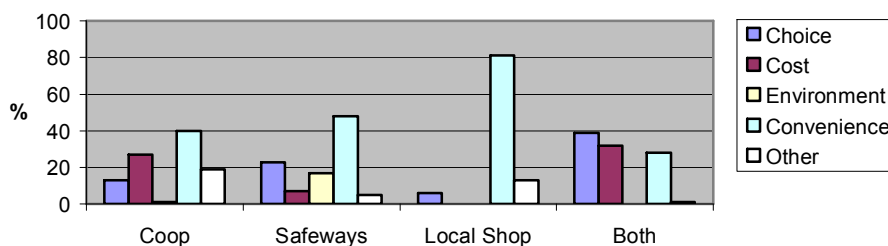


4.1.4 It was found that a slightly higher proportion of women choose Safeway, whilst males prefer the Co-op. A higher percentage of males use a mixture of both supermarkets.

4.2 Main Grocery Shopping - Reason for Preferred Choice?

Interviewees were asked to state their main reason when choosing their weekly shopping destination. Figure 4 displays the percentage of each reason, and is calculated against the total people using the destination. For example 65 (40%) of the 162 interviewees that use the Co-op did so for convenience.

Figure 4 - Reason for Shopping at Supermarkets

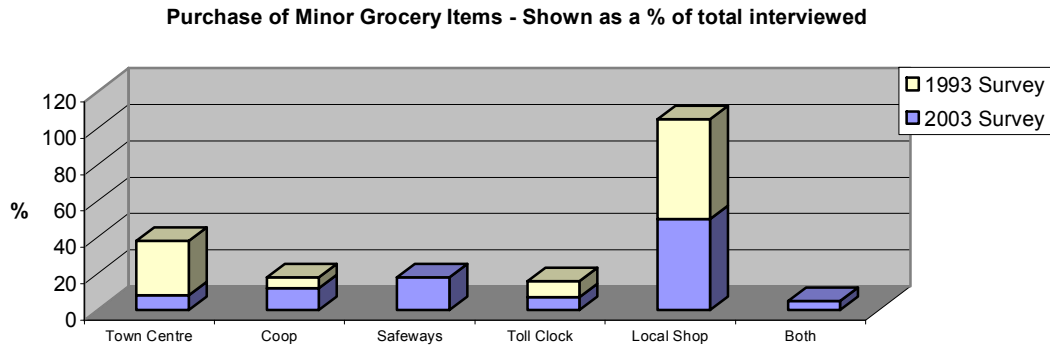


4.2.1 The most popular reason for shopping in Lerwick’s supermarkets was for convenience. A higher percentage of interviewees mentioned this in regards to shopping at Safeway, although the supermarkets proximity to the interviewee’s home address was also a major influence.

4.2.2 It was found that the Co-op is perceived to be cheaper than Safeway as 44 or 27% of its shoppers gave this reason for there preferred choice in comparison to 11(7%) of Safeway’s shoppers.

4.2.3 In the opinion of those interviewed Safeway offered a better choice than the Co-op, and has a more attractive shopping environment.

4.3 THE PURCHASE OF MINOR GROCERY ITEMS



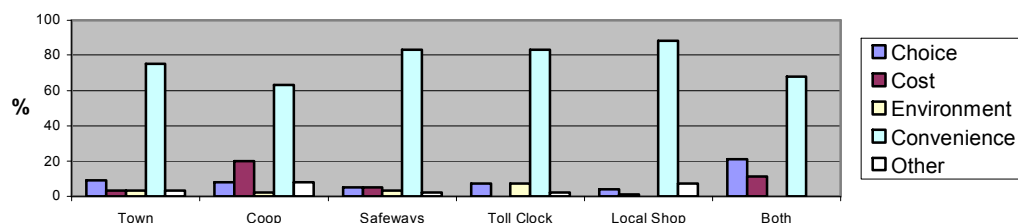
Exactly half of those interviewed chose their local shop as their preferred choice for minor grocery shopping. When compared to the previous survey it can be seen that the local shop has fallen in popularity by 5%. Safeway (20%) and the Co-op (12%) were the next most popular choices, of which accessibility to home address was a major determining factor.

- 4.3.1** The use of the Toll Clock fell by only 1% since the last survey whilst the Town Centre experienced the largest decline with a fall of 22%. This decline can be linked to the accessibility/convenience of the supermarkets to those living or working in Lerwick and the decline of grocery shops in the Town Centre.
- 4.3.2** A clear trend emerged when minor grocery shopping was analysed by home address, as the percentage using a local shop increased as distance from Lerwick increased. For example only 28% of Lerwick residents use a local shop in comparison to 76% of Area 4 residents.
- 4.3.3** There were no significant trends emerging when minor grocery shopping was analysed by age group, although a higher percentage of 40-59 yr olds use Safeways, and 0-19yr olds use local shops most frequently.

4.4 Minor Grocery Shop – Reason for Preferred Choice?

It can be seen that convenience is clearly the principal motive when purchasing minor grocery items, with 76% of interviewees mentioning this as the main reason for their preferred choice.

Figure 5 - Reason for Minor Grocery Shopping Choice



- 4.4.1** The cost of goods at the Co-op was once again mentioned as a popular reason for shopping there. 20% of people using both supermarkets did so to take advantage of the choice of goods on offer.

4.5 When Weekly/Fortnightly Shopping is Undertaken?

It was found that mornings are the most popular time to go shopping, with Thursdays and Fridays being the most popular day of the week. However, 139 interviewees had no set day or time when they undertake their shopping.

Table 3 - Preferred Time and Day of the Week for Weekly Grocery Shop

	Total	%
Mornings	50	13 %
Lunchtimes	11	3
Afternoons	44	11
Evenings	30	8
Monday	6	2
Tuesday	15	4
Wednesday	8	3
Thursday	34	9
Friday	39	10
Saturday	21	5
Sunday	3	1

4.6 How often do you incorporate your grocery shop with non-food shopping trips, for example social visits?

When analysed by location it was found that the further the interviewee lived from Lerwick the more likely they were to incorporate social visits with their shopping trips. For example 25% of people from Area 4 and 23% of people from Area 3 always incorporate non-food shopping trips while coming into Lerwick for their grocery shopping. This is in comparison to only 1 person from Lerwick.

Always	42 (11%)
Sometimes	190 (47%)
Never	168 (42%)

5. LOCAL SHOPS/POST OFFICES

Since the 1993 survey was undertaken, a number of village shops throughout Shetland have closed. It is recognised that the presence of a local shop can be a major attraction when considering moving to, or investing in a village/rural area. It was therefore decided to include questions on local shops and post offices in this survey.

5.1 Do you use a local/rural shop/post office?

In response to this question 324 (81%) of interviewees responded yes with 76 (19%) of those interviewed expressing that they do not use a local shop or post office.

5.2 How many times a week a local shop/post office is used?

Table 4 shows that the highest proportion of those interviewed used their local shop once or twice a week on average. A number of interviewees use their local shop on a daily basis, and it was discovered that the highest percentages of these people live in the East & Central Mainland, and the North Central & South Mainland (Areas 2 & 3).

Table 4 – Frequency of use for local shop/post office

Use per week	Amount	Percentage of total
<1	17	5 %
1	76	23 %
2	83	26 %
3	57	18 %
4	24	7 %
5	15	5 %
6	6	2 %
7	45	14 %

5.3 Why a local shop/post office is not used

The three most popular answers to this question were as follows:

Use supermarkets instead	28 (37%)
It has closed	19 (25%)
Don't have	13 (17%)

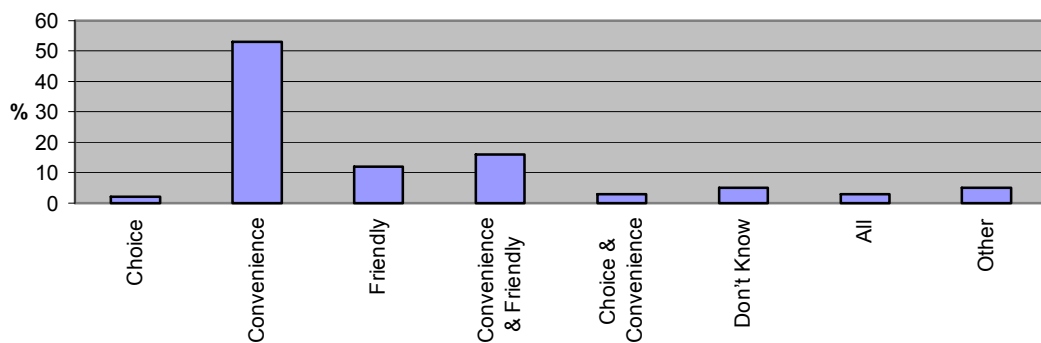
5.3.1 By analysing the answers against the home address of the interviewees it was found that 89% of those who use supermarkets instead of a local shop were residents of Lerwick. It is also interesting to note that the provision of a local shop is a social inclusion issue, as 8% (32) of the total interviewed did not have access to a local shop.

5.4 What do you like most about your local shop?

The most popular answers are shown on Figure 6. Interviewees were told that they could highlight more than one choice to this question.

5.4.1 It can be seen that convenience was clearly the most popular reason for choosing a local shop. The friendly atmosphere of local shops was also a common answer with a combined total of 92 people stating that their local shop was a friendly place to shop.

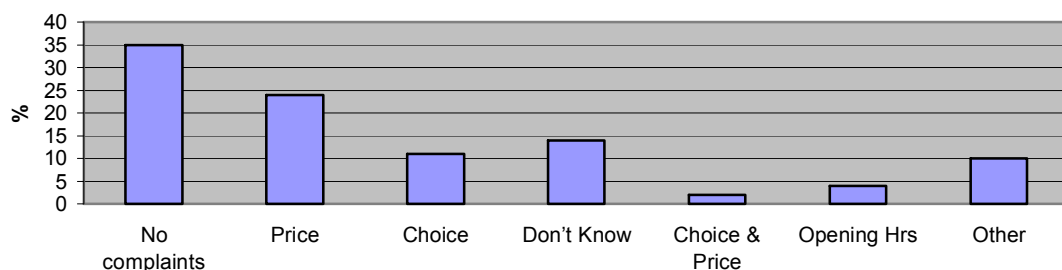
Figure 6 - What do you like most about your local shop



5.5 What do you like least about your local shop?

The majority of the 324 people that use a local shop were happy with the service provided and stated that they had no complaints. This total amounted to 112 (35%). The cost of goods was the most significant area of dissatisfaction with 78 (24%) commenting on the high price while 35 (11%) of those questioned mentioned lack of choice.

Figure 7 - What do you like least about your local shop



5.5.1 It was discovered that residents of Area 4 were the most dissatisfied with the price of goods from their local shop. This could be attributed to distance from the town centre and supermarkets. It was recognised by some interviewees that the higher price of goods was inevitable and that higher prices were outweighed by savings in travel costs.

5.6 Would you be concerned if your local shop was to close?

The importance of the local shop is evident as 287 (85%) of interviewees stated that they would be concerned if their local shop was to close. Only 47 (14%) of interviewees said they wouldn't be concerned.

Table 5 - Reason for concern.

Convenience	155 (54%)
Community Reasons	60 (21%)
Other	53 (18%)
Don't Know	19 (7%)

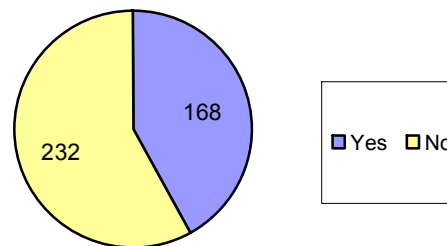
- 5.6.1** More than half of the interviewees stated that convenience would be their main concern if their shop were to close. The local shop's function as being an essential part of a local community was confirmed as 60(21%) of interviewees highlighted that the community would suffer if their shop were to close.
- 5.6.2** There was a marked increase in concern for community reasons when home address was taken into account. For example, 32% of those questioned from Areas 3 & 4 highlighted community reasons in comparison to 13% from Areas 1 & 2. This response demonstrates that rural communities rely on their local shop/post office for more than just convenience shopping. Of the 53 'other' reasons that were given, the most popular included the loss of local employment, good opening hours and the availability of petrol.
- 5.6.3** Two main reasons for not being concerned if the interviewee's local shop were to close were given. 25 (53%) stated that they had other options available, while 9 (19%) stated that they could live without it. It should be noted that 22 out of 25 people who stated that they had other options available lived in Lerwick.

6. USE OF SUPERMARKETS & THE INTERNET

6.1 Have you used one of Lerwick's supermarkets to purchase electrical goods?

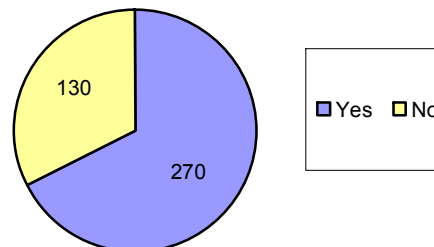
A relatively high proportion of those interviewed had purchased electrical goods from at least one of Lerwick's supermarkets. When asked to comment on their reason for purchasing it was found that the cost of the goods and impulse were the most popular motives. 14 of the interviewees had adverse comments on the electrical goods sold by the supermarkets with a lack of quality and no servicing being their main reasons for not purchasing items

Figure 8 - Use of supermarkets to purchase electrical goods



6.2 Do you anticipate using the Internet or Sky TV to purchase goods in the future.

Figure 9 - Use of Sky TV or the Internet to purchase goods



A high proportion (68%) of interviewees anticipated using the internet or Sky TV to purchase goods. This total decreased as the interviewees age increased. 36 people provided various positive comments about the Internet, with the main reason for purchasing goods being cheap prices and convenience. Of the 32% of those interviewed who do not use the internet, fifteen stated that lack of trust was a deterrent reason for not purchasing goods.

7. TRANSPORT, PEDESTRIANISATION & PARKING

Since the 1993 survey a number of changes have occurred in Lerwick:

- An additional 43 parking spaces have been provided through the demolition of the old swimming pool, in addition to this a 45min short stay parking scheme has been introduced at the esplanade and a new 2hr system of parking and access has been introduced below Fort Charlotte.
- Environmental improvements have been carried out in Commercial Street involving improvements in street furniture, signage and the resurfacing.
- In 2002 a pedestrianisation order took effect in Commercial Street, prohibiting all but disabled drivers from driving between 11.30am-5.30pm, Mondays to Saturdays.

It was decided to include a number of the same questions that were contained in the 1993 survey to allow for comparisons. In addition to this, a question was asked on the pedestrianisation of Commercial Street to assess whether or not the existing scheme is perceived as a success.

7.1 Do you own a car or have access to a car?

In response to this question 310 (78%) of interviewees stated that they owned or had access to a car with 90 (22%) stating that they did not.

- 7.1.1 As expected, the youngest age group had the lowest percentage of car ownership/access to a car. When compared to the 1993 survey, car ownership of the 60+ age group has increased whilst the 0-19 age group has decreased. Table 6 shows the results.

Table 6 – Car ownership by age group

Age Group	% of those with access to a car	% of 1994 Survey
0-19	21%	50%
20-39	78%	84%
40-59	89%	93%
60+	79%	57%

- 7.1.2 Car ownership is lower in Lerwick than any of the other 3 areas, which all have similar levels. This can be expected as car ownership in areas outwith Lerwick is deemed to be a necessity rather than an option for many.

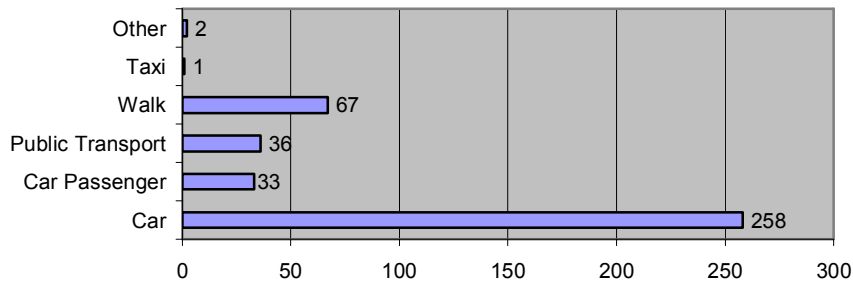
Table 7 – Car ownership by home address

Home Address	% of those with access to a car
Area 1	70%
Area 2	86%
Area 3	83%
Area 4	82%

7.2 How did you travel here today?

The private car is clearly the most popular choice when shopping in Lerwick with 65% of interviewees using this mode of transport. When travel is assessed by location it is encouraging to see that a relatively high proportion of Lerwick’s residents walk to the shops (36%), whilst public transport is most popular with the residents of Area 3 (17%).

Figure 10 - Mode of Travel



7.3 Where do you usually park in the Town Centre?

Lerwick’s largest car park at Hillhead, commonly referred to as ‘the old swimming pool car park’, was the most popular choice with 99 (32%) of the interviewees who own or have access to a car. The pier was the second most popular choice, whilst a similar number of people use the Fort (14%) and Esplanade (11%) car parks, which are referred to in Table 7 as ‘on street’ car parks.

Table 7 – Preferred Parking Location

Location	2003 Survey	1993 Survey	%Difference
Pool (Hillhead)	32%	24%	+ 8%
Pier	24%	25%	- 1%
On Street	25%	34%	- 9%
Other	14%	17%	- 3%

7.3.1 In comparison with the 1993 survey it can be seen that the use of the Hillhead car park has increased while on street parking has fallen. This rise can be attributed to the provision of an additional 43 spaces at the pool car park since the last survey. A fall in on street parking may be related to a fall in the number of spaces, pedestrianisation of the street and a revised parking system below Fort Charlotte.

7.3.2 When parking is compared by the home location of the interviewees, it was found that the Hillhead car park was clearly the most popular choice with residents of Area 2 (45%), whilst the pier car park was least popular with Area 2 residents and most popular with residents of Area 3.

7.4 How long does it take you to find a parking space?

A high proportion of interviewees, 222 (76%), found a car parking space within five minutes, with just under a quarter of those interviewed taking five or more minutes to find a space. When assessed alongside the interviewees preferred parking location it was discovered that half the people parking below the Fort take longer than five minutes to locate a space. Lerwick’s most popular car park, the Hillhead car park, had its downsides as over a quarter of its users took five or more minutes to find a space.

5-10 or 10+ minutes parking:

1-5 mins -	222 (76%)	The Hillhead car park	29%
5-10 mins -	59 (20%)	The Fort car park	50%
10+ mins -	11 (4%)	The Esplanade	29%

7.5 What is your opinion on the car parking charges for Victoria Pier?

Cheap	19 (6%)
Reasonable	123 (42%)
Too Expensive	49 (17%)
Don't Know/Use	102 (35%)

In response to this question 123 (42%) of those interviewed thought that the charges for Victoria Pier were reasonable. A high proportion of interviewees (35%) didn't comment on charges, principally because they never use the pier for parking. Residents of Area 3 were the most satisfied with the pier parking charges and this correlates with the fact that they use the pier car park the most. The highest proportion of those not using the pier lived in Lerwick (46%).

7.6 Are the parking facilities in town adequate?

Car owners were asked their views on car parking facilities, to which 304 interviewees responded. Of those interviewed 166 (55%) said they were satisfied with the parking facilities in Lerwick. This is in comparison to 44% of car owners, questioned during the 1993 survey.

Figure 11 -Car Parking Satisfaction by Home Address

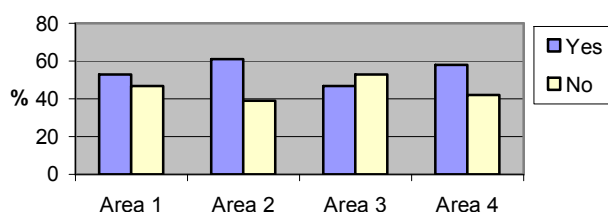
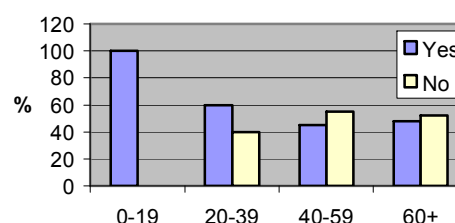


Figure 12 - Car Parking Satisfaction by Age



7.6.1 It can be seen that residents of Area 2 are the most satisfied with Lerwick's parking facilities, whilst Area 3 is the only area to have a higher percentage of those who are unsatisfied. When parking facilities are analysed against age and gender the main findings were that the 0-19 & 20-39 age groups were the most satisfied, with a higher proportion of females being unsatisfied.

7.7 How could parking facilities be improved?

The most popular answer to this question was to increase the number of car parking spaces in the town. However, it can be seen that the demand for more parking spaces has dropped considerably since 1993. This can be contributed in part to an increase in parking space at the Hillhead car park and the introduction of short stay parking.

7.7.1 There was a general acceptance though that lack of space prohibited any major improvements, and this was reflected by 14% of interviewees stating that they didn't know how to improve facilities. Other comments included the need to improve public transport, and to provide a park and ride facility somewhere in Lerwick.

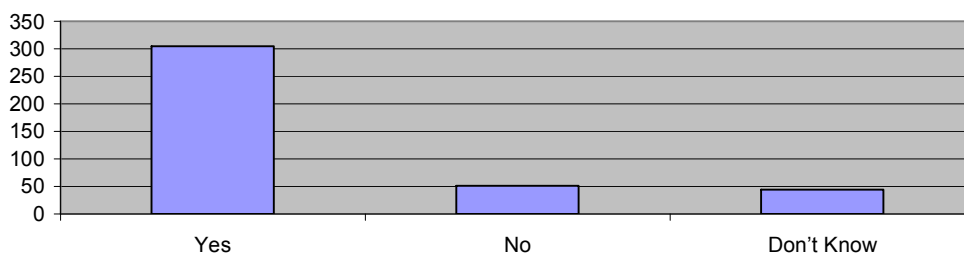
Table 8 – How Car Parking Could be Improved

	1994 survey	
More spaces	50 (36%)	(64%)
Don't Know	19 (14%)	
Multi storey car park	11 (8%)	
More short stay spaces	10 (7%)	
More long stay spaces	8 (6%)	

7.8 Do you think the street has been improved by pedestrianisation?

More than 75% of interviewees thought that the street had been improved by pedestrianisation. A number of people commented that the street was now safer place especially for young children and the elderly. Those against pedestrianisation stated that it was difficult for the elderly to get access to shops for bulky goods and that shopkeepers had suffered.

Figure 13 - Has the Street Been Improved by Pedestrianisation?

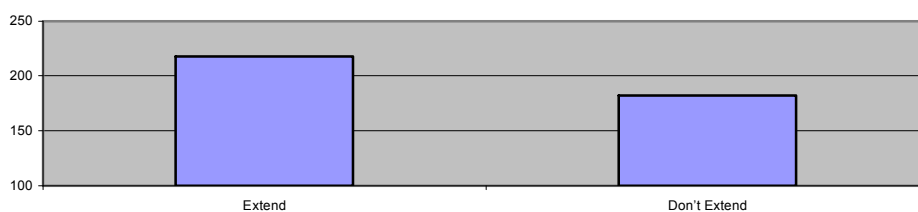


7.8.1 A number of people stated that pedestrianisation was ineffective as cars were still using the street throughout the course of the day. A consensus came forward from this question that pedestrianisation would work better if it were properly enforced.

7.9 Do you think that pedestrianisation should be extended

In response to whether pedestrianisation should be extended, in order to include the area from the east end of Commercial Street to the cross, 55% of those interviewed were in favour of an extension. When analysed alongside age group it was found that only the 60+ age group were less in favour of an extension with 57% wanting the street to remain as it is.

Figure 14 - Should Pedestrianisation be Extended



8 SATISFACTION WITH SHOPPING FACILITIES

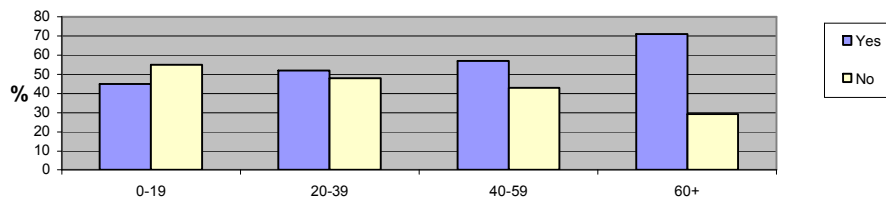
In order to gauge public opinion on the shopping facilities that exist in Lerwick the 1993 survey contained four questions that invited a response on Lerwick's shops and its shopping environment. It was decided to include the same questions within the 2003 survey to allow for a comparison.

8.1 Are you satisfied with the shopping facilities in Lerwick?

On the whole, a higher percentage of the interviewees (224 or 56%) were satisfied with the shopping facilities that exist in Lerwick.

The 1993 survey identified the trend that satisfaction with facilities increased with age. This trend is still clearly evident 10 years later, as Figure 15 shows. The 1993 survey revealed that only 15% of 0-19 year olds were satisfied, but this has now increased to over 40%. Satisfaction with the 20-39 and 30-49 age groups increased slightly whilst the 60+ age groups decreased by 10%.

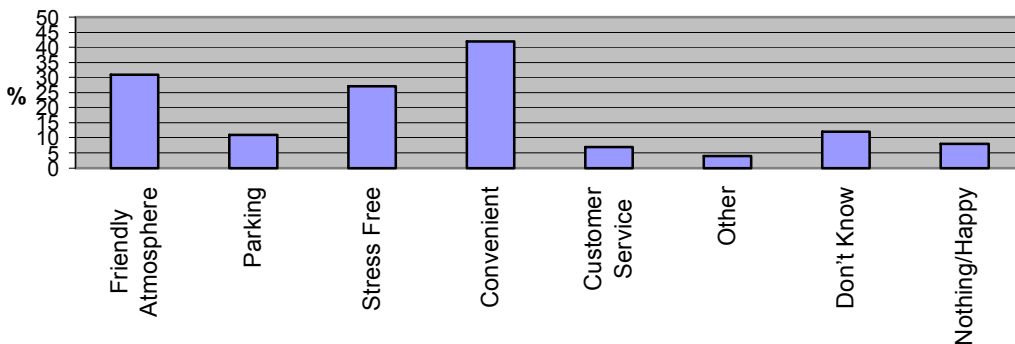
Figure 15 - Satisfaction by Age Group



8.2 What do you like most about shopping in Lerwick?

The three most popular answers to this question were that Lerwick was a convenient, friendly and stress free place to shop.

Figure 16 - What do You Like Most About Shopping in Lerwick?



8.2.1 When analysed against the home address of the interviewees it was found that all of the areas has similar rates of satisfaction with the town being a friendly and stress free place to shop.

8.2.2 A high proportion of people from Lerwick commented on shopping being convenient, although this could be due to the fact that they had the least distance to travel. It was also discovered that the greater the distance the interviewee lived from Lerwick the more satisfied they were with the parking facilities.

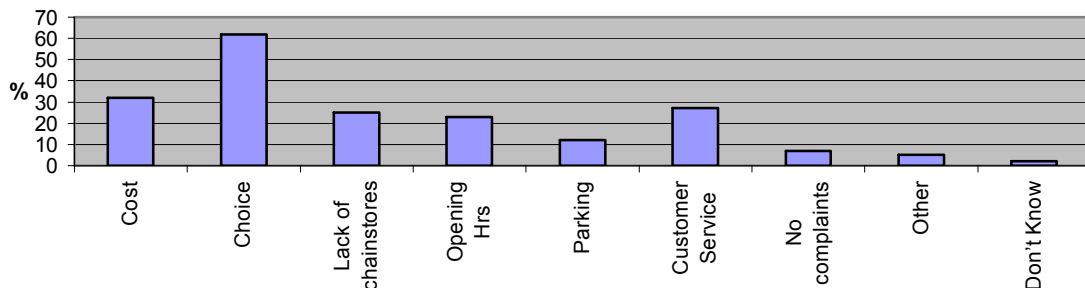
8.2.3 When the reason for satisfaction is analysed by age group, it was discovered that there is little fluctuation in percentage across the age groups. The 60+ age group were most satisfied with stress free shopping and customer service, but were the least satisfied with the friendly atmosphere of Lerwick. A number of 'other' comments were also given on what people like most about shopping in Lerwick. Examples are given below:

<i>"It's a good place to meet people"</i>	<i>"I like to support local shops"</i>
<i>"I prefer to shop locally"</i>	<i>"We are well covered for shops"</i>
<i>"There is a diverse range of craft shops"</i>	<i>"The gift shops"</i>
<i>"McKays has improved the street"</i>	<i>"You get to see what your buying"</i>
<i>"Lerwick is a safe place to shop"</i>	
<i>"Shetland can provide everything you need, you just have to look for it"</i>	

8.3 What do you like least about shopping in Lerwick?

Lack of choice was identified as being the biggest drawback when shopping in Lerwick, with 248 (62%) of questioned people. A quarter of interviewees also wanted more variety in the form of chainstores.

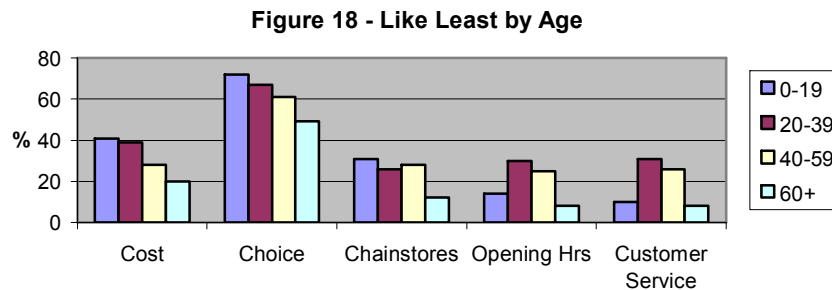
Figure 17 - Things Liked Least About Shopping in Lerwick



8.3.1 The cost of goods, customer service and opening hours were all mentioned by just under a quarter of those interviewed. The increasing dissatisfaction with customer service is worth particularly noting as only 5% of the interviewees in the 1993 survey mentioned this as something they liked least. This survey encountered a rise of 22%.

8.3.2 When the results were analysed by home address it was found that the residents of Area 4 had the lowest percentage of complaints about the most popular areas of dissatisfaction.

8.3.3 When analysed against age group it was found that a trend emerged with the dissatisfaction of cost, choice and chainstores. The percentage of dissatisfaction decreased as age group rose.



8.3.4 A higher percentage of females were dissatisfied with the lack of choice. For example 70% of females were dissatisfied in comparison to 48% of males. The lack of chainstores and the opening hours of shops caused dissatisfaction with a higher percentage females whilst a greater percentage of males were unhappy with the cost of goods and customer service.

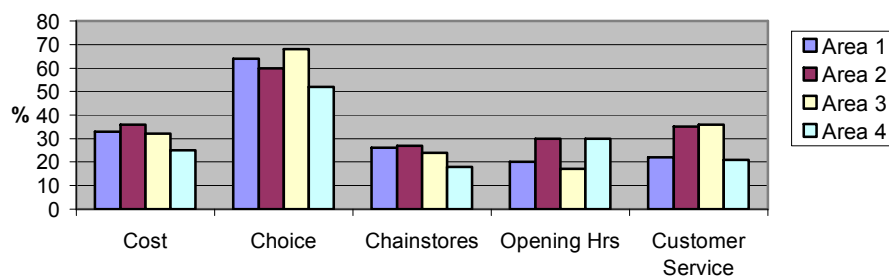
8.3.5 The comments below are taken from interviewees who stated their own opinions and ‘other’ reasons for dissatisfaction:

- | | |
|--|---------------------------------|
| <i>“Too many offices on the street”</i> | <i>“Lack of quality”</i> |
| <i>“Lack of control over disabled parking”</i> | <i>“The rates are too high”</i> |
| <i>“Chewing gum on the street”</i> | <i>“Too many gift shops”</i> |
| <i>“Lack of grocery shops on the street”</i> | <i>“Lack of social space”</i> |

8.6 What improvements would you like to see?

This question follows on from the previous one, and asked the interviewees what improvements they would wish to see. Unsurprisingly, the most popular answers to the previous question were reiterated.

Figure 19 - Like Least by Home Address



8.6.1 When the results were analysed by home address it was found that residents of Area 2 wished to see the most improvements, having the highest percentage improvements in the form of chainstores, variety, opening hours and the shopping environment.

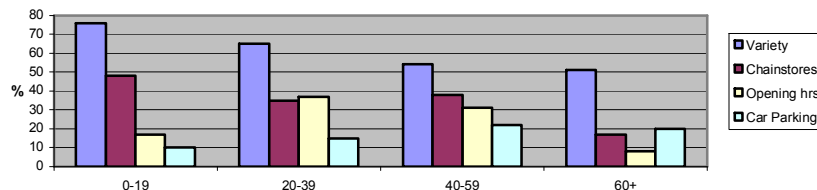
Table 9 – Improvements Interviewees Would Like to See

	2003 %	1993 %	Difference
Increased variety of shops	60	66	< 6
More chainstores	32	36	< 4
Longer opening hrs	28	45	<17
Improved car parking	18	29	<11
Improved customer service	15	-	
Improved shopping environment	12	57*	<45

*In the 1993 survey environmental improvements were grouped together with improvements with pedestrianisation and traffic restrictions, thus making the % much higher than the 2003 survey.

8.6.2 Age once again influenced decisions with the call for improvements in the variety of shops and more chainstores decreasing with the older age groups. The 1993 survey produced similar results in relation to the trend between the younger age groups and the desire for improvements. When compared to the 1993 survey it was found that a higher percentage of the 40 - 60+ age groups now wished for more variety and chainstores.

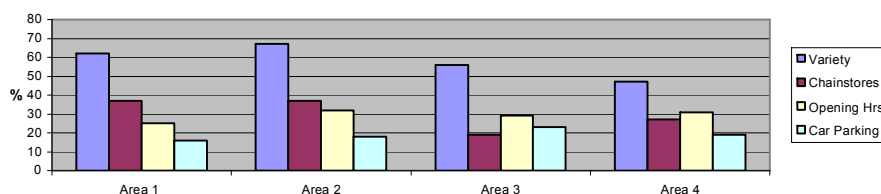
Figure 20 - Improvements by Age



8.6.3 When improvements are analysed by home address, the most noticeable trend is that a higher percentage of residents from Areas 1 and 2 want more variety and chainstores. This could be due to the fact that they live closer to shops and use them on a more frequent basis.

8.6.4 The 1993 survey discovered that the further one lives from Lerwick the more likely they were to want longer opening hours. This is no longer apparent to such an extent.

Figure 21 - Improvements by Home Address



9. WHERE NON-GROCERY ITEMS ARE PURCHASED

In order to discover where people purchase specific types of non-grocery items, and to compare trends, the same question that was included in the 1993 survey was incorporated in this questionnaire.

This question asked where people purchased clothes, shoes, electrical goods, furniture/carpets and DIY goods. An additional question of where people purchase CDs/DVDs & videos was asked.

People were asked to state where they normally bought the above items, and to rank these methods/locations in terms of preference of choice. For example, if a person bought most of their clothes in Shetland, some by mail-order, and none on the mainland, a "1" would be recorded in the Shetland column, a "2" in the mail-order column and a "0" in the mainland column.

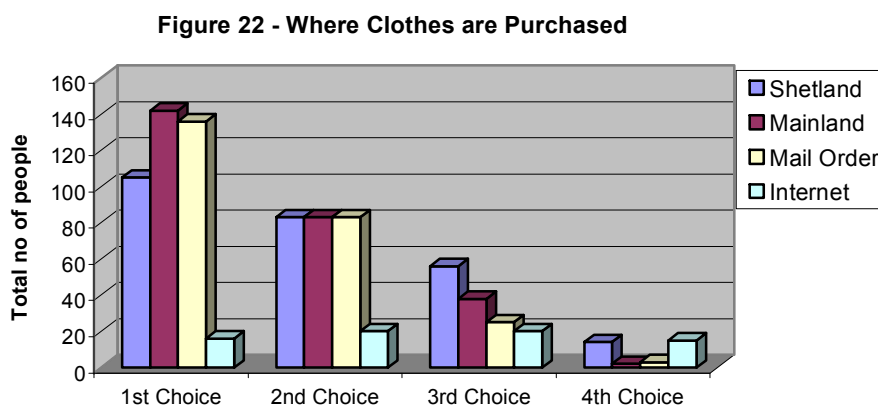
If the interviewee purchased items in Shetland, they were asked to specify where from a choice of the Town Centre, Toll Clock or elsewhere.

The 1993 survey used a simple subjective scoring system to show the relative importance of each sector. As the scores were notional, it was felt that it was not necessary to use this system again. Instead, the graphs show the four most popular choices.

9.1 Clothes

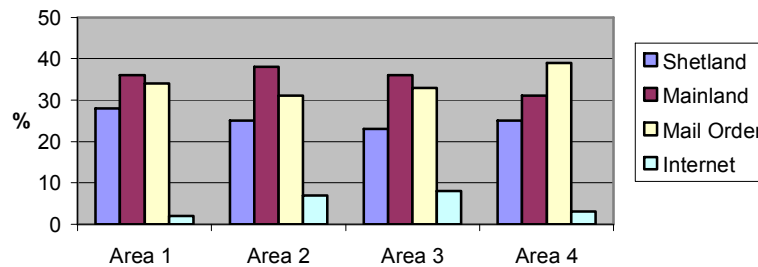
The 1993 Survey reported that Shetland was the most popular destination for the purchase of clothes, followed by the UK Mainland and Mail Order which enjoyed an equal share of the market.

- 9.1.1 The UK Mainland is now the most popular first choice for the purchase of clothes, followed by mail order and then Shetland. When the total amount of people purchasing clothes are combined, the results were that Shetland, the Mainland and Mail-Order had an almost equal share. Of note is that a total 81(20%) of the interviewees had used the internet to purchase clothes.



9.1.2 When the purchase of clothes is assessed against home address it was discovered that a slightly higher proportion of Lerwick's residents purchase their clothes in Shetland. The only other noticeable trend was that the further the interviewees home address was from Lerwick the more likely they were to use Mail Order to purchase clothes and less likely to shop on the UK Mainland.

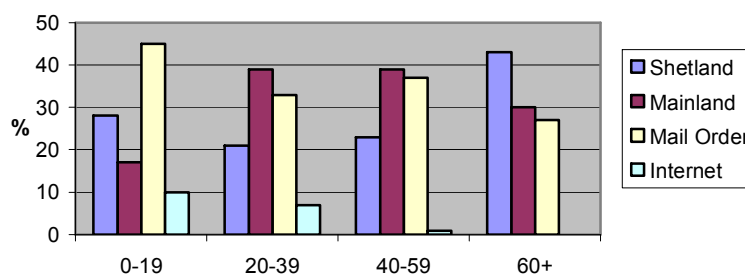
Figure 23 - Purchase of Clothes by Location - 1st Choice



9.1.3 When the most popular choice of destination is analysed against age group. It can be seen that the 0-19 year olds principally use mail order for the purchase of clothes. In comparison to the 1993 Survey, it was found that the popularity of Shetland has increased, and is now more popular than the mainland. It is worth noting that the 0-19 age group also had the highest percentage of internet users.

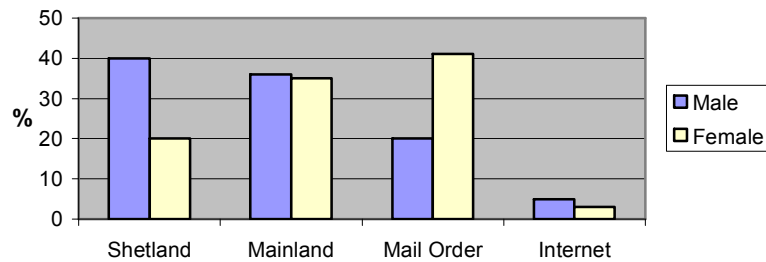
9.1.4 The 20-39 & 40-59 age groups chose the UK Mainland as their preferred location, followed by mail order and then Shetland. The previous survey found that mail order was the preferred choice with the 20-39 age group, whilst Shetland was the preferred choice of the 40-59 age group. Shetland was the most popular choice with the 60+ age group, as was the case in the 1993 Survey.

Figure 24 - Purchase of Clothes by Age - 1st Choice



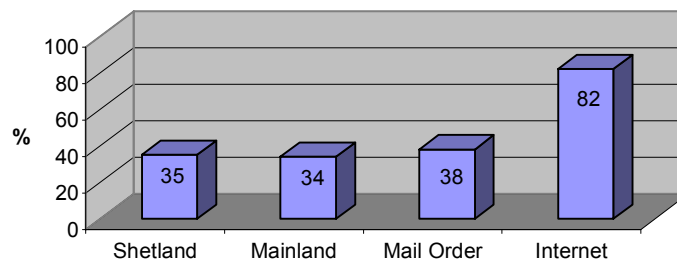
9.1.5 When the 1st choice is analysed by gender, it can be seen that double the percentage of males prefer to shop in Shetland, while a far greater percentage of females use mail order.

Figure 25 - Clothes by Gender 1st choice



9.1.6 The equal share in the clothing market with Shetland's residents is represented when the percentage of people who never purchase clothes at certain locations are analysed (Figure 26). It can be seen that just over a third of interviewees never purchase their clothes in Shetland. This figure is similar for the UK Mainland and mail order.

Figure 26 - Never Shop for Clothes



9.1.7 Table 10 shows that the majority of people use the Town Centre for the purchase of clothes. Only 3% of people use the Toll Clock, whilst more than one in four (29%) shop at both the Town Centre and the Toll Clock.

Table 10 - Where Clothes are Purchased in Shetland:

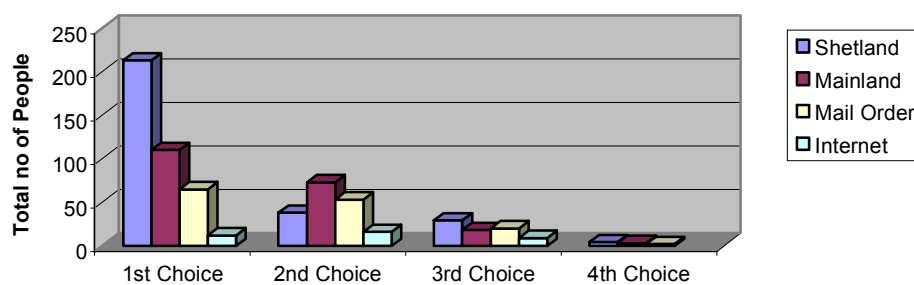
Town	169 (66%)
Toll Clock	9 (3%)
Elsewhere	4 (2%)
Town & Toll Clock	76 (29%)

9.2 SHOES

The 1993 Survey reported that the most popular destination for shoe shopping was Shetland, followed by the Mainland and then Mail Order.

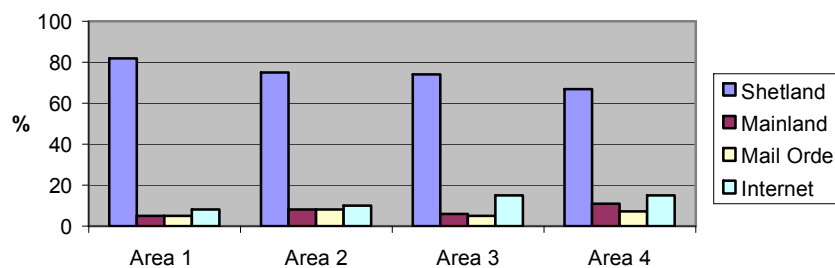
9.2.1 Shetland has remained the most popular choice for footwear with 284 (71%) of interviewees using its shops to purchase shoes. The UK Mainland was the second most popular choice, and the most popular 2nd choice. The main reason given for purchasing shoes in Shetland is inevitably that people get to try them on before they buy.

Figure 27 - Where shoes are purchased



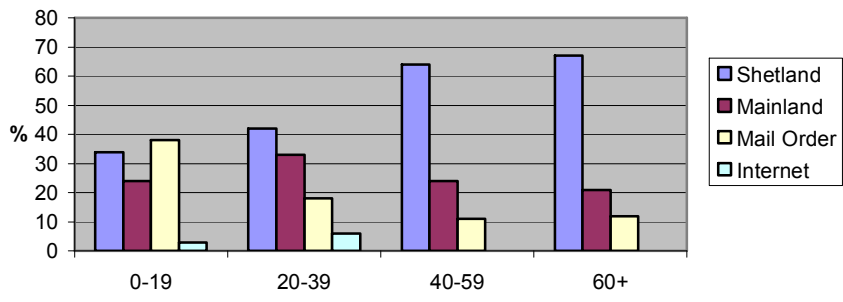
9.2.2 When shoe shopping destinations were analysed by home address, it was discovered that distance from Lerwick had an influence on where shoes were purchased. For example the percentage of shoes purchased in Shetland decreases slightly in each of the three areas outwith Lerwick. In contrast the use of the internet increases as distance from Lerwick becomes greater.

Figure 28 - Purchase of Shoes by Location



9.2.3 When analysing by age group it can be seen that the older the person, the more likely they are to purchase shoes in Shetland.

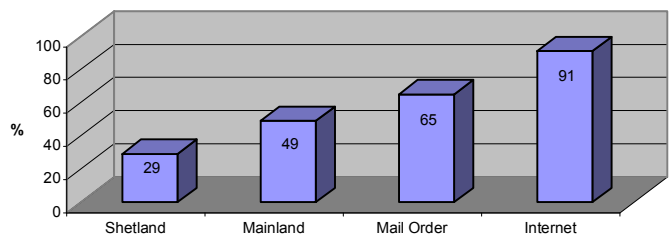
Figure 29 - Purchase of Shoes by Age



9.2.4 In comparison to the 1993 survey, when the 0-19 age group stated the mainland was their most popular choice, the 2003 survey found that the greatest percentage (38%) of 0-19 year olds are now using mail order. It was also revealed that the highest percentage purchasing shoes on the mainland were aged between 20-39.

9.2.5 The graph below (Figure 30) shows that while Shetland is the most popular choice, 29% of interviewees never purchase their shoes in Shetland. As expected, Lerwick Town Centre was the preferred location in Shetland for the purchase of shoes with 94% of shoppers using the Town.

Figure 30 - Never shop for shoes



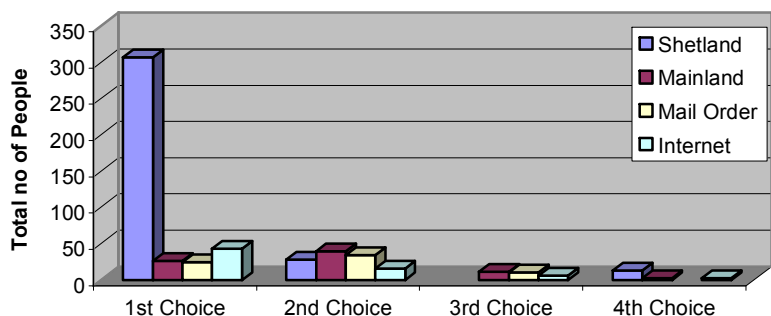
9.2.6 When first choice was analysed by gender it was found that a slightly greater percentage (+5%) of women purchased their shoes in Shetland, with males being more likely to purchase on the mainland.

9.3 ELECTRICAL GOODS

The 1993 Survey found that the electrical goods sector in Shetland attracted substantially more customers than either the mail order companies or shops down south.

9.3.1 Shetland remains the most popular choice for the purchase of electrical goods with 308 (77%) interviewees stating that it was their first destination/method of purchase. The popularity of purchasing electrical goods in Shetland may be linked to the difficulty of servicing items which are bought on the UK Mainland. A number of people mentioned that they liked to see and test what they purchase before

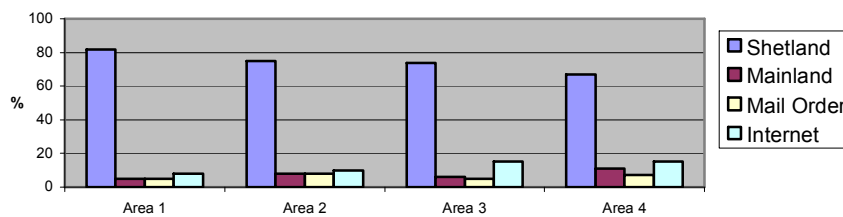
Figure 31 - Where Electrical Goods are Purchased



spending money on goods that may be expensive. It is interesting to note that the internet is the second most popular choice with 10% of interviewees choosing this method. With the exception of the internet, the 2003 survey showed almost identical trends to the 1993 survey.

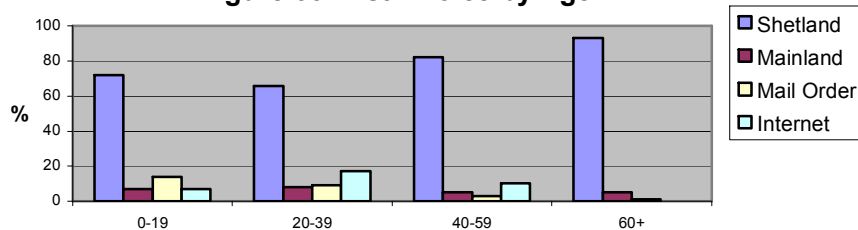
9.3.2 As with the 1993 survey, it was found that people living further away from Lerwick were less likely to shop in Shetland for electrical goods. It was established that the use of the internet increases in areas outwith Lerwick. The reason for these trends could be linked to the convenience of shopping online, and possibly, that people are deterred to travel far to purchase electrical goods when they can be order them from the comfort of their own home and have them delivered to their door.

Figure 32 - 1st Choice by Location



9.3.3 The 60+ age group contained the highest percentage of people most likely to use Shetland to purchase electrical goods, as was the case with the previous survey, whilst the 20-39 age group contained the highest amount of internet purchasers (17%).

Figure 33 - 1st Choice by Age



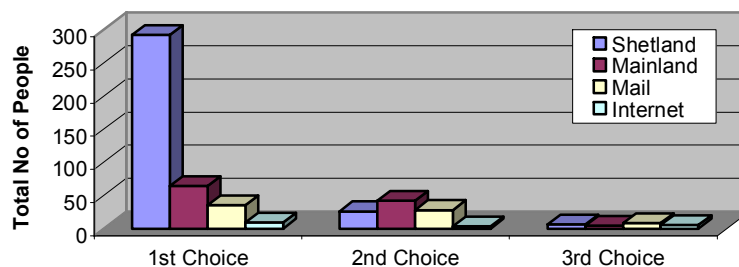
9.3.4 When the purchase of electrical goods was analysed by gender it was found that males were twice as likely to use the internet and the mainland to purchase electrical goods.

9.4 FURNITURE, FURNISHING & CARPETS

The 1993 Survey found that Shetland was the first choice for all age groups, although there was a tendency for the younger age groups to shop on the mainland whilst 80% of the 60+ age group never shopped on the UK Mainland or used mail order.

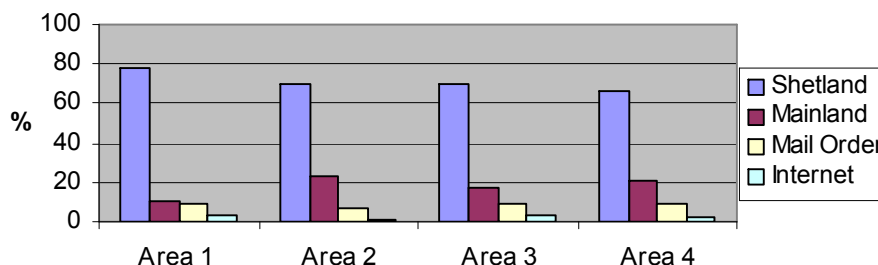
- 9.4.1** Shetland was clearly the most popular location with 292 (73%) of people stating it was their first choice. The UK Mainland was the second most popular destination although it fell well behind Shetland in terms of popularity. The popularity of Shetland can be linked to the majority of these items being bulky, low value and easily damaged. The benefit of seeing and testing what you are purchasing is also a major influence on choosing Shetland's stores.

Figure 34 - Where Furniture etc is Purchased



- 9.4.2** When the 1st choice is analysed by location it was found that residents of Lerwick were the most likely to purchase furniture in Shetland. It was found that the greater the distance from Lerwick, the higher the percentage was of people using the mainland to purchase furniture.

Figure 35 - 1st Choice by Location



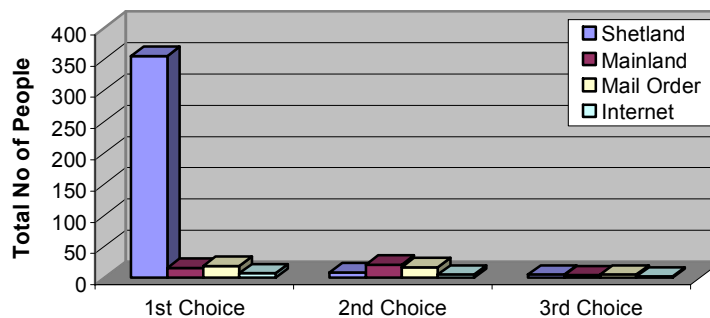
- 9.4.3** When 1st choice is analysed by age the results are similar in nature to the 1993 survey. The 40-59 (77%) and 60+ (91%) age groups were the most likely to use Shetland, whilst only 52% of 0-19 year olds choose Shetland as their first choice. The 1993 survey showed identical trends although the amount of 60+ year olds using Shetland has increased by 10%.

9.5 DIY

The 1993 survey revealed that Shetland was the most popular choice with 84-93% of all age groups.

- 9.5.1 Shetland's shops continue to dominate the DIY market with 89% of people using the island as their first choice, as was the case with the previous survey. The only notable difference was that 10% of people from Area 4 use mail order as their first choice.

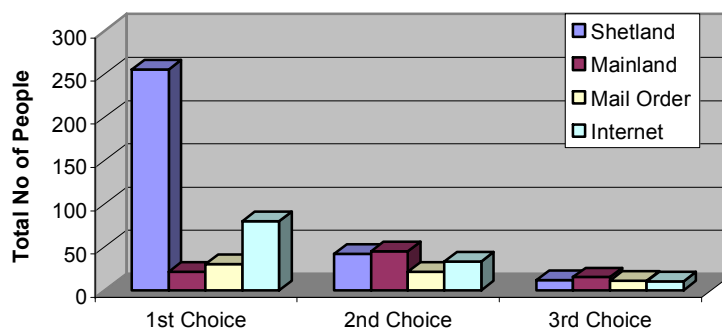
Figure 36 - Where DIY Goods are Purchased



9.6 CD's, DVD's and VIDEOS

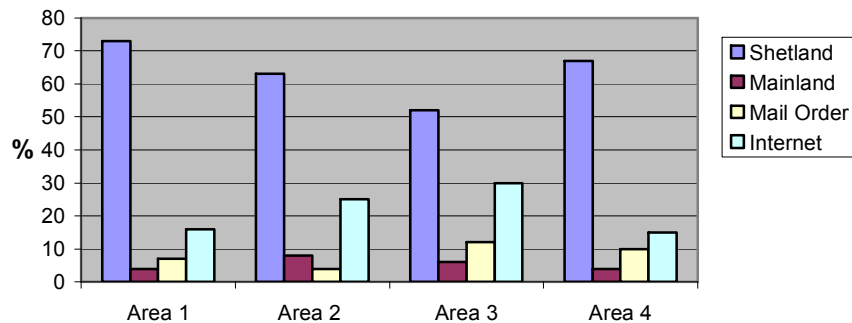
Shetland is the most popular destination for CD's etc, with 64% of people using its shops for their first choice. The popularity of internet shopping is noticeable within this range of goods as 20% of people use it as their first choice. The mainland was a popular second choice, with people stating that they would purchase CD's etc when on holiday.

Figure 37 - Where CD's,DVD's etc are Purchased



9.6.1 When the first choice is analysed by location, residents of Lerwick (73%) were the most likely to use Shetland as their first choice in comparison to 52% of residents of Area 3. Area 3 had the greatest number of people (30%) purchasing online.

Figure 38 - 1st Choice by Location



9.6.2 The highest percentage of age groups purchasing CDs in Shetland were aged 60+ and between 0-19. The highest percentage of age group using the internet as first choice was the 20-39 age group, who may presumably be the most likely to own a computer.

9.6.3 A slightly higher percentage of males used the internet to purchase CD's etc, rather than using Shetland.

9.6.4 Lerwick town centre was the most popular location within Shetland for the purchase of CD's etc, with 73% of all interviewees purchasing only there. 20% of those surveyed only used the Toll Clock, whilst 5% purchased elsewhere, presumably at supermarkets.

10. CONCLUSIONS

The following conclusions can be made in regards to this survey:

Grocery Shopping

- ◆ Shetland's two largest retail outlets, the Co-op and Safeway supermarkets, have an equal share of the grocery shopping sector. In comparison to 10yrs ago, the Co-op's market share has dropped by half, the town centre has dropped by 20% and the use of local shops has dropped by 10%.
- ◆ The main reason for shopping at Lerwick's two supermarkets was convenience. The Co-op was perceived to be a cheaper place to shop whilst a greater number of people thought Safeways offered more choice and had a better shopping environment.

Minor Grocery Shopping

- ◆ The most popular choice with the majority of interviewees was their local shop. When compared to the 1993 survey, it was found that the Town Centre has experienced the largest fall in use.
- ◆ People who live outwith Lerwick are more likely to use a local shop and this is especially the case in remote rural areas.
- ◆ Convenience was clearly the determining factor when choosing a location for minor grocery shopping.

Local Shops

- ◆ A high proportion of interviewees used a local shop, with the majority of people using them between one and three times a week. People who didn't use a local shop were most likely to live in Lerwick and shop at supermarkets instead.
- ◆ There was a marked concern if a local shop was to close, with loss of convenience being the main reason. In general, the local shop was seen as a friendly place to shop that brought benefits to a community, especially in rural areas of Shetland.

Use of Supermarkets & The Internet

- ◆ Supermarkets appear to be relatively popular for the purchase of electrical items and this was due to their competitive prices and convenience of purchasing goods whilst undertaking grocery shopping.
- ◆ Over two thirds of interviewees anticipated using the internet to purchase goods in the future with many people doing so at present.

Transport, Pedestrianisation & Parking

- ◆ The majority of people travel to the town centre by car. Over a third of Lerwick's residents walk when doing their shopping, with residents of the north and south mainland most likely to use public transport.
- ◆ The Hillhead car park is the most popular location to park in Lerwick. The pier car park was another popular choice, whilst on street parking at the Esplanade and the Fort was used by a quarter of interviewees.
- ◆ A majority (55%) of car owners were satisfied with the parking facilities in Lerwick, and this represented an 11% increase in satisfaction since the 1993 survey. This increase in satisfaction can be related to a 28% drop in people wanting more parking spaces.
- ◆ Pedestrianisation of Commercial Street was seen as a success by a significant number of interviewees, although many people thought better enforcement was necessary. With the exception of the 60+ age group, a slight majority of people wanted pedestrianisation to be extended.

Satisfaction with Shopping Facilities

- ◆ Just over half of the interviewees stated that they were satisfied. The percentages increased with age, as with the previous survey.
- ◆ Convenience was once again the most popular reason for shopping in the town, whilst a number of people see the town as being a friendly and stress free shopping location.
- ◆ Lack of choice and the cost of goods were the two most popular areas of dissatisfaction with all age groups and all areas of Shetland. A trend was found in that dissatisfaction lessened with the older age groups. A noticeable increase in dissatisfaction, when compared to the 1993 survey was poor customer service. The Improvements people would like to see were related to areas of dissatisfaction.

Non-food Retailing

- ◆ The UK Mainland and mail order are now the most popular first choice destination and method for the purchase of clothes. People who live in Area 4 and 0-19 year olds use mail order most frequently whilst the 60+ age group use Shetland most frequently. Males were twice as likely to use Shetland's shops, with two times as many women purchasing clothes by mail order. 17% of people have used the internet to purchase clothes.
- ◆ Shetland is clearly the most popular destination for the purchase of shoes, however, 30% of people interviewed never purchase shoes in Shetland. The use the internet became more popular as distance from Lerwick increased.
- ◆ Shetland remains the most popular location for the purchase of electrical goods. Purchasing by the internet accounted for 10% of first choices a figure that is likely to increase once broadband is introduced to Shetland.
- ◆ Shetland has remained the first choice destination for the purchase of furniture/carpets and DIY goods, with over 80% of interviewees using Shetland's shops.
- ◆ Just under two thirds of people purchase CDs etc in Shetland. It was interesting to note the popularity of the internet which accounts for one in five 'first choice' purchases.

LIST OF APPENDICES

Appendix 1: Questionnaire & explanatory notes

Appendix 2: Map of areas used in questionnaire analysis

(1) (i) Where do you live? (ii) Occupation.....

(2) What are the main reasons for your visit to town today?

Shopping (grocery) Shopping (non-grocery) Employment
Multi-purpose trip Other (please specify)

(3) (i) Where do you usually purchase your main grocery shopping?

Town Centre Co-op Safeways Toll Clock Local Shop

(ii) Please state the reason for your preferred choice

Choice Cost Environment Convenience Other

Comments:.....

(4) (i) Where do you usually purchase your minor grocery items?

Town Centre Co-op Safeways Toll Clock Local Shop

(ii) Please state the reason for your preferred choice

Choice Cost Environment Convenience Other

Comments:.....

(5) When do you usually undertake your weekly/fortnightly grocery shop?

Mon Tue Wed Thu Fri Sat Sun

Morning Lunchtime Afternoon Evenings No set day/time

(6) How often do you incorporate your grocery shop with non-food shopping trips, social visits etc?

Always Sometimes Never

(7) (i) Do you use a local/rural shop/post office? Yes No

(ii) If Yes, which one?

(iii) How many times a week on average do you use it?.....

(iv) If No, why not?

It has closed Too expensive Shut when needed

Other (please state)

(8) What do you like most about shopping in at your local shop?

Choice Convenience Friendly atmosphere Don't know

Other (please state)

(9) What do you like least about shopping at your local shop?

Choice Price of goods Opening hours Don't know Other (please state)

Comments:.....

(10) (i) Would you be concerned if your local/village shop was to close?

Yes No (Please explain your choice)

(11) (i) Where do you purchase the following items?

If in Shetland:

Shetland Mainland Mail Internet Digital Town Toll Elsewhere
Order Centre Clock

(i) Clothes								
(ii) Shoes								
(iii) Electrical Goods								
(iv) Furniture/Carpets								
(v) DIY Goods								
(vi) CD's, DVD's, etc								

(12) Have you ever used one of Lerwick's supermarkets to purchase electric goods?

Yes No comments

(13) Do you anticipate using the internet or digital television to purchase goods in the future?

Yes No comments

(14) Do you own a car (or have access to have to a car)? Yes No

(15) How did you travel here today?

Bike Car Car (Passenger) Public Transport Walk

(16) Where do you usually park in the town centre?.....

(17) How long does it normally take for you to find a parking space?

1-5mins 5-10mins +10mins

(18) What is your opinion on the car parking charges for Victoria Pier?

Cheap Reasonable Too expensive Don't Know

(19) Do you think the parking facilities in the town centre are adequate? Yes No
If no, how could they be improved?

(20) Do you think the street has been improved by pedestrianisation?

Yes No Don't Know Should be extended Shouldn't be extended
Comments.....

(21) Are you satisfied with the shopping facilities in Lerwick? Yes No

(22) What do you like most about shopping in Lerwick?

Friendly atmosphere Parking facilities Stress Free Convenient

Customer Service Don't know Other (specify)

(23) What do you like least about shopping in Lerwick?

Cost of goods Lack of choice Lack of chainstores Opening hours
Parking Facilities Customer Service Other (specify)

(24) What improvements to the shopping experience would you like to see in Lerwick?

More chainstores Increased variety of shops Improved car parking facilities

Longer opening hrs Improved shopping environment Don't Know Other (please specify)

QUESTIONNAIRE EXPLANATORY NOTES

(a) Purpose of the Survey

In 1993 the SIC undertook a shopping questionnaire for input into the 'Commercial Development' working paper. This survey is required to compare whether trends and opinions have changed since 1993. This questionnaire also builds on the previous survey to discover views on rural/local shops and internet shopping.

(b) Locations to survey

It is proposed to use the questionnaire at the following four locations; namely:-

- Town centre (Commercial Street, Esplanade, Market Street)
- Toll Clock centre (within the covered mall area and rear car park)
- Outside the Co-op supermarket.
- Outside the Safeway supermarket.

(c) Survey size and organisation

It is proposed to sample 5% of Shetland households. This is equivalent to about 400 completed questionnaires. It is suggested that the ratio should be:

150 in the Town Centre
100 in the Toll Clock
75 in the Co-op
75 in Safeway's

When organising times/days to do the survey work, it is important to plan ahead to ensure that there is no bias in the day or time the data was collected at one location (e.g. all Co-op survey work carried out on Thursday/Friday afternoons).

Please try to ensure that you interview a representative cross section of the public, (as far as is practicable), in terms of age and sex.

Do not fill in a questionnaire if the person you are interviewing has already been asked the questions at another time/day or location.

(d) Detailed instructions for filling in the questionnaires

Q1: If the interviewee is not usually resident in Shetland, do not fill in a questionnaire form. If the person lives in Lerwick, record their area (and preferably the street name). For places outwith Lerwick give the village or local area name.

Q2: Tick as many boxes as are appropriate. If more than one reason is given, also tick the multi-purpose trip box.

Q3 & Q4: Analysis of shopping trips for food confirms a split between "main grocery trips" and "minor top-up trips". The former is represented by regular weekly/fortnightly/monthly trips to stock up non-perishable food supplies, the latter, by more irregular trips for additional (often perishable) foodstuffs e.g. milk, bread etc. The purpose of Q3 & Q4 is to see what Shetland patterns emerge for these different trips. Only record one tick per question.

Q3(i) & Q4(i): Reason for preferred choice. This is to analyse the reason people undertake their shopping at their chosen location. Only record one tick per question.

Q5: Is used to discover when interviewees usually undertake their weekly/fortnightly (major) grocery shop. Tick the appropriate day and/or time. If they don't have a set day or day or time tick the appropriate box.

Q6: Please tick only one box for this.

Q7(i) – Tick yes or no. If yes get the interviewee to answer Q7(ii) & Q7(iii). **If no, get the interviewee to answer Q7(iv) and then finish the interview.** If they don't have a local/rural shop or post office move on to Q11.

Q8 & Q9 – You may tick more than one box for these questions. Again, include opinions and try not to influence decisions.

Q10 – Get the interviewee to answer and to briefly explain their choice.

Q11 - Questions 7(i)-(vi) should be filled in differently. Note that the questions are in two parts. Rather than ticking the appropriate box, use the numbers 1-5 to express the proportion of goods bought at the five different locations. For example if a person says they mainly buy their clothes down south, sometimes in Shetland, occasionally by mail order and they use the internet on rare occasions, record a number "1" in the down south box, "2" in the Shetland box, "3" in the mail order box and "4" in the Internet box. Where a person never uses mail order, for example, or never buys furniture through digital television, leave that box blank.

For questions 7(i)-(vi), if items are bought in Shetland, record in the highlighted box where the goods are mainly bought by ticking the appropriate boxes.

Q12 - This question is used to examine whether the interviewees are purchasing items such as TV's, Video's etc from the supermarkets. Please give examples in the comments box.

Q13 - This question is used to discover whether people intend to use the internet or digital television to purchase goods in the future. Tick the appropriate box(s) & write any comments.

Q14 & Q15 – Questions on travel - tick the appropriate box for each.

Q16 – Please write in where the interviewee usually parks when in the town centre.

Q17 & 18 – Tick one box.

Q19 – Tick one box and write in the interviewees comments/views.

Q20 – Tick the appropriate box. (yes, no or don't know), also ask them whether they think the pedestrianisation should be extended and tick the appropriate box.

Q21 – Tick appropriate box.

Q22-24 – You may tick more than one box for these questions. These questions include a chance for people to give their opinions. Try to make sure you do not influence them by making suggestions yourself! If a person has no particular opinion record their view as "don't know".

APPENDIX 2

Areas used in shopping questionnaire analysis

Area 1: **Lerwick**

Area 2: **East & Central Mainland**

Area 3: **North Central & South Mainland**

Area 4: **Rest of Shetland**

