

Plans For More Supermarkets In Hayle – Consultation Outcome

An independent study into the views and attitudes of the local community and traders on plans for more supermarkets in

HAYLE



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Overview

This survey and report has been prepared on a voluntary basis by Hayle Residents Association with the full support of Hayle Town Council. A subsidy towards the modest printing costs of the questionnaire was gratefully received from the Hayle Area Plan Partnership.

There currently exists no substantive, up-to-date study detailing the views of the local community and businesses on the issue of further supermarkets in the Hayle context.

In 2007 a study was commissioned jointly by Penwith District Council and Hayle harbour owners ING to establish various retail trends in the region. The Penwith Retail Study has subsequently become an important reference document for developers and planners alike and to the best of our knowledge, the only such document in existence.

The Penwith Retail Study however did not set out to discern the attitude of the community and businesses with respect to more supermarkets in Hayle. It does, via a telephone survey of 67 households, estimate where Hayle's grocery expenditure is going in terms of locality. The findings of which are currently used to support supermarket development aspirations.

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Purpose

The purpose of the exercise was to obtain up-to-date, representatively accurate views of the local community and businesses on plans for more supermarkets in Hayle. Importantly our aim was to ensure that any views attained were done so in a totally neutral and 'non-leading' way.

Another primary aim was to establish a robust, up-to-date view of the buying patterns of the community with respect to their main grocery shopping.

The overriding purpose of this report is to provide a timely, accurate reference to assist councillors and planners alike to make informed choices on such matters as it is the community that has to endure the outcome of the decision makers.

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Study area/scope

The study area covers households in the TR27 postcode region.

Approximately 6% of returned questionnaires were from non-TR27 post code areas. The key findings from these are shown separately in this report.

The study has gone to considerable lengths to ensure that the specific views of Hayle's independent 'high street' traders are also fully taken into account. To this end we have separated their views from those of the community at large.

Three sets of results are shown for the majority of questions;

- ✓ Community
- ✓ Businesses
- ✓ Consolidated (Community + Businesses)

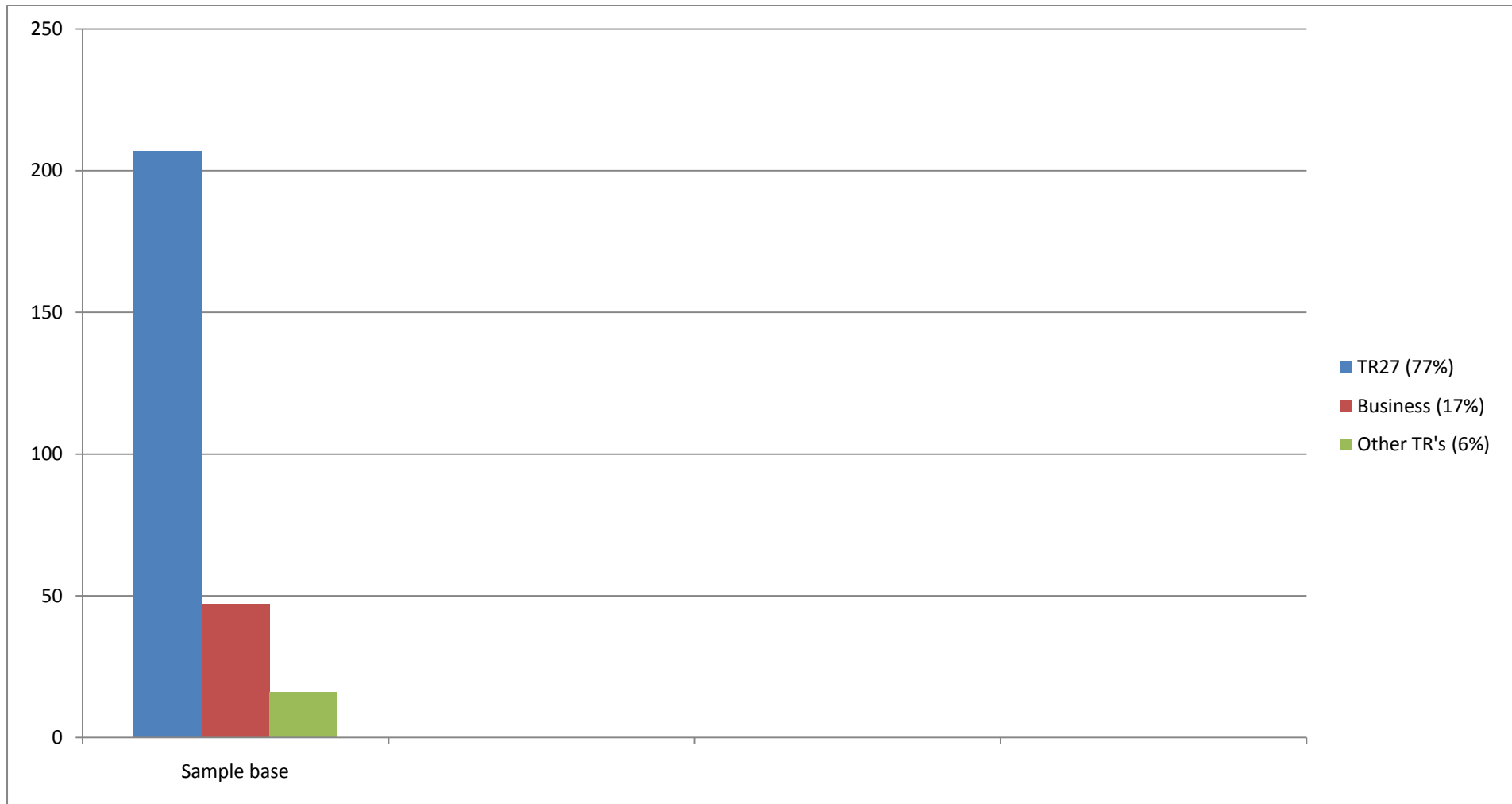
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Method/Sample

- A neutral, non-leading questionnaire formed the basis of this study.
- Only raw data from the returned questionnaires has been used in compiling this report.
- No weighting, factoring or any form of empirical adjustment has been made to the data.
- Window posters and questionnaires were widely distributed to a number of outlets in Hayle.
- Outlets included 'high-street' traders/businesses - Foundry to Copperhouse and the library.
- Respondents completed the questionnaires voluntarily under their own volition.
- No door to door or pavement canvassing has taken place.
- The consultation took place during September/October 2009.
- 270 completed questionnaires were received inclusive of 47 separate business returns.
- Total consolidated sample base is therefore 270.
- The same questionnaire was completed by the community and businesses.
- Business sample represents in excess of 90% 'high-street' retail based businesses.
- Approximately 6% (16) of returned questionnaires were from outside TR27 postcode area.

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Breakdown of sample base



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Hayle businesses consulted

Public Houses/Cafe's/Bars/Restaurants

Mr B's, Cornish Arms, Heyls kitchen, Johnny's Café, The Royal Standard, Grameen Indian Restaurant, Fresh Cafe, Philps Bakery, Salt Bar, Curry Leaf Indian Restaurant, Balti King Indian Restaurant, The Cornubia, Copperhouse Pub, Chip Shop (Penpol Terrace), The White Hart & Cafe 7.

Grocery Shops/Newsagents/Butchers

Hampson's, Premier, Martins, Spar Shop, The Ark, Copperhouse Post Office & Colin's Market Garden.

Non Food/Service Provision

Fishing Tackle Shop (Pratt's Market), Foundry Gallery (Pratt's Market), Inspiration, Auto Shack, Hayle Cycles, Hairdressers (59), The Wharf, HQ Hairdressers, Silver Workz, Copperhouse Clinic, Angove Sports, TJ Barber Shop, Blewett's, Shelly's Furniture Emporium (Pratt's Market), Flowertime Florists, Sue's Wool Stall (Pratt's Market), Male Company Barbers, Rainbow Cat Rescue, New Image, Bee Inspired, Blush, Biggleston's, Down The Line, Strawberry Blondes, Central Garage, Copperhouse Jewellers , Jolly Bodger, & Dune.

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The questions asked

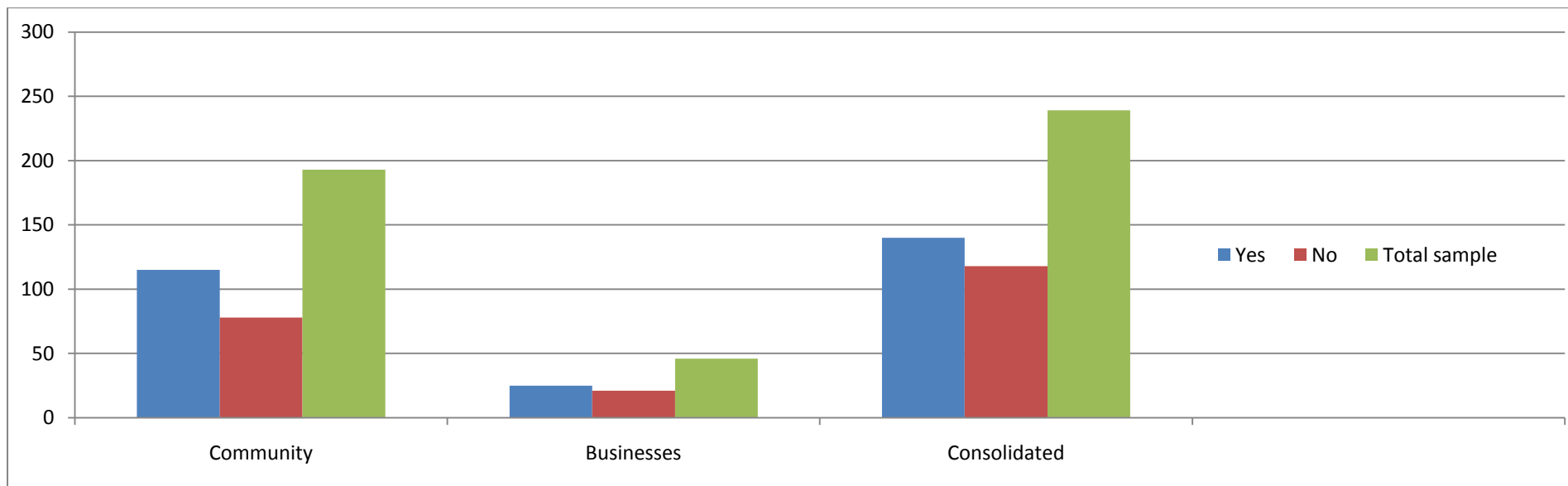
Q1. Are more supermarkets needed in Hayle?	Yes	No
Q2. Have you seen ING's proposal for South Quay?	Yes	No
If yes do you approve?	Yes	No
Q3. Are you in favour of a supermarket on South Quay (opposite Penpol Terrace)?	Yes	No
If No , where would your preferred location(s) be?		
1 st choice.....		2 nd choice.....
If No , would the inclusion of leisure facilities such as a cinema and swimming pool for example change your view?	Yes	No
Q4. Would you prefer a higher number of smaller, more diverse retail outlets on South Quay?	Yes	No
Q5. What effect do you believe a supermarket will have on Hayle's existing traders if it was located at:-		
a) An 'In-Town' location (e.g. South Quay)?	Negative	Negligible Positive
b) An 'Out of Town' (e.g. Loggans Moor)?	Negative	Negligible Positive
Q6. Should a supermarket development go ahead on South Quay, do you believe that an adjacent, key tourist attraction (e.g. H.M.S. Plymouth) would benefit existing traders?	Yes	No
Q7 Which town do you buy your main grocery shopping from?		
Is this through convenience because you work in or near that town?	Yes	No

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Responses to question 1

Q1. Are more supermarkets needed in Hayle?

Community responses:	Yes (115) 60%	No (78) 40%
Business responses:	Yes (25) 54%	No (21) 46%
Community + businesses consolidated:	Yes (140) 59%	No (99) 41%

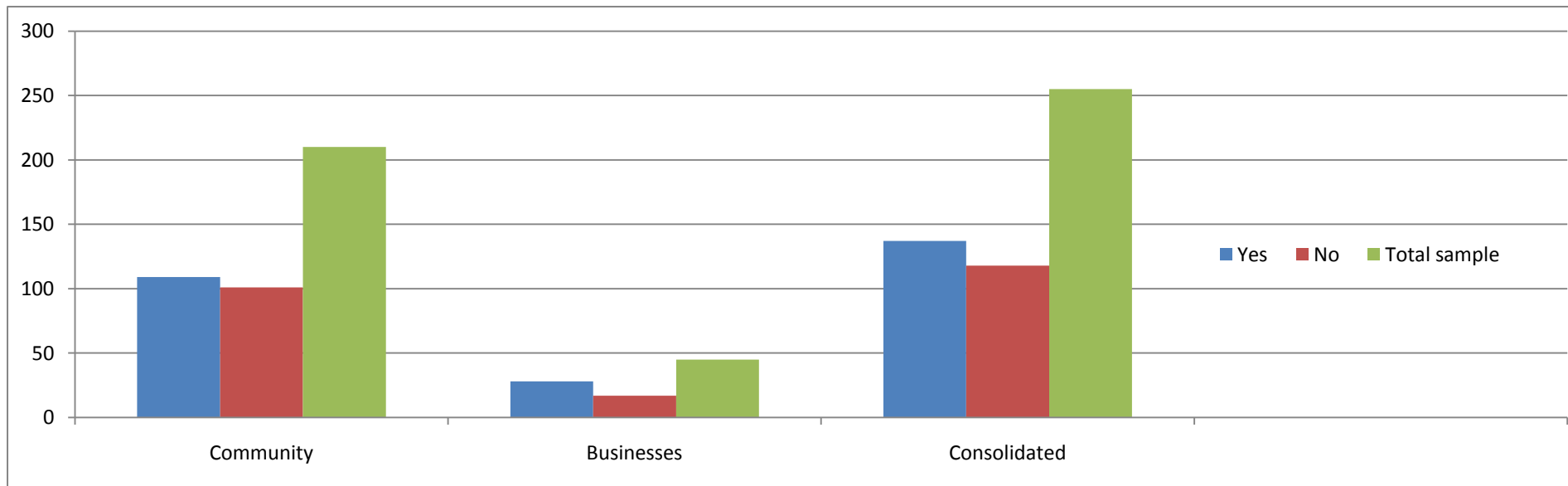


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Responses to question 2

Q2. Have you seen ING's proposal for South Quay?

Community responses:	Yes (109) 52%	No (101) 48%
Business responses:	Yes (28) 62%	No (17) 38%
Community + businesses consolidated:	Yes (137) 54%	No (118) 46%

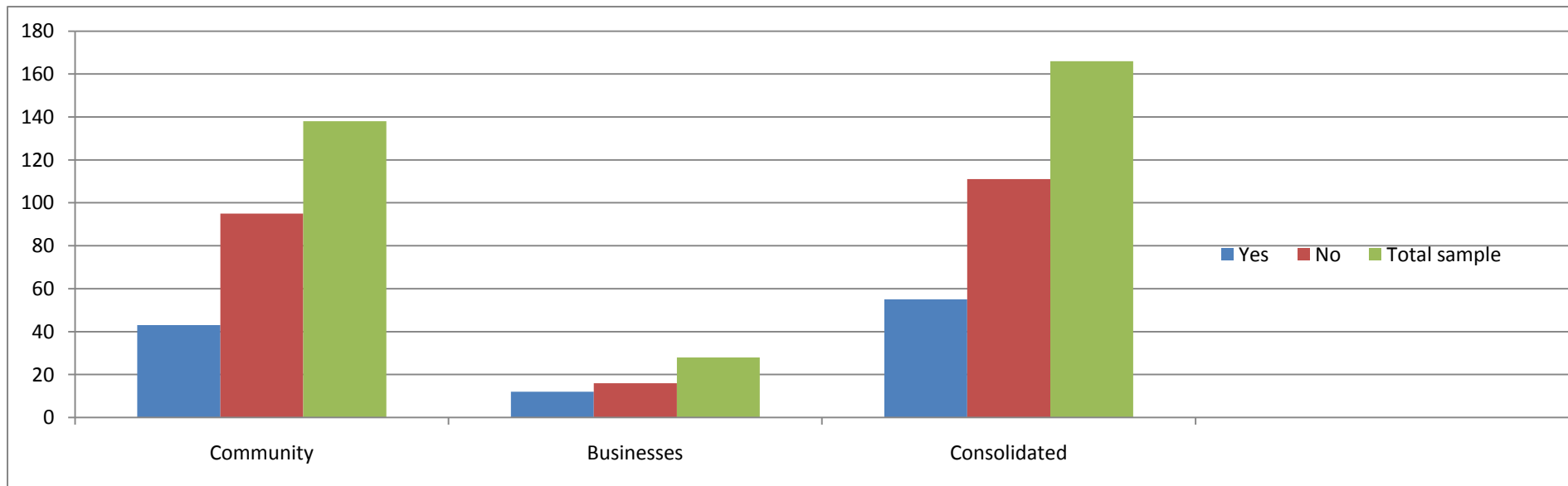


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Responses to question 2

If yes to Q2 do you approve of ING's proposal for South Quay?

Community responses:	Yes (43)	31%	No (95)	69%
Business responses:	Yes (12)	43%	No (16)	57%
Community + businesses consolidated:	Yes (55)	33%	No (111)	67%

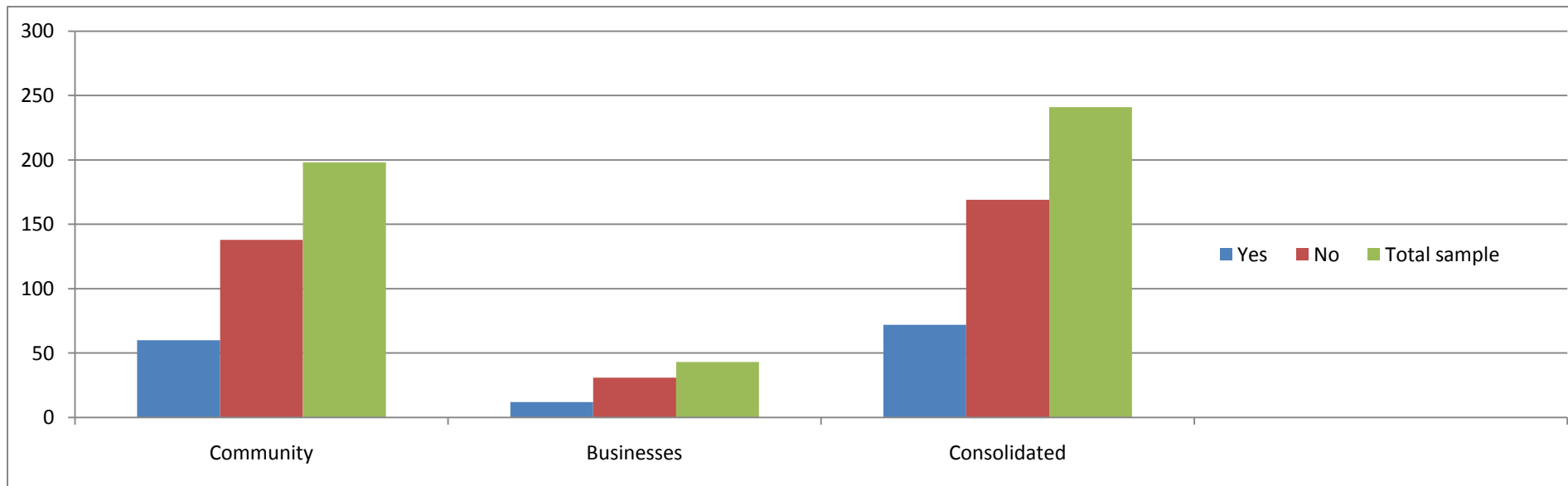


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Responses to question 3

Q3. Are you in favour of a supermarket on South Quay (opposite Penpol Terrace)?

Community responses:	Yes (60)	30%	No (138)	70%
Business responses:	Yes (12)	28%	No (31)	72%
Community + businesses consolidated:	Yes (72)	30%	No (169)	70%



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Responses to question 3 continued

Q3. If No to Q3 (South Quay), where would your preferred location(s) be?

Table 1

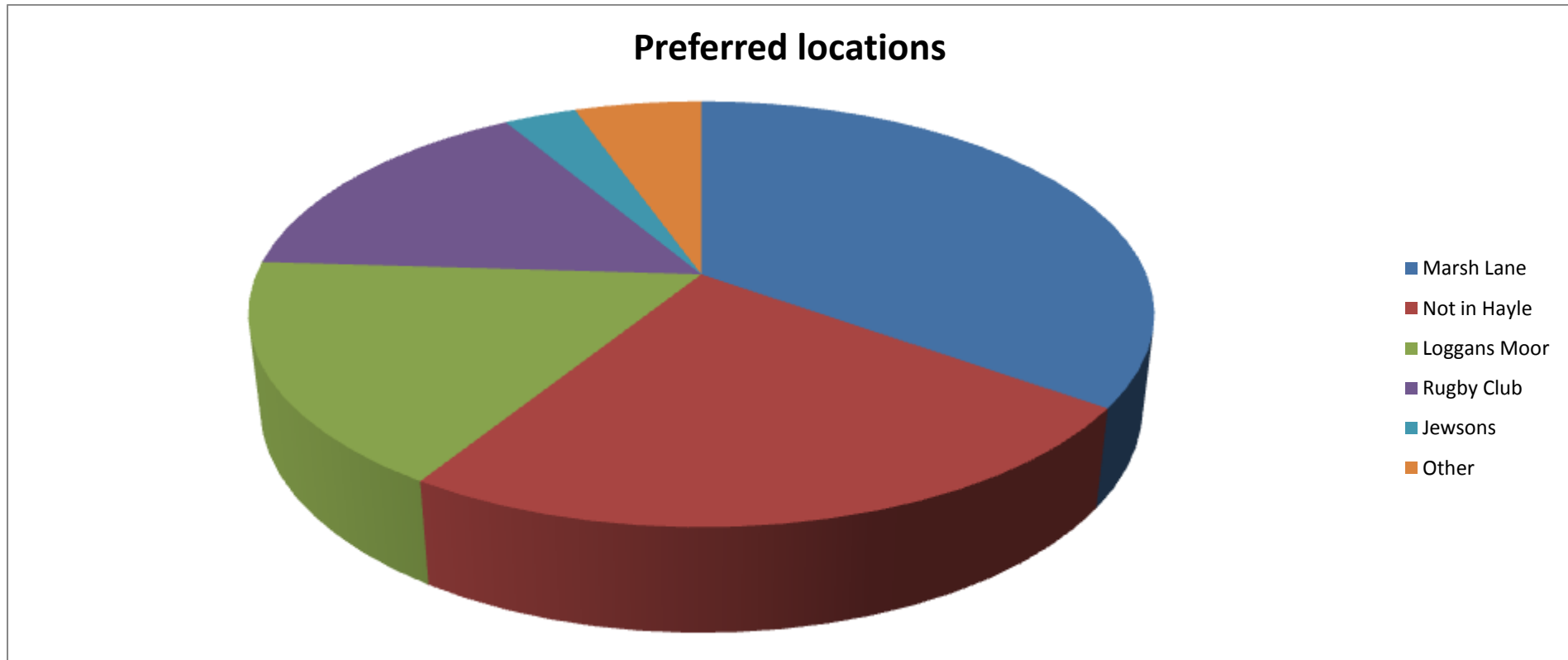
LOCATION	COMMUNITY	BUSINESSES	CONSOLIDATED	%
Not in Hayle	22	9	31	24%
Marsh Lane	34	11	45	35%
Loggans Moor	19	3	22	17%
Rugby Club	19	1	20	15.75%
Jewsons site	4	0	4	3%
Old Daniels site	2	0	2	1.5%
R & J site	2	0	2	1.5%
Old ATS site East Quay	1	0	1	0.75%
Old primrose dairy site	1	0	1	0.75%
Copperhouse	0	1	1	0.75%
Sample	104	25	129	100%

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Responses to question 3 continued

Q3. If No to Q3 (South Quay), where would your preferred location(s) be?

Pie chart representative of Table 1 above.

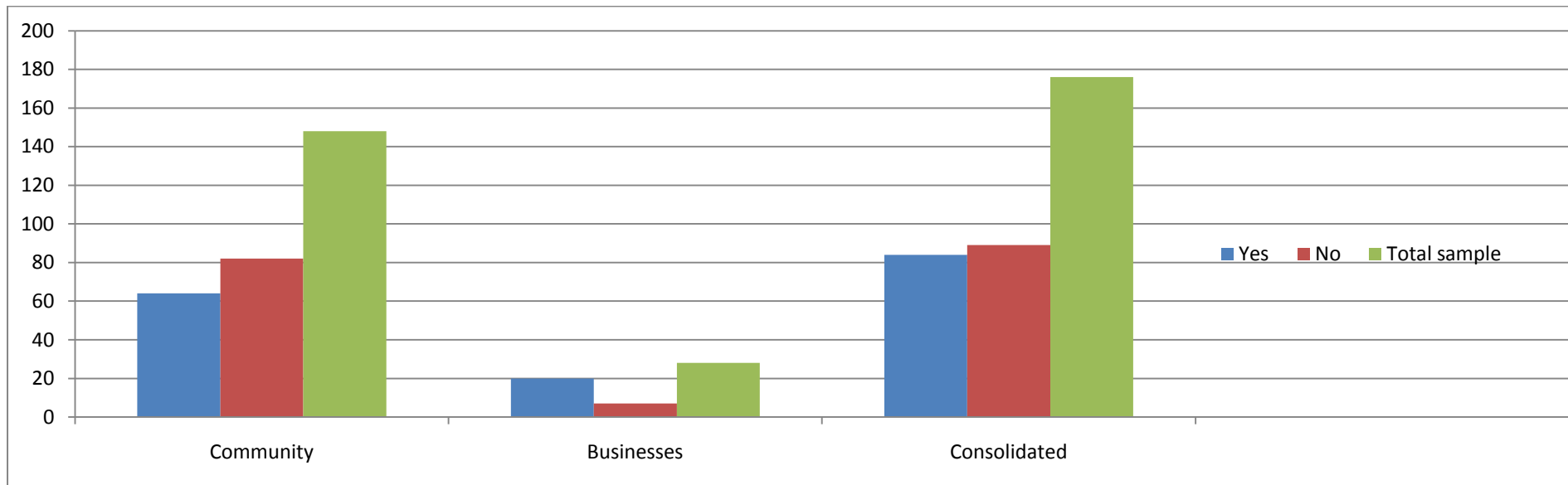


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Responses to question 3 continued

Q3. If not approving of supermarket on South Quay, would the inclusion of leisure facilities such as a cinema and swimming pool for example change your view?

Community responses:	Yes (64)	43%	No (82)	56%	Maybe (2)	1%
Business responses:	Yes (20)	71%	No (4)	25%	Maybe (1)	4%
Community + businesses consolidated:	Yes (84)	48%	No (89)	50%	Maybe (3)	2%

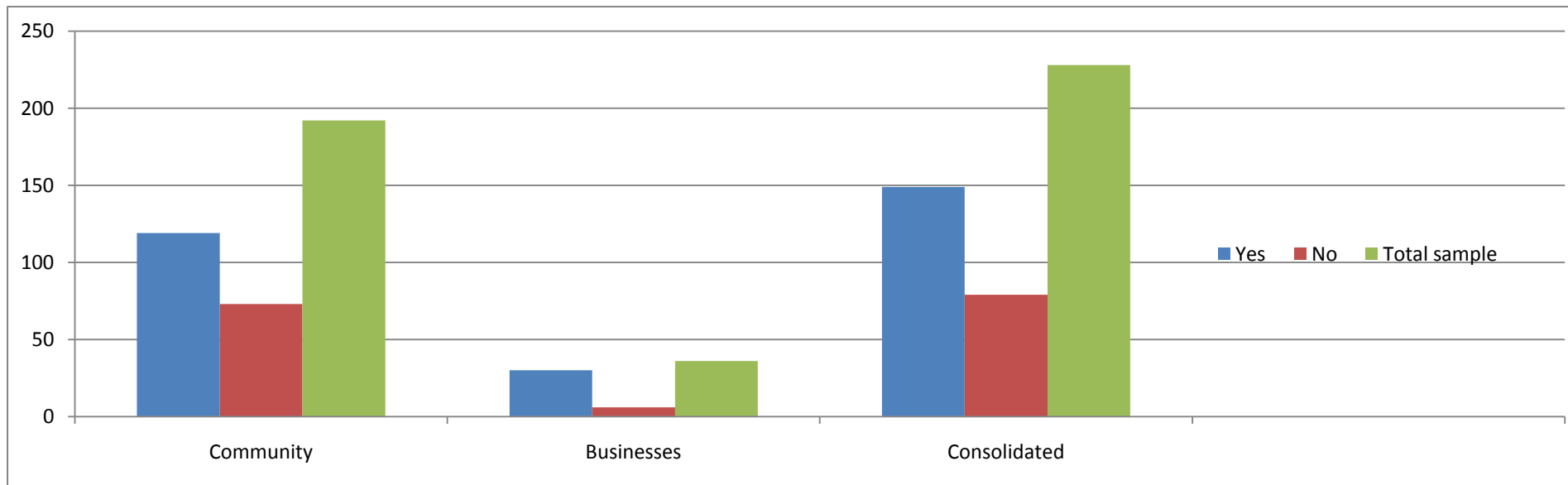


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Responses to question 4

Q4. Would you prefer a higher number of smaller, more diverse retail outlets on South Quay?

Community responses:	Yes (119)	62%	No (73)	38%
Business responses:	Yes (30)	83%	No (6)	17%
Community + businesses consolidated:	Yes (149)	65%	No (79)	35%

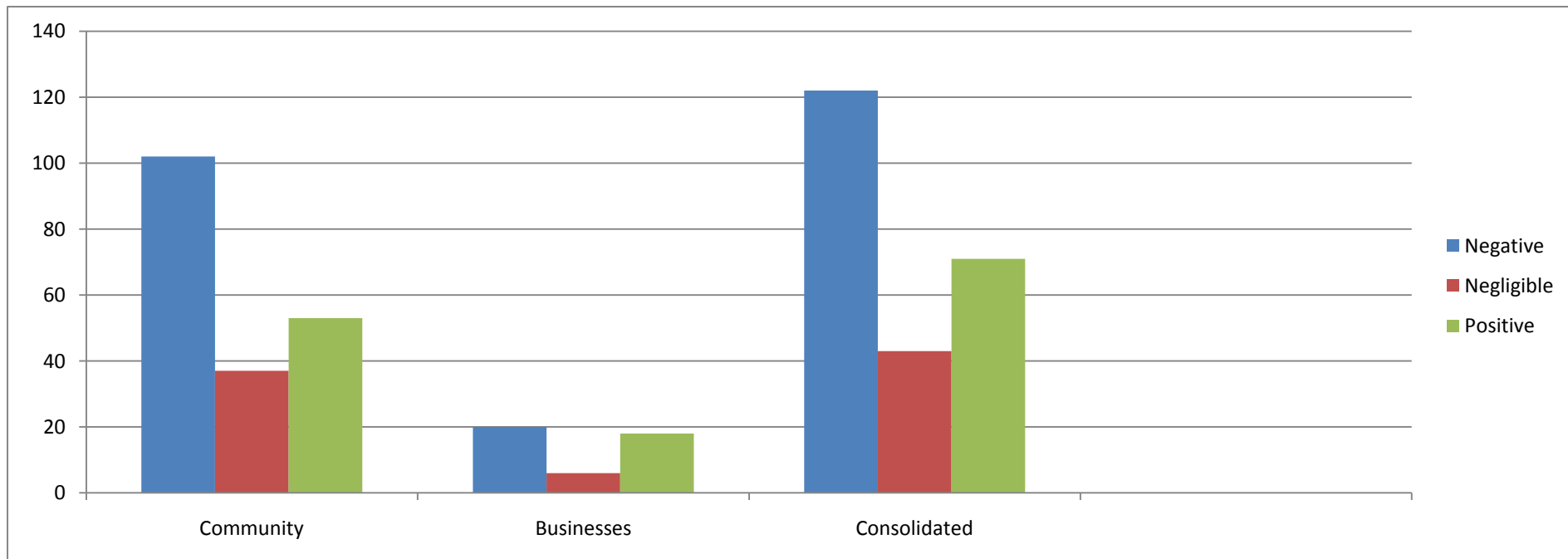


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Responses to question 5a

Q5a. What effect do you believe a supermarket will have on Hayle's existing traders if it was located at an 'In-Town' location (e.g. South Quay)?

Community responses:	Negative (102) 53%	Negligible (37) 19%	Positive (53) 28%
Business responses:	Negative (20) 45%	Negligible (6) 14%	Positive (18) 41%
Community + businesses consolidated:	Negative (122) 52%	Negligible (43) 18%	Positive (71) 30%

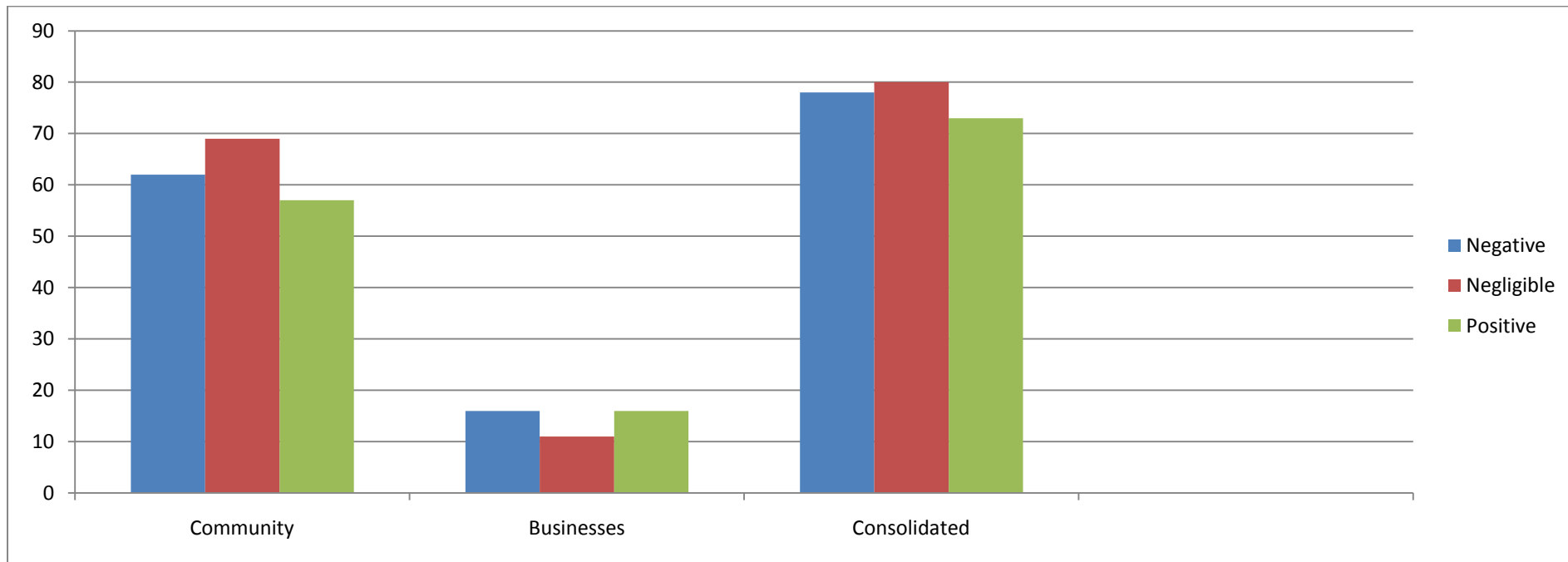


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Responses to question 5b

Q5b. What effect do you believe a supermarket will have on Hayle’s existing traders if it was located at an ‘Out of Town’ location (e.g. Loggans Moor)?

Community responses:	Negative (62)	33%	Negligible (69)	37%	Positive (57)	30%
Business responses:	Negative (16)	37%	Negligible (11)	26%	Positive (16)	37%
Community + businesses consolidated:	Negative (78)	34%	Negligible (80)	34%	Positive (73)	32%

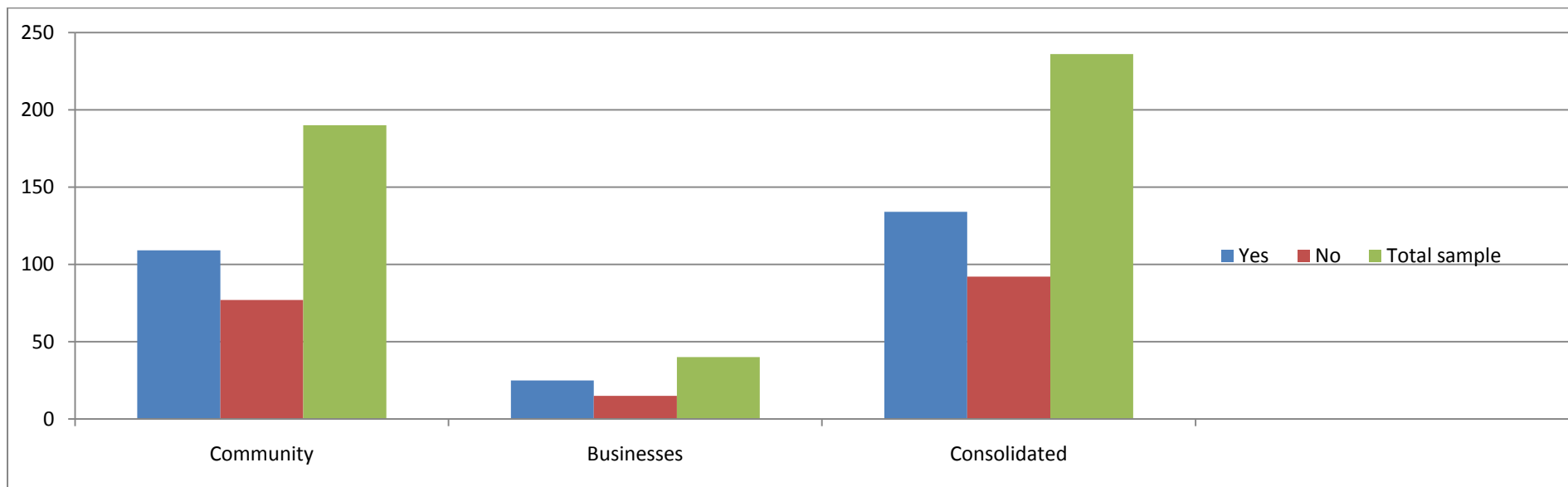


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Responses to question 6

Q6. Should a supermarket development go ahead on South Quay, do you believe that an adjacent, key tourist attraction (e.g. H.M.S. Plymouth) would benefit existing traders?

Community responses:	Yes (109) 57%	No (77) 41%	Maybe (4) 2%
Business responses:	Yes (25) 62.5%	No (15) 37.5%	Maybe (0) 0%
Community + businesses consolidated:	Yes (134) 58%	No (92) 40%	Maybe (4) 2%

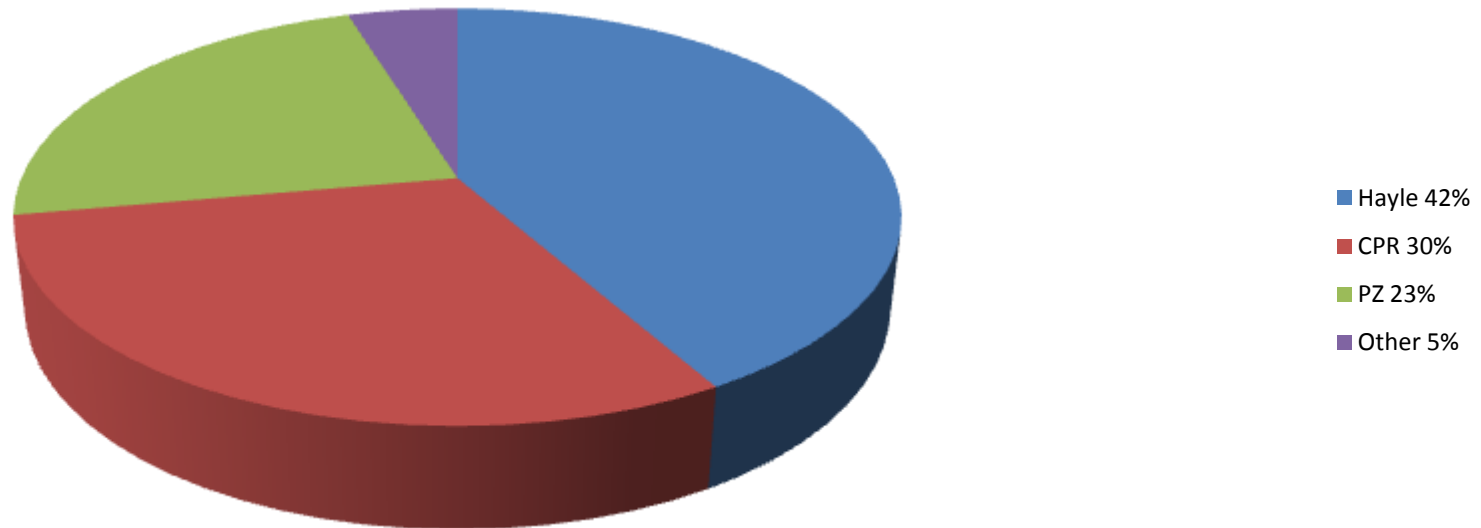


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Responses to question 7

Q7. Which town do you buy your main grocery shopping from?

TR27 Main Grocery Shopping Assessment October 2009



Total sample: 230 (consolidated community & businesses), excludes Non TR27 respondents.

CPR (Camborne, Pool, Redruth) PZ (Penzance)

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Responses to question 7 continued

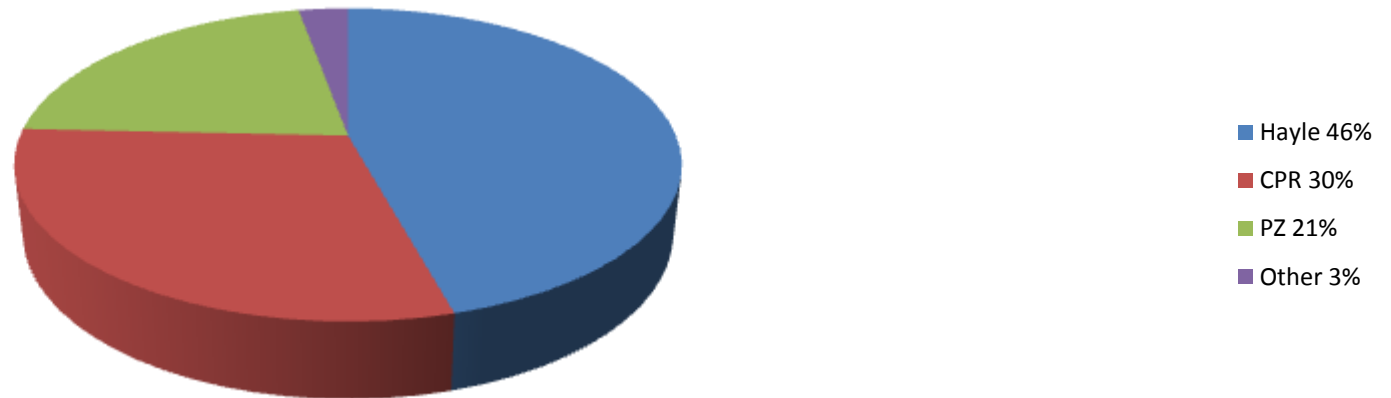
Q7. Which town do you buy your main grocery shopping from.....? Is this through convenience because you work in or near that town?

Note. This question was added to gauge the approximate number of Hayle households (TR27's) that obtain their shopping outside of Hayle through the convenience of working near or in that town.

Out of a total sample of 230, 20 respondents (9%) fell into this category (CPR (7) 35%, PZ (7) 35%, Other (6) 30%).

Assuming additional supermarkets in Hayle would not affect the main grocery buying pattern of the above category, the following revised percentages would apply:

TR27 Main Grocery Shopping Assessment 2009 (Less Convenience Shoppers)



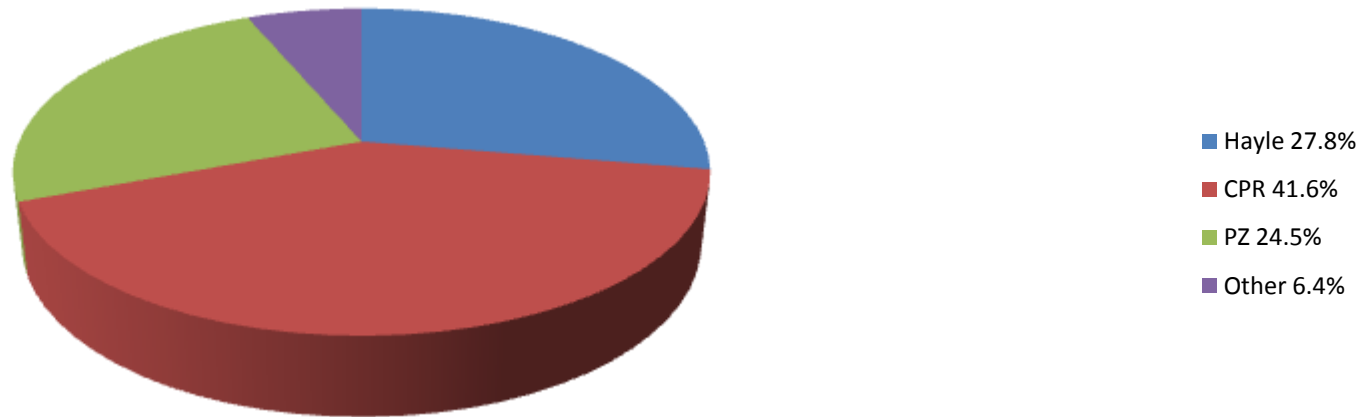
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Responses to question 7 - Variance with Penwith Retail Study of 2007

The Penwith Retail Study 2007

Primarily through a telephone survey of 67 households published in December 2007, The Penwith Retail Study indicated that Hayle was only able to retain circa 25% of main shopping trips and approximately 50% of top-up shopping trips. Statistics frequently used to support supermarket development aspirations in Hayle. This shopping pattern data forms an intrinsic part of the formula in assessing the future need for additional retail floor space.

TR27 Main Grocery Shopping - Penwith Retail Study 2007



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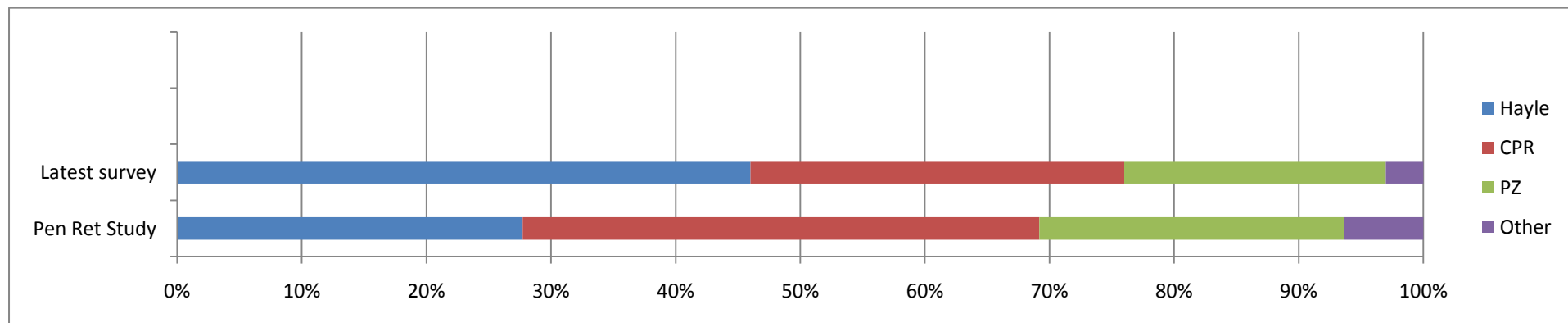
Variance analysis

The significant variance between the Penwith Retail Study 2007 findings and this up-to-date study is most likely attributable to a combination of the following factors:

- The subsequent arrival of M&S at the Southwest Retail Park.
- The recent large-scale expansion of Lidl's store.
- The recent major refurbishment/upgrade of the CO-OP.
- Subsequent introduction/expansion of local farm shops.
- Penwith study did not ascertain/factor for out of town shoppers through convenience of work.
- Inherent inaccuracies in the Penwith study due to very low sample.

The Penwith Retail Study did acknowledge that the arrival of M&S and Lidl's expansion will have an impact on their assessment of main shopping trips.

Main shopping trips by TR27 households - Penwith Retail Study V Latest Study



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Snapshot of Non TR27 respondents to the key questions

Total number of Non TR27 respondents within sample is 16.

Q1. Are more supermarkets needed in Hayle?

Yes = (5) 31% No = (11) 69%

Q3. Are you in favour of a supermarket on South Quay (opposite Penpol Terrace)?

Yes = (2) No = (14) 88%

Q3. If No to Q3 (South Quay), where would your preferred location(s) be?

Marsh Lane = (5) 71% Rugby Club = (1) 14% Loggans Moor = (1) 14%

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Executive Summary - based on consolidated (community + business) findings

- This report was produced on a voluntary basis and is supported by Hayle Town Council.
- Its findings are based on the raw data from completed returns of an unbiased and 'non-leading' questionnaire.
- No known similar study into Hayle community/business views or attitudes to more supermarkets in Hayle exists.
- Developers own questionnaire based studies are often 'leading' in their nature.
- Study was carried out in September/October 2009 with a total sample of 270 from the community and businesses.
- On the issue of more supermarkets in Hayle, 59% feel more are needed.
- Just over half (54%) of the sample have seen ING's proposal for a supermarket on South Quay.
- 67% of the sample disapprove of ING's proposal.
- 70% are not in favour of a supermarket on South Quay, only 30% are in favour.
- Preferred locations; 1st) Marsh Lane 35% 2nd) Not in Hayle 24% 3rd) Loggans Moor 17% 4th) Rugby Club 15.75%.
- Just over half (54%) against a supermarket on South Quay would not change their view if a pool/cinema was included.
- 65% would prefer to see a higher number of smaller, more diverse retail outlets on South Quay.
- 52% said a supermarket on South Quay will have a negative effect on existing traders (30% positive, 18% negligible)
- Effect on an 'out of town' supermarket are evenly split (34% negative, 35% negligible, 32% positive).
- 58% believed a tourist attraction (e.g. H.M.S. Plymouth) would benefit existing traders alongside a supermarket.
- Hayle retains circa 42- 45% of main grocery shopping trips – significant variance with 2007 Penwith Retail Study.
- Circa 9% of the TR27 sample obtain their main grocery shopping out of Hayle through convenience of work.
- Total 16, non TR27 respondents, 69% against more supermarkets in Hayle, 88% against supermarket on South Quay.
- It should be noted that feedback from 'high-street' retailers, indicate a general, desperate need for greater footfall.

All completed questionnaires are available upon request from Hayle Town Council.