

Quantum
Market
Research

Adelaide Retail Trading Hours Report

Shopping Centre Council of Australia
& National Retail Association

June 2021



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Key Findings

Increasingly busy South Australians need more time to shop on Sunday morning and Saturday afternoon

Change is requested urgently and there is majority support for a referendum

Allowing larger shops to open would lead to a NET increase in support for local business

Freedom to shop 'outside of work hours' and combatting youth unemployment are key drivers of demand for reform

Extended hours would offer more convenient times to shop for those caring for children and working shifts



75%

of adults want permitted shopping hours to be extended



61%

of adults agree that they want their chance to vote in a referendum

Support is particularly strong among those:

- In the middle \$90-120k pay bracket **81%**
- Caring for children **71%**
- Households of retail workers **74%**



9 in 10

would support local (smaller) retailers as much, if not more than before, were reform to be passed

Among those who 'wish the shops were open for longer' almost 1 in 3 (30%) would support local retailers more than before



8 in 10

concerned about youth unemployment / underemployment in SA

Yet 6 in 10 agree reform would lead to a significant increase in jobs



Among those caring for children

83%

want shopping hours to be extended

1 in 5 adults are motivated by the need to shop outside of work hours

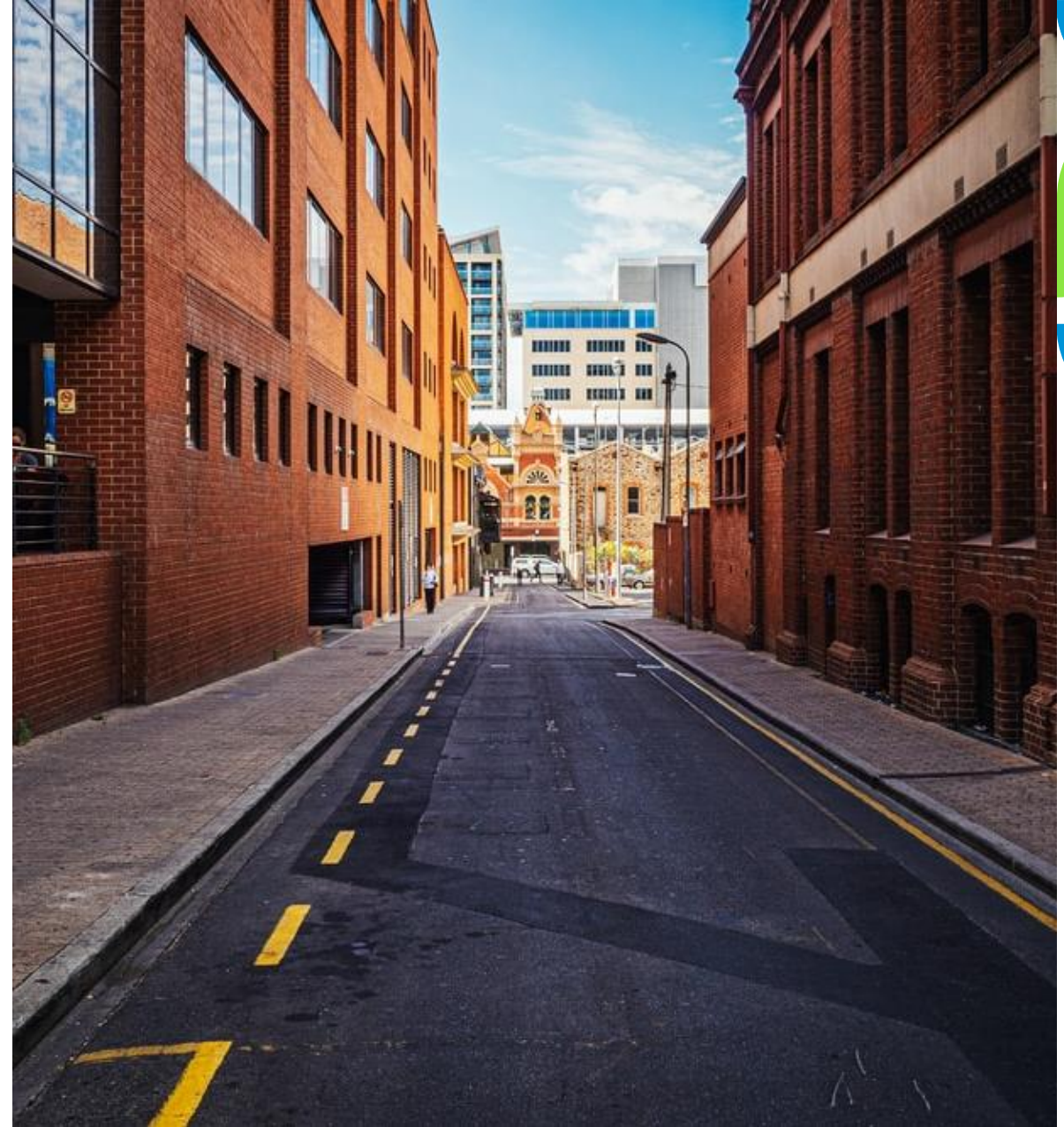


About the research

Research Objectives

To measure the appetite and motivations of adults in Adelaide for the reform of permitted retail trading hours

1. Gain an understanding of Adelaide's attitudes and behaviours around permitted retail hours in their city
2. Measure demand for the reduction / extension of existing permitted retail trading hours
3. Analyse and measure the drivers of demand for permitted trading hours reform
4. Measure the appetite for a referendum on permitted trading hours reform
5. Better understand the potential impact on local (smaller) retailers by the possibility that larger shops could be allowed to open for longer



Methodology



Online quantitative survey of Adelaide adults.



In field 02/06/21-10/06/21



5 minutes survey.

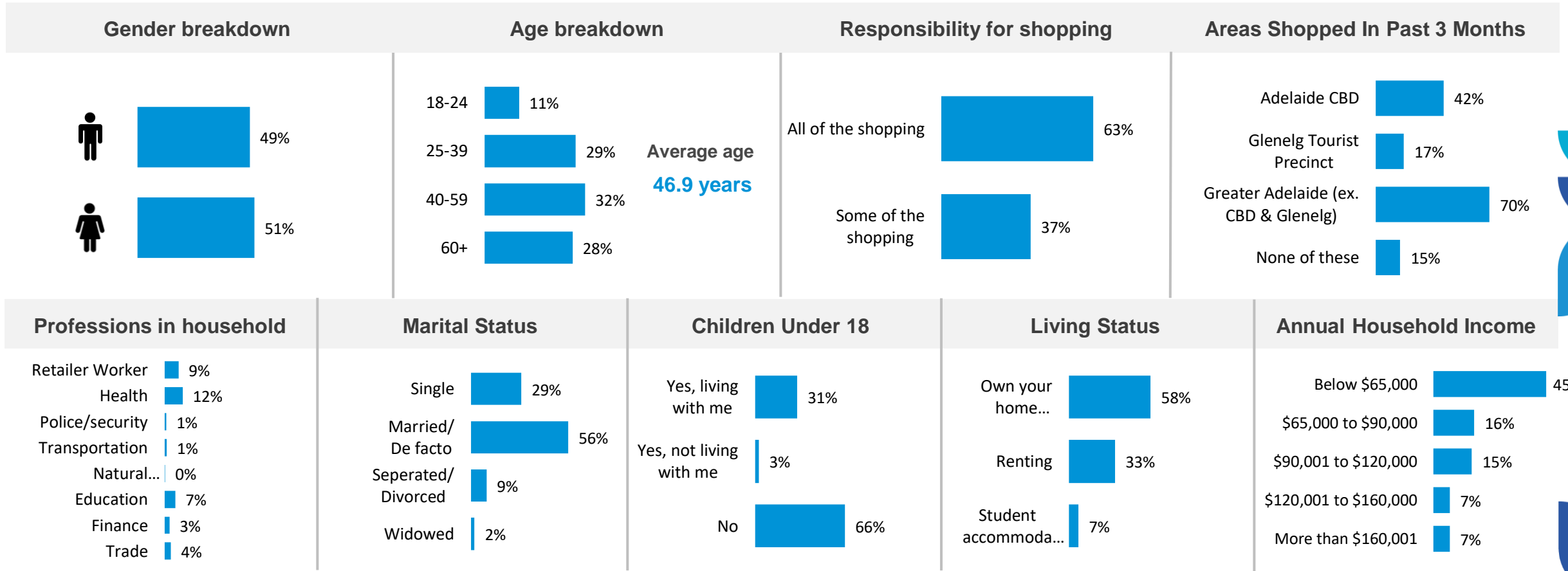


Weighted by ABS data of Adelaide gender and age demographics.

Total sample size, n=501

- The maximum margin of error (at the 95% confidence interval) on the total sample size is +/- 4.4%.
- Where significance testing has been shown, results are significant at the 95% significance level.
- The project was carried out in line with the Market Research International Standard, AS ISO 20252.

Weighted Sample Profile





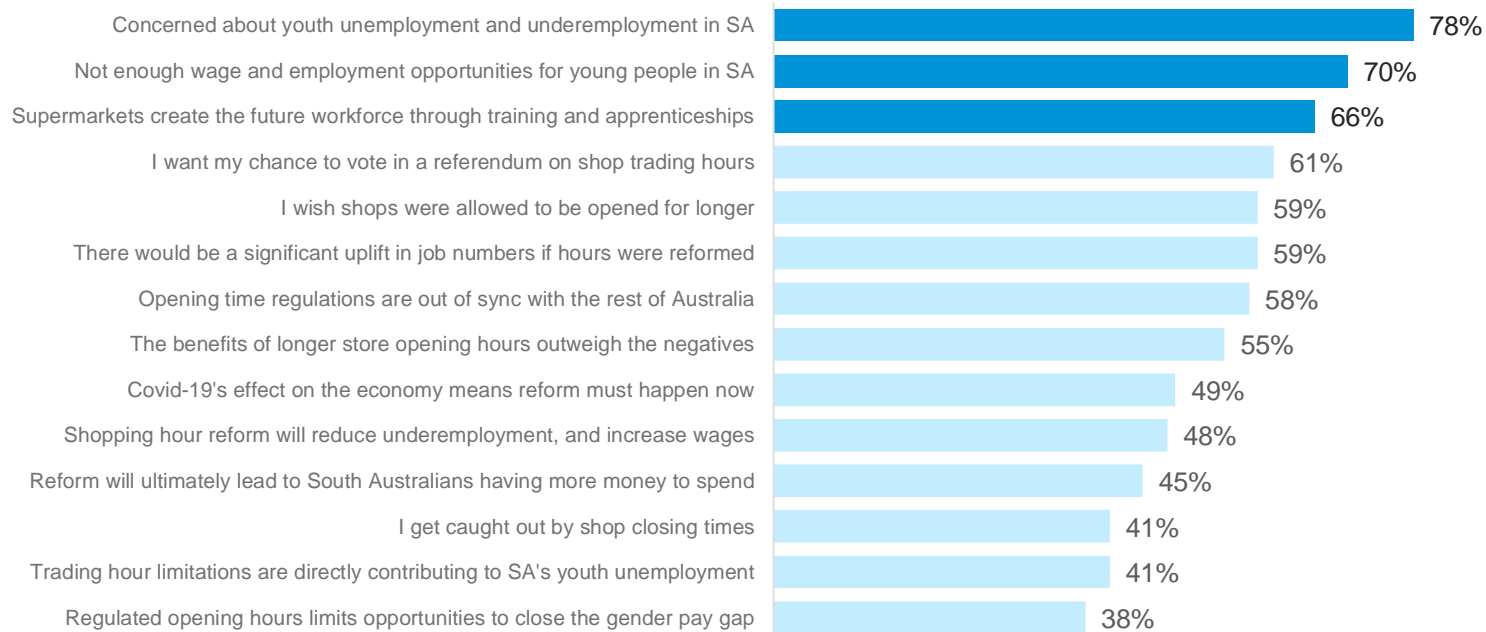
Detailed Findings

The need for reform

8 in 10 (79%) adults concerned about youth unemployment, and 7 in 10 (70%) believe there are not enough opportunities for them

Agreement with statement [% strongly agree/slightly agree]

Base: All respondents: n=501



[Restrictions should be eased..] to give the unemployed a step into the industry they would like, more opening hours would mean more staff

Male 18-24

As someone who works in the industry and having lived in other states, the weekend closing times are ridiculous. We need them extended to at least 7pm and shops have the opportunity to open on public holidays if the store workers are willing too. I'd prefer to be with my family on boxing day, not working/shopping but I'm sure there are others who would be willing to cover my shift

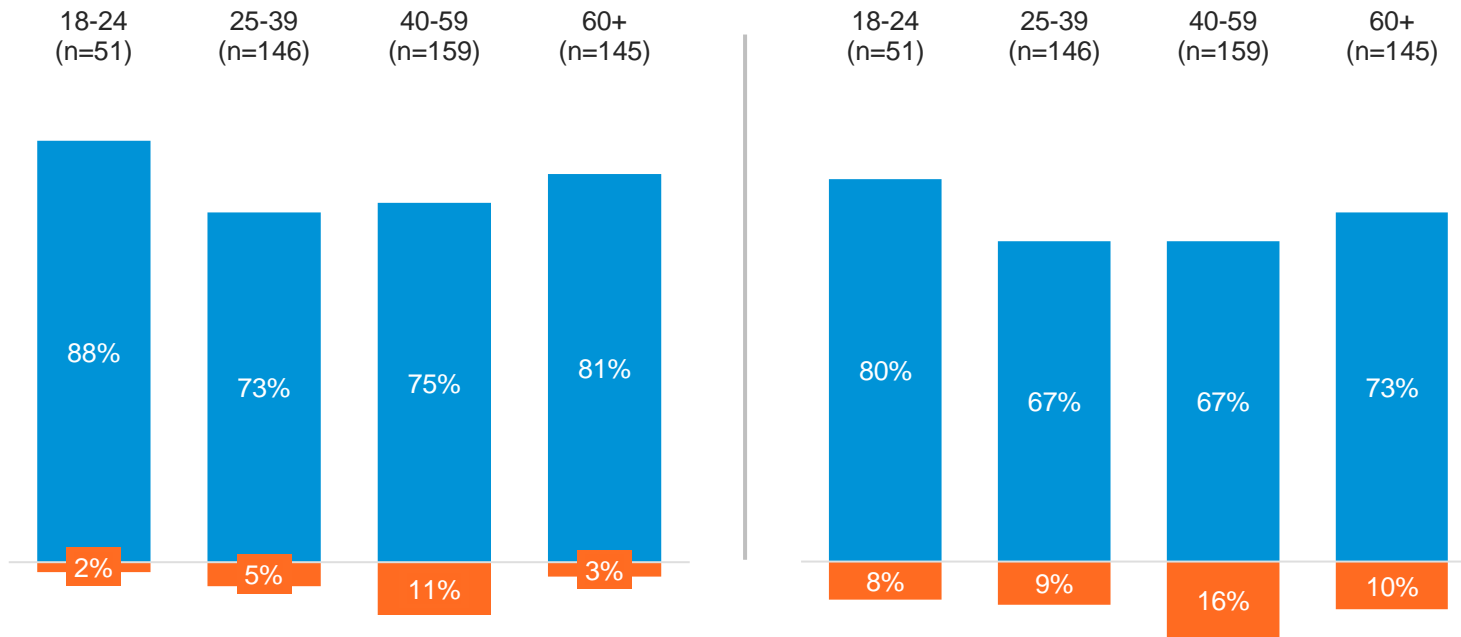
Female, children at home, 24-35

Q.6. To what extent would you agree with the following?

Almost 9 in 10 (88%) 18-24 year olds have some concern about the levels of youth un(der)employment in their state

Concerns of Youth Unemployment by Age [NET Agree/Disagree]

Base: All respondents: n=501



So hard as parents and busy workers to work and get shopping done. Not to mention the youth could take the earlier shifts and some parents could swap to night shifts.

Female, children at home, 25-39

■ NET: Agree
■ NET: Disagree

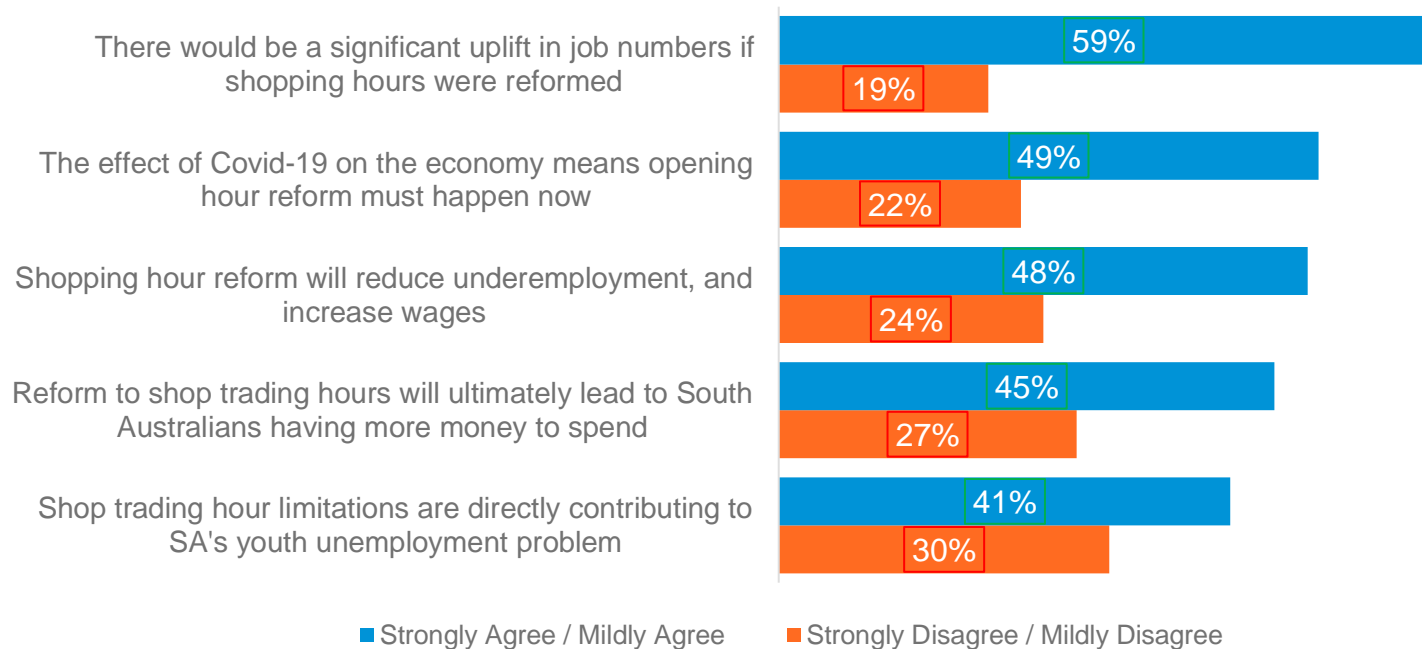
Q.6. To what extent would you agree with the following? - I am concerned by the level of youth unemployment and underemployment in South Australia

Q.6. To what extent would you agree with the following? - There aren't enough wage and employment opportunities for young people in South Australia

6 in 10 adults believe reform would be effective and half (49%) agree it is urgently needed to boost the economy

Opinions on opening hours' impact on the economic recovery and youth unemployment

Base: All respondents: n=501



I believe restrictions should be lifted because I have been caught out a number of times when the shops have just closed and I couldn't get there in time after work to get ingredients for dinner. Having longer hours would also create more job opportunities and encourage more spending into the economy

Female, children at home, 25-39

When I was working a standard 9 to 5 job it made it extremely difficult to actually go at a convenient time. It also makes it difficult for others who work nights of long hours to get general shopping done. Having longer hours would also mean more staff required which would, in theory, mean more hours for those in need of work.

Female, children at home, 25-39

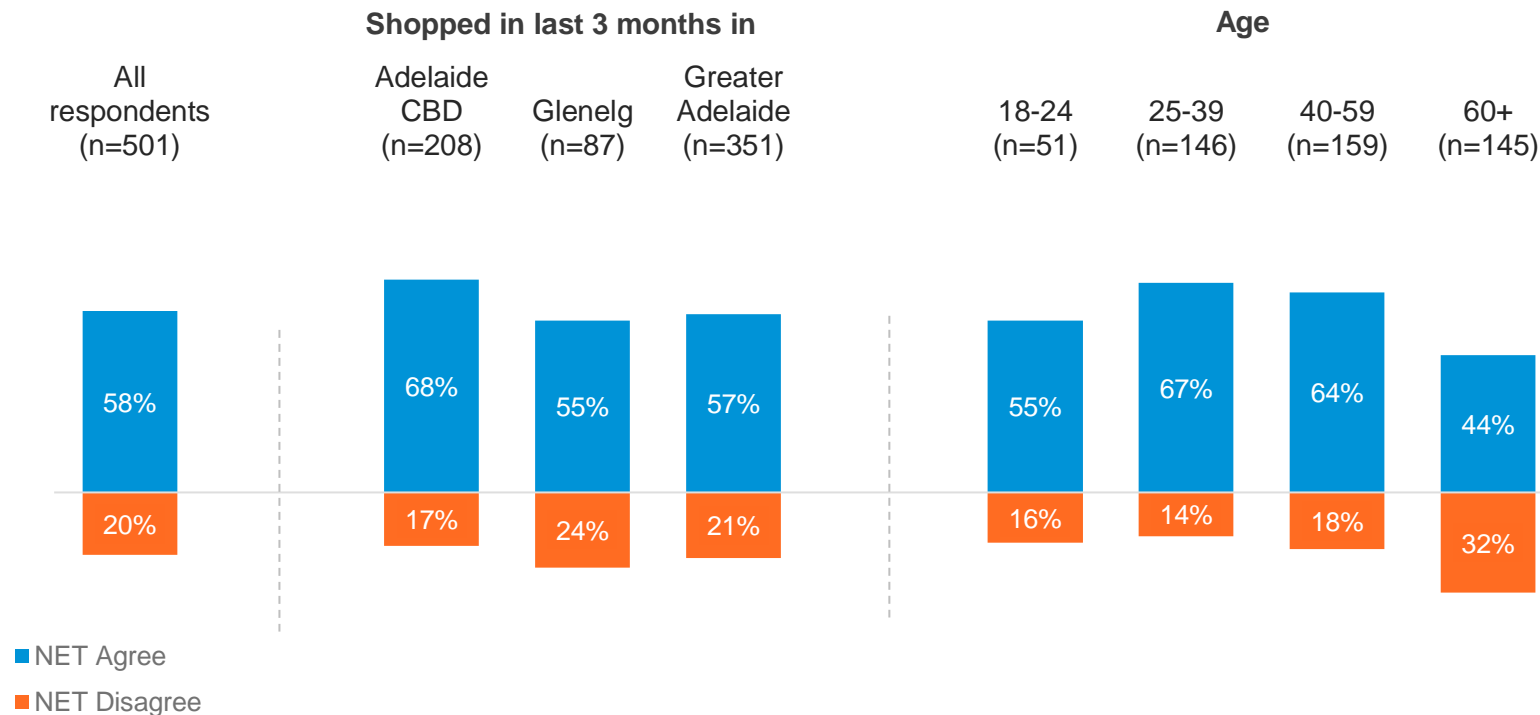
Q.6. To what extent would you agree with the following?

Significantly higher / lower

Out of sync with the rest of Australia

Opening time regulations in SA are too strict compared to the rest of Australia [% NET Agree/NET Disagree]

Base: All respondents



We are behind the Eastern states. I hate that stores don't open until 11 am on Sunday. It could create more work opportunities

Female, children at home, 40-59

South Australia's shopping hours are the joke of the country. We are at least 20 years behind the rest of the country. Longer retail trading hours will liven up the state and create more employment opportunities for ancillary industries like cafés and restaurants

Male, 70-79

Because it is the 21st century and we are not forcing them to open but giving them an opportunity to open if they want to

Male, children at home, 40-59

Q.6. - To what extent would you agree with the following? - Opening time regulations in South Australia are too strict compared to the rest of Australia

Among those seeking reform, flexibility to facilitate shopping around work hours was the most common reason offered

Reasons to ease restrictions (Unprompted)

Base: All those who want at least some hours to be extended: n=377



Working full-time I don't get a lot of time to go to the shops and spend money. I would like to be able to spend more time at the shops. However, I understand everyone deserves some time off including retail workers. Everything should be closed Christmas day.

Female, children at home, 25-29

I am a nurse and can often be on night shifts, so I can't do any shopping because I'm asleep

Male, 18-24

Because opening hours are based on an outdated 9-5 working model. Many people work outside of these hours and shouldn't be disadvantaged

Male, children at home, 40-59

Working shift work I often miss the shops. While I can shop online, I enjoy the shopping experience too. Increasing hours not only allows more time to shop, but more hours to work, and it makes it easier to have 2 to 3 jobs.

Female, children at home, 25-29

With increase in the cost of living, we are having to work longer hours & therefore get to the shops later in the day.

Male, 30-39

Gone are the 9-5pm M-F working hours and now, significantly more people work in 24hr employment industries, so flexibility is essential and restrictive trading hours on weekdays are a severe limitation to my ability to shop due to family commitments

Male, 40-59



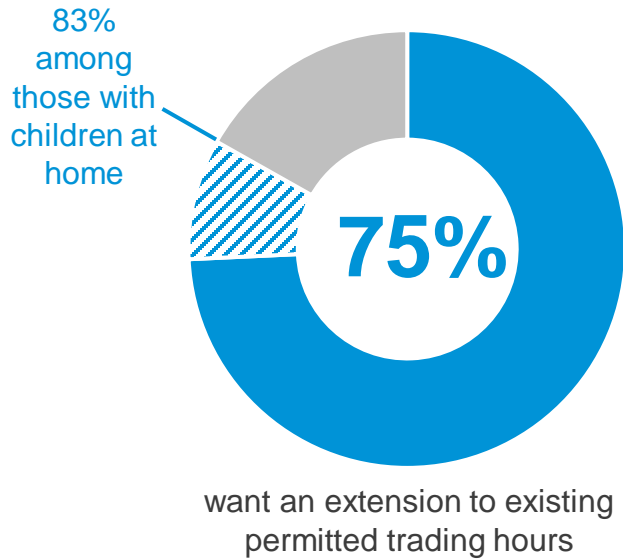
Q.7a. - Why do you believe restrictions should be eased?

Demand for increased permitted trading hours

6 in 10 adults want earlier permitted opening times on Saturday afternoon (57%) and Sunday morning (63%)

Appetite for extended / reduced permitted trading hours by occasion [% believe]

Base: All respondents: n=501, children at home n=156

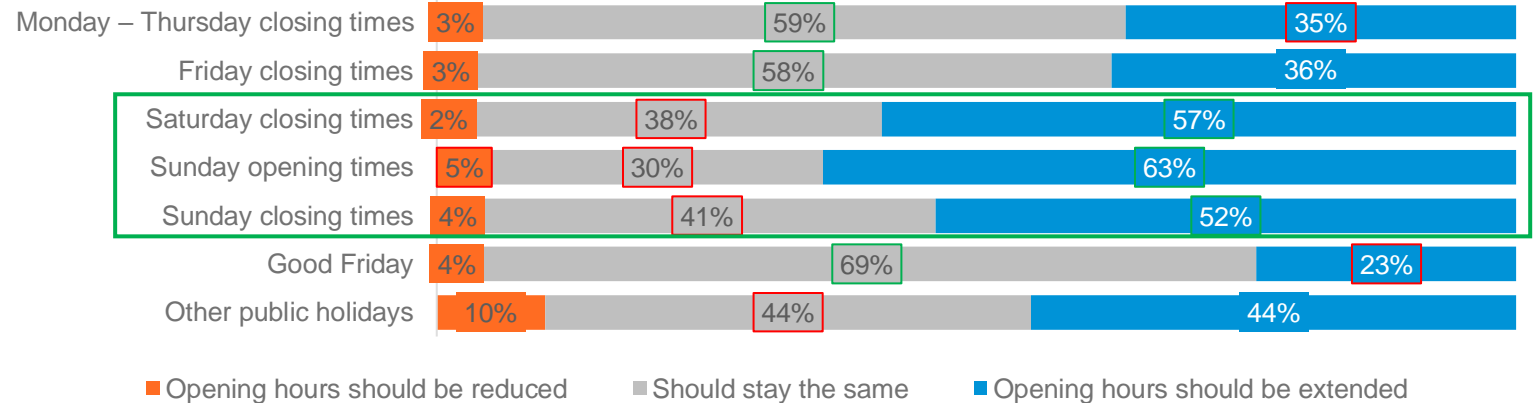


There is sufficient demand for it. People work different hours and have extra responsibilities (family, sports etc.) so extended hours, particularly on weekends would make life easier

Female, children at home, 25-39

I always get caught out by 5pm closing times on Saturday and Sunday.

Female, children at home, 25-39



Q.7. Do you believe all retailers should be able to be permitted trade in these hours...?

Significantly higher / lower

Those aged 18-49 were significantly more likely to request longer opening hours

Belief permitted trading hours should be extended by demographic [% believe]

Base: All respondents

Sunday opening at 11am is the worst as I feel you have to wait around to go to the shops. Inconvenient especially for families who need to shop earlier and have other commitments.

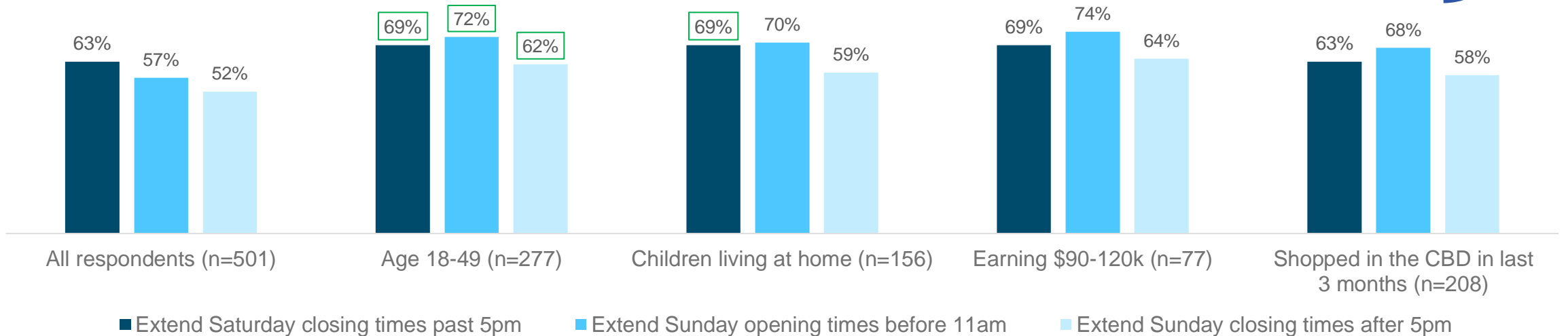
Female, children at home, 40-60

I always get caught out by 5pm closing times on Saturday and Sunday. I feel strongly that Saturday and Sunday should be extended to 9pm. Sunday mornings should also start earlier.

Female, children at home, 25-39

Some people who work during this time 6 times a week and only have one day to clean and take some R&R [rest and relaxation] can't get to shops before they close. This can make them feel trapped and worthless

Female, 18-25



Q.7. Do you believe all retailers should be able to be permitted trade in these hours...?

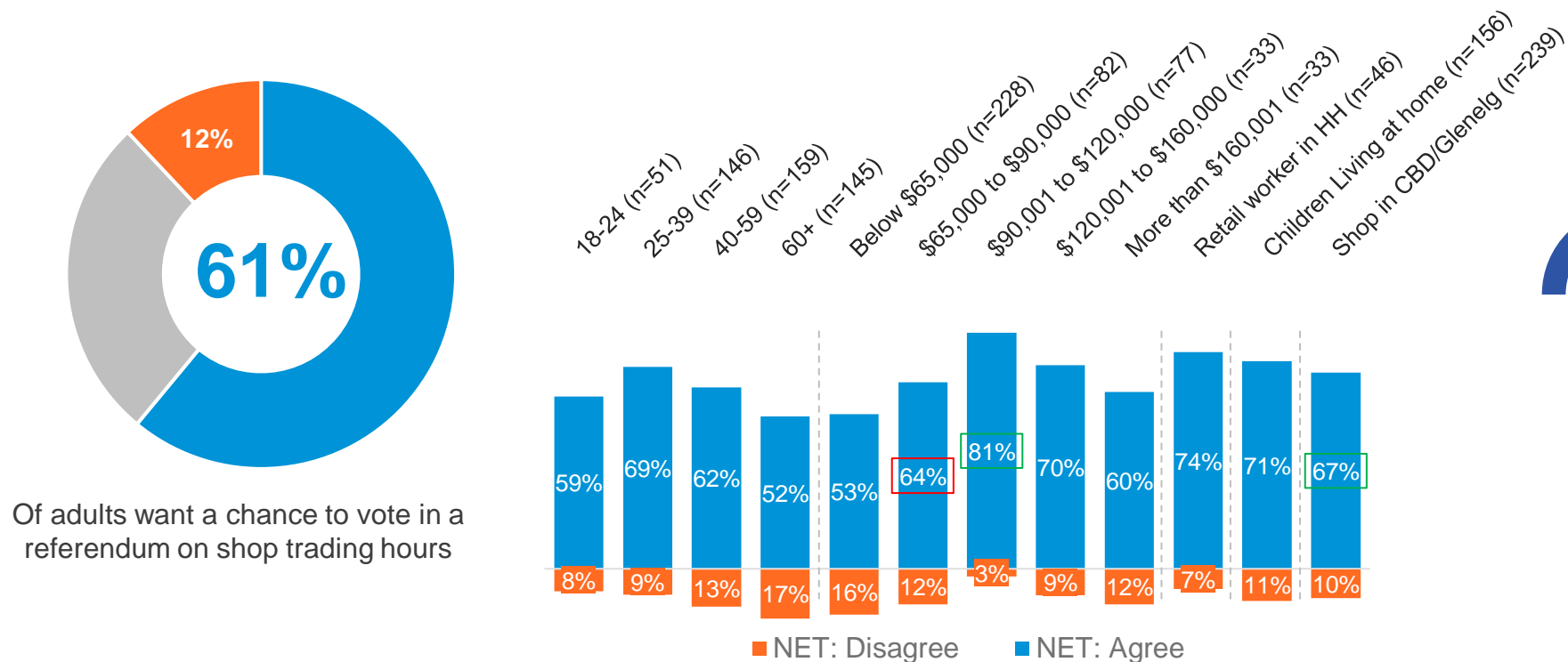
Significantly higher / lower than NET: All

Demand for a referendum

Significantly more middle, \$90-120k, earners (81%) and those caring for children (71%) support a trading hours referendum

Demand for a referendum by demographic [% NET Agree/NET Disagree]

Base: All respondents: n=501



Early closing on weekends is utterly ridiculous. Sunday trading beginning at 11am is ridiculous as well, why not 8am? 9am? Some people including myself like to go to the shops early to avoid crowds thus why I avoid even going near a shopping center on Sundays.

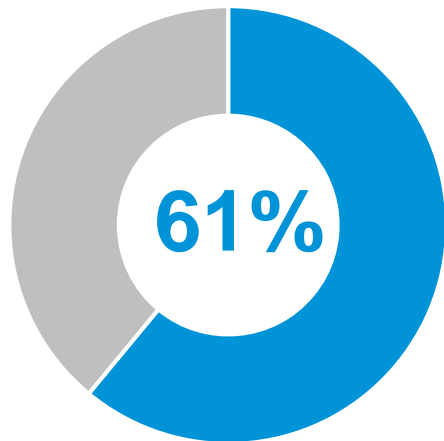
Female, children at home, 25-39

Significantly higher / lower than NET: All

Demand for a referendum is even more prevalent among those who are part of the most populous attitudinal segments

I want my chance to vote in a referendum on shop trading hours [% NET Agree]

Base: All respondents: n=500



Of adults want a chance to vote in a referendum on shop trading hours



■ NET Agree: I want my chance to vote in a referendum on shop trading hours

It's about time south Australia got with the times, the number of jobs reducing shopping hours would bring to the younger generation should be a first priority.

Female, children at home, 18-24

Because it is 19th century thinking. In an always online world, we are out of date. Fix it NOW!

Male, children at home, 40-60

I just think it's embarrassing in this day and age to have such restricted hours. It will happen sooner or later, it should happen now. Some people would find these hours very restrictive especially if they do shift work

Male, 40-60

Q.6. - To what extent would you agree with the following? - I want my chance to vote in a referendum on shop trading hours

Post-reform support for smaller shops

9 in 10 adults would support local retailers as much (66%) if not more (23%) were reform to pass, and slightly more of supporters

Intentions to support smaller retailers if large shops could open for longer [% believe]

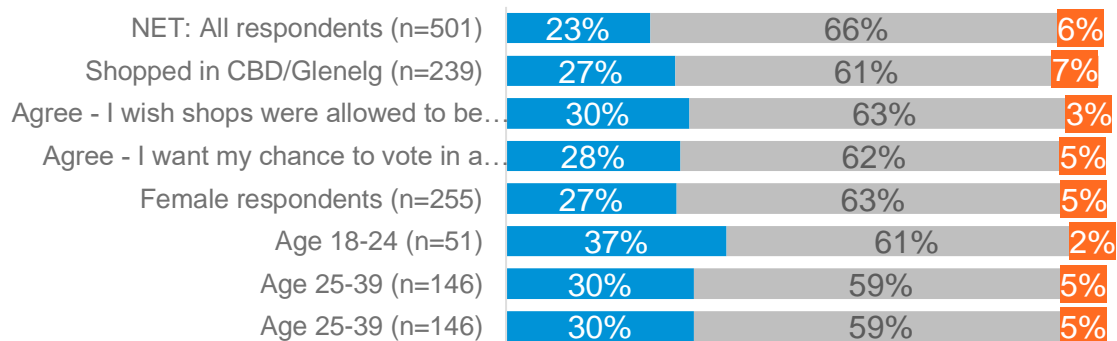
Base: All respondents

[Restrictions should be eased...] to give you more flexibility of when you can shop and to increase viability of small businesses and to promote extra staffing

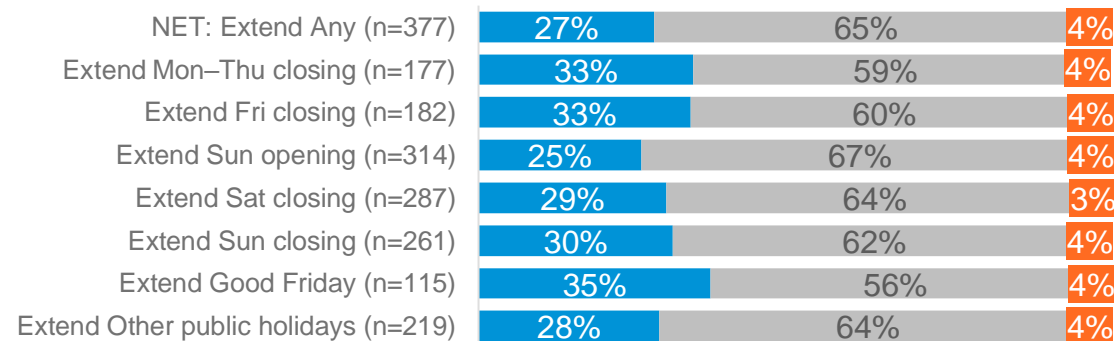
Male, children at home, 40-60

South Australia's shopping hours are the joke of the country. We are at least 20 years behind the rest of the country. Longer retail trading hours will liven up the state and create more employment opportunities for ancillary industries like cafés and restaurants

Male, 70-79



■ More than before ■ The same ■ Less than before



■ More than before ■ The same ■ Less than before

Q.9. If larger shops (e.g. discount stores, department stores, supermarkets etc.) could open for longer would you support local (small) retailers...?

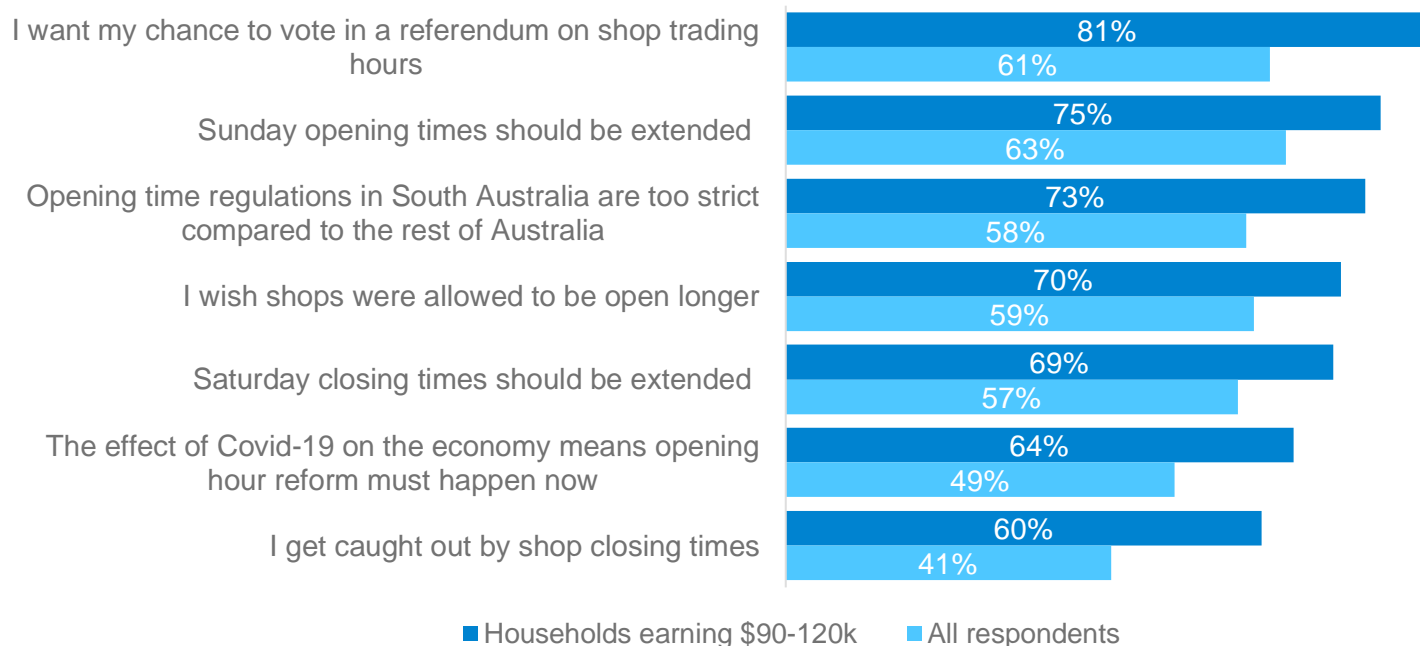


Appendix: sub-group analysis

Middle-income households are highly supportive of trading hour reform

Households earning \$90,000 to \$120,000 [strongly agree/slightly agree]

Base: All respondents: n=501, Households earning \$90,000 to \$120,001 per year: n=77



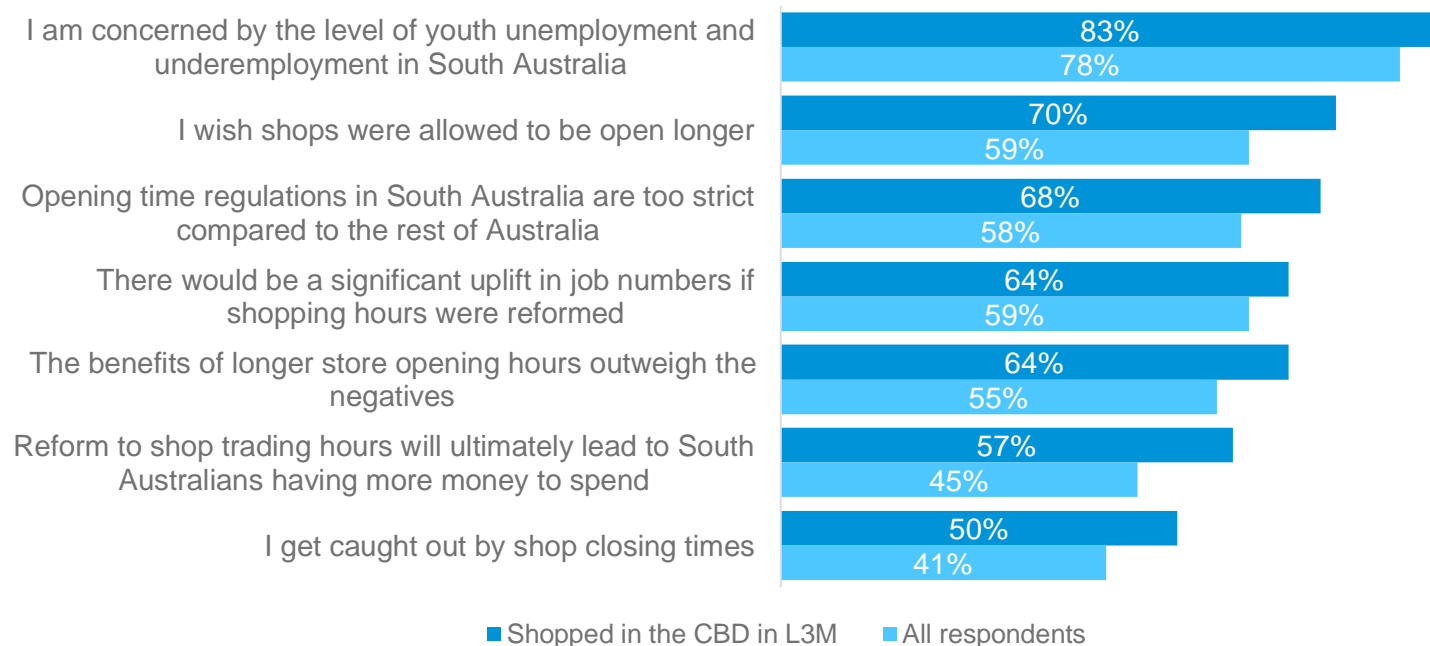
South Australian households on middle incomes, earning between \$90,000 and \$120,000, are particularly supportive of changes to the current regulations. For example, 8 in 10 support a referendum on the issue, while 73% also agree that SA's regulations are inconsistent with the rest of Australia.

Q.6. To what extent would you agree with the following?

CBD Shoppers recognise the impact opening hour regulations are having

South Australians who shop in the Adelaide CBD

Base: All respondents: n=501, Those who shop in the Adelaide CBD: n=204



CBD shop trading hours seem to be of particular concern for South Australians, with 7 in 10 who shop in the CBD agreeing they wished shop were opened for longer. Majority also feel regulations are out of sync with the rest of Australia (68%) and that longer hours could see more job opportunities (64%).

Q.6. To what extent would you agree with the following?



Appendix: questionnaire

Quotas to be applied (panel sample only): by age, sex as per below (ABS representative), even split of male/female per cell

Panel Provider: PureProfile

Total sample: n=500

Target audience: Adelaide adults

Aged	Adelaide
18-29	116
30-39	85
40-49	78
50-59	78
60-69	66
70+ years	77
TOTAL	500

Introduction

Thank you for taking part in this survey.

This survey is about shopping in Adelaide.

Please be reassured that this survey is anonymous, and we will never use your individual responses on their own.

The survey should take no more than 5-10 minutes to complete.

Screening

The first few questions are to check if this survey is relevant to you.

ASK ALL

Q.1. How old are you? [single response]

Under 18.....	1	TERMINATE
18-24.....	2	
25-29.....	3	
30-39.....	4	
40-49.....	5	
50-59.....	6	
60-69.....	7	
70-79.....	8	
80+.....	9	

ASK ALL

Q.2. Are you... [single response]

Male.....	1	49%
Female.....	2	51%
Indeterminate/Intersex/Unspecified.....	3	

ASK ALL

Q.3. In which postcode do you live? *Must live in Adelaide (5000-5199 & 5900-5999);*

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ASK ALL

Q.4. Are you...? [SINGLE RESPONSE]

I am responsible for all of shopping in my household.....	1	
I am responsible for some of the shopping in my household.....	2	
I am not responsible for any of the shopping in my household.....	3	TERMINATE

ASK ALL

Q.5. Do you OR anyone in your household work in any of the following industries? [SINGLE RESPONSE]

Advertising	1	TERMINATE
Journalism	2	TERMINATE
Market research	3	TERMINATE
Media	4	TERMINATE
Marketing	5	TERMINATE
Retail (store management, stock/warehouse, cashier etc.).....	15	CONTINUE
Health or allied health	6	CONTINUE
Police or security service	7	CONTINUE
Transportation	8	CONTINUE
Natural resources	9	CONTINUE
Education	10	CONTINUE
Government (State or Federal)	11	TERMINATE
Finance	12	CONTINUE
Trade position (plumber, electrician, builder etc)	13	CONTINUE
None of these	14	CONTINUE

Main survey

In South Australia, larger retailers that do not meet exemptions can only open during these restricted hours::

	CBD	Metro & Glenelg
Weekdays	until 9pm	until 9pm
Saturdays	until 5pm Includes Easter Saturday	until 5pm Includes Easter Saturday
Sundays	11am to 5pm 12pm to 5pm Anzac Day	11am to 5pm except Easter Sunday
Public holidays	11am to 5pm	CLOSED
Good Friday & Christmas Day	CLOSED	CLOSED

We would next like you answer some questions about your shopping experiences:

ASK ALL

Q.6. To what extent would you agree with the following? [RANDOMISE; MULTIPLE RESPONSE]

	Strongly agree	Mildly agree	Neither agree nor disagree	Mildly disagree	Strongly disagree
I wish shops were allowed to be open longer	1	2	3	4	5
I get caught out by shop closing times	1	2	3	4	5
There aren't enough wage and employment opportunities for young people in South Australia	1	2	3	4	5
I am concerned by the level of Youth unemployment and underemployment in South Australia	1	2	3	4	5
Opening time regulations in South Australia are too strict compared to the rest of Australia	1	2	3	4	5
The benefits of longer store opening hours outweigh the negatives	1	2	3	4	5
Given the large proportion of women that work in the retail sector, keeping regulated shop opening hours further limits opportunities to close the pay gap to men	1	2	3	4	5
The effect of Covid-19 on the economy means opening hour reform must happen now	1	2	3	4	5
Shopping hour reform will reduce underemployment, and increase wages	1	2	3	4	5

	Strongly agree	Mildly agree	Neither agree nor disagree	Mildly disagree	Strongly disagree
I want my chance to vote in a referendum on shop trading hours	1	2	3	4	5
Reform to shop trading hours will ultimately lead to South Australians having more money to spend	1	2	3	4	5
Shop trading hour limitations are directly contributing to SA's youth unemployment problem	1	2	3	4	5
There would be a significant uplift in job numbers if shopping hours were reformed	1	2	3	4	5
Supermarkets are helping create the workforce of the future through training and apprenticeships of staff	1	2	3	4	5

ASK ALL

Q.7. Do you believe all retailers should be able to be permitted trade in these hours...? [SINGLE RESPONSE, SHOW IN GRID]

	Opening hours should be reduced	Should stay the same	Opening hours should be extended	Don't know
a) Monday – Thursday <u>closing</u> times (until 9pm CBD, Metro & Glenelg)	1	2	3	4
b) Friday <u>closing</u> times (until 9pm CBD, Metro & Glenelg)	1	2	3	4
c) Saturday <u>closing</u> times (5pm)	1	2	3	4
d) Sunday <u>opening</u> times (from 11am CBD, Metro & Glenelg)	1	2	3	4
e) Sunday <u>closing</u> times (until 5pm CBD, Metro & Glenelg)	1	2	3	4
f) Christmas Day (CLOSED)	1	2	3	4
g) Good Friday (CLOSED)	1	2	3	4
h) Other public holidays (11am-5pm CBD [except ANZAC Sunday 12pm-5pm], CLOSED elsewhere)	1	2	3	4

ASK IF ERROR! REFERENCE SOURCE NOT FOUND. = SHOULD RELAX (CODE A-M)

Q.7.a Why do you believe restrictions should be eased? [OPEN END]

ASK ALL

Q.8. If larger shops (e.g. discount stores, department stores, supermarkets etc.) could open for longer would you support local (small) retailers...? [SINGLE RESPONSE]

More than before.....1
 The same as before2
 Less than before3
 Don't know/unsure4

Demographics

And finally, just a few more questions about you, so we can understand how different people have answered these questions. All your answers will be kept confidential and will only be used for research purposes.

ASK ALL

Q.9. Are you...? [SINGLE RESPONSE]

Single.....	1
Married/De facto.....	2
Separated/Divorced.....	3
Widowed.....	4
Prefer not to answer.....	5

ASK ALL

Q.10. Do you have any dependent children (aged under 18 years)...? [MULTIPLE RESPONSE]

Yes, living with me at least some of the time.....	1
Yes, not living with me.....	2
No.....	3

ASK ALL

Q.11. Which of the following best describes you? [SINGLE RESPONSE]

Full time work.....	1
Part time/casual work.....	2
Self-employed.....	3
Retired.....	4
Unemployed.....	5
Home duties.....	6
Student.....	7
Volunteer.....	8
Other.....	98

ASK ALL

Q.12. What is your approximate annual household income (including superannuation)? [SINGLE RESPONSE]

Below \$65,000.....	1
\$65,000 to \$90,000.....	2
\$90,001 to \$120,000.....	3
\$120,001 to \$160,000.....	4
\$160,001 to \$210,000.....	5
More than \$210,000.....	6
Prefer not to say.....	7

ASK ALL

Q.13. Which of the following best describes your current living arrangements? [SINGLE RESPONSE]

Own your home outright / paying a mortgage.....	1
Renting.....	2
Live at home (with parent/s).....	3
Student accommodation.....	4
Other (specify):.....	5

ASK ALL

Q.14. Which of the following areas have you shopped in during the previous 3 months? [RANDOMISE; MULTIPLE RESPONSE]

Adelaide Central Business District (CBD).....	1
Glenside Tourist Precinct.....	2
Greater Adelaide (not CBD or Glenside).....	3
None of these.....	7

End with thanks (all):

Thank you for assisting us today. Your response to this questionnaire will be kept strictly confidential and will be used only for research purposes.



**Quantum
Market
Research**

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