



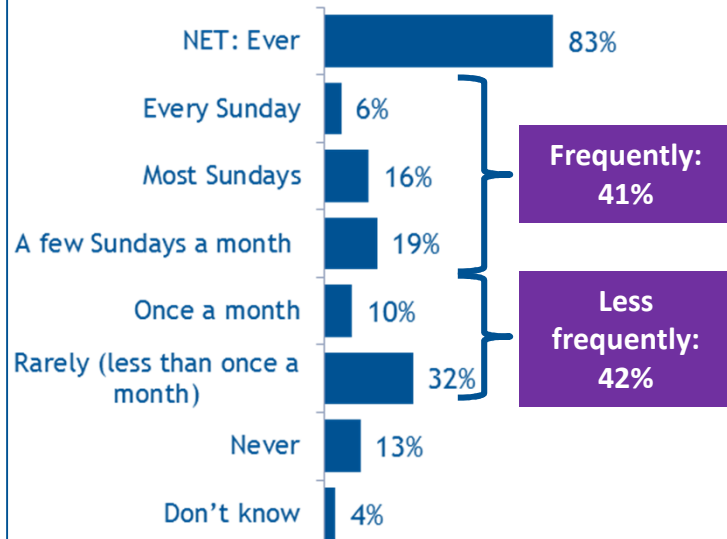
Retail Week - July/August 2014 Sunday Trading Poll



Technical details: Sample size of 1838 English and Welsh respondents
F/W dates: 25th - 27th July 2014
This survey was conducted online

Retail Week Poll - Sunday Trading Poll (July/August 2014)

1. Which of the following best describes how often you go shopping on a Sunday?



4 in 5 people in England and Wales shop on Sundays. 2 in 5 shop frequently on Sundays (more than once a month), and 2 in 5 go less often. Just over 1 in 10 consumers (13%) say they never go shopping on Sundays.

Less affluent consumers (DE) are less likely than other social grades to shop frequently on a Sunday (32%).

There are some indicative differences by region with the South East seeing the highest proportion of those shopping frequently on a Sunday (47%)

2. What sort of shops do you usually shop in on a Sunday?



Food shopping is the most popular category of Sunday shopping, with 7 in 10 consumers who shop on Sundays visiting supermarkets, food shops or delis. Amongst frequent Sunday shoppers this increases to 8 in 10 (82%).

The types of places that people shop on a Sunday varies by age group with those over 45 more likely to shop in garden centres (41% v. 24% under 45) and Home and DIY stores (34% v. 28%), whereas under 45's are more likely to shop in other types of shops such as department shops (26% v. 19 over 45) and fashion and footwear shops (34%v. 12%)

Source : ICM Research on behalf of Retail Week

Technical details: 1. Sample size of 1838 Respondents from England and Wales. F/W dates: 25th - 27th July 2014

2. Sample size of 1533 Respondents from England and Wales who shop on a Sunday

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3. What sort of shops do you usually shop in on a Sunday?



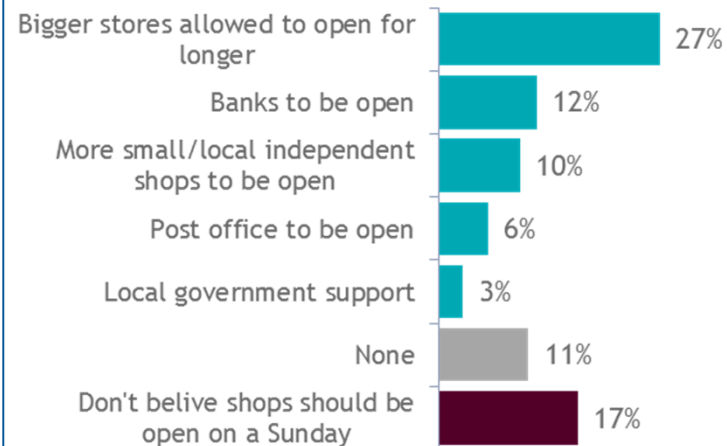
2 in 5 consumers in England and Wales who shop on Sunday do so in a town or city centre, with just over a third visiting out of town retail venues.

Of frequent Sunday shoppers, nearly half (48%) visit a town or city centre, with 44% visiting out of town retail

Town centre shopping is more popular amongst women – 43% versus 36% of men.

Those aged over 65 are least likely of all age groups to visit a town or city centre with only three in ten of those shopping on Sunday visiting this kind of location (29%)

4. Which of the following, if any, would be your MAIN priority for Sunday Trading?



For a quarter, longer opening hours for larger stores is their main priority for Sunday trading. This is twice as popular as the next option which is for banks to be open.

Unsurprisingly those who frequently go shopping on a Sunday are more likely to mention bigger stores being allowed to open longer (41%).

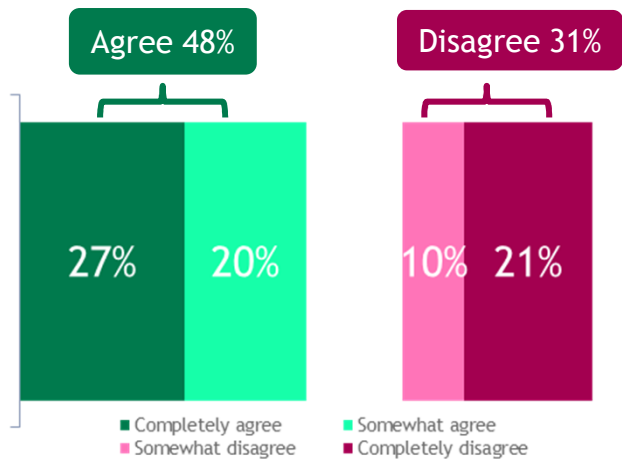
Source : ICM Research on behalf of Retail Week

Technical details: 3. Sample size of 1533 Respondents from England and Wales who shop on a Sunday

4. Sample size of 1838 Respondents from England and Wales. F/W dates: 25th - 27th July 2014

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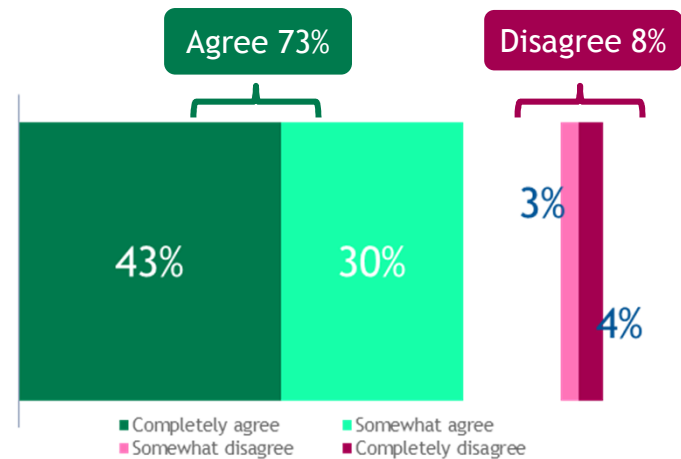
5. To what extent do you agree or disagree with the idea of changing the law so that large shops can open for longer than 6 hours on a Sunday?



The population of England and Wales are split over the lengthening of Sunday trading hours - just under half of the population of England and Wales agree that larger shops should be open for longer on a Sunday, however three in ten do not support the idea.

Those aged under 45 are more likely than those aged over 45 to support the idea (55% v. 41%), as are women aged under 45 (55%)

6. To what extent do you agree or disagree with the following statements: If Sunday opening hours are extended it is important to provide legal protection for people who don't want to work on Sundays

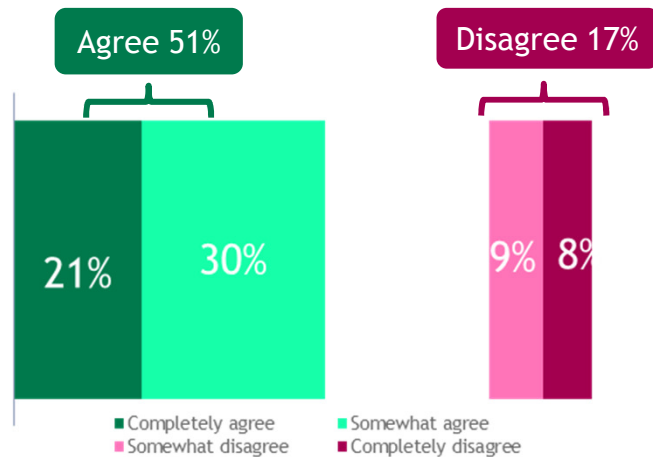


Despite levels of support for longer opening hours on Sunday, people are clear that those who do not want to work on this day should be afforded protection.

Those aged over 45 are more likely to agree (80% v. 66% for under 45's) as are those who are opposed to the idea of longer Sunday trading hours (86% v. 74% of those who support it)

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6. To what extent do you agree or disagree with the following statements: Having longer opening hours on a Sunday would bring more people into the High Street which is good for all traders

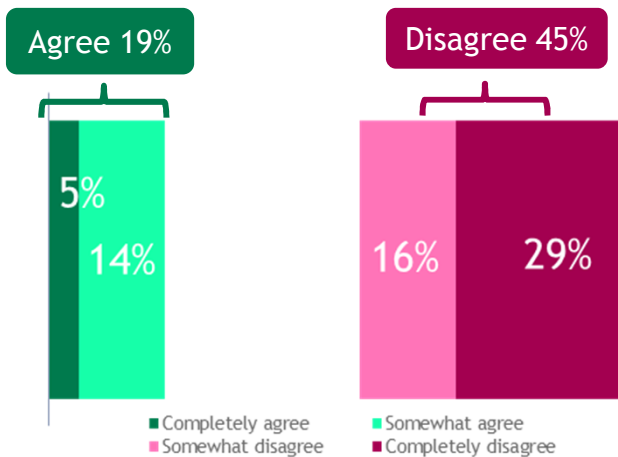


Half agree that extended hours would bring more shoppers into the High Street which could have positive knock on effects for all traders.

Younger people are more likely to feel their will be a wider benefit with more than half of under 45's agreeing with this statement (56% v. 47% of over 45's).

Again, those who support the idea of extended hours completely are more likely to feel that there will be a benefit to all traders (85%), as are those who frequently shop on a Sunday (71%). Those who use their local parade of shops on a Sunday are less likely to agree there will be wider benefits (54% v. 67% for local city/town).

6. To what extent do you agree or disagree with the following statements: Having short opening hours on a Sunday means that I buy more things online



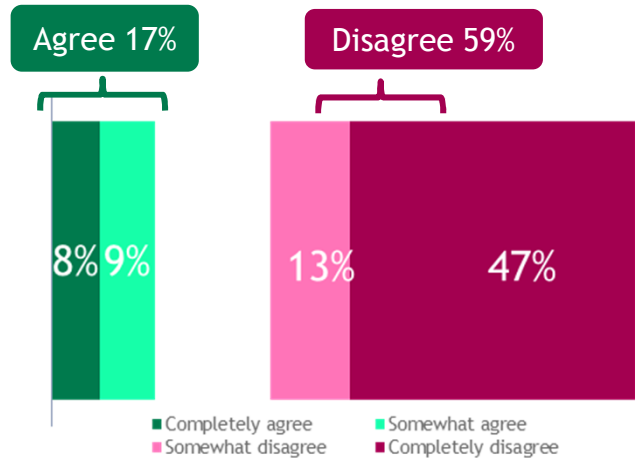
Fewer than one in five shoppers make a direct link between reduced trading hours on a Sunday and making more purchases online. Amongst those aged under 45 the figure climbs to 25%, and even higher for those who completely agree that trading hours should be extended (32%) and those who go shopping on a Sunday frequently (27%).

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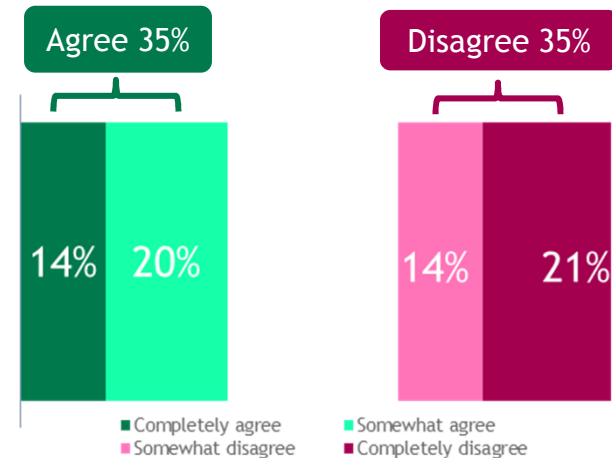
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6. To what extent do you agree or disagree with the following statements: I would reject the call for longer opening hours on religious grounds



Religion is the main motivator for restricted hours for fewer than one in five, a smaller proportion than who are opposed to the idea in general. However, it seems that those who are most strongly opposed to an increase in hours are motivated by religious reasons (Agreement rises to 34% amongst those who completely disagree with an extension to trading hours).

6. To what extent do you agree or disagree with the following statements: Sunday is my key day to get things done, longer opening hours would be really helpful to my lifestyle

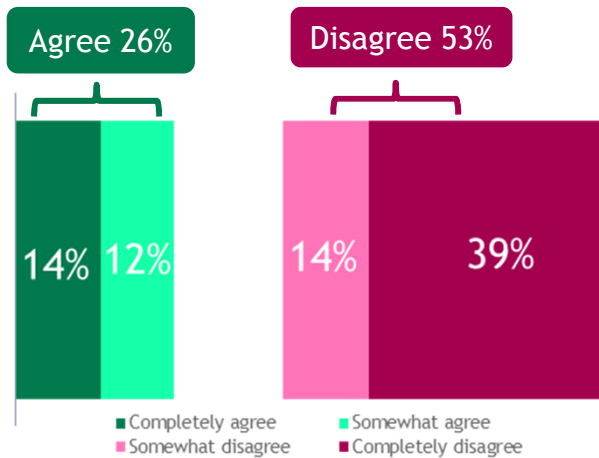


Equal proportions (35%) both agree and disagree that extended trading on a Sunday would be helpful to their lifestyle.

Men are more likely than women to agree (38% v. 31%), as are those aged under 45 (46% v. 24% over 45). It appears that those who completely agree with the idea of changing hours may be driven in large part by the convenience as agreement amongst this group rises to nearly seven in ten (69%). Those who frequently shop on Sunday are also particularly positive about the lifestyle benefits with three in five (60%) agreeing it would help them.

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6. To what extent do you agree or disagree with the following statements: I don't think shops should be open at all on a Sunday



A quarter feel that shops should not be open at all on a Sunday, however more than half disagree with this and amongst those who disagree two in five completely disagree with the idea.

As may be expected there is a strong link between not supporting an extension in trading hours and not supporting the opening of shops in general. The proportion that agree that shops should be closed rises to 53% amongst those who don't agree with the extension of hours. Those who never go shopping on a Sunday are also more likely to agree shops should be open (54% v. 14% who shop frequently on a Sunday)

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