4.0 HOUSEHOLD SURVEY

Survey Structure

4.1 NEMS carried out a telephone survey of 809 households in the Winchester study area in October 2002. The study area has been split into seven sectors based on postcode boundaries (Zones A to G). The number of survey interviews within each zone is broadly based on population on a pro-rata basis. A copy of the survey questionnaire is attached at Appendix E. The main aims of the survey were to establish the following:

- main food and grocery shopping;
- top-up food and grocery shopping;
- non-food shopping, including:
  - clothing and footwear;
  - domestic and non-domestic electrical goods;
  - furniture, soft furnishing or carpets;
  - DIY/garden items and hardware;
  - health, beauty and chemist goods; and
  - other non-food items.
- the role of retail warehouses.

4.2 The survey also sought to cover the following issues:

- mode of travel for non-food shopping;
- frequency of trip to retail warehouses; and
- the desired improvements to shopping in Winchester.

4.3 A demographic analysis was also carried out, breaking down results into three different age groups, and also into different socio-economic categories. Households were selected to ensure that a representative sample was obtained. Interviews were conducted with the person responsible for the majority of food shopping within each household.

Food and Grocery Shopping

Main Food Shopping

4.4 Respondents were asked where they buy most of their household's food and grocery shopping. A summary of the results is shown in Table 4.1. Winchester was the main food shopping destination for the majority of households within the inner study area Zones A, B and C, and the rural northern Zone E. Winchester is not the dominant food shopping destination in the other outer study area zones. Eastleigh is the dominant destination in its own Zone G, and Andover and Romsey are the dominant destinations in the west Zone F.

Table 4.1 Main Food Shopping Destinations

Zone	Primary Main Food Shopping Destinations *	
A – Winchester Urban Area (West)	Winchester (96%)	Eastleigh (2%)
B – Winchester Urban Area (East)	Winchester (96%)	Eastleigh (2%)
E – Outer Rural (North)	Winchester (78%) Alresford (6%)	Andover (8%) Basingstoke (3%)
C –Winchester Inner Rural Area	Winchester (75%) Southampton (2%)	Eastleigh (17%)
D – Outer Rural (East)	Winchester (33%) Bishops Waltham (14%)	Hedge End (14%) Southampton (11%)
F –Outer Rural (West)	Winchester (15%) Romsey (27%) Eastleigh (4%)	Andover (27%) Southampton (8%)
G –Eastleigh	Winchester (12%) Southampton (8%)	Eastleigh (80%) Hedge End (4%)

* NB. Percentages do not total 100% because not all destinations are listed.

4.5 The majority of the households who do most of the food and grocery shopping in Winchester do so at large food stores i.e. Tesco, Winnall (49%) and Sainsbury, Badgers Farm (36%). Sainsbury in the City Centre is also a popular store (12%). Tesco at Winnall attracts a higher share (50%) of households in the east of Winchester urban area (Zone B) than Sainsbury at Badgers Farm (19%), but Sainsbury has a higher share (62%) in the west (Zone A). Tesco also attracts a higher share in some of the outer study area zones, probably due to the store's high level of accessibility from the M3 motorway. Sainsbury in the City Centre attracts a much higher share of households in the east of Winchester (Zone B). The City Centre Sainsbury store is more accessible to residents in the east of Winchester, and there is a higher proportion of non-car owning households and people of retirement age in Zone B. These households may be less likely to undertake bulk food shopping at out-of-centre food superstores.

Top-Up Food Shopping

4.6 Over 63% of households within the Winchester Urban Area (Zones A, B and C) indicated that they undertake small-scale, or top-up, shopping trips in addition to their household's main food shopping trips. Top-up food shopping trips were carried out at a wide variety of locations, including smaller 'local' supermarkets or 'local shops' (i.e. independent convenience retailers). Winchester attracts the majority of these shopping trips in Winchester Urban Area (Zones A and B).

Non-Food Shopping

4.7 Respondents were asked where they normally go to shop for different types of non-food goods. The main shopping destinations for each type of non-food goods are shown in Tables 4.2 to 4.9.

Table 4.2 Overall Non-Food Shopping Destinations (Proportion of Households)

Zone	Main Non-Food Shopping Destinations *
A – Winchester Urban Area (West)	Winchester (64%) Southampton (22%) Eastleigh/Chandlers Ford (8%) Hedge End (3%)
B – Winchester Urban Area (East)	Winchester (70%) Southampton (18%) Eastleigh/Chandlers Ford (2%)
C –Winchester Inner Urban Area	Winchester (51%) Southampton (26%) Eastleigh/Chandlers Ford (17%) Hedge End (2%)
D – Outer Urban Area (East)	Winchester (38%) Southampton (19%) Fareham (12%) Bishops Waltham (6%) Hedge End (5%) Eastleigh/Chandlers Ford (2%)
E – Outer Rural (North)	Winchester (55%) Southampton (10%) Arlesford (8%) Andover (7%) Basingstoke (5%) Eastleigh/Chandlers Ford (3%)
F – Outer Rural (West)	Winchester (12%) Southampton (31%) Andover (19%) Romsey (18%) Salisbury (10%) Eastleigh/Chandlers Ford (2%)
G – Eastleigh	Winchester (12%) Eastleigh/Chandlers Ford (49%) Southampton (33%) Hedge End (3%)

* NB. Percentages do not total 100% because not all destinations are listed.

4.8 Winchester is the most popular non-food shopping destination for residents in the inner study area zones (A, B and C) and rural zone E to the north. However, Southampton is also a popular destination across the study area. Elsewhere within the catchment area, Eastleigh/Chandlers Ford and Andover are important non-food shopping destinations, in the south and west of the study area.

Clothing and Footwear Expenditure

4.9 Table 4.3 suggests that Winchester attracts a reasonable proportion of clothing and footwear expenditure from the inner study area. However, in the outer study area expenditure on clothing and footwear appears to be attracted primarily to other destinations.

Table 4.3 Clothing and Footwear Expenditure in Winchester

Amount of Household's Expenditure Spent in Winchester	**% of Households in Each Area**		
	Inner Winchester Area Zones A, B & C	Outer Winchester Area Zones E, F & G	Total Zones A- G
None	11.5	31.7	21.9
Less than a quarter	27.6	30.2	28.9
About a quarter	11.5	12.0	11.7
About half	15.3	9.6	12.4
About three quarters	10.7	5.0	7.8
Most or all	18.4	5.3	11.6
Don't Know	5.1	6.2	5.7
Total	**100.0**	**100.0**	**100.0**

4.10 A reasonable proportion of households in the inner study area (39%) spend less than a quarter of their clothing and footwear expenditure within Winchester, this figure is much higher in the outer study (62%). These figures suggest there is a large amount of expenditure leakage from both the inner and outer study areas. Only 18% of those living within the inner study area undertake most or all of their clothing and footwear expenditure within Winchester. There may be potential for Winchester to clawback expenditure leakage, particularly within the inner study area.

Domestic Electrical Appliance Expenditure

4.11 A high proportion of households in the inner study area (50%) spend less than a quarter of their expenditure on domestic electrical appliances within Winchester. This figure is much higher in the outer study (76%). Only 28% of those living within the inner study area undertake three quarters or more of their expenditure within

Winchester. Again there may be potential for Winchester to clawback expenditure leakage.

Table 4.4 Domestic Electrical Appliance Expenditure in Winchester

Amount of Household's Expenditure Spent in Winchester	**% of Households in Each Area**		
	Inner Winchester Area Zones A, B & C	Outer Winchester Area Zones E, F & G	Total Zones A- G
None	24.0	57.0	41.0
Less than a quarter	26.0	18.5	22.1
About a quarter	8.2	5.3	6.7
About half	9.4	4.1	6.7
About three quarters	6.1	2.3	4.2
Most or all	21.4	7.4	14.2
Don't Know	4.8	5.3	5.1
Total	**100.0**	**100.0**	**100.0**

4.12 Of the households who purchase domestic electrical appliance within Winchester, only 18% spend three quarters or more of their expenditure at retail warehouses in Winchester.

Other Electrical Goods Expenditure

4.13 The majority of other electrical goods expenditure (e.g. TV/Hi Fi) within the study area is spent outside Winchester. Approximately 52% of respondents spend nothing on these electrical goods within Winchester. The proportion spent in Winchester was much higher in the inner study area than the outer study area, as shown in Table 4.5.

Table 4.5 Other Electrical Goods Expenditure in Winchester

Amount of Household's Expenditure Spent in Winchester	**% of Households in Each Area**		
	Inner Winchester Area Zones A, B & C	Outer Winchester Area Zones E, F & G	Total Zones A- G
None	37.2	66.7	52.4
Less than a quarter	18.1	13.2	15.6
About a quarter	4.1	4.8	4.5
About half	5.1	4.8	4.9
About three quarters	6.4	1.9	4.1
Most or all	20.4	4.6	12.2
Don't Know	8.7	4.1	6.3
Total	**100.0**	**100.0**	**100.0**

4.14 Only 27% of households in the inner catchment spend three quarters or more of their electrical spending within Winchester, compared with only 7% in the in the outer area.

4.15 Of the households who purchase electrical goods within Winchester, approximately 45% spend three quarters or more of their expenditure at retail warehouses in Winchester.

Furniture, Soft Furnishings and Floor Coverings Expenditure

4.16 Table 4.6 suggests that the majority of furniture, soft furnishings and floor coverings expenditure in the study area is also spent outside Winchester. Over 61% of respondents spend nothing on these goods within Winchester. Only 11% of households in the study area purchase three quarters or more of their furniture, soft furnishings and floor coverings in Winchester.

Table 4.6 Furniture, Soft Furnishing and Floor Covering Expenditure in Winchester

Amount of Household's Expenditure Spent in Winchester	**% of Households in Each Area**		
	Inner Winchester Area Zones A, B & C	Outer Winchester Area Zones E, F & G	Total Zones A- G
None	49.0	72.9	61.3
Less than a quarter	15.8	11.5	13.6
About a quarter	4.6	3.2	3.8
About half	5.6	4.6	5.1
About three quarters	2.6	1.7	2.1
Most or all	15.1	2.9	8.8
Don't Know	7.4	3.4	5.3
Total	**100.0**	**100.0**	**100.0**

4.17 Approximately 31% of households who shop for furniture goods in Winchester spend at least 75% of their furniture expenditure at the retail warehouses in Winchester.

DIY Garden Items and Hardware Expenditure

4.18 A high proportion of DIY expenditure in the study area is also spent outside Winchester, as shown in Table 4.7. Over 48% of respondents spend nothing on these goods in Winchester. Only 22% of households in the study area purchase three quarters or more of their DIY goods in Winchester. Approximately 49% of households who shop for DIY goods in Winchester spend at least 75% of their furniture expenditure at retail warehouses in Winchester.

Table 4.7 DIY Garden Items and Hardware Expenditure in Winchester

Amount of Household's Expenditure Spent in Winchester	% of Households in Each Area		
	Inner Winchester Area Zones A, B & C	Outer Winchester Area Zones E, F & G	Total Zones A- G
None	34.2	61.9	48.5
Less than a quarter	15.1	11.0	13.0
About a quarter	6.9	4.3	5.6
About half	5.9	6.7	6.3
About three quarters	5.4	4.8	5.1
Most or all	28.3	8.6	18.2
Don't Know	4.3	2.6	3.5
Total	**100.0**	**100.0**	**100.0**

Health, Beauty and Chemist Items

4.19 Winchester attracts a higher proportion of expenditure on health beauty and chemist items than it does for most other types of non-food goods, which suggests residents are less prepared to travel longer distance to make these purchases. Nearly 46% of households within the inner study area spend three-quarters or more of their expenditure on these goods in Winchester, and only 19% of households spend nothing in Winchester. Nevertheless, expenditure leakage from the inner study area still appears to be relatively high. Over 42% of households within the inner area spend a quarter or less in Winchester.

Table 4.8 Health, Beauty and Chemist Items Household Expenditure in Winchester

Amount of Household's Expenditure Spent in Winchester	% of Households in Each Area		
	Inner Winchester Area Zones A, B & C	Outer Winchester Area Zones E, F & G	Total Zones A- G
None	18.6	56.6	38.2
Less than a quarter	17.1	14.1	15.6
About a quarter	6.7	5.0	5.8
About half	6.7	4.8	5.7
About three quarters	4.6	4.8	4.7
Most or all	41.3	10.3	25.8
Don't Know	5.1	3.4	4.2
Total	**100.0**	**100.0**	**100.0**

Other Non-Food Household Expenditure

4.20 Winchester attracts a higher proportion of expenditure on other non-food goods (i.e. books, CDs, gifts, toys etc.) than it does for most other types of non-food goods. Over 47% of households within the inner study area spend three quarters or more of their expenditure on these goods in Winchester, and only 10% of households spend nothing in Winchester. Nevertheless, expenditure leakage from the inner study area still appears to be relatively high. Over 39% of households within the inner area spend a quarter or less in Winchester.

Table 4.9 Other Non-Food Household Expenditure within Winchester

Amount of Household's Expenditure Spent in Winchester	% of Households in Each Area		
	Inner Winchester Area Zones A, B & C	Outer Winchester Area Zones E, F & G	Total Zones A- G
None	10.3	12.6	11.2
Less than a quarter	18.7	24.0	20.6
About a quarter	10.0	11.4	10.5
About half	13.4	24.6	17.4
About three quarters	7.4	9.6	8.2
Most or all	39.8	16.8	31.5
Don't Know	0.3	1.2	0.6
Total	**100.0**	**100.0**	**100.0**

4.21 These figures, and preceding tables, demonstrate there is a high level of non-food expenditure outflow from the Winchester area, and this is the case for all non-food goods categories.

Retail Warehouses Provision

4.22 Tables 4.11 and 4.10 shows how often residents within the study area shop at retail warehouses within and outside Winchester. Nearly half of residents (49%) in the outer area stated that they never visit retail warehouses in Winchester. Only 21% of residents in the inner area never shop at retail warehouses in Winchester.

Table 4.10 Frequency of Visits to Retail Warehouses in Winchester

Frequency of Visit to retail warehouses in Winchester	% of Households in Each Area		
	Inner Winchester Area Zones A, B & C	Outer Winchester Area Zones E, F & G	Total Zones A- G
Once a week or more	10.2	7.2	8.7
Once a fortnight	7.7	4.6	6.1
Once a month	25.0	13.7	19.2
Once every 2 to 3 months	18.1	10.3	14.1
Less than once every 3 months	18.1	15.1	16.6
Never	20.9	49.2	35.5
Total	**100.0**	**100.0**	**100.0**

Table 4.11 Frequency of Visits to Retail Warehouses Outside Winchester

Frequency of Visit to retail warehouses in Winchester	% of Households in Each Area		
	Inner Winchester Area Zones A, B & C	Outer Winchester Area Zones E, F & G	Total Zones A- G
Once a week or more	3.6	5.3	4.5
Once a fortnight	5.1	8.4	6.8
Once a month	16.6	17.6	17.1
Once every 2 to 3 months	15.1	13.9	14.5
Less than once every 3 months	25.6	22.5	24.0
Never	34.2	32.4	33.3
Total	**100.0**	**100.0**	**100.0**

4.23 These tables suggest that retail warehouses in Winchester attract a reasonably high share of retail warehouse trade within the inner study area, but a much lower share in the outer area. Nevertheless, retail warehouses outside Winchester still attract a reasonable proportion of trade from within the inner study area. Over 25% of households in this inner area visit retail warehouses outside Winchester once a month or more often.

Mode of Travel

4.24 Table 4.12 shows the normal mode of travel used by respondents when undertaking non-food shopping. Car travel is the main method of transportation across all zones, (accounting for 88% of all respondents). Car based travel was particularly dominant for residents in the outer area, over 91% of respondents, compared with 85% in the inner area.

4.25 These results reflect the high levels of car ownership in the study area. Over 87% of households own one or more motor vehicles, of which 46% of households own two or more motor vehicles. Only 6% of all respondents travel by bus/coach. Approximately 8% of respondents in the inner area normally walk. These results suggest that most households are highly mobile and choose to drive to visit their preferred shopping destination.

Table 4.12 Mode of Travel to Non Food Shopping Destinations

Mode of Travel	**% of Households in Each Area**		
	Inner Winchester Area Zones A, B & C	Outer Winchester Area Zones E, F & G	Total Zones A- G
Car (Driver)	74.5	80.0	77.3
Car (Passenger)	9.4	11.5	10.5
Bus/Coach	6.7	4.8	5.7
Train	1.3	1.0	1.1
Walk	7.7	1.7	4.6
Other	0.5	1.2	0.8
Total	**100.0-**	**100.0-**	**100.0-**

Potential Improvements

4.26 Respondents were also asked what improvements would make them shop more regularly within Winchester. The results are shown in Table 4.13.

Table 4.13 Suggested Improvements in Winchester

Improvement	**% of Households in Each Area**		
	Inner Winchester Area Zones A, B & C	Outer Winchester Area Zones E, F & G	Total Zones A- G
Nothing	15.8	33.7	23.8
Better choice of clothing shops	10.9	8.0	9.6
Better choice of shops in general	18.0	9.6	14.2
Better maintenance/cleanliness	0.8	0.2	0.5
Better quality shops	9.4	5.7	7.8
More retail warehouses	1.8	0.6	1.3
New department store	7.2	2.3	5.0
More car parking	10.8	18.0	14.0
Better public transport	2.9	3.3	3.1
More large shops	4.8	2.7	3.8
More small specialist shops	5.7	2.5	4.5
Other	12.0	13.4	12.6
Total	**100.0**	**100.0**	**100.0**

4.27 A reasonable proportion of respondents (24%) said nothing would make them shop more often in Winchester. However, only 16% of the respondents in the inner area gave this response.

4.28 Approximately 58% of respondents in the inner study area suggested improvements to the choice of shopping facilities would make them more likely to shop in Winchester. More car parking was mentioned by 14% of households in the study area.

4.29 These results suggest that improvements to shopping provision in Winchester could help to reduce the level of expenditure leakage from the study area, particularly within the inner area.