

5.0 CITY CENTRE STREET SURVEY

Survey Structure

5.1 A street survey of 356 visitors within Winchester City Centre was undertaken by NEMS. A copy of the questionnaire and the results are shown at Appendix E. The results of the survey are summarised in this section. The respondents were asked:

- the purpose of their visit;
- what they intended to buy;
- how much they would spend in Winchester;
- the main reasons for choosing Winchester as a shopping destination;
- how they travelled to Winchester;
- how long they intended to stay in the centre; and
- the main factors they liked and disliked about the centre.

Main Purpose of Visit to the City Centre

5.2 Nearly 72% of respondents live in the Winchester study area, as defined in this report. The remaining 28% were long distance visitors and commuters. Of these long distance visitors interviewed, 29% indicated they work in Winchester, although 17% declined to answer. All survey respondents were asked what was the main reason for their visit to the centre. The results are shown in Table 5.1 below.

5.3 The main reason for visiting Winchester was shopping, with 48.1% undertaking some form of shopping as the main reason for their visit. Shopping for non-food goods was the most popular form of shopping, with 34% of visitors undertaking some non-food shopping. Food shopping was undertaken by 22% of visitors. Other predominant reasons amongst respondents included work/business purposes (16%), use of services (9%), healthcare (7%) and social/leisure purposes (7%). These results demonstrate Winchester's importance as a service and employment centre, as well as a shopping destination.

Table 5.1 Main Purpose of Visit to Winchester

Reason for Visit	% of Respondents
Shopping for food only	10.7
Shopping for non-food goods only	22.8
Shopping for both food and non-food items	11.5
Window shopping	3.1
Shopping sub- total	48.1
To visit a restaurant/café/public house	2.2
To have a walk/stroll around	5.1
To use services, e.g. bank, post office, hairdresser	8.7
Work/business purposes	16.3
Healthcare e.g. Doctor, Dentist, Optician	2.2
Social/leisure reason e.g. meeting friends/going to gym	7.3
Tourism, e.g. holiday, day trip	1.4
Other	5.1
Don't know	3.7

- 5.4 Only 1.4% of the visitors in Winchester described themselves as tourists. However, as identified earlier, approximately 15% of all visitors interviewed live outside the study area, and are not commuters.
- 5.5 Approximately 65% of visitors for whom shopping was not the main purpose for their visit intended to make some purchases. Therefore only 18% of all visitors interviewed did not intend to do any shopping during their visit.

Intended Visitor Purchases

- 5.6 Of those respondents who intended to purchase goods during their visit, nearly half intended to buy food and grocery items. The second highest proportion intended to purchase clothing/footwear. A more detailed break down is given in Table 5.2.

Table 5.2 Intended Purchases of Visitors to Winchester

Reason for Visit	% Respondents
Food and groceries	49.3
Newspapers/magazines	10.8
Confectionery/tobacco	2.1
Clothing/footwear	27.8
Furniture/carpets/soft furnishings	2.8
Other electrical goods (TV, Hi-fi etc)	0.3
DIY/hardware/gardening	4.5
Other household goods	2.1
Gifts/jewellery/china and glass	9.4
Books/CDs/Videos/Toys/Hobbies	11.8
Health and Beauty/Chemist Items	11.8
Other	14.2
Don't know	1.0

5.7 These results demonstrate that a wide range of goods are purchased within the town centre. Food and grocery shopping is important within the town centre, concentrated primarily within the Sainsbury supermarket, which attracts a large number of customers. The importance of clothing and footwear shopping suggests Winchester attracts higher order fashion shopping trips as well as day-to-day lower order shopping.

Expenditure

5.8 Visitors who intended to undertake some shopping were asked to estimate how much they would spend on different items during their visit. The results are shown in Table 5.3.

Table 5.3 Expenditure Within Winchester

Type of Expenditure	Approximate Spend	Count	%
Food and Grocery	Nothing	127	44.1
	Less than £5.00	44	15.3
	£5.01 - £10.00	47	16.3
	£10.01 - £20.00	30	10.4
	£20.01 - £30.00	14	4.9
	£30.01 - £40.00	4	1.4
	£40.01 - £50.00	3	1.0
	£50.01 - £75.00	2	0.7
	£75.01 - £100.00	1	0.3
	Don't know	16	5.6
	Average per visitor		£6.43
Non-Food	Nothing	58	20.01
	Less than £5.00	43	14.9
	£5.01 - £10.00	28	9.7
	£10.01 - £20.00	46	16.0
	£20.01 - £30.00	26	9.0
	£30.01 - £40.00	16	5.6
	£40.01 - £50.00	16	5.6
	£50.01 - £75.00	11	3.8
	£75.01 - £100.00	9	3.1
	£100.01 - £150.00	4	1.4
	More than £150.00	8	2.8
Don't know	23	8.0	
	Average per visitor		£23.07
Eating/Drinking Out	Nothing	180	62.5
	Less than £5.00	51	17.7
	£5.01 - £10.00	28	9.7
	£10.01 - £20.00	11	3.8
	£20.01 - £30.00	2	0.7
	More than £150.00	0	0.0
	Don't know	16	5.6
		Average per visitor	
	TOTAL AVERAGE		£31.53

- 5.9 Approximately 56% of shoppers indicated they would purchase food and grocery goods during their visit to Winchester. However, most intended to spend under £10, which suggests the City Centre primarily attracts basket/top-up food and grocery shopping rather than bulk food shopping. Few respondents intended to spend over £50.00. The average spend per shopper on food and grocery items was £6.43.
- 5.10 Around a fifth of shopping visitors did not intend to purchase non-food goods during their visit to Winchester. Of those who intended to purchase non-food shopping goods, 85% intended to spend less than £50.00. Only 3% intended to spend more than £150.00. The average spend per shopper on non-food items was £23.07, which based on our experience is a relatively low average for a major comparison shopping destination.
- 5.11 A large proportion of shopping visitors (62.5%) did not intend to spend anything on eating/drinking out in Winchester. However, it is worth noting that the survey was undertaken during daytime hours, and the results may be different during the night. Most of the remaining visitors intended to spend under £10.00. No visitors interviewed intended to spend over £30.00 on eating/drinking out in Winchester. The average spend per shopper was only £2.03.

Reasons for Choosing to Shop in Winchester

- 5.12 Survey respondents were asked what was the main reasons for choosing to shop in the centre, rather than another town or centre. The results are shown in Table 5.4.

Table 5.4 Main Reason for Choosing to Shop in Winchester

Reason	% of Respondents
Close to home	58.3
Close to work	19.1
Reliable/frequent public transport	1.4
Easy to walk to	7.6
Plenty of parking	2.4
Cheap parking	1.0
Specialist shops	2.8
Good choice/range of shops	4.5
Quality of shops	2.4
Quality of the shopping environment	5.6
Friendly atmosphere	5.2
Specific shop/destination	9.7
Habit	4.9
Other	17.0
Don't Know	3.5

5.13 The main reason given for choosing to shop in Winchester was its proximity to the interviewees' homes (58.3%), followed by proximity to the workplace (19.1%). These results indicate that the location/convenience of the centre is a major factor in determining whether people choose to shop in Winchester. A small proportion of interviewees mentioned the quality and range of shopping. Smaller proportions of respondents also mentioned other reasons, such as habit, quantity of parking, accessibility and the character of Winchester. These results suggest that Winchester provide an important role for local residents. Local residents should continue to shop in Winchester in the future because it is convenient.

Mode of Travel

5.14 The majority of visitors travelled to Winchester by car, either as a driver (41.8%) or as a passenger (11.9%). A reasonable percentage of visitors (31.5%) were pedestrians, which suggests that many people within Winchester urban can walk to the town centre. This demonstrates the sustainability benefits of maintaining a good range of shops and services within the town centre. Public transport was used by approximately 13% of visitors (see Table 5.5 below).

Table 5.5 Mode of Travel

Mode	% of Respondents
Car (Driver)	41.8
Car (Passenger)	11.0
Bus/Coach	9.5
Train	3.4
Taxi	0.3
Walked	31.5
Bicycle	1.7
Other	1.1

Frequency of Shopping Trips to Winchester

5.15 Respondents were asked how frequently they visited Winchester City Centre, shown in Table 5.6. Most respondents visited the centre at least once a week (72.5%) or more, compared with 10.4% of respondents who visited the centre less than once a month. Presumably many of the very frequent visitors are employees working in Winchester or local residents who undertake their day to day shopping within the town centre. For example, the high proportion of visitors undertake top-up food and grocery shopping on a frequent basis

Table 5.6 Frequency of Shopping Trips

Frequency of visit	% of Respondents
Every day	17.7
2-3 times a week	32.6
Once a week	22.2
Once a fortnight	7.3
Once a month	7.0
Less than once a month	10.4
First time today	1.7
Never	1.1

Duration of Visit

5.16 Table 5.7 shows the time visitors intended to spend in Winchester town centre. The average length of stay in Winchester was approximately one hour (excluding those respondents who did not know how long they would spend in the centre). Based on our experience, this average length of stay is relatively low compared with other major comparison shopping destinations. The average time spent in the centre may be low because of the reasonably high proportion of employees visiting the centre during their lunch breaks and the large number of top-up food and grocery shopping trips. However, there does appear to be potential for new shopping facilities to keep customers in the town centre for longer.

Table 5.7 Duration of Visit

Time spent in Winchester	% of Respondents
0-15 minutes	9.0
16-30 minutes	14.9
31 mins – 1 hour	34.8
1-1 1/2 hours	9.8
1 1/2 – 2 hours	16.0
2-3 hours	8.7
Over 3 hours	5.6
Don't know	1.1

Visitor Perceptions

5.17 Interviewees were asked what they like and dislike about shopping in Winchester. The results are shown in Table 5.8. The most popular aspect of shopping in Winchester City Centre was its close proximity to the home and accessibility (36.0%). Winchester City Centre's character and atmosphere was perceived as a major

attraction (28%). A further 19.4% enjoy the attractive environment. The historic character of Winchester appears to be a key strength of the town centre.

5.18 However, only 15% of respondents liked the choice of shops and services, and 10% liked the quality of shopping provision. A further 5% like the specialist shops. In comparison 22% disliked the choice of shops and services, and 10% want more large shops. On balance more visitors appear to dislike shopping provision in Winchester.

5.19 Approximately 23.0% of respondents said there was nothing in particular they liked about Winchester City Centre, but a higher proportion indicated there was nothing they disliked.

Table 5.8 What Respondents Liked and Disliked about Shopping in Winchester

Issue	% of Respondents	
	Liked	Disliked
Nothing in particular	23.0	29.8
Close to home/easy to get to	36.0	N/A
Choice of shops and services	15.4	22.2
Parking provision	3.9	11.0
Cost of parking	1.7	9.8
Specialist shop provision	4.8	11.0
Quality of shops	9.6	4.2
General character/atmosphere	28.4	1.7
Attractive environment	19.4	0.3
Traffic congestion	N/A	10.7
Shopping prices	N/A	6.5
Large shop provision	N/A	9.8
Poor facilities e.g. seating, bins	N/A	0.8
Litter/dirty streets	N/A	0.8
Anti-social behaviour (begging, vandals, on-street drinking)	N/A	2.0
Other	14.9	21.3
Don't know	1.4	3.1
Total	100.0	100.0

5.20 The perceived poor choice of shops and services was the main factor disliked by some visitors (22%), followed by a lack of specialist shops, amount of parking and traffic congestion (11% each) and the cost of parking (10%).

5.21 Only 2% of respondents disliked Winchester's character or environment and anti-social behaviour. These low figures suggest that there is a reasonable degree of satisfaction with the shopping environment in Winchester.

5.22 These results suggest that improvements to the range and choice of shops could help to attract additional, longer and more frequent shopping trips to Winchester town centre.

Visitor Profile

5.23 Winchester attracts a high number of visitors within the higher social economic groups as shown in Table 5.9. Approximately 70% of visitors are within social groups A, B and C1. Nevertheless, Winchester also attracted a high proportion of non-car owners (24%). These characteristics broadly reflect the profile of households within the Winchester study area.

Table 5.9 Socio-Economic Characteristics of Visitors in Winchester

Characteristics	Visitor Survey
Car Ownership (number of vehicles)	
Two or more	42.7%
One	33.7%
None	23.6%
Occupation (chief wage earner)	
AB	38.8%
C1	30.9%
C2	13.5%
DE	11.0%
Other	-