Retail Update 2012

Retail and Town Centre Uses Study

Winchester City Council

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1.0 Introduction

1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by Winchester City Council to prepare a retail and town centre uses study in 2007. This study included:

a an assessment of the future needs for additional retail and commercial leisure facilities within the authority area up to 2026;

b an analysis of the role and function of existing centres in the Winchester District;

c an assessment of the capacity of Winchester's centres to accommodate growth, and the identification of potential development sites; and

d a policy review and proposed issues and options for the Local Development Framework (LDF).

1.2 In 2010, NLP was commissioned to provide an update to the 2007 retail and town centre uses study providing information on recent changes/trends in retail planning and an update of the retail capacity assessment.

1.3 Due to recent changes in population and the continued effects of the recession on retail expenditure levels and forecasts, NLP has been commissioned to undertake a partial update focusing on the retail floorspace projections. It is not considered necessary to update the findings of previous studies in relation to commercial leisure provisions, the network of centres, centre health checks and centre boundaries, because these remain relatively up to date and the conclusions remain robust.

1.4 This 2012 report provides a further update, identifying recent changes and trends in retail planning, including the National Planning Policy Framework (NPPF) and provides an update of the retail capacity assessment based on the latest available information, e.g. population, expenditure and turnover levels. The report also reviews the capacity for Winchester's centres to accommodate growth.

1.5 This report includes an update of the household survey for part of the study area in and around Winchester (Zones 1 to 4) but does not update the health checks carried out in 2007 and should therefore be read alongside the 2007 retail study.

1.6 Section 2 of this report summarises recent relevant changes to the retail capacity assessments and outlines retail trends. Sections 3 sets out the updated retail capacity and quantitative need assessment. Section 4 reassesses the scope for accommodating growth. Section 5 provides the recommendations and conclusions.

2.0 Recent Changes and Trends

The Need for the Study Update

2.1 The Council's previous retail and town centres study (2007) and update (2010) provided projections up to 2026 and these figures now need to be updated.

2.2 Central government guidance in PPS4 has been replaced by the NPPF and this will have implications for plan making and development control decisions.

The National Planning Policy Framework

2.3 The 2010 study update was based on the guidance set out in PPS4: 'Planning for Sustainable Growth' published in December 2009. This guidance has now been superseded by the NPPF published by the Department for Communities and Local Government on 27 March 2012. It sets out the Government's planning policies for England and replaces all previously issued Planning Policy Statements (PPSs) and Planning Policy Guidance Notes (PPGs) with a single national planning policy document (including PPS4).

2.4 At the heart of the NPPF is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision-taking. In terms of plan-making this means that (para. 14):

- Local planning authorities should positively seek opportunities to meet development needs of their area;
- Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:
    - any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or
    - specific policies in this Framework indicate development should be restricted.

2.5 All plans should be based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally (para. 15).

2.6 A set of 12 core land-use planning principles should underpin both plan-making and decision-taking (para. 17), including:

- proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made objectively to meet the needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of residential and business communities;
- take account of the different roles and character of different areas, promoting the vitality of main urban areas;
- encourage the effective use of land by reusing land that has been previously developed (brownfield land), provided that it is not of high environmental value.

2.7 Local Planning Authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century (para. 20).

2.8 In terms of plan making, the NPPF (para. 161) states that Local Planning Authorities should use their evidence base to assess:

- the need for land or floorspace for economic development, including both quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including retail and leisure development.
- the role and function of town centres and the relationship between them, including any trends in the performance of centres.
- the capacity of existing centres to accommodate new development.

2.9 In terms of retail development, the NPPF states (para. 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should:

- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;

- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.10 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against NPPF policies and the key sequential and impact tests.

2.11 In terms of the sequential test, the policy requirements are largely unchanged from PPS4. Applications for main town centre uses should be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Both applicants and local planning authorities should demonstrate flexibility on issues such as format and scale (para. 24).

2.12 The NPPF states that Local Planning Authorities should require an impact assessment for applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq m (para. 26). This should include an assessment of:

- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should be assessed up to ten years from the time the application is made.

2.13 Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on one of more of the above factors, it should be refused (para. 27).

Rural Policy

2.14 The NPPF states that in relation to the rural economy, local and neighbourhood plans should promote the retention and development of local services and community facilities in villages, such as local shops, meeting places, sports venues, cultural buildings, public houses and places of worship (para. 28).

Development Plan

2.15 The development plan consists of the South East Plan (May 2009) and the saved policies of the Winchester District Plan Review (adopted July 2006). No provisions or policies within the Hampshire Structure Plan 1996-2011 (Dec 2000) are in force.

2.16 In terms of the Local Development Framework, the Local Plan Part 1 - Joint Core Strategy Pre-Submission was published in January 2012 for consultation. Part of the spatial vision for Winchester Town is to ensure it retains its desirability and prosperity by providing the development necessary to meet the needs of the whole community. To achieve this vision, there is a requirement to ensure sufficient land and premises are available to allow existing businesses to prosper and provide opportunities for new businesses and enterprises to look towards Winchester as a location of choice and to allow the retail sector to expand and diversify to ensure Winchester retains its place in the sub-regional retail hierarchy.

2.17 Policy DS1 (Development Strategies and Principles) states that development proposals will be expected to demonstrate conformity with various principles including applying a town centres first approach to retail, leisure or other development proposals that are high attracters of people.

2.18 Policy WT1 (Development Strategy for Winchester Town) states that the spatial vision for the town will be achieved through the provision of additional retail floorspace through existing planned developments and future additional provision to support Winchester's role as a sub-regional shopping centre for existing and new communities and promotion of the town centre as the preferred location for new development that attracts high visitor numbers such as retail, leisure, culture and tourism.

2.19 For Market Towns and Larger Villages, Policy MTRA 2 states that retail and services should be accommodated through development and redevelopment opportunities within existing settlement boundaries in the first instance.

The Economic Downturn

2.20 The economic downturn is still having a significant impact on the retail sector. A number of national operators have failed, leaving major voids within centres and retail parks (e.g. Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat). Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.

2.21 Projecting expenditure levels within this study update takes into account the economic downturn, particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the LDF period. This study takes a long term view for the LDF period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency will also need to be carefully considered. We believe the study should take a balanced approach.

Retail Trends

2.22 A revised assessment of the need for retail facilities in Winchester District is set out in Section 3.0 of this report. This section provides an overview of national tends within the retail sector.

Expenditure Growth

2.23 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the current economic downturn is expected to lead to limited growth in the short term.

2.24 In the past expenditure growth has fuelled the growth in retail floorspace, including major out-of-centre development particularly in the 1980's and 1990's. The economic downturn suggests that rates of growth during the past few years are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further retail floorspace. We anticipate these national trends will be mirrored in Hampshire.

New Forms of Retailing

2.25 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. Trends within this sector may well have implications for retailing within Hampshire. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Growth in home shopping needs to be considered in Winchester District.

2.26 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure (Experian Briefing Note 9 (Sept 2011)).

Recent trends suggest continued strong growth in this sector, from 5.1% of retail transactions in 2008 to 9.6%% in 2011 (Experian Briefing Note 9), but there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian's Retail Planning Note 9 states:

"Growth in internet shopping has exceeded our expectations. Online spending increased in real terms by 18% in 2010 in line with the forecast in Retail Planner 8 of August 2010. However, 2011 has seen expansion continue at this impressive pace, despite the squeeze on consumers, rather than easing as in our previous forecast. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales in the next few years, but we now expect that market share holds constant from 2018 (rather than 2016). Our assumption that after 2018 internet shopping grows in line with total retail sales reflects the maturing of the market as the number of computer-literate adults reaches saturation point."

2.27 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990s. Retailers also responded to stricter planning controls by changing their trading formats. In addition some major food operators have introduced smaller store formats capable of being accommodated within town centres, such as the Tesco Metro, Sainsbury Central/Local store and Marks and Spencer's Simply Foods formats. Food operators have also entered the local convenience store market, for example Tesco Express store and convenience stores linked with petrol filling stations. The entrance of European discount food operators such as Aldi, Lidl and Netto has also been rapid during the last decade.

2.28 Food store operators have also implemented a programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have attempted to increase the sale of non-food products within their food stores, including clothing and electrical goods.

2.29 Comparison retailers have also responded to recent market conditions. The bulky goods retail warehouse sector has rationalised and there have been a number of mergers. For example there are now fewer DIY operators and B&Q and Homebase have scaled down or closed their stores. This may be due to the current downturn in the housing market, which has been historically linked to the success of DIY store operators.

2.30 Other traditional high street retailers have sought out-of-centre stores, for example Boots and Poundstretcher. Matalan has also opened numerous discount clothing stores across the country. Sports clothing retail warehouses including JJB Sports and Decathlon have also expanded out-of-centre.

2.31 The economic downturn has had, and is likely to continue to have, an impact on the retail sector. The effects of the recession may continue to have an impact on shop vacancy levels in the District. The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods are particularly weak at present.

2.32 Within town centres, some high street multiple comparison retailers changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq m/2,150 sq ft) with an increasing polarisation of activity into the larger regional and sub-regional centres. The continuation of these trends will influence future operator requirements in Winchester District with smaller vacant units becoming less attractive for new occupiers and existing retailers looking to relocate into larger units in higher order centres.

2.33 Operator demand for space has decreased during the recession, and of those national multiples looking for space many prefer to locate in larger centres i.e. Winchester, Southampton, Basingstoke and Portsmouth. Demand from multiples within the District's town centres is likely to be weaker, which will affect the appropriate strategies for individual centres.

3.0 Quantitative Scope for Retail Floorspace

Introduction

3.1 This section assesses the quantitative scope for new retail floorspace in Winchester District up to 2031. It sets outs the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping.

3.2 All monetary vales expressed in this analysis are at 2010 prices unless stated otherwise. The previous 2010 NLP study Update was based on 2008 prices, therefore the expenditure and turnover figures in this report are not directly comparable with the figures in the 2010 study update.

3.3 The 2010 study update provided projections from 2010 to 2013, 2016, 2021 and 2026. The projections in this report have been rolled forward and figures are provided from 2012 to 2018, 2021, 2026 and 2031.

Methodology and Data

3.4 The quantitative analysis is based on the study area defined for the main centres in the 2007 NLP Study. In the 2007 Study and the 2010 Update the study area was divided into nine zones for more detailed analysis. For this study update, the three zones around Winchester (previous zones 3, 4 and 8) have been redrawn and amalgamated to provide two zones, in order to better reflect actual shopping patterns established by the household survey results, i.e. the new zones are more contiguous in terms of shopping patterns.

3.5 The study area is shown in Appendix A. The extent of the study area is based on postcode area boundaries and the proximity of major competing shopping destinations i.e. shopping facilities within the study area are expected to attract a significant proportion of their trade from residents within the study area.

3.6 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's latest local consumer expenditure estimates for comparison and convenience goods for the study area zones have been obtained.

3.7 Experian's EBS national expenditure information has been used to forecast expenditure within the study area in the short term (2010 to 2013). Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

3.8 For longer term projections Experian provide forecast growth rates and trend line projections. Experian's average annual growth forecast for the period 2014 to 2018 is 0.5% for convenience goods and 3% for comparison goods. The ultra long term trend line annual growth rates are 0.6% for convenience goods and 5.9% for comparison goods. We have adopted the mid-point between Experian's forecast growth rates and the ultra long term growth (0.55% per annum for convenience goods and 4.45% for comparison) to project expenditure between 2013 to 2031.

3.9 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors, but primarily information gathered within the household survey undertaken in April 2012 for Zones 1 to 4 (Winchester Urban Area) and June 2007 for Zones 5 to 8, with amendments to reflect changes since 2007. A copy of the April 2012 household survey results commissioned by NEMS Market Research can be found in Appendix D.

3.10 The 2012 household survey results indicate that convenience good shopping patterns have not changed significantly since 2007, although Winchester town has increased its market share of expenditure marginally within the urban area (zones 1 and 2).

3.11 In terms of comparison shopping, the 2012 results suggest Winchester town's market share of expenditure may have reduced marginally both within the urban area and the surrounding rural catchment area.

3.12 The total turnover of identified shops within Winchester District is estimated based on penetration rates. The turnover estimate for retail floorspace is then compared to average benchmark or average sales floorspace densities derived from Verdict Information 2011 and Mintel's Retail Rankings, which provides an indication of how food stores are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail floorspace.

Population and Spending

3.13 The study area population for 2012 to 2031 is set out in Table 1B in Appendix B, based on the 2001 Census and Hampshire County small area population forecasts (April 2011) up to 2018 and district wide long term projections up to 2031 (Housing Technical Paper 2011). These population figures are consistent with those currently used for the Core Strategy.

3.14 Table 2B in Appendix B sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2031. Comparison forecasts of per capita spending are shown in Table 1C in Appendix C. Two growth scenario have been adopted for long term growth (up to 2026 and 2031) in comparison expenditure, due to uncertainties inherent with projections beyond 10 years. The low growth scenario is based on Experian's forecast expenditure growth rate (3% per annum). The high growth scenario is based on the mid-point between Experian's forecast expenditure growth rate and the ultra long term trend line growth rate (i.e. 4.45% per annum). In terms of plan making and allocating sites for long term growth, we believe the low growth scenario should be adopted. However long term projections should continue to be monitored and reviewed accordingly.

3.15 The level of available spending are derived by combining the population in Table 1B and per capita spending figures in Tables 2B and 1C. For both convenience and comparison spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.

3.16 Special Forms of Trading (SFT) and non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. "Special forms of Trading" includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship to the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street.

3.17 Experian provide projections for E-tailing and other SFT. These projections have been used to exclude expenditure attributed to e-tailing through non-retail businesses, which will not directly impact on the demand for retail floorspace. Based on Experian data SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is 3.7% and 8.8% of total convenience and comparison goods expenditure respectively in 2010. The projections provided by Experian suggest that these percentages could increase to 5.9% and 12.7% by 2016. The amount of e-tail expenditure through non-retail businesses is expected to increase significantly in proportional terms, but as a proportion of total expenditure this sector is expected to remain relatively insignificant for the foreseeable future.

3.18 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 18.9% from £415.47 million in 2012 to £509.67 million in 2031, as shown in Table 3B in Appendix B.

3.19 Comparison goods spending is forecast to nearly double between 2012 and 2031, increasing from £638.61 million to £1,232.45 million based on the low growth scenario, as shown in Table 2C in Appendix C. These figures relate to real growth and exclude inflation.

Existing Retail Floorspace

3.20 Existing convenience goods retail sales floorspace within the Winchester District is 20,071 sq m net as set out in Table 1A in Appendix A. Most of this floorspace is concentrated in Winchester urban area. This floorspace figure excludes comparison sales floorspace within food stores (4,013 sq m net).

3.21 Comparison goods retail sales floorspace within the Winchester local authority area, including retail warehouses is estimated as 59,784 sq m net as shown in

Table 3A to 5A in Appendix A, which includes comparison sales within food stores.

Existing Spending Patterns 2012

Convenience Shopping

3.22 The results of the household shopper questionnaire survey, undertaken by NEMS in April 2012 have been used to estimate existing shopping patterns with Zones 1 to 4 of the study area (Appendix D). For Zones 5 to 8, the results of the household survey undertaken by NEMS in June 2007 have been used. The estimates of market share or penetration within each study area zone are shown in Table 4B in Appendix B.

3.23 Table 5B indicates that the level of convenience goods expenditure attracted to shops/stores in the Winchester District in 2012 is estimated to be £191 million as shown in Appendix B. Winchester LA's market share of total convenience expenditure in the study area as a whole is estimated to be about 40% (£166.2 million of £415.4 million), i.e. the sum of Zones 1 to 8 in Table 5B.

3.24 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 1A in Appendix A, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

3.25 The estimated convenience goods sales areas have been derived from a combination of the Goad data and the Institute of Grocery Distribution (IGD). Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1A in Appendix A, for consistency with the use of goods based expenditure figures.

3.26 Average sales densities are not widely available for small convenience shops, particularly independent retailers. An average sales density of £4,000 per sq m has been adopted for small convenience shops. The total benchmark turnover of existing convenience sales floorspace within Winchester District is £191.73 million.

3.27 The assessment of shopping patterns suggests that convenience goods expenditure available to facilities in Winchester District in 2012 is £191 million. These figures suggest that collectively convenience retail facilities in Winchester District are trading at around average levels.

Comparison Shopping

3.28 The estimated comparison goods expenditure available within the study area is £638.6million in 2012, as shown in Table 3C in Appendix C. This is expected to increase to £1,232.4 million in 2031, based on the low growth scenario.

3.29 Winchester District's market share of total comparison goods expenditure generated within the study area is about 30%, i.e. the sum of Zones 1 to 8 in Table 3C (£190.4 million out of the total of £638.6 million). Therefore 70% of comparison expenditure is spent elsewhere, in particular Southampton, Andover, Eastleigh, Fareham and Waterlooville. However, the retention rate within the core Winchester (Zones 1 to 4) is much higher at about 64%.

3.30 Company average sales densities are only available for a selection of multiple retailers. Available information indicates that the sales densities amongst comparison retailers vary significantly. Within Winchester urban area available company average sales densities (per sq m or per unit) from Mintel's Retail Rankings 2010 have been used to calculate an expected turnover for existing facilities, as shown in Tables 3A and 5A. For other shopping centres (Table 4A) outside Winchester urban area, we have adopted an average sales density of £4,000 per sq m net.

3.31 The current level of comparison expenditure attracted to facilities in Winchester District is £235.22 million. Facilities within Winchester urban area are estimated to be trading around benchmark. Whiteley is estimated to be trading £20.83 million below the benchmark turnover (£41.71 million based on a sales density of £4,000 per sq m net). However Whiteley Village is in the process of being redeveloped.

3.32 On balance comparison shopping facilities within the Winchester District appear to be trading healthily.

Quantitative Capacity for Convenience Floorspace

3.33 The level of available convenience goods expenditure in 2018, 2021, 2026 and 2031 is shown at Tables 5B to 9B in Appendix B.

3.34 The total level of available convenience goods expenditure available for shops in Winchester District between 2012 and 2031 is summarised in Table 10B. This table takes into account the population and expenditure projections shown in Table 1B to 3B in Appendix B. The benchmark turnover of existing convenience floorspace has been subtracted from the estimates of available expenditure to provide surplus expenditure estimates.

3.35 Table 10B assumes that the benchmark turnover of convenience floorspace will not increase during 2012 to 2031 due to the recession Experian suggest there could be a reduction in convenience efficiency in the short term, then 0.4% per annum growth is recommended between 2014 to 2018 and 0.2% thereafter (Source: Experian Retail Planner Briefing (September 2011)). The reduction in turnover efficiency in the short term is expected to cancel out longer term growth, therefore no change in convenience goods turnover efficiency is assumed in this study.

3.36 The estimates of surplus/deficit expenditure are converted into floorspace projections in Table 10B, Appendix B. These floorspace projections relate only to convenience sales floorspace and exclude any comparison sales within food stores. Table 10B assumes different benchmark turnover densities for Winchester urban and rural areas and Whiteley based on the existing benchmark sales densities shown in Table 1A. The projections assume that a mix of different types of floorspace would be provided i.e. large food superstores, smaller supermarkets and small shops. These projections are over and above commitments as set out in Table 2A in Appendix A.

3.37 In the study area as a whole there is currently a small deficit of convenience expenditure (-£0.73 million). As a result of commitments coming forward before 2018 (Silver Hill scheme, Sainsbury's at Bishops Waltham and Aldi in Weeke shown in Table 2A, Appendix A) this convenience expenditure deficit will increase to -£32.26 million in 2018, but will reduce to -£11.45 million in 2026.

3.38 Most of the deficit in convenience expenditure is within the Winchester Rural Area as a result of the Sainsbury's commitment at Bishop Waltham coming forward. Within Winchester Urban Area expenditure growth could support 1,125 sq m net of convenience floorspace by 2031 over and above commitments.

3.39 The Whiteley projection is 508 sq m net up to 2031, but this could be offset against the over-supply caused by the Sainsbury store at Bishop Waltham.

Quantitative Capacity for Comparison Floorspace

3.40 The assessment of existing shopping patterns in 2012 indicates that there is a high level of comparison expenditure leakage from the southern half of the study area. One would expect comparison expenditure outflow to continue to large centres including Basingstoke, Portsmouth and Southampton. Eastleigh, Fareham and Waterlooville will also attract trade from the study area.

3.41 Further improvements to comparison retail provision within the District could help to claw back some additional expenditure leakage from parts of the study area. We have projected the level of comparison goods expenditure available to shops in Winchester District at 2018, 2021, 2026 and 2031 as shown in Tables 4C to 9C in Appendix C. The market shares have been adjusted from 2018 to take account of the redevelopment of Whiteley Village and the impact this will have on expenditure claw back. The level of comparison expenditure attracted to facilities in Winchester local authority area is expected to increase from £235.2 million in 2012 to £518.9 million in 2031, based on the preferred low growth scenario.

3.42 Future available expenditure is compared with the projected turnover of existing and proposed comparison retail facilities within the District in order to provide estimates of surplus expenditure, as shown in Table 10C. Table 10C assumes that the existing turnover of comparison floorspace will increase its benchmark turnover in real terms. A growth rate of 1.7% per annum is adopted. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

3.43 The growth in comparison goods expenditure available for shops in Winchester District between 2012 and 2031 is summarised in Table 10C, in Appendix C, based on both the low and high growth scenarios for long term growth up to 2026 and 2031.

3.44 In the short term up to 2018, in the study area as a whole there is a deficit in available comparison expenditure due to the implementation of commitments (listed in Table 6A in Appendix A). By 2021 population and expenditure growth will result in a comparison expenditure surplus of £21.15 million increasing to £68.93 million in 2031, based on the low growth scenario. Surplus comparison expenditure has been converted into comparison floorspace projections at the foot of Table 10C in Appendix C. These floorspace figures are over and above commitments, i.e. Whiteley redevelopment (before at 2018) and Silver Hill development (before 2018) (Table 6A, Appendix A).

3.45 Surplus expenditure at 2021 could support 3,786 sq m net of comparison sales floorspace, over and above commitments in the District. The low growth projection up to 2031 is 10,768, as shown in Table 10C.

3.46 The retail floorspace projections above takes into account the Fareham Strategic Development Areas (SDA) which proposes up to 7,500 dwellings in the plan period. It is possible that over the plan period the SDA may not come forward, or may be delayed or reduced in size. However, the SDA falls mainly outside the study area and will therefore not have a significant bearing on the projections bearing in mind the long term nature of the projections.

4.0 Scope for Accommodating Growth

Floorspace Projections

4.1 The floorspace projections set out in the previous sections assume that new shopping facilities within Winchester District can maintain and improve their current market share of expenditure within the study area, following the implementation of proposed commitments. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

1 major retail developments in competing centres, such as Southampton, Andover and Portsmouth;

2 the re-occupation of vacant town centre floorspace;

a the availability of land to accommodate new development;

3 the reliability of long term expenditure projections, particularly after 2021;

4 the effect of Internet/home shopping on the demand for retail property;

5 the level of operator demand for floorspace in Winchester District, bearing in mind the proximity of larger centres (e.g. Southampton);

6 the likelihood that Winchester's existing market share of expenditure will change in the future; and

7 the potential impact new development may have on existing centres.

4.2 The long term floorspace projections (i.e. 2026 and 2031) shown in Table 10C in Appendix C should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development control decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. For these reasons, we recommend the low growth projection up to 2031 should be adopted for plan making purposes. Long term projections should be monitored and kept under-review.

4.3 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. However, the impact of internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and internet services utilise existing stores rather than warehouses, for example Tesco Direct. Therefore, Internet sales will not always significantly reduce the demand for shop floorspace. In addition, some of the growth in Internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.

4.4 The quantitative assessment of the potential capacity for new retail floorspace within the previous sections suggests that there is limited scope for new convenience retail development up to 2031, however there is scope for new comparison retail development within Winchester District, over and above existing commitments by 2021. This section examines the opportunities for accommodating this projected growth and assesses potential opportunities to accommodate this floorspace.

Accommodating Future Growth

4.5 The sequential approach suggests that designated town centres should be the first choice for retail and leisure development. In considering this important issue the following factors should be assessed.

a What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?

b Is the nature and scale of development likely to serve a wide catchment area e.g. a large part of Winchester authority area?

c Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?

d If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?

4.6 All development should be appropriate in terms of scale and nature to the centre in which it is located. Based on the hierarchy of centres and the retail floorspace projections in this study report, retail developments over 1,000 sq m gross should generally be accommodated in Winchester town.

4.7 The NPPF indicates that impact assessments should normally only be necessary for developments outside town centres of over 2,500 sq m gross. This threshold is considered inappropriate within Winchester District because this scale of development would represent a significant proportion of the overall retail floorspace projections in the District. Development smaller than 2,500 sq m gross could have a significant adverse impact, particularly on the smaller town centres. Based on the retail floorspace projections and the network of centres, a threshold of 1,000 sq m gross is recommended for retail development within Winchester town and a 500 sq m gross threshold for other parts of the District.

4.8 The existing stock of premises may have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing comparison retail floorspace can, on average, increase its turnover to sales floorspace densities. A growth rate of 1.7% per annum is assumed for comparison floorspace and this represents a balanced approach. The floorspace projections reflect these assumptions. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

4.9 There were 23 vacant shop units within Winchester town centre in September 2011, a vacancy rate of about 7.1% which is significantly below the Goad national average at February 2012 (13.67%). These vacant premises could also help to accommodate growth, e.g. if the current vacancy rate fell from 7.1% to 5% (i.e. the reoccupation of 7 vacant properties) could accommodate at least 560 sq m gross of retail space (about 80 sq m gross per unit).

Potential Development Opportunities

4.10 We have reviewed the potential development sites identified in the five main centres in the District within the 2007 study. Sites in each centre have been re-evaluated, in terms of their implications on the scope and need for additional retail facilities in the District.

Winchester Town Centre

4.11 Within and around Winchester town centre 14 potential development opportunities were identified of which 9 sites have reasonable to good potential to deliver additional retail/leisure floorspace. Some of these sites are outside the town centre boundary and could be considered to be edge or out-of-centre sites in sequential terms for retail development, e.g. WIN1, WIN2, WIN7 to WIN10. The nearest sites to the Primary Shopping Area are WIN4, WIN5 and WIN6.

4.12 The existing commitments including Silver Hill are expected to accommodate growth in the short to medium term (up to 2018). The priority is to secure the development and occupation of this development proposal. As indicated in Section 3, the projection for comparison retail floorspace in Winchester urban area is 3,338 sq m net up to 2021 as identified in Table 10C in Appendix C, or around 4,769 sq m gross, based on a 70% net to gross ratio. It may also be reasonable to expect a further 15% floorspace to be devoted to other non-retail Class A uses (Classes A2 to A5), which would produce total Class A floorspace projection of about 5,484 sq m gross by 2021. Based on the low growth scenario this increases to 12,848 sq m gross up to 2031.

4.13 Short to medium term opportunities within the Winchester town centre boundary, with an overall development rating of “reasonable” to “good” (seven sites – WIN3, WIN5, WIN6, WIN11 to WIN14), are in theory capable of accommodating around 16,000 sq m gross of Class A1 to A5 floorspace, and could therefore meet all of the Winchester urban area projection up to 2021. The main opportunities, closest to the Primary Shopping Area, are the Cossack Lane Car Park (up to 10,000 sq m gross) and the Middle Brook Centre/Upper Brook Street Car park (3,000 sq m gross).

4.14 If insufficient opportunities can be brought forward within the town centre, then it may be necessary to consider sites just outside the centre boundary. In addition, if certain formats of retail use, where there is a demonstrable need, cannot be accommodated within the town centre boundary then less central sites could be considered, for example retail warehouse type uses.

4.15 Three opportunities just outside the town centre boundary have been identified with reasonable development potential (WIN1, WIN2 and WIN14), which could accommodate about 9,000 sq m gross of large format type retail use, and retail uses (1,500 sq m gross) associated with the railway station.

Rest of the District

4.16 Within the other five centres (New Alresford, Bishop's Waltham, Wickham, Whiteley and Denmead) 10 potential development opportunities were identified, 3 in New Alresford, 3 in Bishop's Waltham 2 in Wickham and 2 in Denmead, all of which have "reasonable" to "good" potential to deliver additional retail/leisure floorspace in the short to medium term.

4.17 Within the rural area, there is a deficit of convenience expenditure during the plan period due to the Sainsbury's commitment at Bishop Waltham coming forward. In terms of additional comparison floorspace, the short to medium term growth is expected to be accommodated in the Whiteley Village development and other commitments. The projection for retail comparison floorspace in the Winchester rural area (excluding Winchester urban area and Whiteley) is about 464 sq m net up to 2021 (as identified in Appendix C, Table 10C).

4.18 This results in 663 sq m gross comparison retail floorspace assuming a 70% net to gross ratio. It may also be reasonable to expect a further 15% floorspace to be devoted to other non-retail Class A uses (Classes A2 to A5), which would produce total floorspace projection of about 762 sq m gross by 2021. This increases to 1,712 sq m gross by 2031.

4.19 Short to medium term opportunities within or near the four centres are capable of accommodating up to 7,500 sq m gross of Class A1 to A5 floorspace, and could meet the 2031 low growth projection.

4.20 In Whiteley Town Centre, if further opportunities for intensification do come forward, the low growth floorspace projection is about 1,904 sq m net for comparison retail at 2031, as identified in Appendix C, Table 10C). This results in 2,720 sq m gross retail floorspace assuming a 70% net to gross ratio. Accounting for non-retail Class A uses produces a total floorspace of about 3,128 sq m gross by 2021. However the projections suggest further expansion is not the priority in the short to medium term (up to 2021).

5.0 Conclusions and Recommendations

5.1 This report provides an update of the district wide needs assessment for retail development in Winchester District and should be read alongside the 2007 Study. The principal conclusions of the analysis contained within this study are summarised below

Meeting Shopping Needs in Winchester

5.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period.

5.3 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

5.4 Existing commitments, including Silver Hill and Whiteley Village redevelopment, will meet the need within the District up to and beyond 2018. The short to medium term priority is to secure the implementation and occupation of commitments. If an out-of-centre proposal emerges then the ability to accommodate the proposed use within town centres or emerging town centre developments will need to be carefully considered, along with an assessment of the proposal's impact.

5.5 Long term forecasts up to 2026 and 2031 may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2018 is attributable to projected growth in spending per capita, extrapolated from past growth projections, as well as population growth. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding the District should also be monitored along with the affect proposals may have on the demand for additional development in Winchester.

Retail Floorspace Projections

5.6 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. However, the impact of Internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and Internet services utilise existing stores, therefore, internet sales will not always significantly reduce the demand for shop floorspace. In addition, some of the growth in Internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.

5.7 The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within the Winchester Urban Area and the rest of the district in the longer term. The projections suggest new floorspace (over and above commitments) should be distributed as follows:

Table 5.1 Class A1 Retail Floorspace Projections

Location	Floorspace sq.m. net (sq. ft net)		
	Convenience	Comparison	Total
Up to 2021 (taking account of commitments)			
Winchester Urban Area	-	3,338	**3,338**
Winchester Rural Area	-	448	**448**
Whiteley	-	-	**-**
Total	**-**	**3,786**	**3,786**
Up to 2031 (taking account of commitments)			
Winchester Urban Area	1,125	7,821	**8,946**
Winchester Rural Area	-	1,042	**1,042**
Whiteley	-	1,904	**1,904**
Total	**1,125**	**10,768**	**11,892**

Source: Appendix B, Table 10B and Appendix C, Table 10C

**Figures are net floorspace. For consistency, when deriving the gross floorspace apply a 70% net to gross ratio. Low growth scenario up to 2031 for comparison goods*

Changes Since 2010

5.8 The updated convenience and comparison retail floorspace projections are lower throughout the period up to 2026 than the projections within the 2010 Update. These decreases are due to a number of factors including:

Convenience

- a slight decrease in convenience retail expenditure per capita for the study area;
- the Sainsbury's commitment at Bishops Waltham; and
- changes to the average sales densities of food store retailers.

Comparison

- a decrease in the comparison retail expenditure per capita for the study area; and
- lower forecast annual expenditure growth rates.

Accommodating Future Growth

5.9 The NPPF sequential approach still suggests that designated town centres should be the first choice for retail development. In considering this important issue the following factors should be assessed.

- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
- Is the nature and scale of development likely to serve a wide catchment area e.g. a large part of Winchester District?
- Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
- if the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?

5.10 Based on the hierarchy of centres and the retail floorspace projections in this study report, retail developments over 1,000 sq m gross should generally be accommodated in Winchester town.

5.11 Based on the retail floorspace projections and the network of centres, a threshold for impact assessments of 1,000 sq m gross is recommended for retail development outside defined centres within Winchester town and a 500 sq m gross threshold for other parts of the District.

5.12 The existing stock of premises may have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing comparison retail floorspace can, on average, increase its turnover to sales floorspace densities (a growth rate of 1.7% per annum is assumed for comparison goods). The floorspace projections reflect these assumptions. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

5.13 The proportion of vacant shops in Winchester town centre (7.1%) is relatively low when compared with the Goad national average (13.67%). Vacant premises are unlikely to accommodate a significant amount of growth, because all centres will have a certain level of vacant premises at any given time, and this reflects the normal churn of occupiers.

Appendix A Study Area and Retail Facilities

Winchester Retail Study Update - Study Area 2012

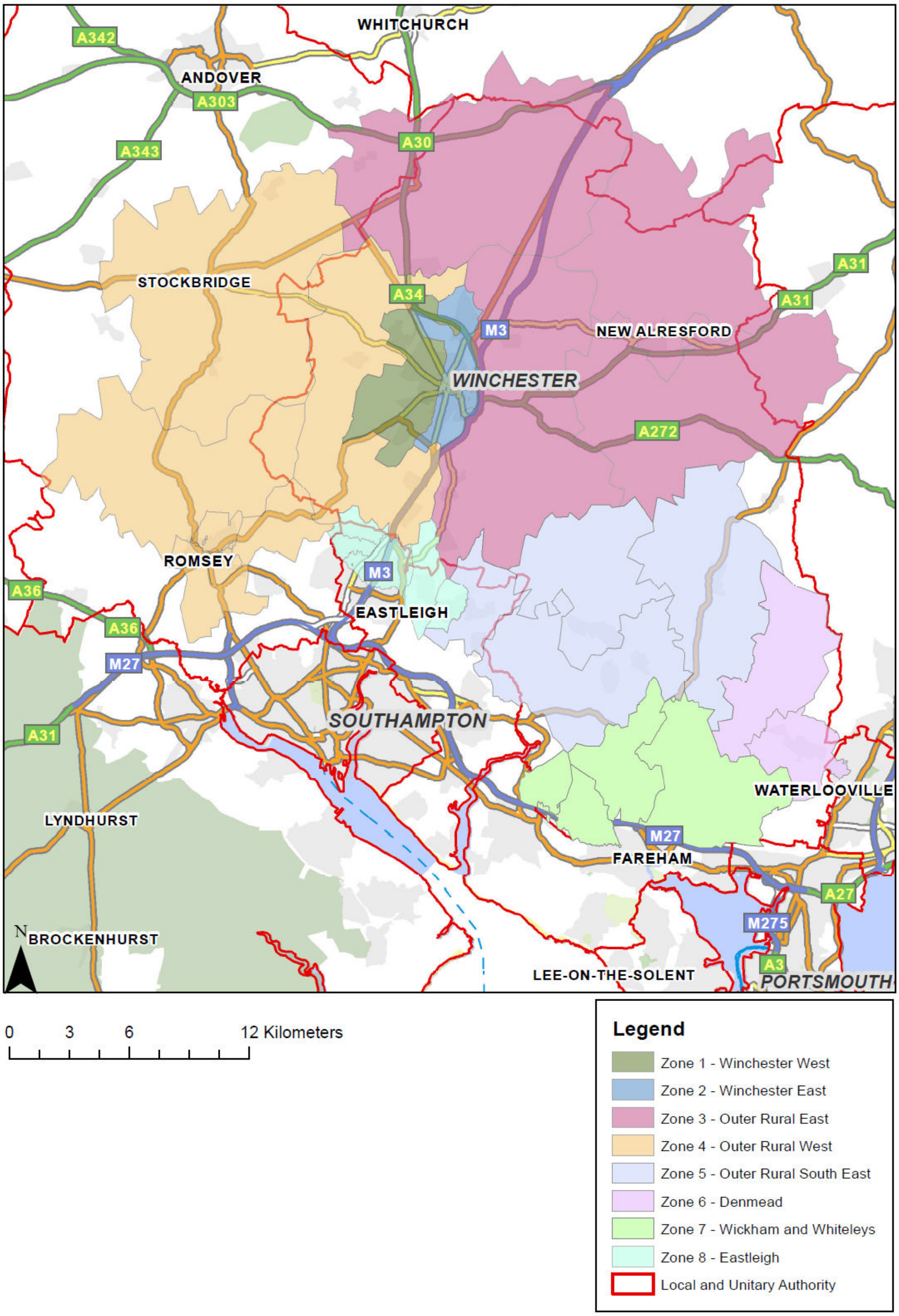

Table 1A : Convenience Shops in Winchester (2010 Prices)

Centre/Stores	Gross Floorspace Sq M	Net Sales Floorspace Sq M	% Conv. Floorspace	Conv. Sales Floorspace Sq M	Company * Average Per Sq M	Benchmark Total £M Turnover
Winchester City Centre						
Sainsbury's	1,929	623	95%	592	£12,599	£7.46
Marks & Spencer (food hall)	n/a	700	100%	700	£10,826	£7.58
Iceland	n/a	473	98%	464	£6,566	£3.04
Other small convenience shops (17)	1,410	920	70%	644	£4,000	£2.58
City Centre Sub-Total	**n/a**	**2,716**		**2,399**		**£20.65**
Winchester Urban Area						
Co-op, Stoney Lane, Weeke	428	212	98%	208	£7,279	£1.51
Waitrose, Stockbridge Road		1,764	90%	1,588	£11,475	£18.22
One Stop, Stanmore	n/a	134	99%	133	£4,000	£0.53
Sainsbury's, Badgers Farm	n/a	5,098	n/a	3,848	£12,599	£48.48
Tesco Express, Harestock	277	163	99%	161	£12,432	£2.01
Tesco Express, Kings Worthy	204	112	99%	111	£12,432	£1.38
Tesco, Winnall	n/a	5,823	n/a	3,706	£12,432	£46.07
Majestic Wine	n/a	270	100%	270	n/a	£1.61
Other small convenience shops	n/a	600	100%	600	£4,000	£2.40
Urban Area Sub-Total	**n/a**	**14,176**		**10,624**		**£122.21**
Winchester Urban Area Total	**n/a**	**16,892**		**13,024**	**£10,970**	**£142.86**
Bishops Waltham						
Budgens	929	539	98%	528	£4,000	£2.11
Co-op	453	186	98%	182	£7,279	£1.33
Local Shops	n/a	329	100%	329	£4,000	£1.32
Bishops Waltham Total		**1,054**		**1,040**		**£4.76**
Denmead						
Co-op	578	379	98%	371	£7,279	£2.70
Local Shops	n/a	92	100%	92	£4,000	£0.37
Denmead Total		**471**		**463**		**£3.07**
New Alresford						
Tesco Express, 12-14 Broad Street	362	208	97%	202	£12,432	£2.51
Co-op	436	300	95%	285	£7,279	£2.07
Local Shops	n/a	271	100%	271	£4,000	£1.08
New Alresford Total		**779**		**758**		**£5.67**
Wickham						
Co-op	466	346	98%	339	£7,279	£2.47
Local Shops	n/a	205	100%	205	£4,000	£0.82
Wickham Total		**551**		**544**		**£3.29**
Other Rural Local Shops	**3,500**	**2,450**	**100%**	**2,450**	**£4,000**	**£9.80**
Winchester Rural Area Total	**n/a**	**5,305**		**5,255**	**£5,059**	**£26.58**
Whiteley						
Tesco	3,315	1,887	95%	1,793	£12,432	£22.29
Whiteley Total		**1,887**		**1,793**	**£12,432**	**£22.29**
Winchester LA Total	**n/a**	**24,084**		**20,071**	**£9,553**	**£191.73**
	Comparison Floorspace in Food stores					**4,013**

** Turnover densities exclude an allowance for petrol sales in large food stores and include an allowance for VAT.*

Sources:

Retail Rankings and Verdict 2011
Institute of Grocery Distribution
Goad Plans

Table 2A: Convenience Retail Commitments (2010 Prices)

	Gross Floorspace Sq M	Net Sales Floorspace Sq M	% Conv. Floorspace	Conv. Sales Floorspace SqM	Company * Average Per Sq M	Benchmark Total £M Turnover
Gains						
Sainsbury's City Centre - New Store*	2,429	1,579	90%	1,421	£12,599	£17.90
Aldi, Weeke	1,193	760	90%	684	£6,148	£4.21
Whiteley Town Centre	465	325	100%	325	£4,000	£1.30
Sainsbury's, Bishop Waltham		3,255	70%	2,279	£12,599	£28.71
Total Gains		**5,919**		**4,709**		**£52.12**
Losses						
Sainsbury's, City Centre	1,929	623	95%	592	£12,599	£7.46
Iceland, City Centre	n/a	473	98%	464	£6,697	£3.10
Total Losses		**1,096**		**1,055**		**£10.56**
Net Increase Total	**n/a**	**4,823**		**3,653**		**£41.56**

** Silver Hill Scheme 65% net:gross assumed*

Sources: *Retail Rankings and Verdict 2011*

Table 3A: Comparison Shops within Winchester City Centre 2012 (2010 Prices)

Location	Gross Floorspace Sq M	Net Sales Floorspace Sq M	Average Turnover Per Sq M	Benchmark Turnover £M
Comparison Shops in Winchester Town Centre				
Argos	300	100	£20,561	£2.06
Beales	2,970	2,200	£1,619	£3.56
BHS (£M per outlet)	3,190	2,400	n/a	£5.13
Blacks (2004/05)	180	130	n/a	£0.75
Boots The Chemist (£M per outlet)	1,010	750	n/a	£2.81
Clarks	330	250	£10,930	£2.73
Clinton Cards (x2)	580	430	£3,200	£1.38
Currys Digital	230	170	£6,109	£1.04
Debenhams	4,170	3,100	£2,820	£8.74
Dolland & Aitcheson (£M per outlet)	90	50	n/a	£0.72
Early Learning Centre (2004/05)	240	180	£4,914	£0.88
Ernest Jones (£M per outlet)	120	90	n/a	£1.08
Fat Face (£M per outlet)	620	460	n/a	£0.87
Game (2007/08)	240	180	£22,930	£4.13
HMV (2007/08)	310	230	£8,626	£1.98
Jaeger (£M per outlet)	180	130	n/a	£0.67
Jessops (£M per outlet)	80	60	n/a	£1.26
JJB Sports (2007/08)	390	290	£2,239	£0.65
Laura Ashley	540	405	n/a	£0.35
Lloyds Phramacy (£M per outlet) (x2)	260	195	n/a	£1.08
London Camera Exchange (£M per outlet)	50	40	n/a	£0.66
Long Tall Sally (£M per outlet)	110	80	n/a	£0.56
Marks & Spencer	1,620	1,200	£4,778	£5.73
Monsoon (£M per outlet)	320	240	n/a	£1.17
Moss Bros (£M per outlet)	240	180	n/a	£0.83
Mulityork (£M per outlet)	340	250	n/a	£0.93
New Look	640	480	£3,974	£1.91
Next (2007/08)	340	250	£5,570	£1.39
O2 (£M per outlet)	120	90	n/a	£1.13
Orange (£M per outlet)	60	40	n/a	£1.18
Paperchase (£M per outlet)	140	100	n/a	£0.51
Phones 4 U (£M per outlet)	240	180	n/a	£1.76
River Island (2006/07)	420	310	£11,003	£3.41
Robert Dyas (2003/04)	300	220	£3,453	£0.76
Russell & Bromley (£M per outlet)	460	340	n/a	£2.31
Specsavers (£M per outlet)	150	100	n/a	£1.34
Stead & Simpson (2006/07)	120	90	£3,788	£0.34
Superdrug (2007/08)	470	352	£4,654	£1.64
The Body Shop (£M per outlet)	180	130	n/a	£0.59
The Carphone Warehouse (£M per outlet)	110	80	n/a	£2.33
The Edinburgh Woollen Mill (£M per outlet)	220	160	n/a	£0.66
Timpson (£M per outlet)	90	70	n/a	£0.20
Vision Express (£M per outlet)	200	150	n/a	£1.05
Vodafone(£M per outlet)	100	80	n/a	£1.08
Waterstones (2007/08) (x2)	930	700	£3,617	£2.53
WH Smith (2007/08)	1,360	1,000	£5,097	£5.10
Other Comparison shops	14,800	11,100	£5,347	£59.35
Food stores (comparison space only)	n/a	317	£5,000	£1.58
Winchester Town Centre Total	**n/a**	**30,129**	**£4,776**	**£143.91**
Winchester Urban Area - Local Centres	**n/a**	**700**	**£4,000**	**£2.80**

Sources: *Winchester Goad*

Table 4A: Comparison Shops within Other Main and Local Centres 2012 (2010 Prices)

Location	**Net Sales Floorspace Sq M**	**Average Turnover Per Sq M**	**Benchmark Turnover £M**
Bishops Waltham	800	£4,000	£3.20
Denmead	200	£4,000	£0.80
New Alresford	1,000	£4,000	£4.00
Wickham	600	£4,000	£2.40
Other Rural Local Centres	1,300	£4,000	£5.20
Rural Centres Sub-Total	**3,900**		**£15.60**
Whiteley (inc. Tesco)	**10,428**	**£4,000**	**£41.71**

Sources: *Goad*
PP. 09/00658/OUT (Redev of Whiteley Centre)

Table 5A: Comparison Floorspace within Retail Warehouses/Out of Centre Food Stores (2010 Prices)

Retail Warehouses in Winchester	**Net Sales Floorspace Sq M**	**Average Turnover Per Sq M**	**Benchmark Turnover £M**
Easton Lane Retail Park			
Homebase	4,880	£1,227	£5.99
Downs Carpets	1,050	£1,000	£1.05
Currys	700	£6,109	£4.28
Halfords	1,200	n/a	£2.20
Scats	600	n/a	£2.27
Pets At Home	700	n/a	£2.12
Fabric Warehouse	600	£2,000	£1.20
Sub-Total	**9,730**		**£19.10**
Winchester Trade Park			
Topps Tiles	180	£1,315	£0.24
Carpetright	900	£1,100	£0.99
Sub-Total	**1,080**		**£1.23**
Andover Road Retail Park			
Brewers	225	£1,500	£0.34
Pets Corner	225	£2,000	£0.45
Sub-Total	**450**		**£0.79**
Out-of-Centre Food Stores			
Tesco, Winnall (non-food sales only)	2,117	£8,975	£19.00
Sainsbury Badger Farm (non-food sales only)	1,250	£7,986	£9.98
Sub-Total	**3,367**		**£28.98**
Out-of-Centre Total	**14,627**	**£3,425**	**£50.10**

Table 6A: Comparison Floorspace in Commitments (2010 Prices)

Location	Net Sales Floorspace Sq M	Average Turnover Per Sq M	Benchmark Turnover £M
Commitments - Gains			
Whiteley Town Centre	10,204	£4,500	£45.92
Silver Hill Development (1)	5,864	£6,000	£35.18
Sainsbury town centre (non-food sales only) (2)	158	£7,986	£1.26
Sainsbury's, Bishop Waltham (non-food sales only)	976	£7,986	£7.79
Total - Gains	**17,202**	**£5,241**	**£90.16**
Commitments - Losses			
Silver Hill Development (1)	1,250	£4,000	£5.00
Sainsbury (non-food sales only)	31	£6,896	£0.21
Iceland (non-food sales only)	7	£6,697	£0.05
Total - Losses	**1,288**	**£4,084**	**£5.26**
Total Net Increase	**15,914**		**£84.90**

(1) Assumes up to 7,818 sq m gross - 75% net to gross ratio
(2) Net gain allowing for loss of existing store

Appendix B Convenience Assessment

Table 1B: Population Projections

Zone	2001	2012	2018	2021	2026	2031
Zone 1: Winchester - West	26,592	28,038	28,244	28,916	30,105	31,154
Zone 2: Winchester - East	20,042	21,896	22,598	23,135	24,087	24,926
Zone 3: Outer Rural East	23,773	25,629	26,142	26,763	27,864	28,835
Zone 4: Outer Rural West	32,208	33,970	34,551	35,373	36,828	38,111
Zone 5: Outer Rural South East	26,466	27,522	27,594	28,250	29,412	30,437
Zone 6: Denmead	10,453	11,313	11,875	12,157	12,657	13,098
Zone 7: Wickham & Whiteley	19,140	21,864	24,508	25,091	26,123	27,033
Zone 8: Eastleigh	39,685	42,762	44,818	45,809	47,209	48,268
Total	**198,359**	**212,994**	**220,330**	**225,493**	**234,284**	**241,864**

Sources:

2001 Population Census

Hampshire County Council's Ward based population projections 2001 to 2018 for Winchester

Winchester Council Housing Technical Paper 2011 (district wide projections 2018 to 2031)

Table 2B: Convenience Retail Expenditure Per Capita (2010 Prices)

Expenditure Per Capita	2012	2018	2021	2026	2031
Zone 1: Winchester - West	£1,891	£1,925	£1,950	£1,994	£2,045
Zone 2: Winchester - East	£1,877	£1,910	£1,936	£1,979	£2,029
Zone 3: Outer Rural East	£2,025	£2,061	£2,089	£2,136	£2,190
Zone 4: Outer Rural West	£1,997	£2,032	£2,060	£2,106	£2,159
Zone 5: Outer Rural South East	£2,119	£2,157	£2,186	£2,234	£2,292
Zone 6: Denmead	£1,946	£1,980	£2,007	£2,052	£2,104
Zone 7: Wickham & Whiteley	£1,806	£1,838	£1,862	£1,904	£1,953
Zone 8: Eastleigh	£1,913	£1,947	£1,973	£2,017	£2,068

Sources:

Experian local estimates of 2010 convenience goods expenditure per capita

Excluding special forms of trading

Experian Business Strategies - forecast annual growth rates for 2011 to 2013 (-0.3%, -0.4% and 0.5%)

Experian Business Strategies - ultra long term growth rate adopted beyond 2013 (0.55% per annum)

Table 3B: Total Convenience Retail Expenditure Excluding SDA's (2010 Prices)

Expenditure	2012	2018	2021	2026	2031	Growth 2012-2018	Growth 2012-2026	Growth 2012-2031
Zone 1: Winchester - West	£53.02	£54.36	£56.39	£60.02	£63.70	6.4%	13.2%	20.2%
Zone 2: Winchester - East	£41.09	£43.16	£44.78	£47.66	£50.59	9.0%	16.0%	23.1%
Zone 3: Outer Rural East	£51.91	£53.89	£55.91	£59.51	£63.16	7.7%	14.6%	21.7%
Zone 4: Outer Rural West	£67.84	£70.23	£72.85	£77.54	£82.30	7.4%	14.3%	21.3%
Zone 5: Outer Rural South East	£58.32	£59.52	£61.74	£65.72	£69.75	5.9%	12.7%	19.6%
Zone 6: Denmead	£22.01	£23.52	£24.40	£25.97	£27.56	10.8%	18.0%	25.2%
Zone 7: Wickham & Whiteley	£39.48	£45.04	£46.73	£49.73	£52.78	18.4%	26.0%	33.7%
Zone 8: Eastleigh	£81.79	£87.25	£90.37	£95.21	£99.83	10.5%	16.4%	22.1%
Catchment Area Total	**£415.46**	**£436.95**	**£453.16**	**£481.36**	**£509.67**	**5.2%**	**15.9%**	**22.7%**

Sources: Tables 1B & 2B

Table 4B: **Estimated Convenience Shopping Penetration Rates 2012**

Store/Destination	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow Beyond Study Area
Tesco, Winnall	17%	35%	38%	4%	3%	0%	0%	6%	5%
Sainsbury, Badger Farm	41%	16%	14%	12%	1%	0%	0%	6%	2%
Winchester town centre	11%	34%	3%	2%	0%	0%	1%	0%	15%
Winchester local centres	4%	3%	2%	0%	0%	0%	0%	0%	1%
Waitrose, Stockbridge Road	22%	9%	5%	6%	0%	0%	0%	0%	2%
Winchester Urban Area Sub Total	**95%**	**97%**	**62%**	**24%**	**4%**	**0%**	**1%**	**12%**	
Bishops Waltham	0%	0%	0%	0%	20%	0%	0%	0%	1%
Denmead	0%	0%	0%	0%	0%	12%	0%	0%	15%
New Alresford	0%	0%	10%	0%	0%	0%	0%	0%	5%
Wickham	0%	0%	0%	0%	3%	0%	9%	0%	5%
Rural Local Shops	0%	0%	3%	1%	5%	0%	1%	0%	1%
Winchester Rural Area Sub Total	**0%**	**0%**	**13%**	**1%**	**28%**	**12%**	**10%**	**0%**	
Whiteley	0%	0%	0%	0%	0%	0%	17%	0%	70%
Other Outside Winchester District	***5%***	***3%***	***25%***	***75%***	***68%***	***88%***	***72%***	***88%***	***n/a***
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	***n/a***

Source: NEMS Household Survey April 2012 (Zones 1 to 4) and June 2007 (Zones 5 to 8)

Table 5B: **Convenience Turnover in Winchester 2012**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow £m	Total Turnover (£m)
Available Expenditure 2012 £M	***£53.02***	***£41.09***	***£51.91***	***£67.84***	***£58.32***	***£22.01***	***£39.48***	***£81.79***	**n/a**	**£415.46**
Winchester Urban Area Sub Total	£50.37	£39.86	£32.18	£16.28	£2.33	£0.00	£0.39	£9.81	£7.89	**£137.09**
Winchester Rural Area Sub Total	£0.00	£0.00	£6.75	£0.68	£16.33	£2.64	£3.95	£0.00	£1.19	**£31.54**
Whiteley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£6.71	£0.00	£15.66	**£22.37**
Winchester LA Total	**£50.37**	**£39.86**	**£38.93**	**£16.96**	**£18.66**	**£2.64**	**£11.05**	**£9.81**	**£24.74**	**£191.00**
Outflow from Winchester District	£2.65	£1.23	£12.98	£50.88	£39.66	£19.37	£28.42	£71.98	n/a	n/a
Total	**£53.02**	**£41.09**	**£51.91**	**£67.84**	**£58.32**	**£22.01**	**£39.48**	**£81.79**	**n/a**	**n/a**

Source: Tables 3B and 4B

Table 6B: **Convenience Turnover in Winchester 2018**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow £m	Total Turnover (£m)
Available Expenditure 2018 £M	***£54.36***	***£43.16***	***£53.89***	***£70.23***	***£59.52***	***£23.52***	***£45.04***	***£87.25***	**n/a**	**£436.95**
Winchester Urban Area Sub Total	£51.64	£41.87	£33.41	£16.85	£2.38	£0.00	£0.45	£10.47	£8.22	**£142.54**
Winchester Rural Area Sub Total	£0.00	£0.00	£7.01	£0.70	£16.66	£2.82	£4.50	£0.00	£1.27	**£32.97**
Whiteley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£7.66	£0.00	£17.87	**£25.52**
Winchester LA Total	**£51.64**	**£41.87**	**£40.42**	**£17.56**	**£19.05**	**£2.82**	**£12.61**	**£10.47**	**£27.35**	**£201.03**
Outflow from Winchester District	£2.72	£1.29	£13.47	£52.67	£40.47	£20.69	£32.43	£76.78	n/a	n/a
Total	**£54.36**	**£43.16**	**£53.89**	**£70.23**	**£59.52**	**£23.52**	**£45.04**	**£87.25**	**n/a**	**n/a**

Source: Tables 3B and 4B

Table 7B: **Convenience Turnover in Winchester 2021**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow £m	Total Turnover (£m)
Available Expenditure 2021 £M	***£56.39***	***£44.78***	***£55.91***	***£72.85***	***£61.74***	***£24.40***	***£46.73***	***£90.37***	**n/a**	**£453.16**
Winchester Urban Area Sub Total	£53.57	£43.44	£34.66	£17.49	£2.47	£0.00	£0.47	£10.84	£8.53	**£147.86**
Winchester Rural Area Sub Total	£0.00	£0.00	£7.27	£0.73	£17.29	£2.93	£4.67	£0.00	£1.31	**£34.20**
Whiteley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£7.94	£0.00	£18.53	**£26.48**
Winchester LA Total	**£53.57**	**£43.44**	**£41.93**	**£18.21**	**£19.76**	**£2.93**	**£13.08**	**£10.84**	**£28.38**	**£208.54**
Outflow from Winchester District	£2.82	£1.34	£13.98	£54.64	£41.99	£21.47	£33.64	£79.52	n/a	n/a
Total	**£56.39**	**£44.78**	**£55.91**	**£72.85**	**£61.74**	**£24.40**	**£46.73**	**£90.37**	**n/a**	**n/a**

Source: Tables 3B and 4B

Table 8B: **Convenience Turnover in Winchester 2026**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow £m	Total Turnover (£m)
Available Expenditure 2026 £M	***£60.02***	***£47.66***	***£59.51***	***£77.54***	***£65.72***	***£25.97***	***£49.73***	***£95.21***	**n/a**	**£481.36**
Winchester Urban Area Sub Total	£57.02	£46.23	£36.89	£18.61	£2.63	£0.00	£0.50	£11.42	£9.07	**£157.26**
Winchester Rural Area Sub Total	£0.00	£0.00	£7.74	£0.78	£18.40	£3.12	£4.97	£0.00	£1.40	**£36.40**
Whiteley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£8.45	£0.00	£19.73	**£28.18**
Winchester LA Total	**£57.02**	**£46.23**	**£44.63**	**£19.39**	**£21.03**	**£3.12**	**£13.93**	**£11.42**	**£30.20**	**£221.84**
Outflow from Winchester District	£3.00	£1.43	£14.88	£58.16	£44.69	£22.85	£35.81	£83.78	n/a	n/a
Total	**£60.02**	**£47.66**	**£59.51**	**£77.54**	**£65.72**	**£25.97**	**£49.73**	**£95.21**	**n/a**	**n/a**

Source: Tables 3B and 4B

Table 9B: **Convenience Turnover in Winchester 2031**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow £m	Total Turnover (£m)
Available Expenditure 2031 £M	***£63.70***	***£50.59***	***£63.16***	***£82.30***	***£69.75***	***£27.56***	***£52.78***	***£99.83***	**n/a**	**£509.67**
Winchester Urban Area Sub Total	£60.52	£49.07	£39.16	£19.75	£2.79	£0.00	£0.53	£11.98	£9.62	**£166.75**
Winchester Rural Area Sub Total	£0.00	£0.00	£8.21	£0.82	£19.53	£3.31	£5.28	£0.00	£1.49	**£38.63**
Whiteley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£8.97	£0.00	£20.94	**£29.91**
Winchester LA Total	**£60.52**	**£49.07**	**£47.37**	**£20.58**	**£22.32**	**£3.31**	**£14.78**	**£11.98**	**£32.05**	**£235.30**
Outflow from Winchester District	£3.19	£1.52	£15.79	£61.73	£47.43	£24.25	£38.00	£87.85	n/a	n/a
Total	**£63.70**	**£50.59**	**£63.16**	**£82.30**	**£69.75**	**£27.56**	**£52.78**	**£99.83**	**n/a**	**n/a**

Source: Tables 3B and 4B

Table 10B: Summary of Convenience Turnover 2012 to 2026 (£Millions)

	2012	2018	2021	2026	2031
Available Expenditure					
Winchester Urban Area	£137.09	£142.54	£147.86	£157.26	£166.75
Winchester Rural Area	£31.54	£32.97	£34.20	£36.40	£38.63
Whiteley	£22.37	£25.52	£26.48	£28.18	£29.91
Total	**£191.00**	**£201.03**	**£208.54**	**£221.84**	**£235.30**
Benchmark Turnover Existing Floorspace					
Winchester Urban Area	£142.86	£142.86	£142.86	£142.86	£142.86
Winchester Rural Area	£26.58	£26.58	£26.58	£26.58	£26.58
Whiteley	£22.29	£22.29	£22.29	£22.29	£22.29
Benchmark Turnover Sub-Total	**£191.73**	**£191.73**	**£191.73**	**£191.73**	**£191.73**
Benchmark Turnover Commitments					
Winchester Urban Area	£0.00	£11.55	£11.55	£11.55	£11.55
Winchester Rural Area	£0.00	£28.71	£28.71	£28.71	£28.71
Whiteley	£0.00	£1.30	£1.30	£1.30	£1.30
Benchmark Turnover Sub-Total	**£0.00**	**£41.56**	**£41.56**	**£41.56**	**£41.56**
Surplus/Deficit Expenditure					
Winchester Urban Area	-£5.77	-£11.87	-£6.55	£2.85	£12.34
Winchester Rural Area	£4.96	-£22.32	-£21.09	-£18.89	-£16.66
Whiteley	£0.08	£1.93	£2.89	£4.59	£6.32
Surplus/Deficit Total	**-£0.73**	**-£32.26**	**-£24.75**	**-£11.45**	**£2.01**
Average Sales Density (£ per Sq M Net)					
Winchester Urban Area	£10,970	£10,970	£10,970	£10,970	£10,970
Winchester Rural Area	£5,059	£5,059	£5,059	£5,059	£5,059
Whiteley	£12,432	£12,432	£12,432	£12,432	£12,432
Sales Floorspace Projection (Sq M Net)					
Winchester Urban Area	-526	-1,082	-597	260	1,125
Winchester Rural Area	980	-4,413	-4,169	-3,734	-3,292
Whiteley	6	155	232	369	508
Total	**461**	**-5,339**	**-4,534**	**-3,105**	**-1,659**

Source: Tables 5B to 9B

Appendix C Comparison Assessment

Table 1C: Comparison Goods Retail Expenditure Per Capita (2010 Prices)

Expenditure Per Capita	2012	2018	2021	2026 Low	2031 Low	2026 HIgh	2031 High
Zone 1: Winchester - West	£2,801	£3,480	£3,965	£4,111	£4,765	£4,930	£6,129
Zone 2: Winchester - East	£2,766	£3,436	£3,915	£4,058	£4,705	£4,867	£6,051
Zone 3: Outer Rural East	£3,224	£4,005	£4,564	£4,731	£5,485	£5,674	£7,054
Zone 4: Outer Rural West	£3,087	£3,835	£4,370	£4,530	£5,251	£5,432	£6,754
Zone 5: Outer Rural South East	£3,418	£4,246	£4,839	£5,016	£5,815	£6,015	£7,478
Zone 6: Denmead	£2,969	£3,688	£4,202	£4,356	£5,050	£5,224	£6,495
Zone 7: Wickham & Whiteley	£2,829	£3,514	£4,004	£4,151	£4,812	£4,978	£6,188
Zone 8: Eastleigh	£2,865	£3,559	£4,055	£4,204	£4,874	£5,042	£6,268

Sources:

Experian local estimates for 2010 comparison goods expenditure per capita

Excluding special froms of trading

Experian Business Strategies - forecast annual growth rates for 2011 to 2013 and beyond for low growth scenario

Experian Business Strategies - forecast annual growth rates for 2011 to 2013 and mid-point with ultra long term trend thereafter for high growth scenario

Table 2C: Total Available Comparison Goods Expenditure (£M - 2010 Prices)

Expenditure	2012	2018	2021	2026 Low	2031 Low	2026 High	2031 Hgh
Zone 1: Winchester - West	£78.54	£98.28	£114.66	£123.75	£148.46	£148.41	£190.93
Zone 2: Winchester - East	£60.56	£77.64	£90.58	£97.75	£117.27	£117.24	£150.83
Zone 3: Outer Rural East	£82.64	£104.71	£122.15	£131.83	£158.16	£158.11	£203.41
Zone 4: Outer Rural West	£104.86	£132.49	£154.57	£166.82	£200.13	£200.06	£257.39
Zone 5: Outer Rural South East	£94.07	£117.16	£136.69	£147.52	£176.98	£176.92	£227.61
Zone 6: Denmead	£33.58	£43.79	£51.09	£55.14	£66.15	£66.12	£85.07
Zone 7: Wickham & Whiteley	£61.84	£86.11	£100.46	£108.42	£130.07	£130.03	£167.29
Zone 8: Eastleigh	£122.51	£159.50	£185.78	£198.47	£235.24	£238.02	£302.55
Catchment Area Total	**£638.60**	**£819.70**	**£955.97**	**£1,029.70**	**£1,232.45**	**£1,234.91**	**£1,585.08**

Sources: Table 1B and 1C

Table 3C: **Comparison Expenditure Penetration Rates and Turnover 2012 (£million)**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available Expenditure 2012	**£78.54**	**£60.56**	**£82.64**	**£104.86**	**£94.07**	**£33.58**	**£61.84**	**£122.51**	**n/a**	**£638.60**
Market Share										
Winchester town centre	52%	56%	36%	21%	7%	0%	1%	8%	15%	
Winchester local shops	1%	2%	3%	0%	0%	0%	0%	0%	1%	
Winchester out-of-centre	8%	7%	6%	2%	1%	0%	0%	0%	5%	
Winchester urban area sub-total	**61%**	**65%**	**45%**	**23%**	**8%**	**0%**	**1%**	**8%**	**14%**	
Bishops Waltham	0%	0%	0%	0%	8%	0%	1%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	15%	
New Alresford	0%	0%	6%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	3%	0%	5%	
Rural Local Shops	0%	0%	2%	0%	2%	0%	1%	0%	2%	
Winchester rural sub-total	**0%**	**0%**	**8%**	**0%**	**11%**	**2%**	**5%**	**0%**	**3%**	
Whiteley	0%	0%	0%	0%	1%	1%	3%	0%	85%	
Winchester LA Total	**61%**	**65%**	**53%**	**23%**	**20%**	**3%**	**9%**	**8%**	**n/a**	
Other outside Winchester District	**39%**	**35%**	**47%**	**77%**	**80%**	**97%**	**91%**	**92%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 9**	**Inflow**	**Total**
Turnover £M										
Winchester town centre	£40.84	£33.91	£29.75	£22.02	£6.58	£0.00	£0.62	£9.80	£25.33	£168.86
Winchester local shops	£0.79	£1.21	£2.48	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£4.52
Winchester out-of-centre	£6.28	£4.24	£4.96	£2.10	£0.94	£0.00	£0.00	£0.00	£0.97	£19.49
Winchester urban area sub-total	**£47.91**	**£39.36**	**£37.19**	**£24.12**	**£7.53**	**£0.00**	**£0.62**	**£9.80**	**£26.35**	**£192.87**
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£7.53	£0.00	£0.62	£0.00	£0.08	£8.23
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£0.67	£0.00	£0.00	£0.12	£0.79
New Alresford	£0.00	£0.00	£4.96	£0.00	£0.00	£0.00	£0.00	£0.00	£0.26	£5.22
Wickham	£0.00	£0.00	£0.00	£0.00	£0.94	£0.00	£1.86	£0.00	£0.15	£2.94
Rural Local Shops	£0.00	£0.00	£1.65	£0.00	£1.88	£0.00	£0.62	£0.00	£0.08	£4.24
Winchester rural sub-total	**£0.00**	**£0.00**	**£6.61**	**£0.00**	**£10.35**	**£0.67**	**£3.09**	**£0.00**	**£0.69**	**£21.42**
Whiteley	£0.00	£0.00	£0.00	£0.00	£0.94	£0.34	£1.86	£0.00	£17.75	£20.88
Winchester LA Total	**£47.91**	**£39.36**	**£43.80**	**£24.12**	**£18.81**	**£1.01**	**£5.57**	**£9.80**	**£44.79**	**£235.17**
Other outside Winchester District	**£30.63**	**£21.20**	**£38.84**	**£80.74**	**£75.26**	**£32.58**	**£56.28**	**£112.71**	**n/a**	**n/a**
Total	**£78.54**	**£60.56**	**£82.64**	**£104.86**	**£94.07**	**£33.58**	**£61.84**	**£122.51**	**n/a**	**n/a**

Sources: NEMS Household Survey June 2007 (Zones 5 to 8) and April 2012 (Zones 1 to 4)

Table 4C: Comparison Expenditure Penetration Rates and Turnover 2018

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available Expenditure 2018	**£98.28**	**£77.64**	**£104.71**	**£132.49**	**£117.16**	**£43.79**	**£86.11**	**£159.50**	**n/a**	**£819.70**
Market Share										
Winchester town centre	52%	56%	34%	21%	6%	0%	1%	7%	15%	
Winchester local shops	1%	2%	3%	0%	0%	0%	0%	0%	1%	
Winchester out-of-centre	8%	7%	5%	2%	1%	0%	0%	0%	5%	
Winchester urban area sub-total	**61%**	**65%**	**42%**	**23%**	**7%**	**0%**	**1%**	**7%**	**14%**	
Bishops Waltham	0%	0%	0%	0%	7%	0%	1%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	15%	
New Alresford	0%	0%	5%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	2%	0%	5%	
Rural Local Shops	0%	0%	2%	0%	2%	0%	1%	0%	2%	
Winchester rural sub-total	**0%**	**0%**	**7%**	**0%**	**10%**	**2%**	**4%**	**0%**	**3%**	
Whiteley	0%	0%	6%	0%	6%	6%	16%	2%	60%	
Winchester LA Total	**61%**	**65%**	**55%**	**23%**	**23%**	**8%**	**21%**	**9%**	**n/a**	
Other outside Winchester District	**39%**	**35%**	**45%**	**77%**	**77%**	**92%**	**79%**	**91%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 9**	**Inflow**	**Total**
Turnover £M										
Winchester town centre	£51.11	£43.48	£35.60	£27.82	£7.03	£0.00	£0.86	£11.17	£31.25	£208.31
Winchester local shops	£0.98	£1.55	£3.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£5.73
Winchester out-of-centre	£7.86	£5.43	£5.24	£2.65	£1.17	£0.00	£0.00	£0.00	£1.18	£23.53
Winchester urban area sub-total	**£59.95**	**£50.47**	**£43.98**	**£30.47**	**£8.20**	**£0.00**	**£0.86**	**£11.17**	**£32.48**	**£237.58**
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£8.20	£0.00	£0.86	£0.00	£0.09	£9.15
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£0.88	£0.00	£0.00	£0.15	£1.03
New Alresford	£0.00	£0.00	£5.24	£0.00	£0.00	£0.00	£0.00	£0.00	£0.28	£5.51
Wickham	£0.00	£0.00	£0.00	£0.00	£1.17	£0.00	£1.72	£0.00	£0.15	£3.05
Rural Local Shops	£0.00	£0.00	£2.09	£0.00	£2.34	£0.00	£0.86	£0.00	£0.11	£5.41
Winchester rural sub-total	**£0.00**	**£0.00**	**£7.33**	**£0.00**	**£11.72**	**£0.88**	**£3.44**	**£0.00**	**£0.78**	**£24.15**
Whiteley	£0.00	£0.00	£6.28	£0.00	£7.03	£2.63	£13.78	£3.19	£49.36	£82.27
Winchester LA Total	**£59.95**	**£50.47**	**£57.59**	**£30.47**	**£26.95**	**£3.50**	**£18.08**	**£14.36**	**£82.62**	**£344.00**
Other outside Winchester District	**£38.33**	**£27.17**	**£47.12**	**£102.02**	**£90.22**	**£40.29**	**£68.03**	**£145.15**	**n/a**	**n/a**
Total	**£98.28**	**£77.64**	**£104.71**	**£132.49**	**£117.16**	**£43.79**	**£86.11**	**£159.50**	**n/a**	**n/a**

Table 5C: **Comparison Expenditure Penetration Rates and Turnover 2021**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available Expenditure 2021	**£114.66**	**£90.58**	**£122.15**	**£154.57**	**£136.69**	**£51.09**	**£100.46**	**£185.78**	**n/a**	**£955.97**
Market Share										
Winchester town centre	52%	56%	34%	21%	6%	0%	1%	7%	15%	
Winchester local shops	1%	2%	3%	0%	0%	0%	0%	0%	1%	
Winchester out-of-centre	8%	7%	5%	2%	1%	0%	0%	0%	5%	
Winchester urban area sub-total	**61%**	**65%**	**42%**	**23%**	**7%**	**0%**	**1%**	**7%**	**14%**	
Bishops Waltham	0%	0%	0%	0%	7%	0%	1%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	15%	
New Alresford	0%	0%	5%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	2%	0%	5%	
Rural Local Shops	0%	0%	2%	0%	2%	0%	1%	0%	2%	
Winchester rural sub-total	**0%**	**0%**	**7%**	**0%**	**10%**	**2%**	**4%**	**0%**	**3%**	
Whiteley	0%	0%	6%	0%	6%	6%	16%	2%	60%	
Winchester LA Total	**61%**	**65%**	**55%**	**23%**	**23%**	**8%**	**21%**	**9%**	**n/a**	
Other outside Winchester District	**39%**	**35%**	**45%**	**77%**	**77%**	**92%**	**79%**	**91%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 9**	**Inflow**	**Total**
Turnover £M										
Winchester town centre	£59.62	£50.72	£41.53	£32.46	£8.20	£0.00	£1.00	£13.00	£36.45	£243.00
Winchester local shops	£1.15	£1.81	£3.66	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£6.69
Winchester out-of-centre	£9.17	£6.34	£6.11	£3.09	£1.37	£0.00	£0.00	£0.00	£1.37	£27.45
Winchester urban area sub-total	**£69.94**	**£58.87**	**£51.30**	**£35.55**	**£9.57**	**£0.00**	**£1.00**	**£13.00**	**£37.89**	**£277.14**
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£9.57	£0.00	£1.00	£0.00	£0.11	£10.68
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£1.02	£0.00	£0.00	£0.18	£1.20
New Alresford	£0.00	£0.00	£6.11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.32	£6.43
Wickham	£0.00	£0.00	£0.00	£0.00	£1.37	£0.00	£2.01	£0.00	£0.18	£3.55
Rural Local Shops	£0.00	£0.00	£2.44	£0.00	£2.73	£0.00	£1.00	£0.00	£0.13	£6.31
Winchester rural sub-total	**£0.00**	**£0.00**	**£8.55**	**£0.00**	**£13.67**	**£1.02**	**£4.02**	**£0.00**	**£0.91**	**£28.17**
Whiteley	£0.00	£0.00	£7.33	£0.00	£8.20	£3.07	£16.07	£3.72	£57.58	£95.96
Winchester LA Total	**£69.94**	**£58.87**	**£67.18**	**£35.55**	**£31.44**	**£4.09**	**£21.10**	**£16.72**	**£96.38**	**£401.27**
Other outside Winchester District	**£44.72**	**£31.70**	**£54.97**	**£119.02**	**£105.25**	**£47.00**	**£79.36**	**£169.06**	**n/a**	**n/a**
Total	**£114.66**	**£90.58**	**£122.15**	**£154.57**	**£136.69**	**£51.09**	**£100.46**	**£185.78**	**n/a**	**n/a**

Table 6C: **Comparison Expenditure Penetration Rates and Turnover 2026 (Low Growth)**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available Expenditure 2026	**£123.75**	**£97.75**	**£131.83**	**£166.82**	**£147.52**	**£55.14**	**£108.42**	**£198.47**	**n/a**	**£1,029.70**
Market Share										
Winchester town centre	52%	56%	34%	21%	6%	0%	1%	7%	15%	
Winchester local shops	1%	2%	3%	0%	0%	0%	0%	0%	1%	
Winchester out-of-centre	8%	7%	5%	2%	1%	0%	0%	0%	5%	
Winchester urban area sub-total	**61%**	**65%**	**42%**	**23%**	**7%**	**0%**	**1%**	**7%**	**14%**	
Bishops Waltham	0%	0%	0%	0%	7%	0%	1%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	15%	
New Alresford	0%	0%	5%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	2%	0%	5%	
Rural Local Shops	0%	0%	2%	0%	2%	0%	1%	0%	2%	
Winchester rural sub-total	**0%**	**0%**	**7%**	**0%**	**10%**	**2%**	**4%**	**0%**	**3%**	
Whiteley	0%	0%	6%	0%	6%	6%	16%	2%	60%	
Winchester LA Total	**61%**	**65%**	**55%**	**23%**	**23%**	**8%**	**21%**	**9%**	**n/a**	
Other outside Winchester District	**39%**	**35%**	**45%**	**77%**	**77%**	**92%**	**79%**	**91%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 9**	**Inflow**	**Total**
Turnover £M										
Winchester town centre	£64.35	£54.74	£44.82	£35.03	£8.85	£0.00	£1.08	£13.89	£39.31	£262.09
Winchester local shops	£1.24	£1.96	£3.96	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£7.22
Winchester out-of-centre	£9.90	£6.84	£6.59	£3.34	£1.48	£0.00	£0.00	£0.00	£1.48	£29.63
Winchester urban area sub-total	**£75.49**	**£63.54**	**£55.37**	**£38.37**	**£10.33**	**£0.00**	**£1.08**	**£13.89**	**£40.87**	**£298.93**
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£10.33	£0.00	£1.08	£0.00	£0.12	£11.53
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£1.10	£0.00	£0.00	£0.19	£1.30
New Alresford	£0.00	£0.00	£6.59	£0.00	£0.00	£0.00	£0.00	£0.00	£0.35	£6.94
Wickham	£0.00	£0.00	£0.00	£0.00	£1.48	£0.00	£2.17	£0.00	£0.19	£3.84
Rural Local Shops	£0.00	£0.00	£2.64	£0.00	£2.95	£0.00	£1.08	£0.00	£0.14	£6.81
Winchester rural sub-total	**£0.00**	**£0.00**	**£9.23**	**£0.00**	**£14.75**	**£1.10**	**£4.34**	**£0.00**	**£0.98**	**£30.40**
Whiteley	£0.00	£0.00	£7.91	£0.00	£8.85	£3.31	£17.35	£3.97	£62.08	£103.47
Winchester LA Total	**£75.49**	**£63.54**	**£72.51**	**£38.37**	**£33.93**	**£4.41**	**£22.77**	**£17.86**	**£103.93**	**£432.80**
Other outside Winchester District	**£48.26**	**£34.21**	**£59.33**	**£128.45**	**£113.59**	**£50.72**	**£85.65**	**£180.60**	**n/a**	**n/a**
Total	**£123.75**	**£97.75**	**£131.83**	**£166.82**	**£147.52**	**£55.14**	**£108.42**	**£198.47**	**n/a**	**n/a**

Table 7C: **Comparison Expenditure Penetration Rates and Turnover 2031 (Low Growth)**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available Expenditure 2031	**£148.46**	**£117.27**	**£158.16**	**£200.13**	**£176.98**	**£66.15**	**£130.07**	**£235.24**	**n/a**	**£1,232.45**
Market Share										
Winchester town centre	52%	56%	34%	21%	6%	0%	1%	7%	15%	
Winchester local shops	1%	2%	3%	0%	0%	0%	0%	0%	1%	
Winchester out-of-centre	8%	7%	5%	2%	1%	0%	0%	0%	5%	
Winchester urban area sub-total	**61%**	**65%**	**42%**	**23%**	**7%**	**0%**	**1%**	**7%**	**14%**	
Bishops Waltham	0%	0%	0%	0%	7%	0%	1%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	15%	
New Alresford	0%	0%	5%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	2%	0%	5%	
Rural Local Shops	0%	0%	2%	0%	2%	0%	1%	0%	2%	
Winchester rural sub-total	**0%**	**0%**	**7%**	**0%**	**10%**	**2%**	**4%**	**0%**	**3%**	
Whiteley	0%	0%	6%	0%	6%	6%	16%	2%	60%	
Winchester LA Total	**61%**	**65%**	**55%**	**23%**	**23%**	**8%**	**21%**	**9%**	**n/a**	
Other outside Winchester District	**39%**	**35%**	**45%**	**77%**	**77%**	**92%**	**79%**	**91%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 9**	**Inflow Expenditure**	**Total £M**
Turnover £M										
Winchester town centre	£77.20	£65.67	£53.77	£42.03	£10.62	£0.00	£1.30	£16.47	£47.13	£314.19
Winchester local shops	£1.48	£2.35	£4.74	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	£8.66
Winchester out-of-centre	£11.88	£8.21	£7.91	£4.00	£1.77	£0.00	£0.00	£0.00	£1.78	£35.54
Winchester urban area sub-total	**£90.56**	**£76.23**	**£66.43**	**£46.03**	**£12.39**	**£0.00**	**£1.30**	**£16.47**	**£48.99**	**£358.39**
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£12.39	£0.00	£1.30	£0.00	£0.14	£13.83
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£1.32	£0.00	£0.00	£0.23	£1.56
New Alresford	£0.00	£0.00	£7.91	£0.00	£0.00	£0.00	£0.00	£0.00	£0.42	£8.32
Wickham	£0.00	£0.00	£0.00	£0.00	£1.77	£0.00	£2.60	£0.00	£0.23	£4.60
Rural Local Shops	£0.00	£0.00	£3.16	£0.00	£3.54	£0.00	£1.30	£0.00	£0.16	£8.17
Winchester rural sub-total	**£0.00**	**£0.00**	**£11.07**	**£0.00**	**£17.70**	**£1.32**	**£5.20**	**£0.00**	**£1.18**	**£36.48**
Whiteley	£0.00	£0.00	£9.49	£0.00	£10.62	£3.97	£20.81	£4.70	£74.39	£123.98
Winchester LA Total	**£90.56**	**£76.23**	**£86.99**	**£46.03**	**£40.70**	**£5.29**	**£27.32**	**£21.17**	**£124.56**	**£518.85**
Other outside Winchester District	**£57.90**	**£41.05**	**£71.17**	**£154.10**	**£136.27**	**£60.85**	**£102.76**	**£214.07**	**n/a**	**n/a**
Total	**£148.46**	**£117.27**	**£158.16**	**£200.13**	**£176.98**	**£66.15**	**£130.07**	**£235.24**	**n/a**	**n/a**

Table 8C: Comparison Expenditure Penetration Rates and Turnover 2026 (High Growth)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available Expenditure 2026	**£148.41**	**£117.24**	**£158.11**	**£200.06**	**£176.92**	**£66.12**	**£130.03**	**£238.02**	**n/a**	**£1,234.91**
Market Share										
Winchester town centre	52%	56%	34%	21%	6%	0%	1%	7%	15%	
Winchester local shops	1%	2%	3%	0%	0%	0%	0%	0%	1%	
Winchester out-of-centre	8%	7%	5%	2%	1%	0%	0%	0%	5%	
Winchester urban area sub-total	**61%**	**65%**	**42%**	**23%**	**7%**	**0%**	**1%**	**7%**	**14%**	
Bishops Waltham	0%	0%	0%	0%	7%	0%	1%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	15%	
New Alresford	0%	0%	5%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	2%	0%	5%	
Rural Local Shops	0%	0%	2%	0%	2%	0%	1%	0%	2%	
Winchester rural sub-total	**0%**	**0%**	**7%**	**0%**	**10%**	**2%**	**4%**	**0%**	**3%**	
Whiteley	0%	0%	6%	0%	6%	6%	16%	2%	60%	
Winchester LA Total	**61%**	**65%**	**55%**	**23%**	**23%**	**8%**	**21%**	**9%**	**n/a**	
Other outside Winchester District	**39%**	**35%**	**45%**	**77%**	**77%**	**92%**	**79%**	**91%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 9**	**Inflow**	**Total**
Turnover £M										
Winchester town centre	£77.17	£65.65	£53.76	£42.01	£10.62	£0.00	£1.30	£16.66	£47.15	£314.32
Winchester local shops	£1.48	£2.34	£4.74	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	£8.66
Winchester out-of-centre	£11.87	£8.21	£7.91	£4.00	£1.77	£0.00	£0.00	£0.00	£1.78	£35.53
Winchester urban area sub-total	**£90.53**	**£76.20**	**£66.41**	**£46.01**	**£12.38**	**£0.00**	**£1.30**	**£16.66**	**£49.01**	**£358.51**
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£12.38	£0.00	£1.30	£0.00	£0.14	£13.82
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£1.32	£0.00	£0.00	£0.23	£1.56
New Alresford	£0.00	£0.00	£7.91	£0.00	£0.00	£0.00	£0.00	£0.00	£0.42	£8.32
Wickham	£0.00	£0.00	£0.00	£0.00	£1.77	£0.00	£2.60	£0.00	£0.23	£4.60
Rural Local Shops	£0.00	£0.00	£3.16	£0.00	£3.54	£0.00	£1.30	£0.00	£0.16	£8.16
Winchester rural sub-total	**£0.00**	**£0.00**	**£11.07**	**£0.00**	**£17.69**	**£1.32**	**£5.20**	**£0.00**	**£1.18**	**£36.46**
Whiteley	£0.00	£0.00	£9.49	£0.00	£10.62	£3.97	£20.81	£4.76	£74.45	£124.09
Winchester LA Total	**£90.53**	**£76.20**	**£86.96**	**£46.01**	**£40.69**	**£5.29**	**£27.31**	**£21.42**	**£124.64**	**£519.06**
Other outside Winchester District	**£57.88**	**£41.03**	**£71.15**	**£154.05**	**£136.23**	**£60.83**	**£102.72**	**£216.60**	**n/a**	**n/a**
Total	**£148.41**	**£117.24**	**£158.11**	**£200.06**	**£176.92**	**£66.12**	**£130.03**	**£238.02**	**n/a**	**n/a**

Table 9C: **Comparison Expenditure Penetration Rates and Turnover 2031 (High Growth)**

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Inflow	Total
Available Expenditure 2031	**£190.93**	**£150.83**	**£203.41**	**£257.39**	**£227.61**	**£85.07**	**£167.29**	**£302.55**	**n/a**	**£1,585.08**
Market Share										
Winchester town centre	52%	56%	34%	21%	6%	0%	1%	7%	15%	
Winchester local shops	1%	2%	3%	0%	0%	0%	0%	0%	1%	
Winchester out-of-centre	8%	7%	5%	2%	1%	0%	0%	0%	5%	
Winchester urban area sub-total	**61%**	**65%**	**42%**	**23%**	**7%**	**0%**	**1%**	**7%**	**14%**	
Bishops Waltham	0%	0%	0%	0%	7%	0%	1%	0%	1%	
Denmead	0%	0%	0%	0%	0%	2%	0%	0%	15%	
New Alresford	0%	0%	5%	0%	0%	0%	0%	0%	5%	
Wickham	0%	0%	0%	0%	1%	0%	2%	0%	5%	
Rural Local Shops	0%	0%	2%	0%	2%	0%	1%	0%	2%	
Winchester rural sub-total	**0%**	**0%**	**7%**	**0%**	**10%**	**2%**	**4%**	**0%**	**3%**	
Whiteley	0%	0%	6%	0%	6%	6%	16%	2%	60%	
Winchester LA Total	**61%**	**65%**	**55%**	**23%**	**23%**	**8%**	**21%**	**9%**	**n/a**	
Other outside Winchester District	**39%**	**35%**	**45%**	**77%**	**77%**	**92%**	**79%**	**91%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	
	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 9**	**Inflow Expenditure**	**Total £M**
Turnover £M										
Winchester town centre	£99.29	£84.46	£69.16	£54.05	£13.66	£0.00	£1.67	£21.18	£60.61	£404.08
Winchester local shops	£1.91	£3.02	£6.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£11.14
Winchester out-of-centre	£15.27	£10.56	£10.17	£5.15	£2.28	£0.00	£0.00	£0.00	£2.29	£45.71
Winchester urban area sub-total	**£116.47**	**£98.04**	**£85.43**	**£59.20**	**£15.93**	**£0.00**	**£1.67**	**£21.18**	**£63.01**	**£460.93**
Bishops Waltham	£0.00	£0.00	£0.00	£0.00	£15.93	£0.00	£1.67	£0.00	£0.18	£17.78
Denmead	£0.00	£0.00	£0.00	£0.00	£0.00	£1.70	£0.00	£0.00	£0.30	£2.00
New Alresford	£0.00	£0.00	£10.17	£0.00	£0.00	£0.00	£0.00	£0.00	£0.54	£10.71
Wickham	£0.00	£0.00	£0.00	£0.00	£2.28	£0.00	£3.35	£0.00	£0.30	£5.92
Rural Local Shops	£0.00	£0.00	£4.07	£0.00	£4.55	£0.00	£1.67	£0.00	£0.21	£10.50
Winchester rural sub-total	**£0.00**	**£0.00**	**£14.24**	**£0.00**	**£22.76**	**£1.70**	**£6.69**	**£0.00**	**£1.52**	**£46.91**
Whiteley	£0.00	£0.00	£12.20	£0.00	£13.66	£5.10	£26.77	£6.05	£95.67	£159.46
Winchester LA Total	**£116.47**	**£98.04**	**£111.88**	**£59.20**	**£52.35**	**£6.81**	**£35.13**	**£27.23**	**£160.20**	**£667.30**
Other outside Winchester District	**£74.46**	**£52.79**	**£91.54**	**£198.19**	**£175.26**	**£78.27**	**£132.16**	**£275.32**	**n/a**	**n/a**
Total	**£190.93**	**£150.83**	**£203.41**	**£257.39**	**£227.61**	**£85.07**	**£167.29**	**£302.55**	**n/a**	**n/a**

Table 10C: Summary of Comparison Turnover 2010 to 2026 (£Millions)

	2012	2018	2021	2026 Low	2031 Low	2026 High	2031 High
Available Expenditure							
Winchester town centre	£168.86	£208.31	£243.00	£262.09	£314.19	£314.32	£404.08
Winchester local shops	£4.52	£5.73	£6.69	£7.22	£8.66	£8.66	£11.14
Winchester out-of-centre	£19.49	£23.53	£27.45	£29.63	£35.54	£35.53	£45.71
Winchester urban area sub-total	**£192.87**	**£237.58**	**£277.14**	**£298.93**	**£358.39**	**£358.51**	**£460.93**
Bishops Waltham	£8.23	£9.15	£10.68	£11.53	£13.83	£13.82	£17.78
Denmead	£0.79	£1.03	£1.20	£1.30	£1.56	£1.56	£2.00
New Alresford	£5.22	£5.51	£6.43	£6.94	£8.32	£8.32	£10.71
Wickham	£2.94	£3.05	£3.55	£3.84	£4.60	£4.60	£5.92
Rural Local Shops	£4.24	£5.41	£6.31	£6.81	£8.17	£8.16	£10.50
Winchester rural centres sub-total	**£21.42**	**£24.15**	**£28.17**	**£30.40**	**£36.48**	**£36.46**	**£46.91**
Whiteley	£20.88	£82.27	£95.96	£103.47	£123.98	£124.09	£159.46
Winchester LA Total	**£235.17**	**£344.00**	**£401.27**	**£432.80**	**£518.85**	**£519.06**	**£667.30**
Benchmark Turnover - Existing Floorspace							
Winchester urban area	£196.81	£214.12	£225.22	£245.03	£266.58	£245.03	£266.58
Winchester rural centres	£15.60	£16.97	£17.85	£19.42	£21.13	£19.42	£21.13
Whiteley	£41.71	£45.38	£47.73	£51.93	£56.50	£51.93	£56.50
Total	**£254.12**	**£276.47**	**£290.81**	**£316.38**	**£344.20**	**£316.38**	**£344.20**
Benchmark Turnover - Commitments							
Winchester urban area	£0.00	£31.20	£32.82	£35.70	£38.84	£35.70	£38.84
Winchester rural centres	£0.00	£7.79	£8.19	£8.91	£9.70	£8.91	£9.70
Whiteley	£0.00	£45.92	£48.30	£52.55	£57.17	£52.55	£57.17
Total	**£0.00**	**£84.91**	**£89.31**	**£97.17**	**£105.71**	**£97.17**	**£105.71**
Surplus/Deficit Expenditure							
Winchester urban area	-£3.94	-£7.74	£19.10	£18.20	£52.97	£77.78	£155.51
Winchester rural centres	£5.82	-£0.61	£2.13	£2.07	£5.65	£8.13	£16.08
Whiteley	-£20.83	-£9.03	-£0.07	-£1.01	£10.32	£19.61	£45.79
Total	**-£18.95**	**-£17.38**	**£21.15**	**£19.25**	**£68.93**	**£105.51**	**£217.39**
Average Sales Density (£ per Sq M Net)							
Winchester urban area	£5,000	£5,440	£5,722	£6,225	£6,772	£6,225	£6,772
Winchester rural area	£4,000	£4,352	£4,577	£4,980	£5,418	£4,980	£5,418
Whiteley Village	£4,000	£4,352	£4,577	£4,980	£5,418	£4,980	£5,418
Sales Floorspace Projection (Sq M Net)							
Winchester urban area	-788	-1,423	3,338	2,924	7,821	12,494	22,962
Winchester rural area	1,454	-141	464	415	1,042	1,632	2,969
Whiteley	-5,208	-2,075	-16	-203	1,904	3,937	8,452
Surplus/Deficit Total	**-4,542**	**-3,638**	**3,786**	**3,135**	**10,768**	**18,063**	**34,383**

Sources: Tables 3C to 6C
**Takes account of Whiteley Village Redevelopment*

Appendix D Household Survey Results

Q01 At which store or shop did you do your household's last main food and grocery shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Aldi, The Hundred, Romsey	2.6%	13	0.0%	0	0.0%	0	0.0%	0	8.3%	13
Asda, Bournemouth Road, Chandlers Ford, Eastleigh	4.2%	21	1.6%	2	1.0%	1	3.5%	4	9.0%	14
Co-op, High Street, Stockbridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Co-op, Winchester Road, Eastleigh	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Iceland, Middlebrook Street., Winchester	1.4%	7	0.8%	1	6.0%	6	0.0%	0	0.0%	0
Lidl, Twyford Road, Eastleigh	0.4%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Marks & Spencer, High Street, Winchester	1.8%	9	3.1%	4	4.0%	4	0.0%	0	0.6%	1
Sainsbury's, Badger Farm Road, Winchester	22.3%	111	47.3%	61	11.0%	11	14.8%	17	14.1%	22
Sainsbury's, Leigh Road, Eastleigh	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Sainsbury's, Middlebrook Street., Winchester	2.9%	15	1.6%	2	13.0%	13	0.0%	0	0.0%	0
Sainsbury's, Tollbar Way, Hedge End	0.4%	2	0.0%	0	0.0%	0	0.9%	1	0.6%	1
Tesco Express, Broad Street, Alresford	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Tesco Express, Priors Dean Road, Harestock, Winchester	0.4%	2	0.8%	1	0.0%	0	0.9%	1	0.0%	0
Tesco Metro, The Swan Centre, Wells Place, Eastleigh	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Tesco, Easton Lane, Winnal, Winchester	25.9%	129	21.7%	28	45.0%	44	44.3%	51	3.8%	6
Waitrose, Stockbridge Road, Winchester	9.6%	48	17.8%	23	8.0%	8	6.1%	7	6.4%	10
Waitrose, Alma Road, Romsey	10.7%	53	0.0%	0	0.0%	0	0.0%	0	34.0%	53
Waitrose, Oakmount Road, Chandlers Ford, Eastleigh	1.2%	6	0.8%	1	1.0%	1	2.6%	3	0.6%	1
Internet	5.6%	28	3.1%	4	11.0%	11	5.2%	6	4.5%	7
Asda, Anton Mill Road, Andover	0.6%	3	0.0%	0	0.0%	0	0.9%	1	1.3%	2
Asda, Brighton Way, Basingstoke	0.4%	2	0.8%	1	0.0%	0	0.9%	1	0.0%	0
Co-op, West Street, Alresford	0.4%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Iceland, Angel Place Shopping Centre, Bridgwater	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Lidl, Hatches Lane, Salisbury	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Lidl, London Road, Amesbury	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Local shops, Alresford	0.4%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Local shops, Twyford	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Marks & Spencer, Tollbar Way, Hedge End, Southampton	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Morrison's, Spruce Drive, Totton, Southampton	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Sainsbury's, Crooklets Road, Bude	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Sainsbury's, Draymans Way, Alton	0.8%	4	0.0%	0	0.0%	0	3.5%	4	0.0%	0
Sainsbury's, Kempshott, Basingstoke	0.6%	3	0.0%	0	0.0%	0	2.6%	3	0.0%	0
Sainsbury's, Lordshill District Centre, Southampton	1.8%	9	0.0%	0	0.0%	0	0.0%	0	5.8%	9
Sainsbury's, Shepherds Spring Lane, Andover	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Sainsbury's, Station Mall, Basingstoke	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Wallop Drive,	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Basingstoke										
Tesco Express, Cricketers, Compton Square, Andover	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Tesco Superstore, River Way, Andover	1.0%	5	0.0%	0	0.0%	0	0.0%	0	3.2%	5
Tesco, Southampton Road, Salisbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Tesco, Wimpson Lane, Milbrook, Southampton	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Waitrose, Churchill Way West, Salisbury	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

Q02 Is there any other store or shop you do your main food and grocery shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Aldi, The Hundred, Romsey	2.0%	10	0.8%	1	0.0%	0	0.0%	0	5.8%	9
Asda, Bournemouth Road, Chandlers Ford, Eastleigh	1.8%	9	3.1%	4	0.0%	0	0.9%	1	2.6%	4
Co-op Alldays, Stoney Lane, Weeke, Winchester	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, High Street, Stockbridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Co-op, Stoney Lane, Weeke, Winchester	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, City Road, Winchester	0.4%	2	0.8%	1	1.0%	1	0.0%	0	0.0%	0
Co-op, Winchester Road, Eastleigh	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Iceland, Middlebrook Street., Winchester	1.4%	7	2.3%	3	4.0%	4	0.0%	0	0.0%	0
Lidl, Twyford Road, Eastleigh	0.4%	2	0.8%	1	0.0%	0	0.9%	1	0.0%	0
Marks & Spencer, High Street, Winchester	3.4%	17	3.1%	4	9.0%	9	1.7%	2	1.3%	2
Morrison's, Lakesmere Road, Horndean	0.4%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Sainsbury's, Badger Farm Road, Winchester	13.8%	69	17.8%	23	21.0%	21	11.3%	13	7.7%	12
Sainsbury's, Leigh Road, Eastleigh	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Middlebrook Street., Winchester	2.6%	13	3.1%	4	8.0%	8	0.9%	1	0.0%	0
Sainsbury's, Tollbar Way, Hedge End	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Tesco Express, Springvale Road, Kingsworthy, Winchester	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Tesco, Easton Lane, Winnal, Winchester	10.4%	52	8.5%	11	9.0%	9	22.6%	26	3.8%	6
Waitrose, Stockbridge Road, Winchester	8.4%	42	16.3%	21	9.0%	9	3.5%	4	5.1%	8
Waitrose, Alma Road, Romsey	3.4%	17	0.0%	0	0.0%	0	0.0%	0	10.9%	17
Waitrose, Oakmount Road, Chandlers Ford, Eastleigh	0.6%	3	0.0%	0	0.0%	0	1.7%	2	0.6%	1
Internet	0.8%	4	0.0%	0	2.0%	2	0.0%	0	1.3%	2
Asda, Anton Mill Road, Andover	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Asda, Brighton Way, Basingstoke	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Asda, Maynard Road, Totton, Southampton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Co-op, Broadwater Road, Romsey	0.8%	4	0.0%	0	0.0%	0	0.0%	0	2.6%	4
Co-op, Saxon Way, Romsey	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Co-op, West Street, Alresford	0.6%	3	0.0%	0	0.0%	0	2.6%	3	0.0%	0
Co-op, Wokingham Road, Earley, Reading	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Farmers market, Southgate Street, Winchester	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Andover	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Local shops, Salisbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Local shops, Sparsholt	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Local shops, Stockbridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Local shops, Winchester	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Marks & Spencer, Paddington House, Festival Place, Basingstoke	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Marks & Spencer, Tollbar Way, Hedge End, Southampton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Morrison's, Spruce Drive, Totton, Southampton	1.0%	5	0.0%	0	0.0%	0	0.0%	0	3.2%	5
Morrison's, Worting Road, Basingstoke	0.6%	3	0.0%	0	0.0%	0	1.7%	2	0.6%	1

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Sainsbury's, Bridge Street, Andover	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Sainsbury's, Draymans Way, Alton	1.0%	5	0.0%	0	0.0%	0	4.3%	5	0.0%	0
Sainsbury's, Kempshott, Basingstoke	0.4%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Sainsbury's, Lordshill District Centre, Southampton	0.6%	3	0.0%	0	0.0%	0	0.0%	0	1.9%	3
Sainsbury's, Lyndhurst Road, Christchurch	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Sainsbury's, Shepherds Spring Lane, Andover	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Sainsbury's, Station Mall, Basingstoke	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Tesco Express, Cricketers, Compton Square, Andover	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Tesco Express, Shirley Road, Southampton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Tesco Superstore, River Way, Andover	0.6%	3	0.0%	0	0.0%	0	0.9%	1	1.3%	2
Tesco, Southampton Road, Salisbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
(No other store)	28.4%	142	29.5%	38	31.0%	30	32.2%	37	23.1%	36
(Don't know / varies)	10.4%	52	10.1%	13	4.0%	4	8.7%	10	16.0%	25
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

Q03 While you were on your last main shop did you, (or anyone else with you) carry out any of the following activities? [MR/PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Get Petrol	18.8%	94	19.4%	25	17.0%	17	21.7%	25	17.3%	27
Go shopping for non food items	18.0%	90	12.4%	16	19.0%	19	13.0%	15	25.6%	40
Go shopping for other food items	10.8%	54	4.7%	6	12.0%	12	5.2%	6	19.2%	30
Go to Bank, Post Office, Building Society or Cash Point	16.6%	83	10.9%	14	13.0%	13	22.6%	26	19.2%	30
Go to hairdressers, dry cleaners, or other service	3.4%	17	3.1%	4	3.0%	3	0.9%	1	5.8%	9
Go window shopping / browsing	5.0%	25	1.6%	2	9.0%	9	6.1%	7	4.5%	7
Use sports / leisure or entertainment facilities (including library, cafe etc.)	6.2%	31	6.2%	8	2.0%	2	7.0%	8	8.3%	13
Visit family / friends	0.8%	4	0.0%	0	0.0%	0	2.6%	3	0.6%	1
Other	0.8%	4	0.8%	1	1.0%	1	0.0%	0	1.3%	2
(Didn't travel - shopped online)	5.2%	26	2.3%	3	10.0%	10	7.0%	8	3.2%	5
Nothing else	46.2%	231	58.1%	75	46.0%	45	39.1%	45	41.7%	65
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

Q04 How do you normally travel to do your main food shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Car-driver	71.9%	359	71.3%	92	56.0%	55	77.4%	90	78.2%	123
Car-passenger	8.0%	40	10.1%	13	7.0%	7	13.0%	15	3.2%	5
Bus / coach	4.2%	21	6.2%	8	6.0%	6	1.7%	2	3.2%	5
Train	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Taxi	0.4%	2	0.0%	0	1.0%	1	0.9%	1	0.0%	0
Walk	9.1%	46	8.5%	11	19.0%	19	0.0%	0	10.3%	16
Bicycle	0.6%	3	0.0%	0	0.0%	0	0.0%	0	1.9%	3
Mobility scooter	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Delivered / Internet	5.4%	27	2.3%	3	11.0%	11	7.0%	8	3.2%	5
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	0.4%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

Q05 In addition to your main food shopping at which location did you last visit for small scale / top up shopping for things like bread, milk or newspapers?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Aldi, The Hundred, Romsey	3.0%	15	0.8%	1	1.0%	1	0.0%	0	8.3%	13
Asda (formerly Netto), High Street, West End, Southampton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Asda, Bournemouth Road, Chandlers Ford, Eastleigh	0.6%	3	0.0%	0	0.0%	0	0.0%	0	1.9%	3
Co-op Alldays, Stoney Lane, Weeke, Winchester	0.6%	3	2.3%	3	0.0%	0	0.0%	0	0.0%	0
Co-op, High Street, Stockbridge	2.4%	12	0.0%	0	0.0%	0	0.0%	0	7.7%	12
Co-op, Stoney Lane, Weeke, Winchester	0.6%	3	0.8%	1	1.0%	1	0.9%	1	0.0%	0
Co-op, City Road, Winchester	1.4%	7	1.6%	2	4.0%	4	0.9%	1	0.0%	0
Co-op, Winchester Road, Eastleigh	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Iceland, Middlebrook Street., Winchester	1.2%	6	0.0%	0	5.0%	5	0.9%	1	0.0%	0
Lidl, Twyford Road, Eastleigh	0.4%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Marks & Spencer, High Street, Winchester	4.0%	20	3.1%	4	12.0%	12	2.6%	3	0.6%	1
Sainsbury's, Badger Farm Road, Winchester	9.2%	46	24.0%	31	7.0%	7	1.7%	2	3.8%	6
Sainsbury's, Leigh Road, Eastleigh	0.6%	3	0.0%	0	0.0%	0	2.6%	3	0.0%	0
Sainsbury's, Middlebrook Street., Winchester	7.5%	37	6.2%	8	26.0%	25	2.6%	3	0.6%	1
Tesco Express, Broad Street, Alresford	1.4%	7	0.0%	0	0.0%	0	6.1%	7	0.0%	0
Tesco Express, Priors Dean Road, Harestock, Winchester	3.0%	15	9.3%	12	1.0%	1	0.9%	1	0.6%	1
Tesco Express, Springvale Road, Kingsworthy, Winchester	2.6%	13	0.0%	0	8.0%	8	4.3%	5	0.0%	0
Tesco Express, Winchester Road, Fair Oak, Eastleigh	0.4%	2	0.8%	1	0.0%	0	0.9%	1	0.0%	0
Tesco Metro, The Swan Centre, Wells Place, Eastleigh	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Tesco One Stop, Battery Hill, Winchester	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Easton Lane, Winnal, Winchester	5.0%	25	4.7%	6	7.0%	7	8.7%	10	1.3%	2
Tesco, Twyford Road, Eastleigh	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Waitrose, Stockbridge Road, Winchester	8.4%	42	24.0%	31	6.0%	6	1.7%	2	1.9%	3
Waitrose, Alma Road, Romsey	5.4%	27	0.0%	0	0.0%	0	0.0%	0	17.3%	27
Waitrose, Oakmount Road, Chandlers Ford, Eastleigh	0.6%	3	0.0%	0	0.0%	0	0.9%	1	1.3%	2
Internet	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Asda, Anton Mill Road, Andover	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Co-op, Anstey Road, Romsey	1.6%	8	0.0%	0	0.0%	0	0.0%	0	5.1%	8
Co-op, Broadwater Road, Romsey	0.8%	4	0.0%	0	0.0%	0	0.0%	0	2.6%	4
Co-op, Saxon Way, Romsey	0.6%	3	0.0%	0	0.0%	0	0.0%	0	1.9%	3
Co-op, St Vigor Way, Colden Common, Winchester	1.4%	7	0.0%	0	0.0%	0	6.1%	7	0.0%	0
Co-op, West Street, Alresford	3.2%	16	0.0%	0	0.0%	0	13.9%	16	0.0%	0
Co-op, Winchester Hill, Romsey	1.6%	8	0.8%	1	0.0%	0	0.0%	0	4.5%	7
Co-op, Wokingham Road, Earley, Reading	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Iceland, Angel Place	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Shopping Centre, Bridgwater										
Local shops, Alresford	1.8%	9	0.0%	0	0.0%	0	7.8%	9	0.0%	0
Local shops, Barton Stacey	0.4%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Local shops, Basingstoke	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Local shops, Battery Hill	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Bishop's Waltham	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Local shops, Chilbolton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Local shops, Four Marks	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Local shops, Kings Somborne	0.8%	4	0.0%	0	0.0%	0	0.0%	0	2.6%	4
Local shops, Kings Worthy	0.4%	2	0.0%	0	1.0%	1	0.9%	1	0.0%	0
Local shops, Lockerley	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Local shops, Micheldever	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Local shops, Odiham	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Local shops, Oliver's Battery	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Otterbourne	0.6%	3	0.0%	0	0.0%	0	0.0%	0	1.9%	3
Local shops, Romsey	1.6%	8	0.0%	0	0.0%	0	0.0%	0	5.1%	8
Local shops, South Wonston	0.8%	4	0.0%	0	0.0%	0	3.5%	4	0.0%	0
Local shops, Sparsholt	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Local shops, Stanmore	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Stockbridge	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Local shops, Sutton Scotney	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Local shops, Twyford	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Local shops, Winchester	3.0%	15	6.2%	8	4.0%	4	0.9%	1	1.3%	2
Local shops, Winnall	0.4%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Local shops, Witcher's Copse	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Marks & Spencer Simply Food, Waterloo Station, Waterloo, London	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Marks & Spencer, Tollbar Way, Hedge End, Southampton	0.4%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Morrison's, Worting Road, Basingstoke	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Sainsbury's, Lordshill District Centre, Southampton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Tesco Express & Petrol Station, Andover Road, Winchester	1.4%	7	1.6%	2	5.0%	5	0.0%	0	0.0%	0
Tesco Express, Winchester Road, Four Marks, Alton	0.4%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Tesco Superstore, River Way, Andover	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Tesco, Southampton Road, Salisbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
(Can't remember)	0.6%	3	0.0%	0	1.0%	1	0.9%	1	0.6%	1
(Don't do top-up shopping)	13.8%	69	10.9%	14	9.0%	9	12.2%	14	20.5%	32
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

Column %ges.

Q06 In which location do you buy most of your household's non-food shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Andover	2.0%	10	0.0%	0	0.0%	0	0.9%	1	5.8%	9
Basingstoke	2.6%	13	4.7%	6	0.0%	0	5.2%	6	0.6%	1
Chandlers Ford	1.2%	6	0.0%	0	0.0%	0	0.0%	0	3.8%	6
Eastleigh	3.2%	16	3.9%	5	1.0%	1	6.1%	7	1.9%	3
Guildford	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Hedge End	1.4%	7	1.6%	2	2.0%	2	0.0%	0	1.9%	3
London	0.8%	4	0.0%	0	0.0%	0	1.7%	2	1.3%	2
New Alresford	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Portsmouth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Romsey	9.5%	47	0.8%	1	0.0%	0	0.0%	0	29.5%	46
Southampton	11.8%	59	8.5%	11	7.0%	7	7.8%	9	20.5%	32
Winchester	53.9%	269	72.9%	94	77.0%	75	57.4%	66	21.2%	33
Alresford	0.6%	3	0.0%	0	0.0%	0	2.6%	3	0.0%	0
Chichester	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Salisbury	1.2%	6	0.0%	0	0.0%	0	0.0%	0	3.8%	6
Stockbridge	0.4%	2	0.0%	0	1.0%	1	0.0%	0	0.6%	1
Internet / mail order	4.8%	24	3.1%	4	7.0%	7	7.0%	8	3.2%	5
(Don't know / varies)	5.8%	29	4.7%	6	5.0%	5	8.7%	10	5.1%	8
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

Q07 How do you normally travel to do your non-food shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Car-driver	63.0%	315	58.1%	75	37.0%	36	73.9%	86	75.0%	118
Car-passenger	5.0%	25	6.2%	8	6.0%	6	7.0%	8	1.9%	3
Bus / coach	8.6%	43	13.2%	17	6.0%	6	7.8%	9	7.1%	11
Train	1.4%	7	1.6%	2	2.0%	2	0.9%	1	1.3%	2
Taxi	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	14.5%	72	16.3%	21	38.0%	37	0.9%	1	8.3%	13
Bicycle	0.8%	4	0.0%	0	3.0%	3	0.0%	0	0.6%	1
Mobility scooter	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Delivered / Internet	4.8%	24	3.1%	4	7.0%	7	7.8%	9	2.6%	4
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.0%	10	1.6%	2	1.0%	1	1.7%	2	3.2%	5
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

Q08 At which location did your household last buy clothes or shoes?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Andover	0.6%	3	0.0%	0	0.0%	0	0.9%	1	1.3%	2
Basingstoke	3.4%	17	3.9%	5	1.0%	1	8.7%	10	0.6%	1
Chandlers Ford	1.0%	5	1.6%	2	0.0%	0	0.9%	1	1.3%	2
Eastleigh	1.8%	9	1.6%	2	3.0%	3	3.5%	4	0.0%	0
Fareham	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Hedge End	4.2%	21	4.7%	6	4.0%	4	5.2%	6	3.2%	5
London	2.8%	14	0.8%	1	4.0%	4	4.3%	5	2.6%	4
New Alresford	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Portsmouth	1.6%	8	0.8%	1	1.0%	1	2.6%	3	1.9%	3
Reading	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Romsey	5.0%	25	0.8%	1	0.0%	0	0.0%	0	15.4%	24
Southampton	17.8%	89	9.3%	12	11.0%	11	16.5%	19	30.1%	47
Winchester	42.1%	210	60.5%	78	58.0%	57	36.5%	42	21.2%	33
Internet / mail order	8.6%	43	8.5%	11	12.0%	12	8.7%	10	6.4%	10
Abroad	0.8%	4	0.0%	0	0.0%	0	0.9%	1	1.9%	3
Alton	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Badger Farm Local Centre, Winchester	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Bournemouth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Chichester	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Edinburgh	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Exeter	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Glasgow	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Halifax, West Yorkshire	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Lymington	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Newton Abbot, Devon	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Salisbury	2.6%	13	1.6%	2	0.0%	0	0.9%	1	6.4%	10
Stockbridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
West Quay Shopping Centre, Southampton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
(Don't know / can't remember)	2.8%	14	3.1%	4	0.0%	0	4.3%	5	3.2%	5
(Don't regularly buy these kind of goods)	1.8%	9	2.3%	3	2.0%	2	1.7%	2	1.3%	2
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

Q09 Which other locations do you visit to buy clothes or shoes? [MR]
Those who mentioned a specific location to buy clothes or shoes at Q08:

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Andover	1.5%	7	1.6%	2	1.0%	1	0.9%	1	2.0%	3
Basingstoke	7.7%	37	5.7%	7	12.2%	12	14.8%	16	1.3%	2
Chandlers Ford	0.4%	2	0.0%	0	0.0%	0	0.9%	1	0.7%	1
Eastleigh	3.4%	16	4.9%	6	3.1%	3	3.7%	4	2.0%	3
Fareham	0.4%	2	0.0%	0	0.0%	0	0.9%	1	0.7%	1
Guildford	0.6%	3	0.8%	1	0.0%	0	0.9%	1	0.7%	1
Hedge End	2.7%	13	3.3%	4	2.0%	2	3.7%	4	2.0%	3
London	4.2%	20	5.7%	7	5.1%	5	4.6%	5	2.0%	3
New Alresford	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Petersfield	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Portchester	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Portsmouth	1.2%	6	0.8%	1	3.1%	3	0.9%	1	0.7%	1
Romsey	2.9%	14	0.8%	1	3.1%	3	0.0%	0	6.7%	10
Southampton	25.1%	120	26.2%	32	27.6%	26	24.1%	26	23.5%	35
Whiteley	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Winchester	19.3%	92	13.1%	16	19.4%	19	19.4%	21	24.2%	36
Internet / mail order	4.0%	19	3.3%	4	3.1%	3	5.6%	6	4.0%	6
Alton	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Badger Farm Local Centre, Winchester	0.4%	2	0.0%	0	0.0%	0	0.9%	1	0.7%	1
Bath	0.4%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Bournemouth	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Brighton	0.4%	2	0.8%	1	1.0%	1	0.0%	0	0.0%	0
Bristol	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Cheltenham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Chichester	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Isle of Wight	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Lymington	0.4%	2	0.0%	0	0.0%	0	0.9%	1	0.7%	1
Salisbury	1.3%	6	0.0%	0	1.0%	1	0.0%	0	3.4%	5
Stockbridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
(Don't know / can't remember)	1.3%	6	0.8%	1	1.0%	1	0.0%	0	2.7%	4
(None mentioned / no other centre)	35.2%	168	40.2%	49	37.8%	36	29.6%	32	33.6%	50
Weighted base:		477		123		96		109		150
Sample:		477		122		98		108		149

Q10 At which location did your household last buy domestic electric appliances (e.g. fridges and kitchen items)?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Currys Digital, Winchester High Street	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Currys, Easton Lane, Moorside Road, Winchester	14.0%	70	17.1%	22	19.0%	19	20.0%	23	3.8%	6
Homebase, Easton Lane, Winnal, Winchester	1.4%	7	1.6%	2	0.0%	0	3.5%	4	0.6%	1
Andover	1.2%	6	0.0%	0	0.0%	0	0.9%	1	3.2%	5
Basingstoke	1.4%	7	1.6%	2	0.0%	0	4.3%	5	0.0%	0
Bishops Waltham	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Chandlers Ford	0.6%	3	0.0%	0	0.0%	0	0.9%	1	1.3%	2
Eastleigh	5.4%	27	6.2%	8	3.0%	3	6.1%	7	5.8%	9
Fareham	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Hedge End	1.6%	8	1.6%	2	2.0%	2	2.6%	3	0.6%	1
Romsey	1.6%	8	0.0%	0	0.0%	0	0.0%	0	5.1%	8
Southampton	22.8%	114	17.1%	22	18.0%	18	18.3%	21	34.0%	53
Winchester	13.9%	70	19.4%	25	25.0%	24	13.0%	15	3.2%	5
Internet / mail order	19.0%	95	18.6%	24	14.0%	14	17.4%	20	23.7%	37
Alton	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Hamble District Centre, Eastleigh	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Salisbury	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Winnal Local Centre, Winchester	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2
(Don't know / can't remember)	4.4%	22	2.3%	3	4.0%	4	3.5%	4	7.1%	11
(Don't regularly buy these kind of goods)	10.8%	54	14.7%	19	13.0%	13	7.0%	8	9.0%	14
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

Q11 Which other locations do you visit to buy domestic electric appliances (e.g. fridges and kitchen items)? [MR]
Those who mentioned a specific location to buy domestic electrical appliances at Q10:

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Currys Digital, Winchester High Street	0.5%	2	0.0%	0	2.4%	2	0.0%	0	0.0%	0
Currys, Easton Lane, Moorside Road, Winchester	5.6%	24	8.4%	9	9.6%	8	6.8%	7	0.0%	0
Homebase, Easton Lane, Winnal, Winchester	0.9%	4	1.9%	2	1.2%	1	1.0%	1	0.0%	0
Andover	0.9%	4	0.0%	0	0.0%	0	0.0%	0	3.1%	4
Basingstoke	1.2%	5	0.0%	0	0.0%	0	4.9%	5	0.0%	0
Chandlers Ford	0.5%	2	0.0%	0	1.2%	1	0.0%	0	0.8%	1
Eastleigh	4.7%	20	3.7%	4	6.0%	5	6.8%	7	3.1%	4
Fareham	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Gosport	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Hedge End	2.6%	11	4.7%	5	1.2%	1	2.9%	3	1.5%	2
London	0.9%	4	0.9%	1	0.0%	0	1.9%	2	0.8%	1
New Alresford	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Romsey	0.5%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Southampton	11.8%	50	13.1%	14	13.3%	11	6.8%	7	13.7%	18
Winchester	11.1%	47	13.1%	14	8.4%	7	12.6%	13	9.9%	13
Internet / mail order	7.1%	30	6.5%	7	10.8%	9	9.7%	10	3.1%	4
Currys, Farnborough Road, Farnborough	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Alton	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Bournemouth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Boyatt Wood, Eastleigh	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Salisbury	0.5%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Winnal Local Centre, Winchester	0.7%	3	0.0%	0	0.0%	0	2.9%	3	0.0%	0
(Don't know / can't remember)	4.5%	19	2.8%	3	0.0%	0	5.8%	6	7.6%	10
(None mentioned / no other centre)	49.3%	209	50.5%	54	49.4%	40	41.7%	43	54.2%	71
Weighted base:		424		107		81		104		132
Sample:		424		107		83		103		131

Column %ges.

Q12 At which location did your household last buy other kinds of electric goods such as TV / Hi-Fi and computers ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Currys Digital, Winchester High Street	0.6%	3	0.0%	0	3.0%	3	0.0%	0	0.0%	0
Currys, Easton Lane, Moorside Road, Winchester	10.0%	50	17.1%	22	9.0%	9	11.3%	13	3.8%	6
Andover	1.2%	6	0.0%	0	0.0%	0	0.0%	0	3.8%	6
Basingstoke	2.0%	10	1.6%	2	0.0%	0	7.0%	8	0.0%	0
Bishops Waltham	0.4%	2	0.0%	0	1.0%	1	0.9%	1	0.0%	0
Chandlers Ford	0.6%	3	0.8%	1	0.0%	0	0.9%	1	0.6%	1
Eastleigh	3.8%	19	3.9%	5	3.0%	3	4.3%	5	3.8%	6
Hedge End	3.2%	16	4.7%	6	2.0%	2	4.3%	5	1.9%	3
London	0.4%	2	0.0%	0	1.0%	1	0.0%	0	0.6%	1
New Alresford	0.8%	4	0.0%	0	0.0%	0	3.5%	4	0.0%	0
Portsmouth	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Romsey	0.6%	3	0.0%	0	0.0%	0	0.0%	0	1.9%	3
Southampton	25.2%	126	20.9%	27	19.0%	19	13.9%	16	41.0%	64
Winchester	12.9%	65	17.8%	23	23.0%	22	13.0%	15	2.6%	4
Internet / mail order	17.0%	85	14.0%	18	19.0%	19	15.7%	18	19.2%	30
Currys, Southampton Road, Salisbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Alresford	0.6%	3	0.8%	1	0.0%	0	1.7%	2	0.0%	0
Ashford, Kent	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Eastbourne	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Hythe Village, Southampton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Isle of Wight	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Lordshill District Centre, Southampton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Odiham	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Romford, Essex	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Salisbury	1.0%	5	0.0%	0	0.0%	0	0.0%	0	3.2%	5
Winnal Local Centre, Winchester	0.4%	2	0.0%	0	0.0%	0	0.9%	1	0.6%	1
(Don't know / can't remember)	3.6%	18	3.9%	5	3.0%	3	3.5%	4	3.8%	6
(Don't regularly buy these kind of goods)	13.8%	69	14.7%	19	15.0%	15	15.7%	18	10.9%	17
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

Q13 Which other locations do you visit to buy other kinds of electric goods such as TV / Hi-Fi and computers? [MR]
Those who mentioned a specific location to buy other kinds of electrical goods at Q12:

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Currys Digital, Winchester High Street	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Currys, Easton Lane, Moorside Road, Winchester	4.8%	20	3.8%	4	9.8%	8	7.5%	7	0.8%	1
Homebase, Easton Lane, Winnal, Winchester	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Andover	0.7%	3	0.0%	0	0.0%	0	2.2%	2	0.8%	1
Basingstoke	1.7%	7	0.0%	0	1.2%	1	6.5%	6	0.0%	0
Chandlers Ford	1.0%	4	1.0%	1	2.4%	2	1.1%	1	0.0%	0
Eastleigh	2.9%	12	2.9%	3	1.2%	1	5.4%	5	2.3%	3
Hedge End	2.2%	9	2.9%	3	1.2%	1	4.3%	4	0.8%	1
London	1.0%	4	0.0%	0	2.4%	2	1.1%	1	0.8%	1
New Alresford	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Romsey	0.7%	3	1.0%	1	0.0%	0	0.0%	0	1.5%	2
Southampton	11.6%	48	12.4%	13	17.1%	14	9.7%	9	9.0%	12
Winchester	8.5%	35	7.6%	8	12.2%	10	14.0%	13	3.0%	4
Internet / mail order	10.4%	43	16.2%	17	8.5%	7	6.5%	6	9.8%	13
Alresford	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Alton	0.5%	2	0.0%	0	0.0%	0	2.2%	2	0.0%	0
Bournemouth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Boyatt Wood, Eastleigh	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Edinburgh	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Isle of Wight	0.2%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Salisbury	0.5%	2	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Winnal Local Centre, Winchester	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1
(Don't know / can't remember)	2.2%	9	0.0%	0	0.0%	0	3.2%	3	4.5%	6
(None mentioned / no other centre)	55.2%	228	54.3%	57	50.0%	40	45.2%	42	66.2%	89
Weighted base:		413		105		80		94		134
Sample:		413		105		82		93		133

Q14 Which location did your household last buy furniture, soft furnishings or floor-coverings?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Currys, Easton Lane, Moorside Road, Winchester	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Homebase, Easton Lane, Winnal, Winchester	1.2%	6	2.3%	3	1.0%	1	0.9%	1	0.6%	1
Peter Green, School Lane, Chandlers Ford	3.8%	19	5.4%	7	2.0%	2	2.6%	3	4.5%	7
Andover	0.8%	4	0.0%	0	0.0%	0	0.0%	0	2.6%	4
Basingstoke	1.0%	5	0.0%	0	1.0%	1	3.5%	4	0.0%	0
Bishops Waltham	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Chandlers Ford	2.0%	10	1.6%	2	1.0%	1	3.5%	4	1.9%	3
Eastleigh	2.6%	13	4.7%	6	0.0%	0	3.5%	4	1.9%	3
Guildford	0.4%	2	0.0%	0	1.0%	1	0.9%	1	0.0%	0
Hedge End	5.4%	27	6.2%	8	5.0%	5	5.2%	6	5.1%	8
London	1.2%	6	0.0%	0	1.0%	1	2.6%	3	1.3%	2
New Alresford	1.2%	6	0.0%	0	1.0%	1	4.3%	5	0.0%	0
Romsey	3.2%	16	0.8%	1	0.0%	0	0.0%	0	9.6%	15
Southampton	25.4%	127	27.9%	36	25.0%	24	13.0%	15	32.7%	51
Winchester	13.1%	66	14.7%	19	22.0%	21	11.3%	13	7.7%	12
Internet / mail order	6.8%	34	5.4%	7	9.0%	9	7.0%	8	6.4%	10
Alresford	0.8%	4	0.0%	0	1.0%	1	2.6%	3	0.0%	0
Alton	0.6%	3	0.0%	0	0.0%	0	2.6%	3	0.0%	0
Anfield, Liverpool	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Bournemouth	0.4%	2	0.0%	0	1.0%	1	0.0%	0	0.6%	1
Cheltenham	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Ferndown, Dorset	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Ledbury, Herefordshire	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Salisbury	0.6%	3	0.0%	0	1.0%	1	0.0%	0	1.3%	2
Sheffield	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Staines, Surrey	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Weeke Local Centre, Winchester	0.4%	2	0.8%	1	1.0%	1	0.0%	0	0.0%	0
West Quay Shopping Centre, Southampton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Winnal Local Centre, Winchester	0.6%	3	0.0%	0	0.0%	0	2.6%	3	0.0%	0
(Don't know / can't remember)	6.8%	34	6.2%	8	9.0%	9	6.1%	7	6.4%	10
(Don't regularly buy these kind of goods)	19.8%	99	23.3%	30	16.0%	16	26.1%	30	14.7%	23
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

Q15 Which other locations do you visit to buy furniture, soft furnishings or floor-coverings? [MR]

Those who mentioned a specific location to buy furniture, soft furnishings or floor-coverings at Q14:

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Homebase, Easton Lane, Winnal, Winchester	1.1%	4	2.2%	2	1.3%	1	1.3%	1	0.0%	0
Peter Green, School Lane, Chandlers Ford	0.5%	2	1.1%	1	0.0%	0	0.0%	0	0.8%	1
Andover	0.3%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Basingstoke	0.3%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Chandlers Ford	1.6%	6	3.3%	3	0.0%	0	0.0%	0	2.4%	3
Eastleigh	2.5%	9	3.3%	3	0.0%	0	2.6%	2	3.3%	4
Guildford	0.3%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Hedge End	4.1%	15	3.3%	3	4.0%	3	10.3%	8	0.8%	1
London	1.4%	5	0.0%	0	2.7%	2	0.0%	0	2.4%	3
New Alresford	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Reading	0.3%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Romsey	1.4%	5	1.1%	1	0.0%	0	0.0%	0	3.3%	4
Southampton	16.6%	61	16.5%	15	20.0%	15	19.2%	15	13.0%	16
Winchester	12.8%	47	15.4%	14	17.3%	13	15.4%	12	6.5%	8
Internet / mail order	6.2%	23	6.6%	6	10.7%	8	5.1%	4	4.1%	5
Alresford	0.3%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0
Christchurch	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Hambledon	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Hursley	0.3%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Salisbury	1.1%	4	0.0%	0	1.3%	1	0.0%	0	2.4%	3
(Don't know / can't remember)	6.6%	24	3.3%	3	1.3%	1	7.7%	6	11.4%	14
(None mentioned / no other centre)	48.5%	178	51.6%	47	46.7%	34	43.6%	34	50.4%	62
Weighted base:		367		91		73		79		124
Sample:		367		91		75		78		123

Q16 Which location did your household last buy DIY / hardware items?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Currys, Easton Lane, Moorside Road, Winchester	0.4%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0
Homebase, Easton Lane, Winnal, Winchester	27.5%	138	41.1%	53	42.0%	41	30.4%	35	5.1%	8
Andover	2.4%	12	0.0%	0	0.0%	0	0.9%	1	7.1%	11
Basingstoke	1.4%	7	0.0%	0	0.0%	0	6.1%	7	0.0%	0
Eastleigh	11.0%	55	11.6%	15	4.0%	4	14.8%	17	12.2%	19
Hedge End	3.0%	15	2.3%	3	2.0%	2	7.0%	8	1.3%	2
London	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
New Alresford	1.4%	7	0.0%	0	0.0%	0	6.1%	7	0.0%	0
Portsmouth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Romsey	6.6%	33	0.0%	0	0.0%	0	0.0%	0	21.2%	33
Southampton	7.2%	36	0.8%	1	2.0%	2	1.7%	2	19.9%	31
Winchester	20.1%	100	28.7%	37	38.0%	37	12.2%	14	7.7%	12
Internet / mail order	1.4%	7	0.8%	1	2.0%	2	0.9%	1	1.9%	3
B&Q, Leybourne Avenue, Nursling, Southampton	1.6%	8	0.0%	0	0.0%	0	0.0%	0	5.1%	8
B&Q, Southampton Road, Salisbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Alresford	0.8%	4	0.0%	0	0.0%	0	3.5%	4	0.0%	0
Alton	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Boyatt Wood, Eastleigh	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Nursling Village, Test Valley	1.4%	7	0.0%	0	0.0%	0	0.0%	0	4.5%	7
Salisbury	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Winnal Local Centre, Winchester	0.6%	3	0.0%	0	0.0%	0	1.7%	2	0.6%	1
(Don't know / can't remember)	1.2%	6	0.8%	1	1.0%	1	1.7%	2	1.3%	2
(Don't regularly buy these kind of goods)	10.4%	52	12.4%	16	9.0%	9	10.4%	12	9.6%	15
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

Q17 Which other locations do you visit to buy DIY / hardware items? [MR]
Those who mentioned a specific location to buy DIY / hardware items at Q16:

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Homebase, Easton Lane, Winnal, Winchester	11.3%	50	12.5%	14	15.6%	14	15.8%	16	4.3%	6
Andover	0.9%	4	0.0%	0	0.0%	0	2.0%	2	1.4%	2
Basingstoke	2.0%	9	0.9%	1	2.2%	2	5.0%	5	0.7%	1
Chandlers Ford	1.4%	6	1.8%	2	1.1%	1	0.0%	0	2.2%	3
Eastleigh	11.5%	51	19.6%	22	13.3%	12	9.9%	10	5.0%	7
Guildford	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Hedge End	4.5%	20	4.5%	5	6.7%	6	5.9%	6	2.2%	3
London	0.5%	2	0.9%	1	0.0%	0	1.0%	1	0.0%	0
New Alresford	1.1%	5	0.0%	0	0.0%	0	5.0%	5	0.0%	0
Portsmouth	0.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Romsey	4.3%	19	0.9%	1	0.0%	0	1.0%	1	12.2%	17
Southampton	8.6%	38	8.0%	9	10.0%	9	5.0%	5	10.8%	15
Winchester	8.4%	37	8.0%	9	11.1%	10	8.9%	9	6.5%	9
Internet / mail order	2.0%	9	0.9%	1	0.0%	0	2.0%	2	4.3%	6
B&Q, Leybourne Avenue, Nursling, Southampton	0.5%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Homebase, Southampton Road, Salisbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Alresford	0.7%	3	0.0%	0	0.0%	0	3.0%	3	0.0%	0
Badger Farm Local Centre, Winchester	0.2%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Nursling Village, Test Valley	0.9%	4	0.0%	0	0.0%	0	1.0%	1	2.2%	3
Salisbury	0.7%	3	0.0%	0	0.0%	0	0.0%	0	2.2%	3
Winnal Local Centre, Winchester	0.5%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0
(Don't know / can't remember)	2.9%	13	0.0%	0	2.2%	2	3.0%	3	5.8%	8
(None mentioned / no other centre)	42.7%	189	46.4%	52	45.6%	40	35.6%	36	43.2%	60
Weighted base:		442		112		88		102		140
Sample:		442		112		90		101		139

Q18 Which location did your household last buy garden items?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Garson's, Fontley Road, Titchfield, Fareham	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Hillier, Romsey Road, Winchester	18.0%	90	23.3%	30	15.0%	15	7.8%	9	23.1%	36
Homebase, Easton Lane, Winnal, Winchester	19.5%	98	30.2%	39	30.0%	29	22.6%	26	1.9%	3
Peter Green, School Lane, Chandlers Ford	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Wyevale, Winchester Road, Fair Oak, Eastleigh	0.4%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Andover	2.6%	13	0.0%	0	0.0%	0	1.7%	2	7.1%	11
Basingstoke	0.4%	2	0.8%	1	0.0%	0	0.9%	1	0.0%	0
Chandlers Ford	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Denmead	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Eastleigh	5.0%	25	5.4%	7	1.0%	1	8.7%	10	4.5%	7
Fareham	0.6%	3	0.0%	0	0.0%	0	2.6%	3	0.0%	0
Hedge End	1.2%	6	0.8%	1	0.0%	0	2.6%	3	1.3%	2
London	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
New Alresford	0.6%	3	0.0%	0	0.0%	0	2.6%	3	0.0%	0
Romsey	8.2%	41	0.0%	0	0.0%	0	0.0%	0	26.3%	41
Southampton	2.6%	13	2.3%	3	2.0%	2	0.0%	0	5.1%	8
Winchester	13.0%	65	20.9%	27	17.0%	17	11.3%	13	5.1%	8
Internet / mail order	0.8%	4	0.0%	0	2.0%	2	0.9%	1	0.6%	1
B&Q, Leybourne Avenue, Nursling, Southampton	0.6%	3	0.0%	0	0.0%	0	0.0%	0	1.9%	3
Brambridge Park Garden Centre, Kiln Lane, Brambridge	0.4%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Homebase, Southampton Road, Salisbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Alresford	0.4%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Alton	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Boyatt Wood, Eastleigh	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Braishfield Village, Romsey	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Brambridge	3.2%	16	2.3%	3	5.0%	5	6.1%	7	0.6%	1
Cheriton	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Christchurch	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Colden Common Village	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Dummer Village, Basingstoke	0.4%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Fair Oak Village, Eastleigh	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Four Marks	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Kings Worthy	0.6%	3	1.6%	2	0.0%	0	0.9%	1	0.0%	0
Lasham	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Longstock Village, Hampshire	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Lower Upham Village, Winchester	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Nursling Village, Test Valley	0.6%	3	0.0%	0	0.0%	0	0.9%	1	1.3%	2
Otterbourne	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Stockbridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Timsbury Village, Romsey	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Winnal Local Centre, Winchester	0.4%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
(Don't know / can't remember)	1.8%	9	0.8%	1	2.0%	2	3.5%	4	1.3%	2
(Don't regularly buy these kind of goods)	14.4%	72	10.9%	14	23.0%	22	12.2%	14	13.5%	21
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

Q19 Which other locations do you visit to buy garden items? [MR]
Those who mentioned a specific location to buy garden items at Q18:

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Hillier, Romsey Road, Winchester	9.3%	39	12.3%	14	12.0%	9	4.1%	4	9.0%	12
Homebase, Easton Lane, Winnal, Winchester	8.1%	34	12.3%	14	6.7%	5	9.3%	9	4.5%	6
Wyevale, Winchester Road, Fair Oak, Eastleigh	0.7%	3	0.0%	0	1.3%	1	1.0%	1	0.8%	1
Andover	1.0%	4	0.9%	1	0.0%	0	0.0%	0	2.3%	3
Basingstoke	1.7%	7	0.0%	0	1.3%	1	6.2%	6	0.0%	0
Bishops Waltham	0.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Denmead	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Eastleigh	6.7%	28	15.8%	18	6.7%	5	3.1%	3	1.5%	2
Fareham	1.4%	6	1.8%	2	0.0%	0	4.1%	4	0.0%	0
Hedge End	1.9%	8	4.4%	5	1.3%	1	2.1%	2	0.0%	0
New Alresford	1.2%	5	0.0%	0	0.0%	0	4.1%	4	0.8%	1
Romsey	4.1%	17	0.0%	0	2.7%	2	0.0%	0	11.3%	15
Southampton	5.5%	23	6.1%	7	4.0%	3	1.0%	1	9.0%	12
Winchester	8.3%	35	7.0%	8	12.0%	9	9.3%	9	6.8%	9
Internet / mail order	1.2%	5	0.9%	1	1.3%	1	2.1%	2	0.8%	1
Brambridge Park Garden Centre, Kiln Lane, Brambridge	1.0%	4	0.9%	1	1.3%	1	0.0%	0	1.5%	2
Alresford	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Badger Farm Local Centre, Winchester	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Brambridge	1.9%	8	3.5%	4	0.0%	0	4.1%	4	0.0%	0
Cadnam Village, New Forest	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Fair Oak Village, Eastleigh	1.2%	5	1.8%	2	1.3%	1	2.1%	2	0.0%	0
Four Marks	1.0%	4	0.0%	0	0.0%	0	4.1%	4	0.0%	0
Kings Worthy	0.7%	3	2.6%	3	0.0%	0	0.0%	0	0.0%	0
Longstock Village, Hampshire	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1
New Milton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Otterbourne	0.7%	3	0.9%	1	1.3%	1	1.0%	1	0.0%	0
Salisbury	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Stockbridge	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Winnal Local Centre, Winchester	0.5%	2	0.0%	0	0.0%	0	2.1%	2	0.0%	0
(Don't know / can't remember)	4.8%	20	1.8%	2	1.3%	1	6.2%	6	8.3%	11
(None mentioned / no other centre)	42.7%	179	33.3%	38	48.0%	35	42.3%	41	48.1%	64
Weighted base:		419		115		73		98		134
Sample:		419		114		75		97		133

Column %ges.

Q20 Which location did your household last buy health, beauty and chemist items?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Andover	1.4%	7	0.0%	0	0.0%	0	0.9%	1	3.8%	6
Basingstoke	0.6%	3	0.0%	0	0.0%	0	1.7%	2	0.6%	1
Chandlers Ford	0.6%	3	0.0%	0	0.0%	0	0.0%	0	1.9%	3
Eastleigh	1.2%	6	0.0%	0	0.0%	0	4.3%	5	0.6%	1
London	0.4%	2	0.0%	0	0.0%	0	0.9%	1	0.6%	1
New Alresford	2.6%	13	0.0%	0	0.0%	0	11.3%	13	0.0%	0
Newbury	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Romsey	17.5%	88	0.0%	0	0.0%	0	0.0%	0	55.8%	88
Southampton	2.6%	13	0.8%	1	2.0%	2	2.6%	3	4.5%	7
Winchester	57.6%	288	86.8%	112	94.0%	92	46.1%	53	19.2%	30
Internet / mail order	2.4%	12	2.3%	3	0.0%	0	2.6%	3	3.8%	6
Abroad	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Alresford	1.0%	5	0.0%	0	0.0%	0	4.3%	5	0.0%	0
Alton	0.6%	3	0.0%	0	0.0%	0	2.6%	3	0.0%	0
Badger Farm Local Centre, Winchester	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Colden Common Village	0.4%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Farnham, Surrey	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Kings Worthy	0.4%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Naphill, Buckinghamshire	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Salisbury	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Stockbridge	0.6%	3	0.0%	0	0.0%	0	0.0%	0	1.9%	3
Twyford	0.4%	2	0.0%	0	0.0%	0	0.9%	1	0.6%	1
Weeke Local Centre, Winchester	0.6%	3	1.6%	2	0.0%	0	0.9%	1	0.0%	0
Winnal Local Centre, Winchester	2.2%	11	0.0%	0	0.0%	0	9.6%	11	0.0%	0
(Don't know / can't remember)	0.4%	2	0.0%	0	0.0%	0	1.7%	2	0.0%	0
(Don't regularly buy these kind of goods)	5.0%	25	8.5%	11	2.0%	2	4.3%	5	4.5%	7
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

Q21 Which other locations do you visit to buy health, beauty and chemist items? [MR]
Those who mentioned a specific location to buy health, beauty and chemist items at Q20:

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Andover	0.9%	4	0.0%	0	0.0%	0	0.9%	1	2.0%	3
Basingstoke	1.3%	6	0.8%	1	0.0%	0	3.7%	4	0.7%	1
Chandlers Ford	0.8%	4	0.0%	0	1.0%	1	0.0%	0	2.0%	3
Eastleigh	1.5%	7	2.5%	3	0.0%	0	2.8%	3	0.7%	1
Hedge End	0.4%	2	0.8%	1	0.0%	0	0.9%	1	0.0%	0
London	1.1%	5	0.0%	0	1.0%	1	1.9%	2	1.3%	2
New Alresford	1.3%	6	0.0%	0	0.0%	0	5.6%	6	0.0%	0
Petersfield	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Romsey	2.5%	12	1.7%	2	1.0%	1	0.0%	0	6.0%	9
Southampton	6.8%	32	3.4%	4	2.0%	2	6.5%	7	12.8%	19
Winchester	9.6%	45	4.2%	5	2.0%	2	17.6%	19	12.8%	19
Internet / mail order	2.1%	10	5.1%	6	2.0%	2	1.9%	2	0.0%	0
Alresford	0.4%	2	0.0%	0	0.0%	0	1.9%	2	0.0%	0
Alton	0.6%	3	0.0%	0	0.0%	0	2.8%	3	0.0%	0
Badger Farm Local Centre, Winchester	0.4%	2	0.0%	0	0.0%	0	1.9%	2	0.0%	0
Kings Worthy	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Salisbury	0.6%	3	0.0%	0	1.0%	1	0.0%	0	1.3%	2
Twyford	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Weeke Local Centre, Winchester	0.6%	3	0.8%	1	1.0%	1	0.9%	1	0.0%	0
Whitchurch	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Winnal Local Centre, Winchester	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	3.2%	15	0.8%	1	3.1%	3	1.9%	2	6.0%	9
(None mentioned / no other centre)	69.7%	329	81.4%	96	84.7%	81	55.6%	60	61.1%	92
Weighted base:		473		119		96		109		150
Sample:		473		118		98		108		149

Q22 Which location did your household last buy other non-food items such as books, CDs, toys and gifts?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Andover	1.0%	5	0.0%	0	0.0%	0	0.9%	1	2.6%	4
Basingstoke	0.8%	4	0.8%	1	0.0%	0	2.6%	3	0.0%	0
Chandlers Ford	0.6%	3	0.0%	0	1.0%	1	0.0%	0	1.3%	2
Eastleigh	0.8%	4	0.8%	1	0.0%	0	2.6%	3	0.0%	0
Hedge End	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
London	0.6%	3	0.8%	1	0.0%	0	0.9%	1	0.6%	1
New Alresford	1.0%	5	0.0%	0	0.0%	0	4.3%	5	0.0%	0
Romsey	5.0%	25	0.0%	0	0.0%	0	0.0%	0	16.0%	25
Southampton	5.0%	25	2.3%	3	0.0%	0	3.5%	4	11.5%	18
Winchester	36.7%	183	52.7%	68	55.0%	54	32.2%	37	15.4%	24
Internet / mail order	36.4%	182	31.0%	40	37.0%	36	35.7%	41	41.0%	64
Alresford	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Alton	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Badger Farm Local Centre, Winchester	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Bangor, North Wales	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Brambridge	0.2%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Heathrow Airport	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Salisbury	0.4%	2	0.0%	0	1.0%	1	0.0%	0	0.6%	1
Weeke Local Centre, Winchester	0.2%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Winnal Local Centre, Winchester	0.6%	3	0.0%	0	0.0%	0	2.6%	3	0.0%	0
(Don't know / can't remember)	1.4%	7	0.0%	0	3.0%	3	2.6%	3	0.6%	1
(Don't regularly buy these kind of goods)	8.0%	40	10.1%	13	3.0%	3	8.7%	10	9.0%	14
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

Q23 Which other locations do you visit to buy other non-food items such as books, CDs, toys and gifts? [MR]
Those who mentioned a specific location to buy other non-food items at Q22:

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Andover	0.9%	4	0.9%	1	0.0%	0	1.0%	1	1.4%	2
Basingstoke	3.3%	15	4.3%	5	1.1%	1	7.8%	8	0.7%	1
Chandlers Ford	0.4%	2	0.0%	0	1.1%	1	0.0%	0	0.7%	1
Eastleigh	3.5%	16	4.3%	5	1.1%	1	6.9%	7	2.1%	3
Fareham	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Guildford	0.4%	2	0.0%	0	0.0%	0	1.0%	1	0.7%	1
Hedge End	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
London	2.0%	9	1.7%	2	2.1%	2	3.9%	4	0.7%	1
New Alresford	1.1%	5	0.0%	0	0.0%	0	4.9%	5	0.0%	0
Petersfield	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Romsey	2.2%	10	0.9%	1	0.0%	0	0.0%	0	6.4%	9
Southampton	11.5%	52	8.6%	10	9.6%	9	7.8%	8	17.7%	25
Winchester	19.9%	90	18.1%	21	21.3%	20	26.5%	27	15.6%	22
Internet / mail order	10.1%	46	16.4%	19	12.8%	12	5.9%	6	6.4%	9
Alton	0.4%	2	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Badger Farm Local Centre, Winchester	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Bath	0.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Lymington	0.2%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Lyndhurst	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Oxford	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Salisbury	0.9%	4	0.0%	0	0.0%	0	0.0%	0	2.8%	4
Stockbridge	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Winnal Local Centre, Winchester	0.2%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0
(Don't know / can't remember)	3.1%	14	1.7%	2	2.1%	2	2.0%	2	5.7%	8
(None mentioned / no other centre)	45.4%	206	49.1%	57	52.1%	48	37.3%	38	44.0%	62
Weighted base:		453		117		92		103		142
Sample:		453		116		94		102		141

Q24 What things, if any, do you regularly buy on the internet? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Books, CDs, toys etc.	50.0%	250	48.8%	63	58.0%	57	42.6%	49	51.3%	80
Clothes and shoes	20.2%	101	18.6%	24	19.0%	19	20.9%	24	21.8%	34
Computer software / electronic games	6.4%	32	6.2%	8	6.0%	6	6.1%	7	7.1%	11
DIY, hardware and homeware	2.6%	13	2.3%	3	4.0%	4	1.7%	2	2.6%	4
Domestic electrical appliances	7.6%	38	9.3%	12	6.0%	6	7.0%	8	7.7%	12
Electrical TV, Hi-Fi and computers	10.6%	53	10.1%	13	9.0%	9	7.8%	9	14.1%	22
Furniture, soft furnishings and floor coverings	2.8%	14	3.1%	4	2.0%	2	0.9%	1	4.5%	7
Groceries	9.4%	47	7.0%	9	10.0%	10	10.4%	12	10.3%	16
Health and beauty, chemist items	2.2%	11	2.3%	3	1.0%	1	3.5%	4	1.9%	3
Travel goods (tickets, holidays etc.)	2.4%	12	2.3%	3	2.0%	2	1.7%	2	3.2%	5
Car parts	1.0%	5	0.0%	0	0.0%	0	2.6%	3	1.3%	2
Craft / hobby items	1.0%	5	2.3%	3	1.0%	1	0.0%	0	0.6%	1
Downloads (music, books etc.)	0.6%	3	0.0%	0	1.0%	1	0.0%	0	1.3%	2
Gifts, vouchers etc.	1.0%	5	0.8%	1	3.0%	3	0.0%	0	0.6%	1
Pet food / accessories	1.2%	6	0.8%	1	3.0%	3	0.0%	0	1.3%	2
Stationery	0.6%	3	0.8%	1	0.0%	0	0.0%	0	1.3%	2
Nothing	38.8%	194	38.8%	50	33.0%	32	46.1%	53	37.2%	58
Other	1.8%	9	2.3%	3	1.0%	1	0.9%	1	2.6%	4
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

GEN Gender:

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Male	35.2%	176	34.1%	44	40.0%	39	35.7%	41	32.7%	51
Female	64.8%	324	65.9%	85	60.0%	59	64.3%	75	67.3%	106
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

AGE How old are you?

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
18-24	2.2%	11	1.6%	2	4.0%	4	1.7%	2	1.9%	3
25-34	5.3%	27	3.9%	5	14.0%	14	0.9%	1	4.5%	7
35-44	15.0%	75	16.3%	21	17.0%	17	10.4%	12	16.0%	25
45-54	24.2%	121	33.3%	43	16.0%	16	18.3%	21	26.3%	41
55-64	19.2%	96	19.4%	25	16.0%	16	27.0%	31	15.4%	24
65+	32.4%	162	24.8%	32	31.0%	30	39.1%	45	34.6%	54
(Refused)	1.6%	8	0.8%	1	2.0%	2	2.6%	3	1.3%	2
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

PS Postcode Sector

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
SO20 6	6.4%	32	0.0%	0	0.0%	0	0.0%	0	20.5%	32
SO21 1	7.3%	36	0.0%	0	0.0%	0	31.3%	36	0.0%	0
SO21 2	4.6%	23	0.0%	0	0.0%	0	0.0%	0	14.7%	23
SO21 3	5.2%	26	0.0%	0	0.0%	0	22.6%	26	0.0%	0
SO22 4	8.2%	41	31.8%	41	0.0%	0	0.0%	0	0.0%	0
SO22 5	7.6%	38	29.5%	38	0.0%	0	0.0%	0	0.0%	0
SO22 6	10.0%	50	38.8%	50	0.0%	0	0.0%	0	0.0%	0
SO23 0	5.3%	26	0.0%	0	27.0%	26	0.0%	0	0.0%	0
SO23 7	6.1%	30	0.0%	0	31.0%	30	0.0%	0	0.0%	0
SO23 8	3.5%	18	0.0%	0	18.0%	18	0.0%	0	0.0%	0
SO23 9	4.7%	23	0.0%	0	24.0%	23	0.0%	0	0.0%	0
SO24 0	2.6%	13	0.0%	0	0.0%	0	11.3%	13	0.0%	0
SO24 9	8.1%	40	0.0%	0	0.0%	0	34.8%	40	0.0%	0
SO51 0	3.0%	15	0.0%	0	0.0%	0	0.0%	0	9.6%	15
SO51 5	3.4%	17	0.0%	0	0.0%	0	0.0%	0	10.9%	17
SO51 7	8.7%	43	0.0%	0	0.0%	0	0.0%	0	27.6%	43
SO51 8	4.2%	21	0.0%	0	0.0%	0	0.0%	0	13.5%	21
SO51 9	1.0%	5	0.0%	0	0.0%	0	0.0%	0	3.2%	5
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156

Winchester Telephone Household Survey
For Nathaniel Lichfield & Partners

QUOTA Zone

	Total		Zone 1		Zone 2		Zone 3		Zone 4	
Zone 1	25.9%	130	100.0%	130	0.0%	0	0.0%	0	0.0%	0
Zone 2	19.5%	98	0.0%	0	100.0%	98	0.0%	0	0.0%	0
Zone 3	23.2%	116	0.0%	0	0.0%	0	100.0%	116	0.0%	0
Zone 4	31.4%	157	0.0%	0	0.0%	0	0.0%	0	100.0%	157
Weighted base:		500		130		98		116		157
Sample:		500		129		100		115		156