

Winchester Street Market Survey

February 2012

TOURISM
SOUTH EAST

TSE Research
40 Chamberlayne Road
Eastleigh
Hampshire
SO50 5JH
Email: pkhan@tourismse.com



Winchester
City Council

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Research Objectives

This report provides an analysis of the results of a snapshot study of Winchester's Street Markets undertaken by TSE Research on behalf of Winchester City Council and BID. The specific objectives were as follows:

- To investigate shopper attitudes towards, and usage of, the street markets.
- Identify reasons for not visiting the markets among 'non-users'.
- To assess the extent to which markets satisfies the needs of shoppers.
- To assess whether there is strong demand amongst locals and visitors for street markets.
- To establish average spend per head on market goods to assess competition with local shops.



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Methodology

- The survey involved a face-to-face interview with a random sample of shoppers and visitors across the city centre. In total 220 people were interviewed.
- Of these, 120 had visited or planned on visiting the street market during their visit that day and 100 did not.
- Of the total sample of 220, half were local residents and half were visitors. The latter included both tourists and employees working in Winchester but who live elsewhere. For simplicity all non-residents are grouped as 'visitors' in the results.
- The survey took place over December 2011 and February 2012 and involved both market days and non-market days.
- IQCS verified professional interviewers were used to carry out the interviews.

Who uses the street markets? (1)

55% of people interviewed had visited or planned on visiting the street market during their trip.

Figure 1: Resident vs. Visitor split among users

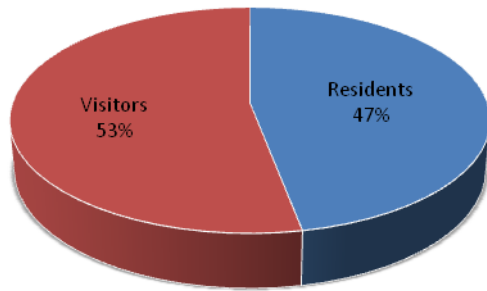


Figure 3: Gender among users

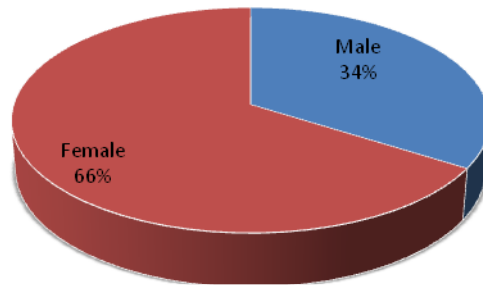


Figure 5: % of respondents who had an illness or disability affecting access to markets

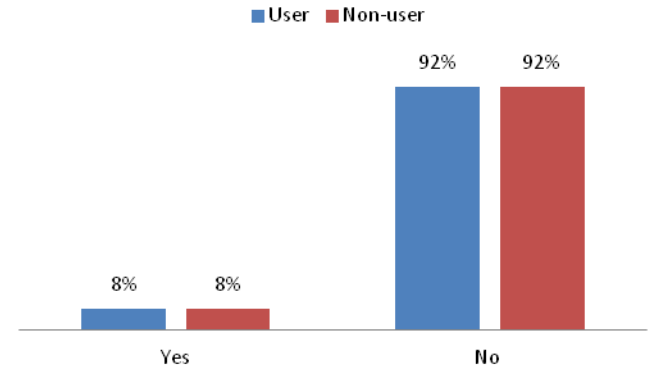


Figure 2: Resident vs. Visitor split among non-users

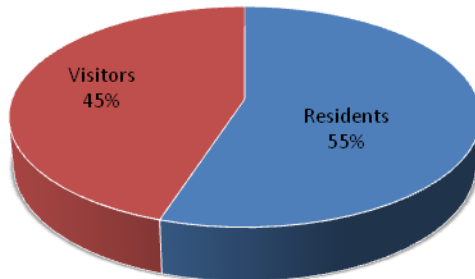
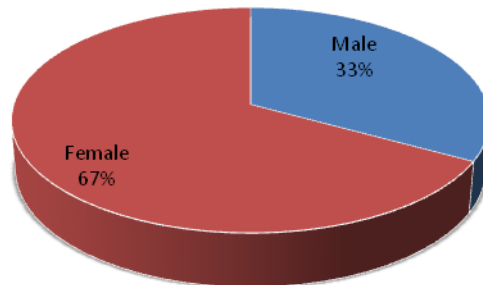


Figure 4: Gender among non-users



No significant difference was found among those visiting and those not visiting the market with regard to gender, disability and whether they were a local resident or non-resident.

The majority of respondents were female.

Who uses the street markets? (2)

Figure 6: Age distribution of all members of group

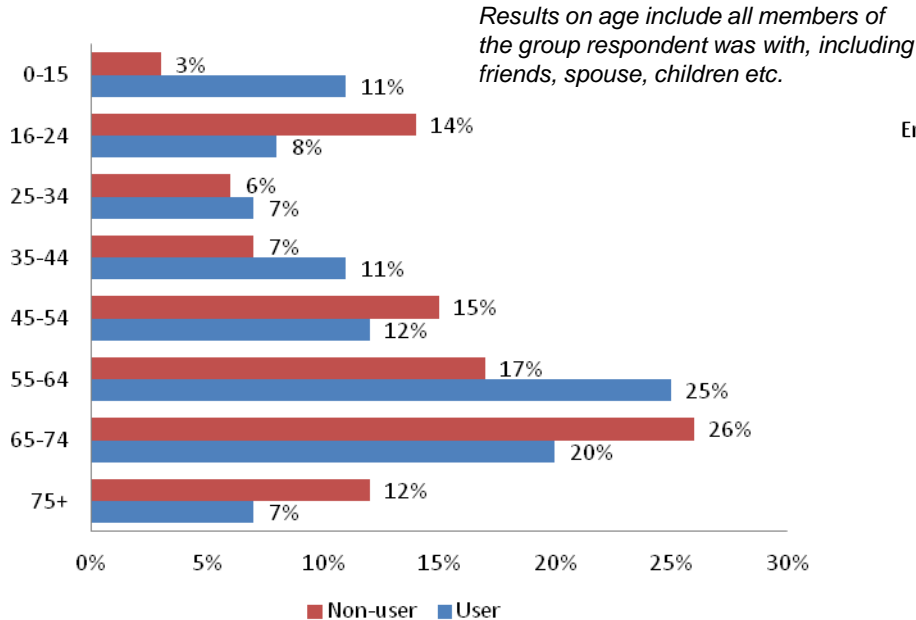
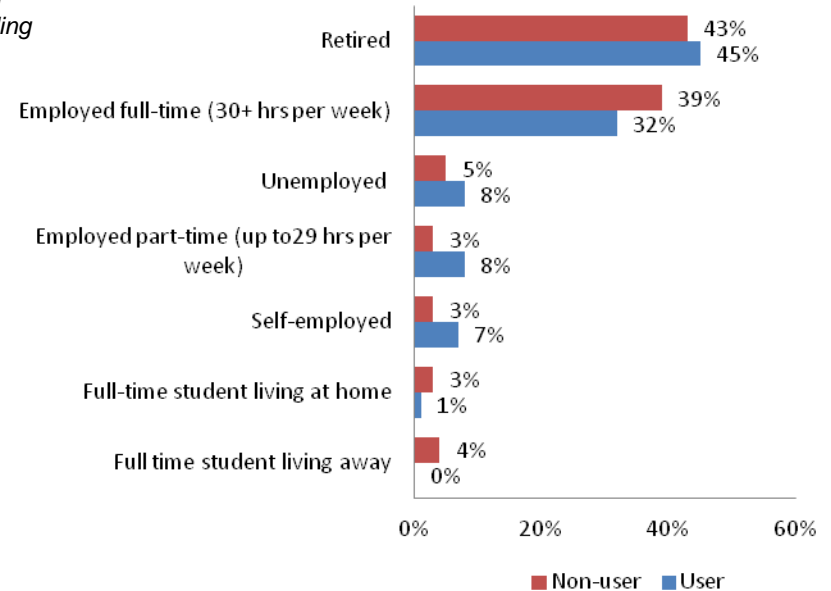


Figure 7: Employment status of head of household



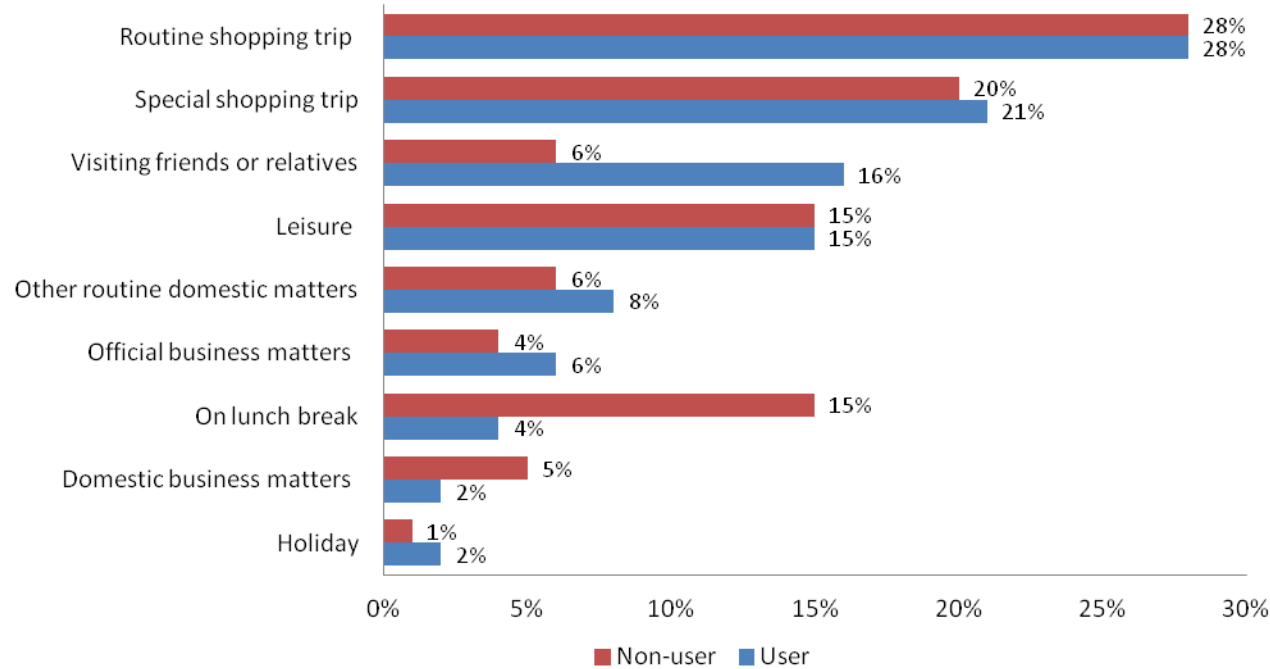
Only marginal differences were found between market users and non-users with regard to age and employment status.

49% of market users and 45% of non-market users were aged 54 years and under. Market visitors were slightly younger and more likely to be with young children.

The percentage of self-employed workers, part-time workers and those who were currently unemployed was marginally higher among market users than non-market users.

Who uses the street markets? (3)

Figure 8: Reasons for visiting Winchester City Centre



The most popular reason for visiting Winchester city centre among both market users and non-market users was a 'Routine shopping trip'. This was followed closely by 'Special shopping trip'.

Why are markets used? (1)

Figure 9: Whether goods purchased at market during visit to City Centre

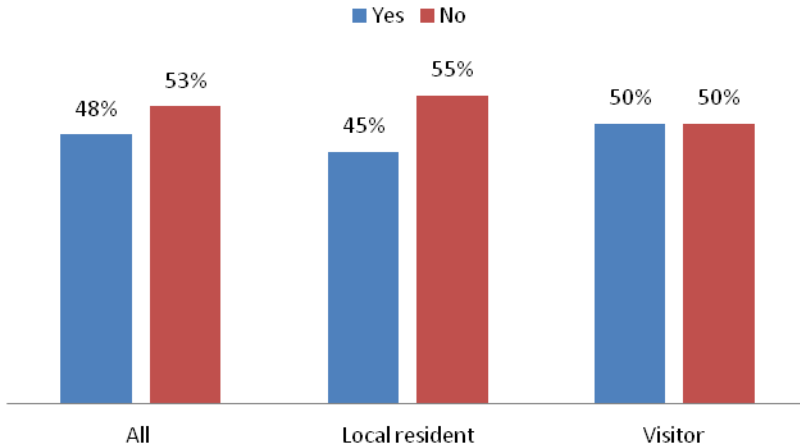
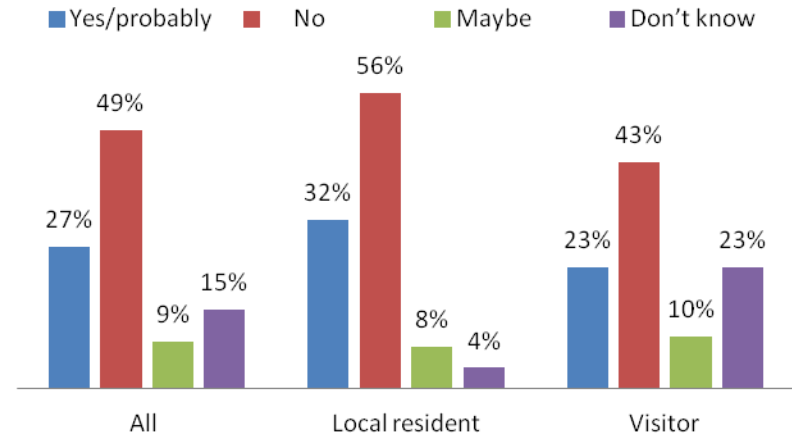


Figure 10: Whether same/similar item could have been purchased from City Centre shop



The results suggest that many people use the markets for 'window shopping' – looking around but not necessarily buying anything on that occasion. Out of all those who had visited the market on the day of they were interviewed, just under half (48%) had purchased one or more items.

Around half (49%) of all those who had made a purchase (of which 56% were residents and 43% were non-residents) believed that the item(s) could not have been purchased from one of the city centre shops.



Why are markets used? (2)

Figure 11: Reasons for buying from market stalls



Given that many market users did not feel that the item(s) purchased could have been obtained elsewhere in the city centre, it is not surprising to find that top among the reasons for buying from market stalls are 'It's speciality – not available in local shops/food outlet' followed by 'Looked like a good deal/cheaper than shops'.

Non-residents (tourists and non-resident employees) were more likely to be impulsive in their purchasing behaviour – just over a quarter (26%) bought goods without giving it a lot of thought.

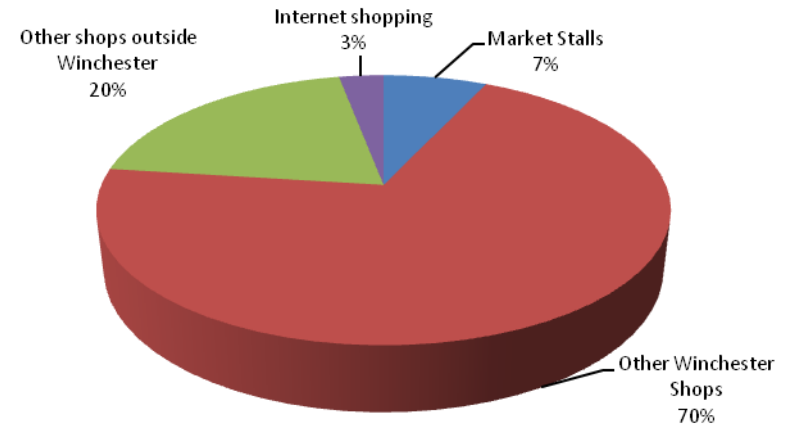


Why are markets used? (3)

Average spend per person with market stalls			
	All	Local resident	Visitor
Food & Drink	£4.74	£3.15	£5.93
Retail goods	£3.27	£2.94	£3.52
Total	£8.01	£6.09	£9.45

Average spend per person with other shops/food outlets			
	All	Local resident	Visitor
Food & Drink	£3.79	£4.90	£3.00
Retail goods	£16.52	£17.68	£15.70
Total	£20.31	£22.58	£18.70

Figure 12: Breakdown of where resident weekly grocery shopping takes place



Expenditure on market stalls is significantly lower than spend which takes place in local shops.

On average a person spends £8.01 on goods purchased at a market stall and £20.31 on goods purchased in local shops.

Market stalls appear to be popular for purchasing food and drink, whereas most retail expenditure is likely to take place in local shops.

Among residents who regularly use the markets, only 7% of the weekly grocery bill is spent with market stalls.

Shopper/visitor opinions / satisfaction (1)

Figure 13: Importance of Wednesday food & produce market

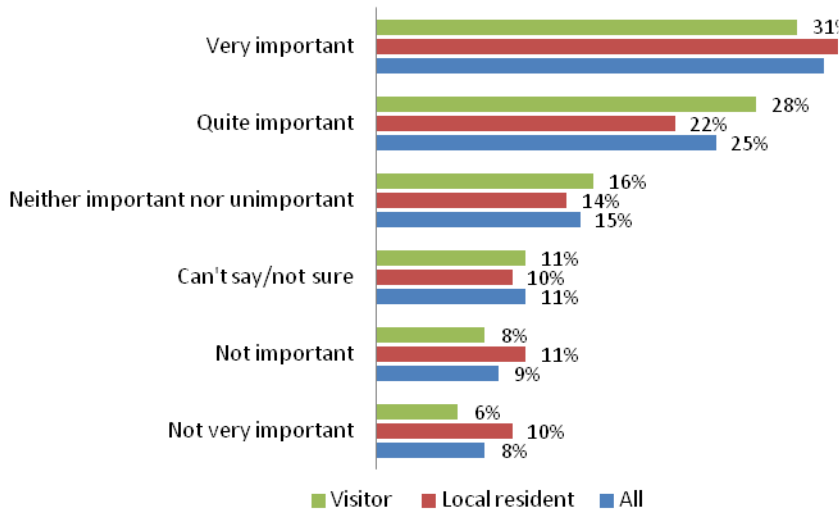
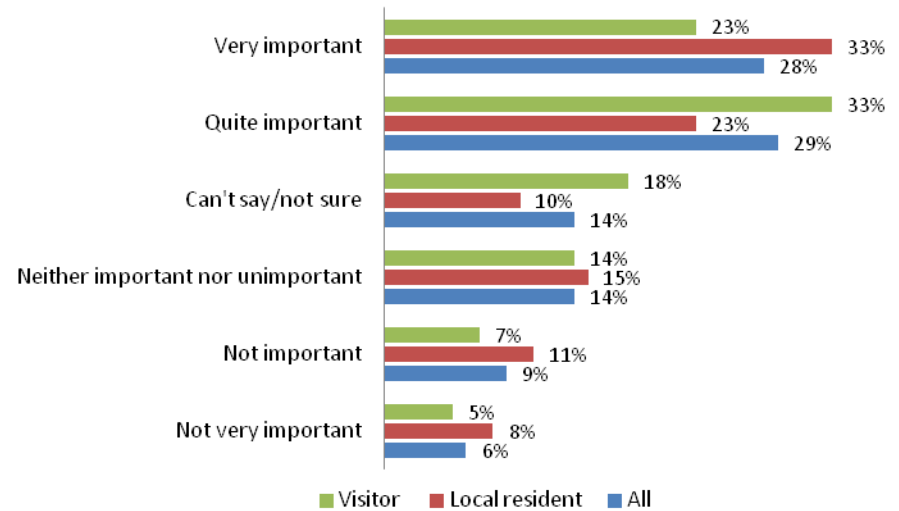


Figure 14: Importance of Thursday to Saturday general market



Market users were asked to rate the importance of the three different types of markets.

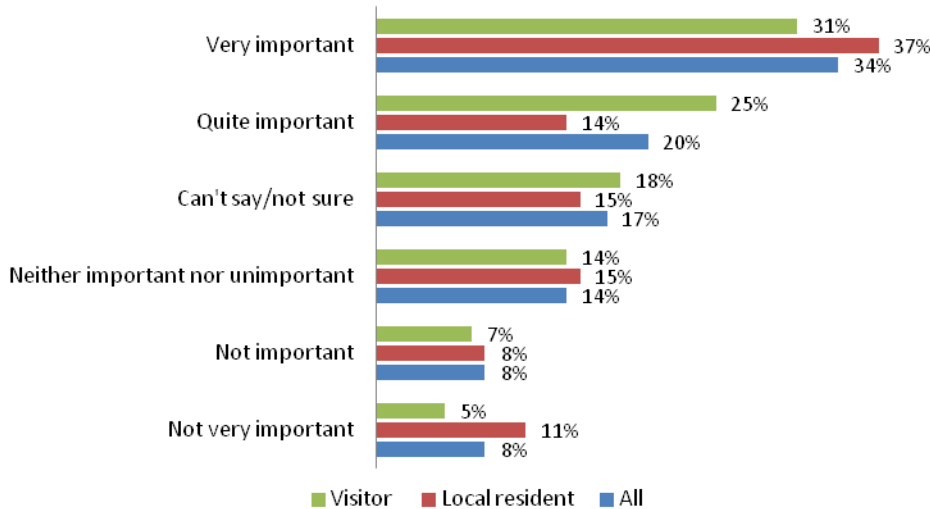
The results show that non-residents generally placed more importance on the Sunday speciality market (31% state 'Very important' see next slide) and the Wednesday food & produce market (31% state 'Very important') than the Thursday to Saturday general market (23% state 'Very important').

A third to just slightly above a third of residents felt all three types of markets were very important.



Shopper/visitor opinions / satisfaction (2)

Figure 15: Importance of Sunday speciality market



Although the survey found an element of indifference among some users; a smaller but significant minority of visitors stated that the markets were 'Neither important nor unimportant' or replied that they 'Can't say/not sure' about their importance, 94% of local residents and 95% of non-residents felt that the markets made the experience of visiting Winchester more enjoyable.

Shopper/visitor opinions / satisfaction (3)

“Markets adds to the vitality and vibrancy of the city centre”

	All	Local resident	Visitor	User	Non-user
Agree	50%	43%	56%	47%	60%
Strongly agree	38%	42%	36%	45%	18%
Neither agree or disagree	6%	11%	2%	3%	15%
Disagree	3%	4%	1%	3%	3%
Don't know	3%	0%	5%	2%	5%
Strongly disagree	0%	0%	0%	0%	0%

“Markets offer greater choice of goods”

	All	Local resident	Visitor	User	Non-user
Agree	64%	61%	67%	66%	60%
Strongly agree	15%	21%	10%	18%	8%
Neither agree or disagree	14%	17%	11%	12%	20%
Don't know	4%	0%	8%	3%	10%
Disagree	3%	1%	3%	3%	3%
Strongly disagree	0%	0%	0%	0%	0%

“Markets offer more competitively priced goods than shops”

	All	Local resident	Visitor	User	Non-user
Agree	48%	46%	49%	48%	48%
Neither agree or disagree	24%	25%	23%	26%	18%
Strongly agree	12%	17%	8%	13%	8%
Don't know	10%	6%	14%	8%	15%
Disagree	6%	7%	6%	4%	13%
Strongly disagree	0%	0%	0%	0%	0%

The results suggest that the majority of people visiting Winchester city centre, even those who did not visit the market stalls themselves on the day of the survey felt that the markets offered many benefits.

Shopper/visitor opinions / satisfaction (4)

“Markets offer opportunity to buy local produce – reduces carbon footprint”

	All	Local resident	Visitor	User	Non-user
Agree	57%	51%	62%	56%	60%
Strongly agree	26%	33%	21%	31%	13%
Don't know	8%	1%	13%	3%	20%
Neither agree or disagree	7%	10%	5%	8%	5%
Disagree	2%	4%	-	2%	3%
Strongly disagree	0%	0%	0%	0%	0%

“Markets make the city centre become unpleasantly over-crowded”

	All	Local resident	Visitor	User	Non-user
Disagree	57%	56%	59%	58%	55%
Strongly disagree	16%	15%	17%	22%	0%
Neither agree or disagree	13%	14%	11%	11%	18%
Agree	6%	10%	3%	5%	10%
Don't know	5%	0%	9%	3%	13%
Strongly agree	3%	6%	0%	2%	5%

“Markets makes it hard for me to get to the shops I want to visit”

	All	Local resident	Visitor	User	Non-user
Disagree	64%	64%	63%	64%	63%
Strongly disagree	13%	11%	14%	17%	0%
Neither agree or disagree	12%	17%	8%	11%	15%
Agree	6%	7%	6%	7%	5%
Don't know	5%	0%	9%	2%	15%
Strongly agree	1%	1%	0%	0%	3%

Only a very small number of people felt that the market stalls made the area become unpleasantly over-crowded or made it hard for them to get to the shops they wanted to visit.

Shopper/visitor opinions / satisfaction (5)

“Markets bring the area down – some stalls are tacky”

	All	Local resident	Visitor	User	Non-user
Disagree	65%	65%	64%	61%	75%
Strongly disagree	20%	22%	18%	27%	0%
Neither agree or disagree	6%	7%	5%	5%	8%
Don't know	5%	1%	8%	3%	13%
Agree	3%	1%	5%	3%	3%
Strongly agree	1%	3%	0%	1%	3%

The overwhelming majority of people interviewed did not believe that the market stalls brought the area down.

“Do you think that the look and feel of the markets are in keeping with Winchester’s image as a visitor destination? ”

Wednesday food and produce market					
	All	Local resident	Visitor	User	Non-user
Yes	96%	97%	95%	95%	97%
No	4%	3%	5%	5%	3%

Thur – Sat general market					
	All	Local resident	Visitor	User	Non-user
Yes	90%	86%	94%	91%	87%
No	10%	14%	6%	9%	13%

Shopper/visitor opinions / satisfaction (6)

“Do you think that the look and feel of the markets are in keeping with Winchester’s image as a visitor destination? ”

Sunday farmers' market					
	All	Local resident	Visitor	User	Non-user
Yes	98%	98%	97%	97%	100%
No	2%	2%	3%	3%	0%

Sunday art and design market					
	All	Local resident	Visitor	User	Non-user
Yes	95%	93%	96%	96%	96%
No	5%	7%	4%	4%	4%

Sunday antiques and collectables market					
	All	Local resident	Visitor	User	Non-user
Yes	95%	93%	96%	96%	97%
No	5%	7%	4%	4%	3%

The overwhelming majority of people interviewed believe that the look and feel of all the different market days/types are in keeping with Winchester’s image as a visitor destination.

Shopper/visitor opinions / satisfaction (7)

Figure 16:

"Would you deliberately avoid the town on market days if you felt the stalls made it hard to get around?"

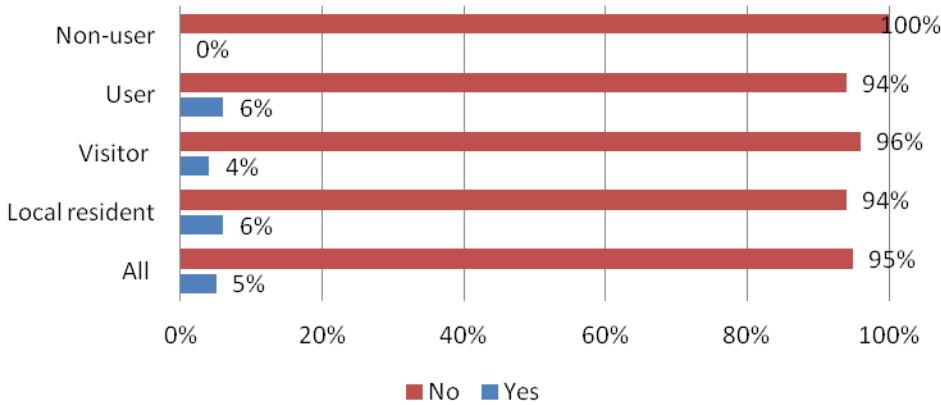
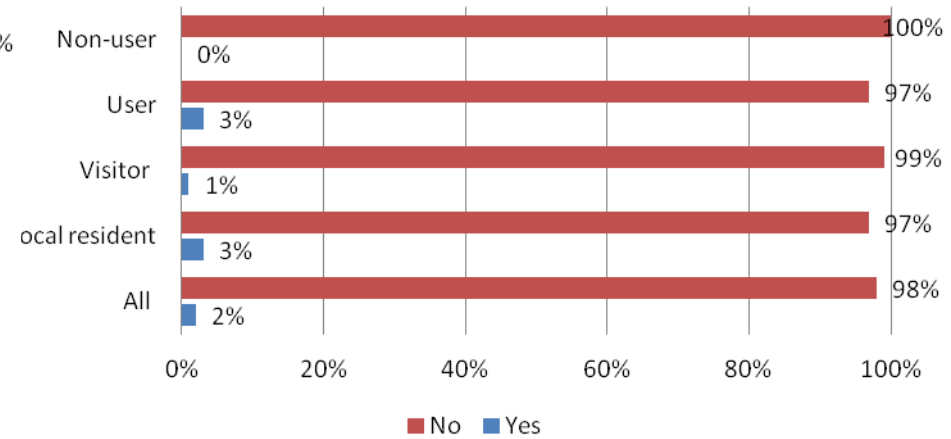


Figure 17:

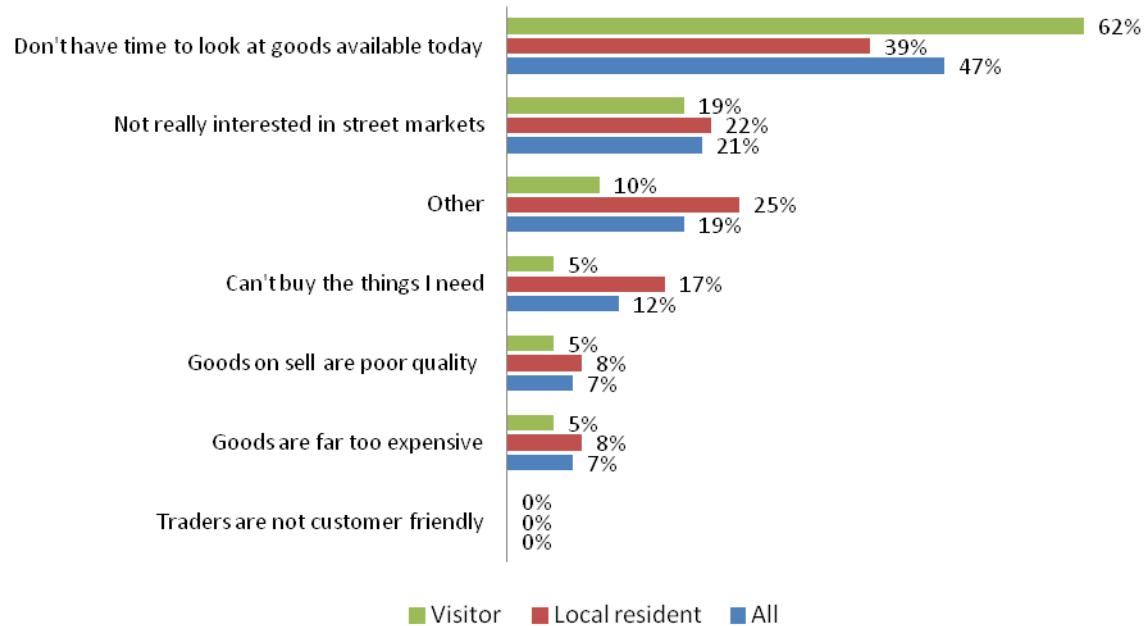
"Do you ever feel unsafe in market day crowds?"



The results suggest that access around the city centre and feeling unsafe are not significant issues on market days.

Non-market stall user

Figure 18: Reasons for not using the markets



45% of those interviewed did not plan to visit the market stalls on that day. The main reason given was that they did not have time to look around.

End of report



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