



**Caerphilly County
Borough Council**

**Shopper Attitude Survey
2006**

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Bargoed Report – August 2006

Finalised by Caerphilly CBC

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1.0 Introduction

1.1 Project Overview

Caerphilly County Borough Council (CCBC) regularly conducts market research to investigate the ever-changing shopping attitudes in the major shopping centres in the County Borough area.

Within the County Borough area, which has approximately 170,000 residents, there are two 'sub-regional' centres in the County Borough, namely Blackwood (pop. 23,000) and Caerphilly (pop. 31,000). Supporting them are four 'district' centres, namely Bargoed (pop. 8,300), Newbridge (pop. 6,000), Risca Pontymister (pop. 11,500) and Ystrad Mynach (pop. 4,000). The settlement pattern in the South Wales Valleys is such that each of these centres has a much wider catchment than just their resident populations.

In August 2006 CCBC required up-dated information on shopping patterns in the County Borough area, in order to monitor the trends in shopper attitudes and, where possible, to compare with previous surveys, which were carried out every three years from 1994 to the present.

1.2 The Research Objectives

The main requirements of this project are to establish where and how often residents and visitors are shopping for their food and non-food purchases, as well as investigating the other reasons for visiting the shopping centres, their attitude towards the centres and the means of transport used.

The specific objectives are as follows:

- Where residents and visitors are shopping for food
- Where residents and visitors are shopping for non-food
- How often residents and visitors are shopping for food
- How often residents and visitors are shopping for non-food
- Reasons for visiting the shopping centres
- Attitude towards the shopping centres
- Means of transport used on trips

Mixed research methodologies of telephone and on-street interviews were deemed the most appropriate to use in order to achieve the necessary objectives. Briefly, these involved:

- A telephone survey of 1500 households
- A shopper/visitor survey at specified locations in six shopping centres of 1000 interviews

1.3 Methodology

CATI survey

1500 interviews were conducted in total during the period 18th July – 28th July. In Bargoed 250 interviews were completed, building on the information given in the previous surveys conducted every three years from 1994 to present.

Interviews were conducted in Research and Marketing's in-house telephone unit and were spread across weekdays, evenings and weekends.

Questionnaire

The survey covered a range of aspects relating to shopping habits and in particular sought to establish the following:

- The town and village/home location of the respondent
- The location where respondents buy most of their household food and grocery items
 - How often respondents normally shop there
 - Where respondents normally start their main food shopping trip
 - Which method of transport respondents normally use to travel there
 - How much respondents normally spend on a main food and grocery shopping trip
- Whether respondents, who conduct a main food shop, combine it with any NON-FOOD shopping
- Whether respondents carry out any small scale 'Top-up' food shopping in addition to their main food shop
 - The location where respondents buy most of their 'Top-up' shopping
- Where respondents buy most of their non-bulky non-food items (First and second choices)
- Where respondents buy most of their non-bulky non-food items (First and second choices)
- Which of the following leisure activities do the respondents or members of their household regularly participate in:
 - Bingo
 - Tenpin Bowling
 - Visiting cafes/restaurants
 - Visiting the cinema
 - Visiting a nightclub
 - Going to pubs/bars
 - Visiting a sports, leisure centre/gym
 - Visiting the theatre/other cultural activities
 - Organised sport
- In which town they participate in each leisure activity
- How frequently they participate in each leisure activity
- Whether respondents or members of their household regularly walk in the countryside
- In which areas respondents go walking in the countryside
- Whether respondents have access to a car or van for shopping and if so, how frequently they have access to it for shopping
- Whether respondents visit their local shopping centre (Bargoed / Blackwood / Caerphilly / Newbridge / Risca Pontymister / Ystrad Mynach)
 - If they do, the reasons why
 - If they do not, the reasons why not

- What would make respondents use their local shopping centre (Bargoed / Blackwood / Caerphilly / Newbridge / Risca Pontymister / Ystrad Mynach) more frequently
- How respondents rate their local shopping centre (Bargoed / Blackwood / Caerphilly / Newbridge / Risca Pontymister / Ystrad Mynach)
- Demographics:
 - Occupation of chief wage earner
 - SEG
 - Number of people aged under 16 in household
 - Number of people aged between 17-59 in household
 - Number of people aged over 60 in household
 - Age
 - Gender

On-Street survey

1000 structured face-to-face interviews were conducted in total during the period 17th July – 29th July. The target audience were males and females over 18 years of age.

Interviews were conducted in batches of 25 interviews at appropriate points in each shopping centre and were carried out on Thursdays, Fridays and Saturdays, as these were the days with the heaviest footfall. In Bargoed 150 interviews were completed at the High Street and Hanbury Road locations.

Questionnaire

In order to provide benchmarking comparisons where appropriate and for general consistency, the questionnaire used in the study was loosely based on that used for the previous wave of the research. The survey consisted predominantly of closed questions with allowance made for verbatim comments.

In particular, the survey sought to establish the following:

- The date, time, location and weather conditions at the point of interview
- The main reason for the respondents' visit to the town centre
- The other reason(s) for the respondents' visit to the town centre
- Whether respondents went directly from home, work, or an other location to the shopping centre
- Which town respondents came from
- The method of transport used to travel to the shopping centre
- Where those respondents travelling by car specifically parked in each town centre (Bargoed / Blackwood / Caerphilly / Newbridge / Risca Pontymister / Ystrad Mynach)
- The travel time for respondents to arrive at their destination
- How frequently respondents visit each town centre
- The amount of money spent on a shopping trip
- The one thing that respondents particularly like about the town centre
- The one thing that respondents particularly dislike about the town centre
- Demographics:
 - Occupation of chief wage earner
 - SEG
 - Age
 - Number of cars in the household
 - Gender

2.0 Executive summary

2.1 Introduction

This report presents the findings of the 2006 Shopper Attitude Survey, carried out by Research and Marketing Plus. The overall aim of the project is to obtain information on shopping patterns within the county borough. In order to obtain the relevant information Household Telephone and On-Street Surveys were conducted. Throughout the duration of the surveys a total of 400 local residents were interviewed who resided across the area. Interviewing was conducted within the catchment area of Bargoed over a period, from July 18th – July 28th 2006.

2.2 Main Findings

The main findings of the Household Telephone Survey are as summarised below.

- Respondents living in the Bargoed area visited a large number of different stores to complete their main food shop. In the previous survey in 2003, the greatest number of respondents had chosen Merthyr Tydfil as the location for food shopping, mostly so to the Asda store at Dowlais. In 2006 Blackwood was the most popular town centre that respondents visited for food and grocery items.
- In 2006, over a quarter of respondents (28.8%) listed Asda, Blackwood Town Centre as the store where they buy most of their household food and grocery items. Asda, Dowlais, Merthyr Tydfil was second and was listed by just over a quarter (26%) of respondents, with just over a fifth (21.2%) of respondents stating Tesco, New Road, Ystrad Mynach, the third most popular location.
- Only 2 respondents (0.8%) stated that they used a store in Bargoed for their household's food and grocery shopping (citing the Spar store), the Kwik Save store having ceased trading.
- The 2003 results showed that the highest proportion of respondents shop in Cardiff for non-food goods (37.2%). In 2006 the most popular town for non-food shopping was still Cardiff, but with fewer respondents stating this (25.6%).
- In 2006, only nineteen respondents (7.6%) indicated that they visit Bargoed for most of their non-bulky non-food items. This figure is a marked reduction in the number of people who visited Bargoed for this type of shopping in previous surveys, (for example in 2003 it was 12%).
- Respondents in the Bargoed catchment area identified a large number of stores, which they visited to purchase most of their bulky non-food items. There was no single store that stood out as being most popular with respondents, as only a tenth (10.4%) visit B&Q, Crossways, in Caerphilly, which was the most visited. This figure was a decrease from 12.4% in 2003.
- In 2006, a series of questions relating to leisure activities were asked for the first time. These included discovering in which leisure activities respondents participate, in which locations and how frequently they undertake these activities.

- Half (50%) of those living within the Bargoed area participate in a leisure activity by socialising in either a pub or bar. They are most likely to visit once a week (37.6%). Other respondents stated that they partake in an activity that's a little more active by visiting a leisure centre/gym (30%). The majority of respondents who partake in this type of activity do so in Bargoed 2-3 times a week. Only 43 respondents (17.2%) indicated that they do not participate in any leisure activity.
- Another topic introduced in 2006 that Caerphilly County Borough Council was interested in, was to discover the number of respondents who regularly participate in walking in the countryside and in which area(s) they do this.
- Just over a fifth (21.1%) of all respondents, who go walking in the countryside, visit Bargoed and over a tenth (12.3%), set off to the Brecon Beacons. A tenth (10.5%) of all respondents go to New Tredegar and Deri and slightly under a tenth (8.8%) visit Aberbargoed countryside.

The main findings of the On-Street Survey are as summarised below.

- Continuing the trend from the previous surveys that were undertaken, the most popular main reason for respondent's visits to Bargoed town centre was for food and grocery shopping (35%). Non-food shopping was the second largest response, with a quarter of all respondents (25%) stating this as the main purpose of their visit.
- The majority of respondents (61%) stated that they had spent, or were likely to spend, between £0 – £20 during their visit. Around a third (34%) said that they would be spending/had spent less than ten pounds, with a further quarter (27%) stating somewhere between £11 - £20.
- Bargoed's location and convenience was the aspect that respondents most liked about the town centre (36%). A tenth (10%) were impressed with the convenient parking in Bargoed town centre.
- A "better range of shops needed" (25%) was the most popular response given by on-street interviewees when asked what one thing they particularly disliked about Bargoed. A lack of supermarkets was also a common theme, as a fifth of all respondents (20%) stated that there was "not enough supermarkets".

3.0 Household Telephone survey

A total of 250 interviews were conducted in the catchment area of Bargoed over a period, from July 18th – July 28th 2006. A random selection of local residents within the Bargoed area were asked for their opinions on a variety of subjects relating to their shopping behaviour. This included establishing which centre each respondent use for their food shopping, as well as where they go for bulky and non-bulky purchases. The survey also documents how respondents rate Bargoed as a place for shopping.

3.1 Food and grocery shopping

Main food

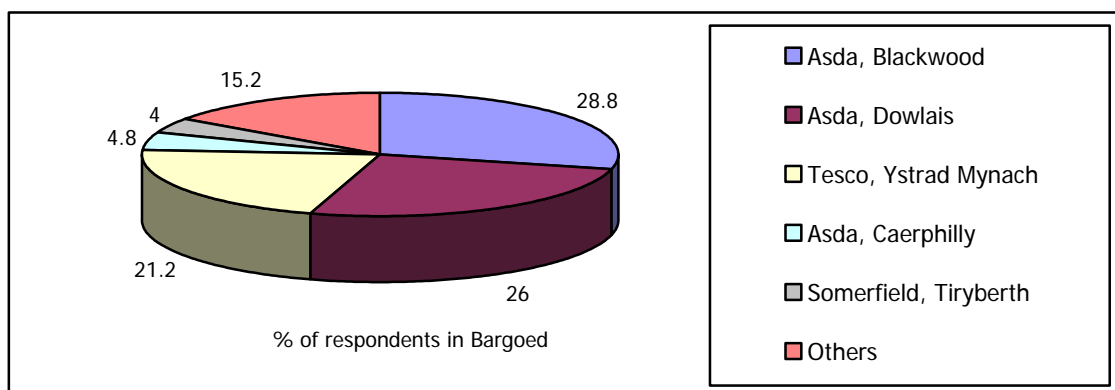
To begin with, respondents were asked to state the location where they buy most of their household food and grocery items. The following table shows the percentage of respondents from within the Bargoed catchment that shop in each town for food shopping, building on the information given in the 2003, 2000, 1997 and 1994 surveys:

Table 3.1.1 – Bargoed catchment – choice of town for main food shop (% of all respondents)

	1994	1997	2000	2003	2006
Blackwood	13	11	8	20	30.8
Merthyr Tydfil	23	35	35	28	26.4
Ystrad Mynach	0	0	16	17	21.2
Caerphilly	3	10	8	7	7.2
Tir y Berth	11	7	4	4	4
Bargoed	22	14	12	11	0.8
Tredegar	3	7	5	2	0.8
Rhymney	20	11	10	4	0.4
Other	6	7	2	7	8.4

Building on the data above, respondents were asked in which specific store they do most of their food and grocery shopping. The following chart summarises the store destinations chosen by respondents from the Bargoed catchment area.

Figure 3.1.2 – Where do you buy MOST of your household’s food and grocery items? (% of all respondents)



Base: 250 respondents overall

In terms of towns, Blackwood was the most popular location with around a third (30.8%) visiting its catchment area. Merthyr Tydfil (26.4%) was the second most popular town, with Ystrad Mynach the third most popular town attracting around a fifth (21.2%) of respondents.

In the 2003 survey, the largest number of respondents had been attracted to Merthyr Tydfil as a location for food shopping, mostly to the Asda store at Dowlais in Merthyr Tydfil.

A large number of different stores were specified by respondents living in the Bargoed area, which they visited to purchase their food and grocery items. Over a quarter of respondents (28.8%) listed Asda, Blackwood Town Centre as the store where they buy most of their household food and grocery items. Asda, Dowlais was second and was listed by just over a quarter (26%) of respondents, with just over a fifth (21.2%) of respondents stating Tesco, Ystrad Mynach as the third most popular location. The fourth most quoted store was Asda, Caerphilly (listed by 4.8% of respondents), with Somerfield, Tir y Berth at number five and Morrison's, Ebbw Vale at number six.

Only 2 respondents (0.8%) stated that they used a store in Bargoed for their household's food and grocery shopping (being the town centre Spar in High Street).

Only 1 respondent (0.4%) stated that they used the Internet for their household's food and grocery shopping.

With regards to the respondents visiting frequency, travelling habits and expenditure, two thirds (65.6%) of respondents normally shop at their main food store once a week, with the majority of respondents (94%) travelling from their home to their main food store and almost half (45.3%) traveling by car/van as a driver.

Over a fifth (22.4%) of respondents spend in the region of £51 - £75 on their main food and grocery shopping, compared with only 15.6% who spend £30 or less.

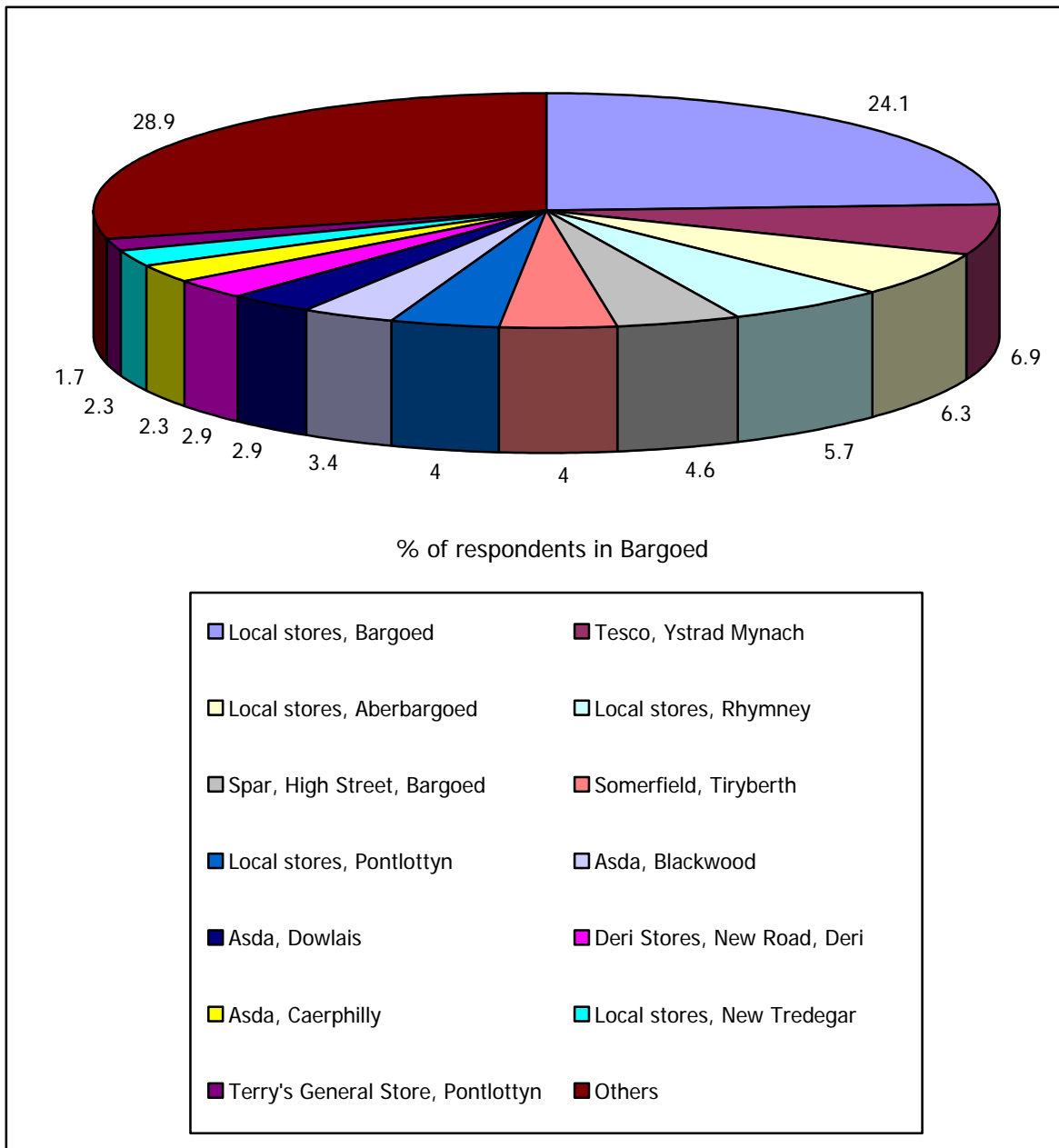
Two fifths (40.8%) specified that they combine their main food shopping with visits to other shops to buy non-food items.

Nearly three quarters (69.6%) indicated that they carry out a top-up food and convenience shop in addition to their main food shopping.

Top-up food

Those who carried out top-up food shopping were asked where they were most likely to do so. A large number of stores were specified by respondents from the Bargoed catchment area, that they visit to purchase most of their top-up food and convenience shopping. The principal stores / areas indicated can be seen in figure 3.1.3.

**Figure 3.1.3 – Where do you buy MOST of your top-up shopping?
(% of all respondents)**



Base: 250 respondents overall

The results show that local stores in Bargoed are mainly used for top-up shopping (24.1% of all respondents), which is in contrast to the location used for main food shopping; Asda, Blackwood (28.8% of all respondents). The second most frequently used store for top-ups was Tesco, Ystrad Mynach (6.9%). Respondents also made use of local stores for top-ups such as, those in Aberbargoed, New Tredegar and Rhymney.

3.2 Non-food shopping

Non-bulky non-food

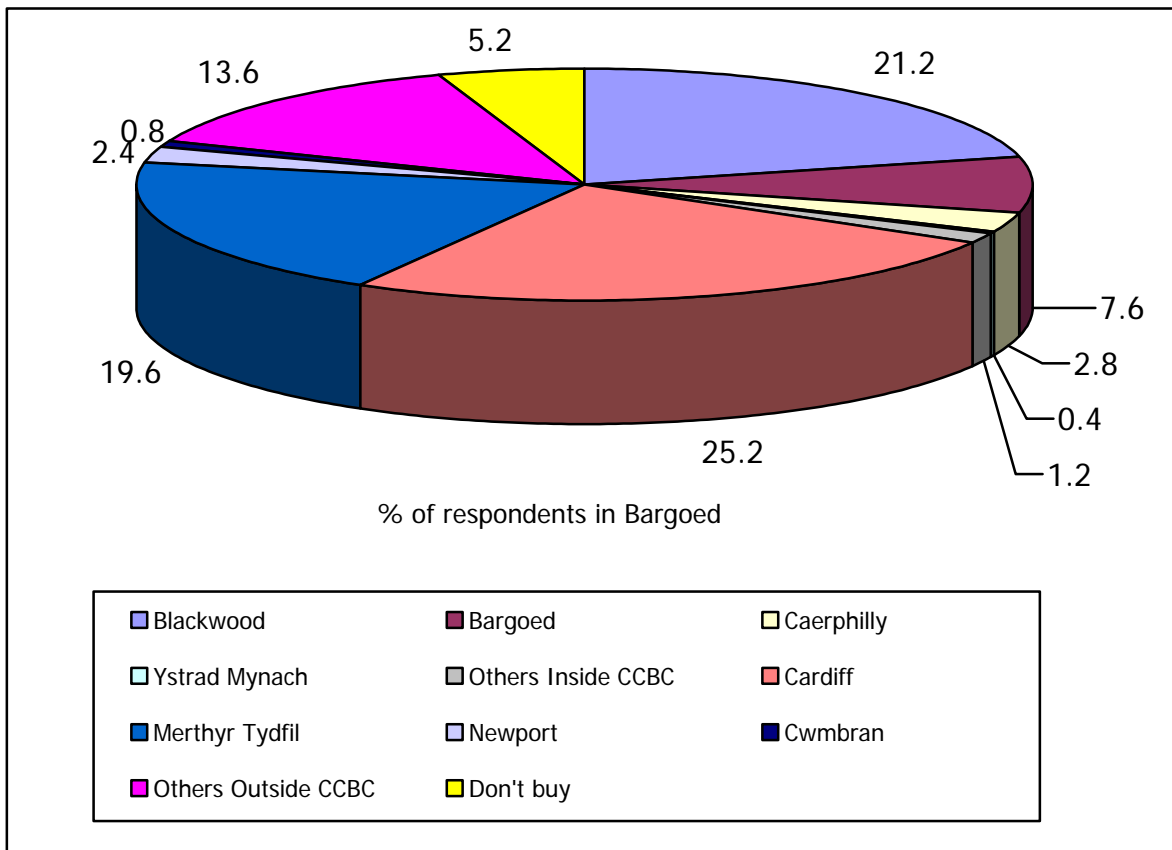
The following table shows the first choice of town for non-food shopping for those living within the Bargoed catchment area, and compares it with information given in the 2003, 2000, 1997 and 1994 surveys:

Table 3.2.1 – Bargoed catchment area – choice of town for non-food shopping (% of all respondents)

	1994	1997	2000	2003	2006
Cardiff	34	41	27	37	25.2
Blackwood	14	12	13	15	21.2
Merthyr Tydfil	22	23	30	12	19.6
Bargoed	10	13	11	12	7.6
Mail Order	5	5	5	5	3.6
Other	15	8	8	19	22.8

Building on the above data, respondents were asked which specific store they do most of their non-bulky non-food shopping. The following chart summarises the destinations chosen by respondents from the Bargoed catchment area.

Figure 3.2.2 – Where do you buy MOST of your NON-bulky non-food items? – First Choice (% of all respondents)



Base: 250 respondents overall

In terms of towns, Cardiff was the most popular location with around a quarter (25.2%) visiting its catchment area. Blackwood attracting over a fifth (21.2%) was the second most popular town, while Merthyr Tydfil attracting slightly under a fifth (19.6%) of respondents, was the third most popular town.

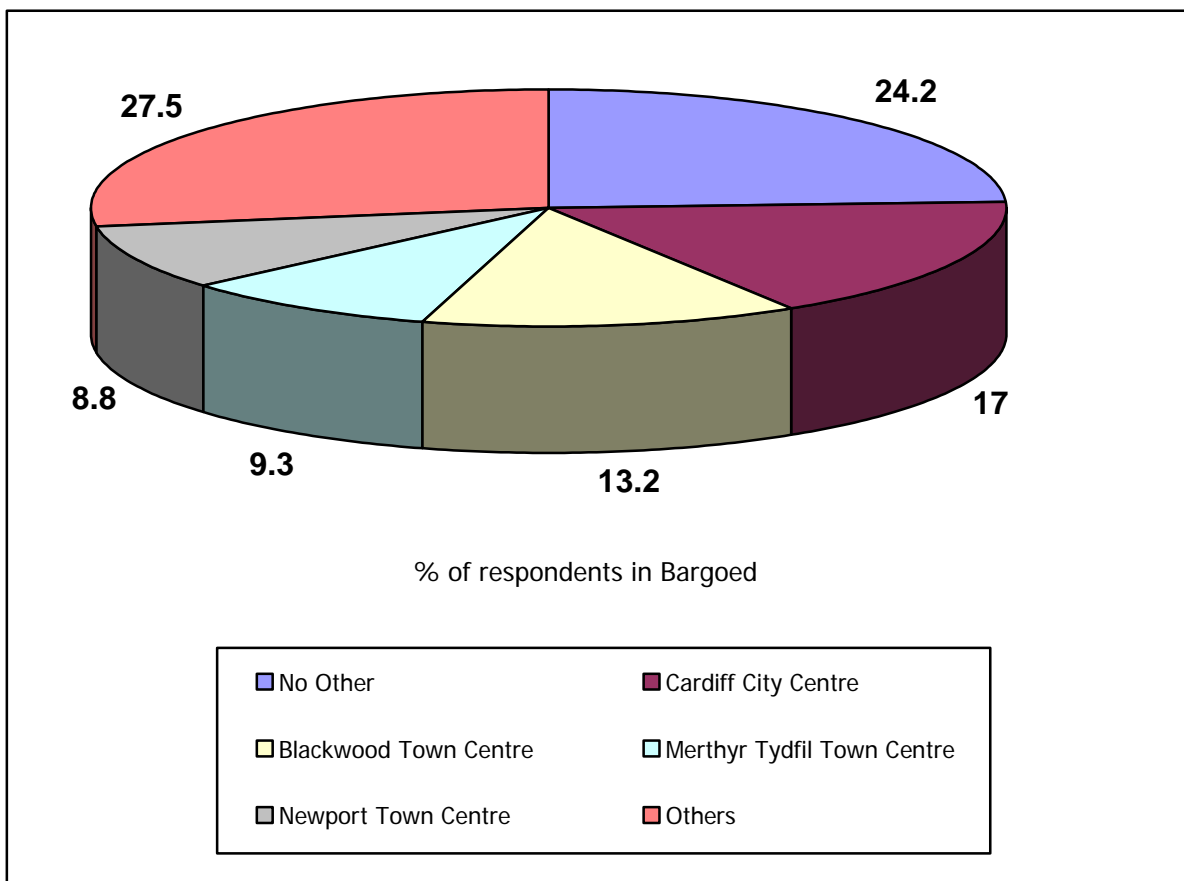
When reviewing data from previous years, the 2003 results showed that the highest proportion of respondents shopped in Cardiff for non-food goods (37%).

In 2006 Blackwood stayed ahead of Merthyr Tydfil in terms of popularity, and both have shown an increase in the number of people shopping there. Blackwood has attracted 21.2% (a 6.2% increase from 2003) and Merthyr Tydfil has attracted 18.4% (a 6.4% increase from 2003).

It was stated in the 2003 survey that compared with previous years Bargoed was managing to retain its non-food trade, even though it was quite a low level of attraction, between 10 – 13%. In 2006, only nineteen respondents (7.6%) within the Bargoed catchment area indicated that they visit Bargoed for most of their non-bulky non-food items. This figure represents a sizeable percentage drop in the retention of non-food trade by Bargoed town centre.

Respondents were then asked which other centres, if any, they use for the same type of shopping. Respondents were asked to state one other choice, without being prompted.

Figure 3.2.3 – What other centres, if any, do you use for your NON-bulky non-food items? – Second Choice (% of all respondents)



Base: 182 respondents overall

Nearly a quarter (24.2%) of respondents (a reduction from 35.4% in 2003) do not visit any other centre as second choice for non-food shopping. Over a sixth of respondents (17%) stated that they visit Cardiff City Centre (an increase from 16.1% in 2003) as an alternative to their main centre of choice. Blackwood came in third with around an eighth (13.2%) stating this centre, then Merthyr Tydfil (9.3%) and finally Newport Town Centre (8.8%). There were only 13 respondents (7.1%) stating Bargoed (a small decrease from 7.6% in 2003) as a second choice of place to visit for non-food shopping.

Bulky non-food

The survey went on to ask respondents about bulky non-food items. Respondents were asked where they buy most of these items, such as furniture, carpets, and DIY goods and asked to state one choice, without being prompted.

The following table shows the proportion of respondent's choice of town for bulky non-food shopping from within the Bargoed catchment area, building on the information given in the 2003, 2000, 1997 and 1994 surveys:

Table 3.2.4 – Bargoed catchment area – choice of town for bulky non-food shopping (% of all respondents)

	1994	1997	2000	2003	2006
Merthyr Tydfil	35	33	35	22	22
Caerphilly	2.1	4	5	17	19.2
Cardiff	8.2	25	16	14	11.6
Bargoed	13.7	8	10	10	3.6
Blackwood	10	15	4.4	2	2.4
Other	26	13	23	19	19.6
Don't do	5	3	6	15	21.6

Respondents were asked which specific store they do most of their bulky non-food shopping. The following charts summarise the destinations chosen by respondents from the Bargoed catchment area.

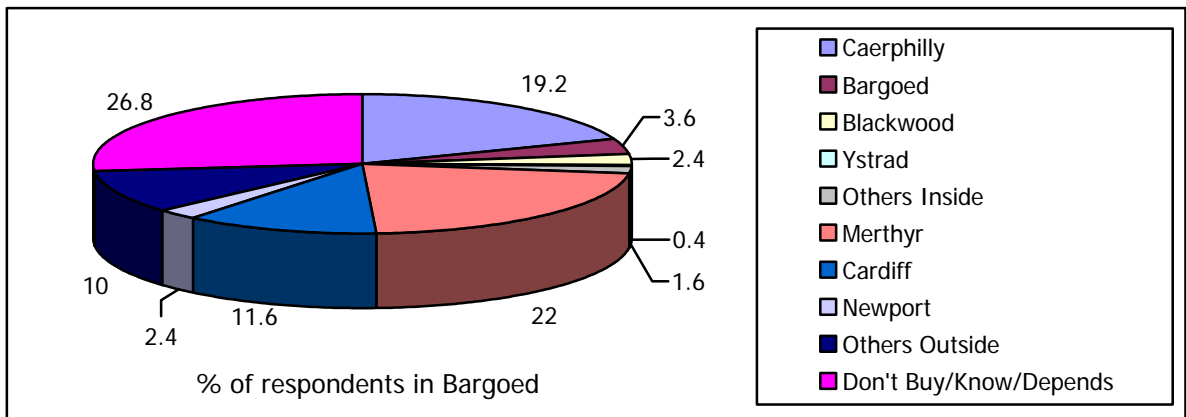
When looking at table 3.2.4, it is apparent that Merthyr Tydfil remains the lead destination to shop for bulky non-food items from within the Bargoed catchment area with over a fifth of respondents (22%) choosing to shop there.

This figure is consistent with the previous survey (2003 – 22%). However it is considerably lower than those numbers who chose to shop in Merthyr Tydfil for Bulky non-food goods from 1994 – 2000.

Caerphilly was the second location of choice as a place for shopping for these items and the percentage of people visiting has increased from 17% in 2003 to 19.2% in 2006. Conversely Cardiff, the third choice, has fallen from 14% in 2003 to 11.2% in 2006.

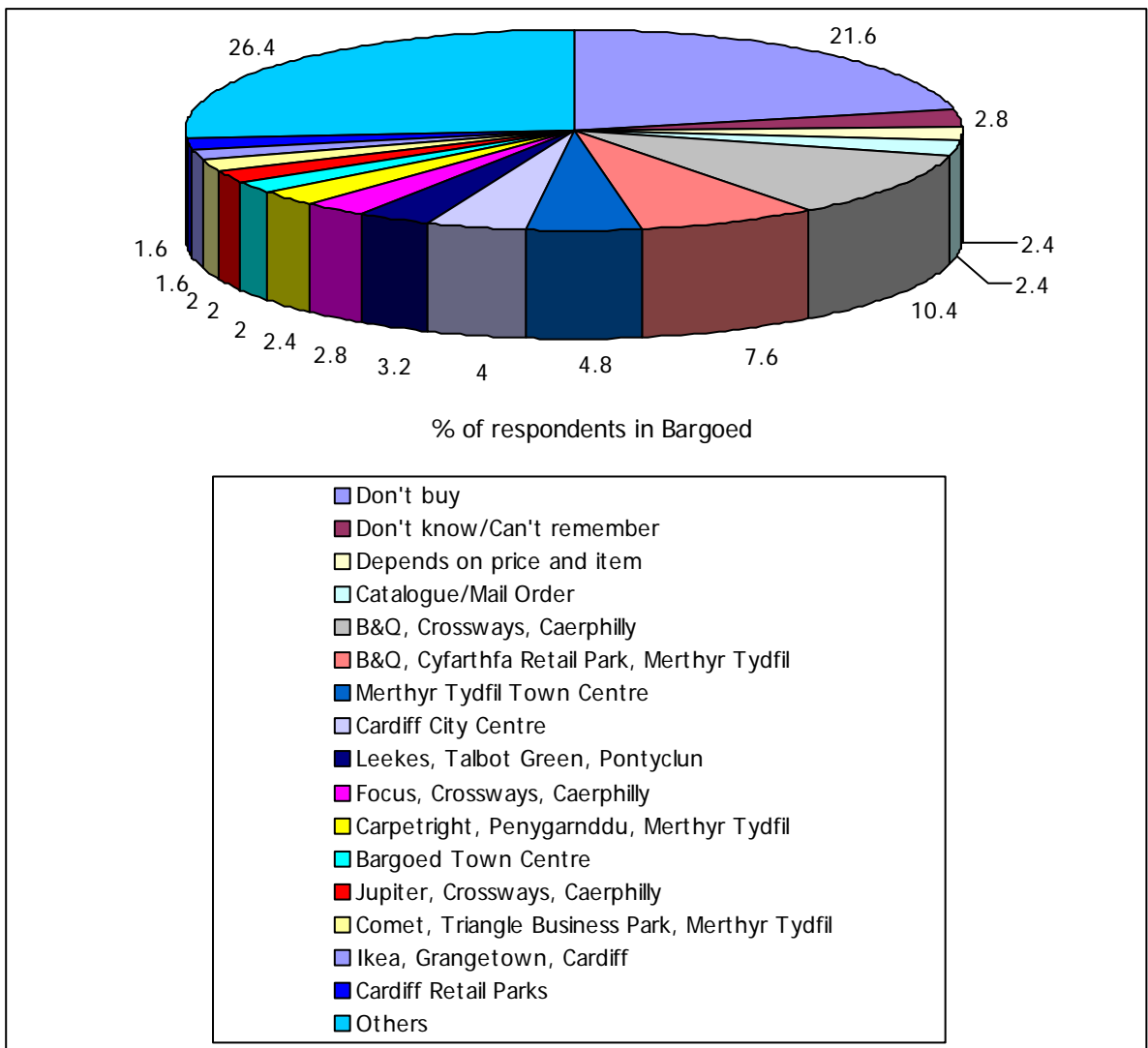
Bargoed itself attracts a very small and declining number of shoppers looking to purchase bulky non-food goods.

Figure 3.2.5 – Bulky non-food purchases from the Bargoed catchment area (% of all respondents)



Base: 250 respondents overall

Figure 3.2.6 – Where do you buy most of your Bulky non-food items? (% of all respondents)



Base: 182 respondents overall

When looking at the locations that respondents visit for bulky non-food purchases (Figure 3.2.5), Merthyr Tydfil was the most popular with over a fifth (22%) of respondents stating this overall location. Caerphilly (19.2%) was the second town of choice, with Cardiff (11.6%) following closely behind. One fifth of respondents (21.6%) indicated that they do not shop for these items.

Respondents in the Bargoed catchment area identified a large number of stores, which they visited to purchase most of their bulky non-food items (Figure 3.2.6). There was no single store that stood out as being most popular with respondents, as only a tenth (10.4%) visit B&Q, Crossways, in Caerphilly, which was the most visited. This figure was a decrease from 12.4% in 2003.

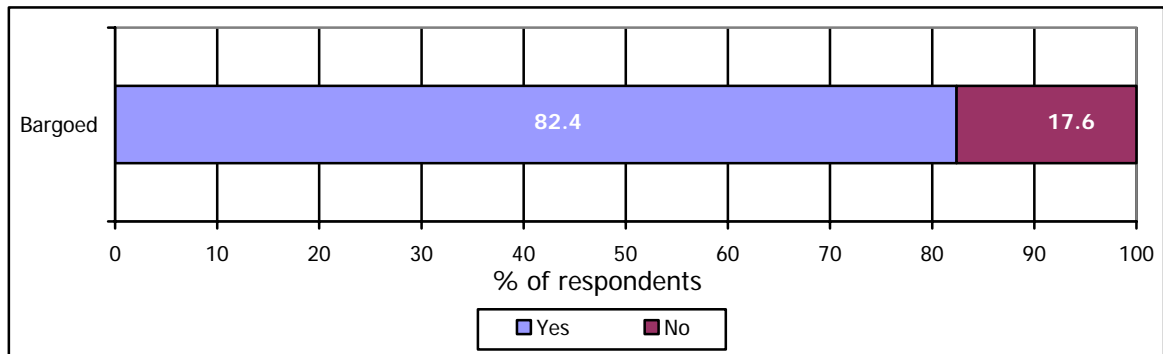
The next most popular store given was B&Q, Cyfarthfa Retail Park in Merthyr Tydfil, named by 7.6% of respondents.

Overall as a choice of town for bulky non-food shopping, Merthyr Tydfil still remains the most popular place compared with Bargoed visited by only 3.6% of respondents from the catchment area.

3.3 Mode of transport

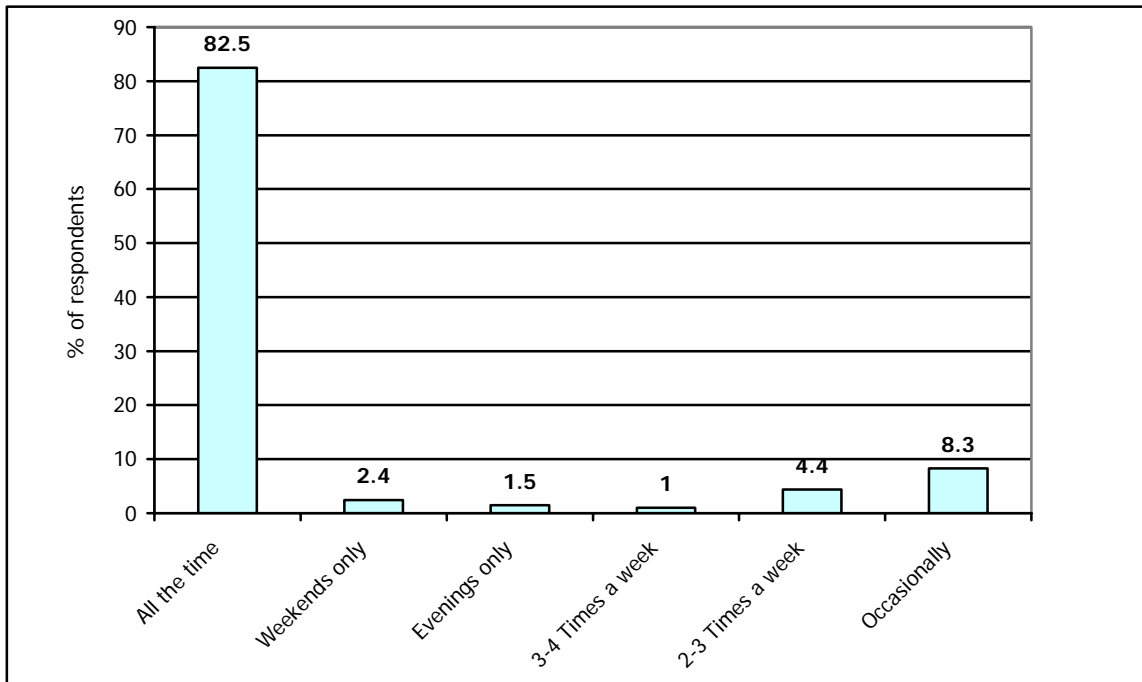
Respondents were next asked questions about their journey for shopping in general. These included whether they have access to a car/van and how often they have access to the car/van. The following data was uncovered:

Figure 3.3.1 – Do you have access to a car/van for shopping? (% of all respondents)



Base: 250 respondents overall

Figure 3.3.2 – How often do you have access to the car/van for shopping? (% of all respondents)



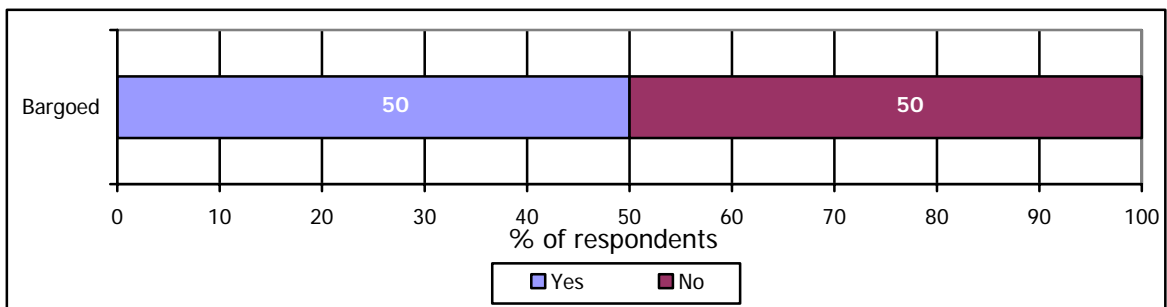
Base: 206 respondents overall

Some 206 respondents (82.4%) travelled by car/van for shopping, and they were asked how often they have access to the vehicle. Over four fifths (82.5%) stated that they have access to a car/van at all times.

3.4 Shopping in Bargoed

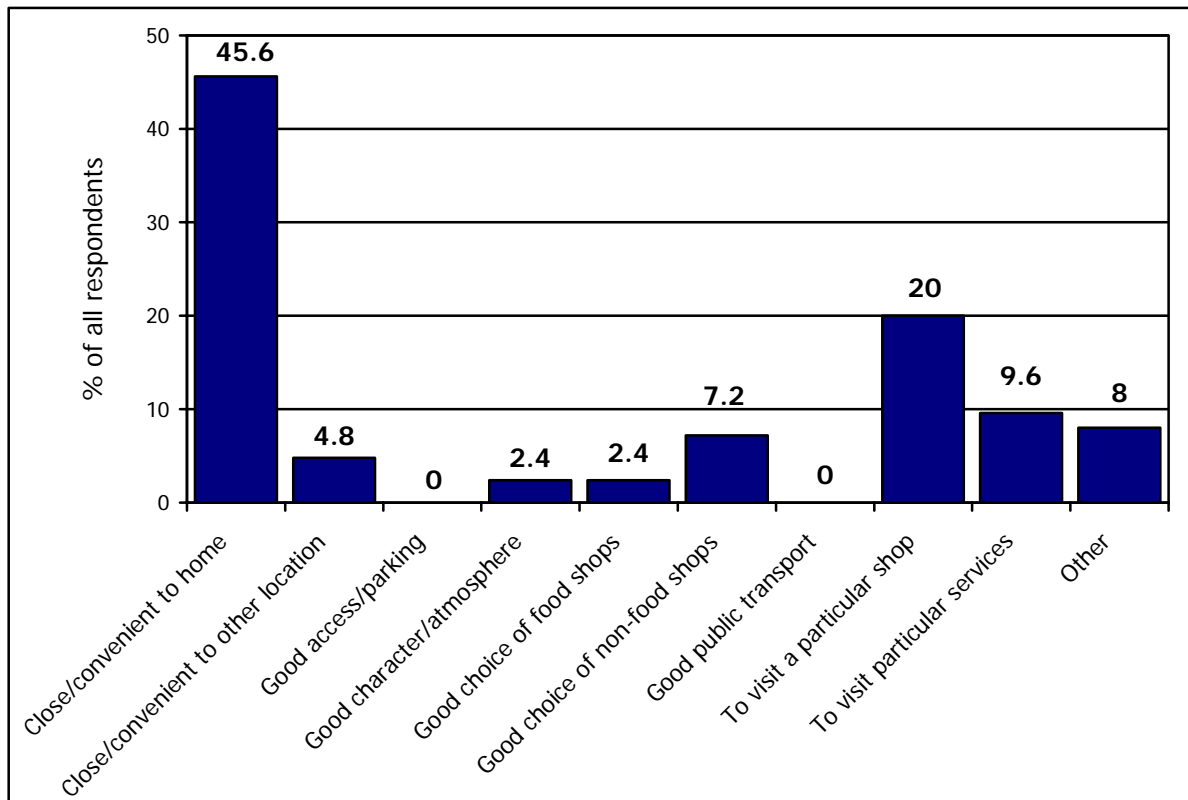
Respondents were asked a series of questions about shopping in Bargoed. These included whether they visit Bargoed for shopping, if so why, and if not, why not? They were also asked what potential improvements would make them use Bargoed as a shopping location more frequently. The following graphs demonstrate the findings that were discovered:

Figure 3.4.1 – Do you ever visit BARGOED for shopping? (% of all respondents)



Base: 250 respondents overall

Figure 3.4.2 – If yes, why is this? (% of all respondents)



Base: Overall 250 respondents; 125 visiting Bargoed

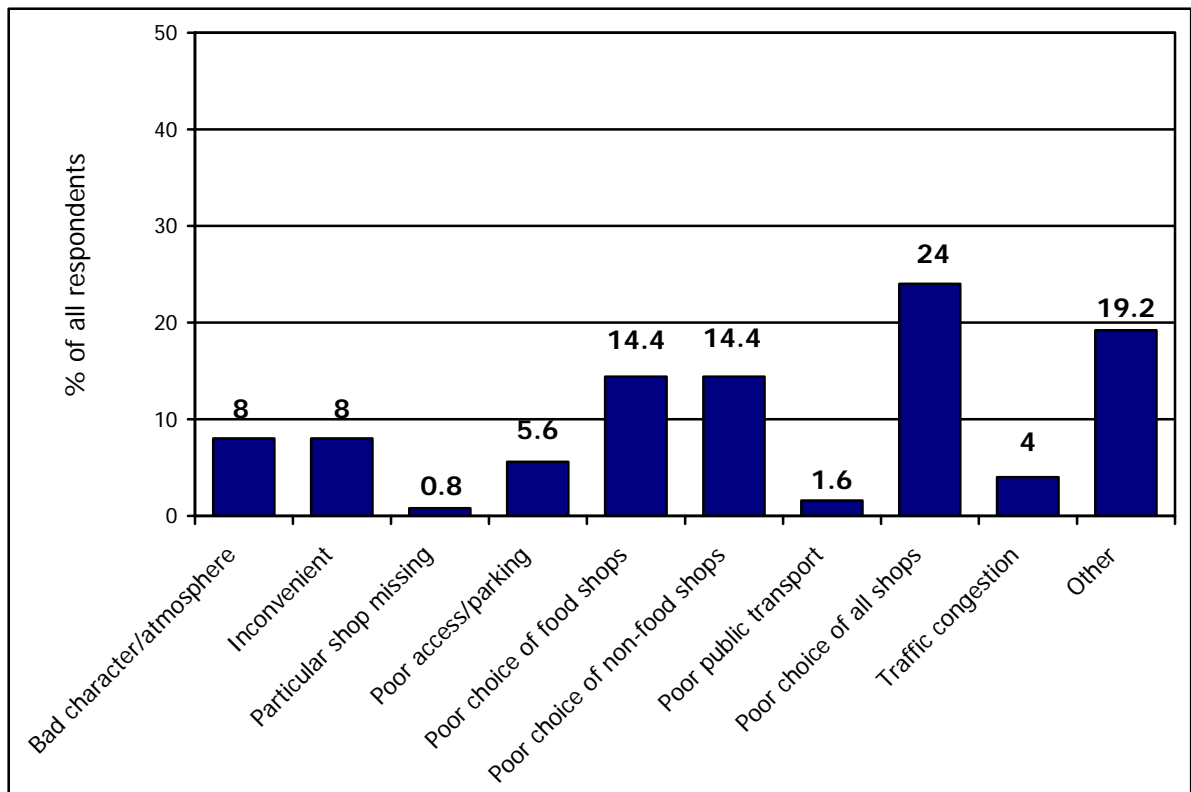
The survey found that there was an even split (see figure 3.4.1) between the respondents who visit Bargoed and those who do not. While only 50% of Bargoed's catchment area population visits the town to shop, the other five main retail centres in the County Borough were visited by a far larger proportion of their catchment area populations (from nearly 80% to nearly 94%).

Some 125 respondents who indicated they visited Bargoed, (Figure 3.4.2) and they stated a number of reasons for visiting for shopping. Almost half of the respondents (45.6%) stated it was because it was close and/or convenient to home and a fifth (20%) said they go to Bargoed to visit a particular shop or service.

The responses contained under the category 'other' (8%) in figure 3.4.2, included the following aspects which proved to be positive for a number of respondents:

- "Good choice of all shops" (1.6%)
- "Supports local trade" (1.6%)

Figure 3.4.3 – If no, why is this? (% of all respondents)



Base: Overall 250 respondents; 125 not visiting Bargoed

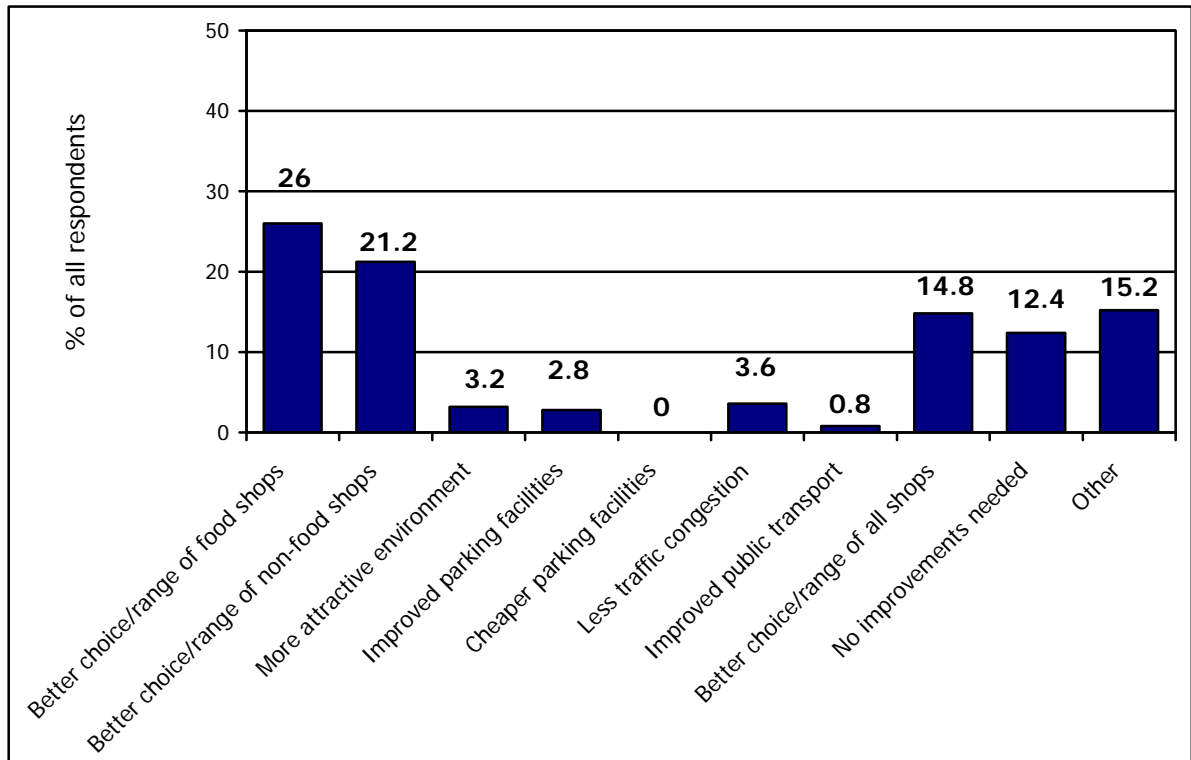
Similarly those respondents, who indicated they did not visit Bargoed (Figure 3.4.3), also stated a number of reasons for not visiting their local area for shopping. Over a quarter stated there are poor choices of non-food and food shops (14.4% each option; overall 28.8%) within the Bargoed area. A sixth (8% each option; overall 16%) of respondents stated that it was inconvenient or Bargoed had bad character and/or atmosphere.

The responses contained under the category 'other' (19.2%) in figure 3.4.3, included the following aspects which proved to be negative for a number of respondents:

- *"Too rundown/too many shops closed down" (3.2%)*
- *"Untidy environment" (2.4%)*
- *"Too far to travel" (1.6%)*

All respondents within the catchment area of Bargoed were then asked what would make them use Bargoed more frequently. The results are as follows:

Figure 3.4.4 – What would make you use BARGOED more frequently? (% of all respondents)



Base: 250 respondents overall

The most popular response, stated by just over a quarter (26%), was that respondents would prefer to have better choice/range of food shops. Slightly over a fifth (21.2%) said that a better choice/range of non-food shops would make them use Bargoed for shopping more frequently.

Only one in eight of respondents felt there was no need for improvements.

Although many parking spaces are free in Bargoed, 2.8% of all respondents stated that they would prefer to have improved parking facilities.

The results suggest that the attractiveness of the town, the parking, the traffic and public transport issues may not be the main concerns to the respondents; it is more to do with factors such as the choice and range of food and non-food shopping.

The responses contained under the category 'other' (15.2%) in figure 3.4.4, included the following requirements for development which would satisfy a number of respondents:

- "More shops" (1.6%)
- "Improve quality of roads" (1.2%)

3.5 Approval rating

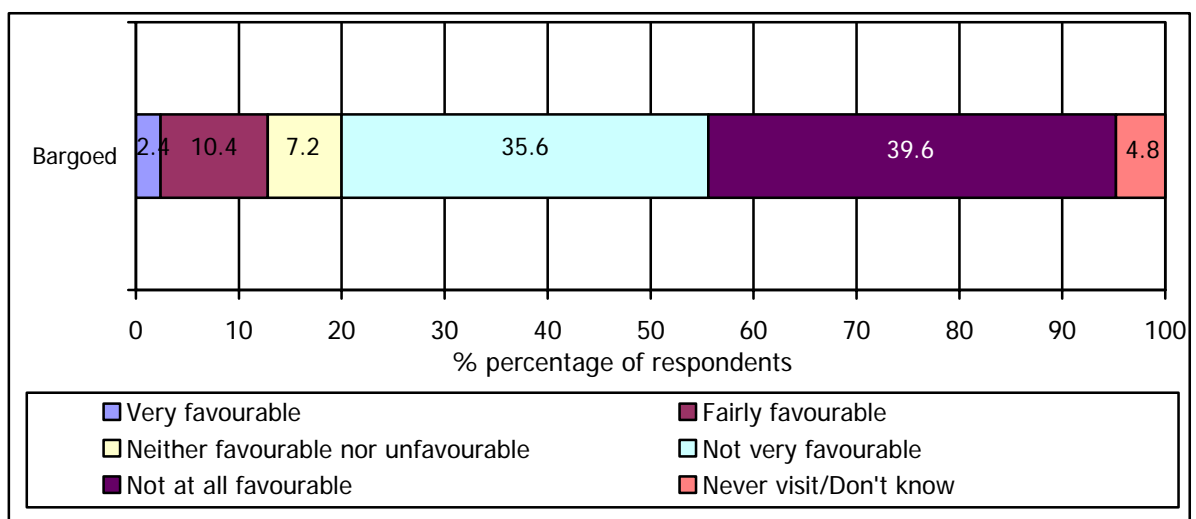
Finally in the telephone survey, respondents were asked how they would rate Bargoed as a place for shopping on a scale from 'very favourable' to 'not at all favourable'. The results can be seen in table 3.5.1 and figure 3.5.2 below:

Table 3.5.1 – Proportion rating town as either 'favourable' or 'fairly favourable' (% of all respondents)

	1994	1997	2000	2003	2006
Blackwood	84.6	84.5	80.3	79.7	70.8
Caerphilly	44.4	75.4	70.7	78.1	68
Newbridge	73.5	63.2	57	67.6	62.8
Ystrad Mynach	54.5	47	49	57.4	54
Risca Pontymister	61.2	61.9	54.5	55.9	52.8
Bargoed	38.6	22.5	19.9	26.4	12.8

Base: 2006 results show rating as either 'very favourable' or 'fairly favourable'

Figure 3.5.2 – How would you rate BARGOED as a place for shopping? (% of all respondents)



Base: 250 respondents overall

Bargoed has been rated the lowest of the six main centres in the County Borough from 1994 to 2003. In the 2006 survey Bargoed remains the lowest rated of all six centres, despite the fact that it is the third largest in the Borough.

Only just over an eighth of respondents (12.8%) stated that they rate the town as either 'very favourable' or 'fairly favourable'. This figure has dropped from previous years surveys and is nearly half the percentage it was in 2003 (down from 26.4%).

The largest known decrease of this statistic was actually in the 1997 survey, when it decreased from 38.6% (in 1994) to 22.5% (in 1997), a 16.1% decrease overall. In the 2006 survey, there has been a 13.6% decrease in Bargoed's approval rating overall, the second lowest over all previous surveys.

3.6 Demographics

The breakdown of SEG, age and gender of those who took part can be seen in figure 3.6.1 below:

Figure 3.6.1 – Breakdown of SEG, age and gender

By SEG

	Base: All respondents		Location											
	Num	%	Bargoed		Blackwood		Newbridge		Risca Pontymister		Caerphilly		Ystrad Mynach	
			Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	1500	100.0%	250	100.0%	250	100.0%	250	100.0%	250	100.0%	250	100.0%	250	100.0%
A/B	235	15.7%	26	10.4%	46	18.4%	38	15.2%	28	11.2%	53	21.2%	44	17.6%
C1	379	25.3%	56	22.4%	52	20.8%	53	21.2%	75	30.0%	70	28.0%	73	29.2%
C2	449	29.9%	74	29.6%	73	29.2%	84	33.6%	80	32.0%	67	26.8%	71	28.4%
D/E	405	27.0%	86	34.4%	73	29.2%	70	28.0%	61	24.4%	56	22.4%	59	23.6%
Refused	32	2.1%	8	3.2%	6	2.4%	5	2.0%	6	2.4%	4	1.6%	3	1.2%

Base: Overall 1500 respondents; 250 respondents in Bargoed

By age group

	Base: Respondents in Bargoed		A/B		C1		C2		D/E		Refused	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: Respondents in Bargoed	250	100.0%	26	100.0%	56	100.0%	74	100.0%	86	100.0%	8	100.0%
18 - 24 years	5	2.0%			2	3.6%	1	1.4%	2	2.3%		
25 - 34 years	18	7.2%	4	15.4%	6	10.7%	5	6.8%	3	3.5%		
35 - 44 years	27	10.8%			12	21.4%	8	10.8%	7	8.1%		
45 - 54 years	43	17.2%	4	15.4%	7	12.5%	14	18.9%	18	20.9%		
55 - 64 years	57	22.8%	9	34.6%	8	14.3%	23	31.1%	16	18.6%	1	12.5%
65 years or above	94	37.6%	9	34.6%	21	37.5%	23	31.1%	39	45.3%	2	25.0%
Refused	6	2.4%							1	1.2%	5	62.5%

Base: 250 respondents in Bargoed

By gender

	Base: Respondents in Bargoed		A/B		C1		C2		D/E		Refused	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: Respondents in Bargoed	250	100.0%	26	100.0%	56	100.0%	74	100.0%	86	100.0%	8	100.0%
Male	60	100.0%	10	100.0%	10	100.0%	25	100.0%	14	100.0%	1	100.0%
Female	190	100.0%	16	100.0%	46	100.0%	49	100.0%	72	100.0%	7	100.0%

Base: 250 respondents in Bargoed

4.0 On-Street survey

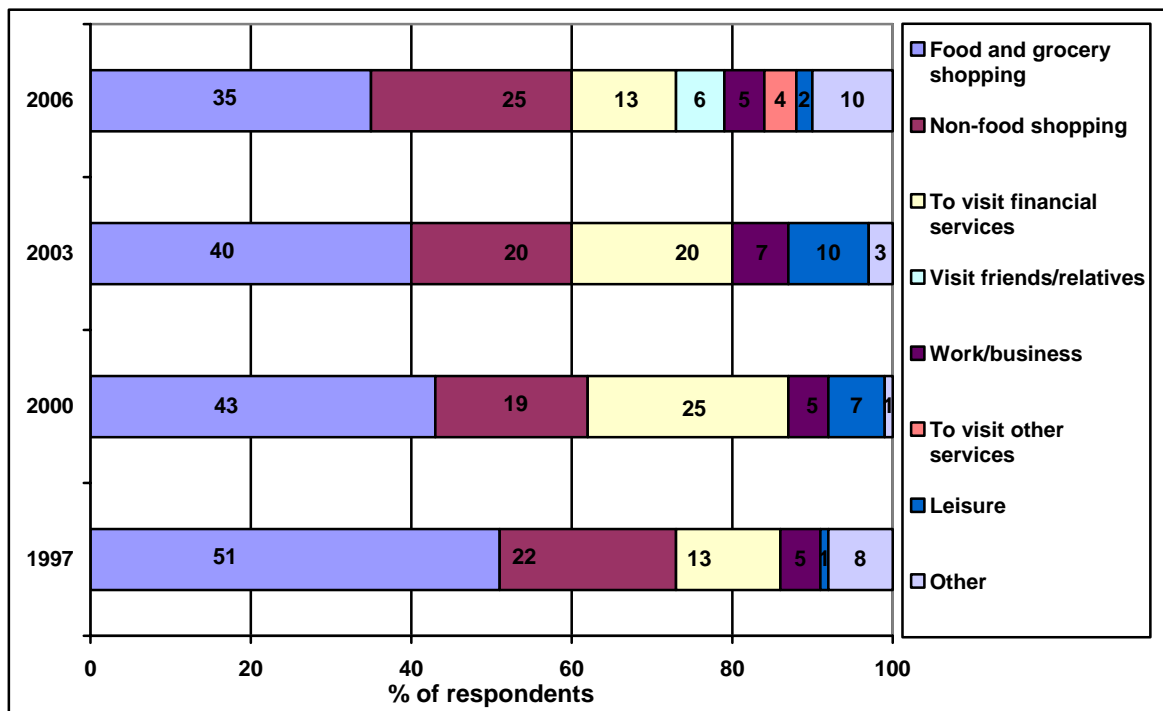
A total of 150 face-to-face interviews were conducted in Bargoed town centre, in July 2006. Interviews were conducted in two locations, namely:

- 1) On the High Street
- 2) At the bottom of Hanbury Road, near Hanbury Square

4.1 Reasons for visiting Bargoed town centre

To begin with in the street survey, respondents were asked to give the main reason for their visit to the town centre. Respondents were asked to state one main reason, without being prompted.

Figure 4.1.1 – What is your main reason for visiting this town centre today? (% of all respondents)



Base: 150 respondents

Continuing the trend from the previous surveys that were undertaken, the most popular main reason for respondent's visits to Bargoed town centre was for food and grocery shopping (35%). Non-food shopping was the second largest response, with a quarter of all respondents (25%) stating this as the main purpose of their visit.

Collectively, those visiting Bargoed for shopping equates for three fifths of all respondents (60%), with visits for non-food shopping being the highest percentage ever reached.

Just over a tenth were there to use financial services, but only 2% were there to use leisure services, dropping from 10% of all respondents in the 2003 survey.

When asked which other activities they would be carrying out on their visit to Bargoed town centre, those who were combining other activities were most likely to be either non-food shopping (29%) or food and grocery shopping (11%). Just over two fifths (43%) were not doing anything else, whilst on their trip.

4.2 Travelling to Bargoed

Respondents were next asked a series of questions about their journey to Bargoed. These included the location that they directly came from, the method of transport that was used, where they parked (if travelling by car) and the time taken to travel.

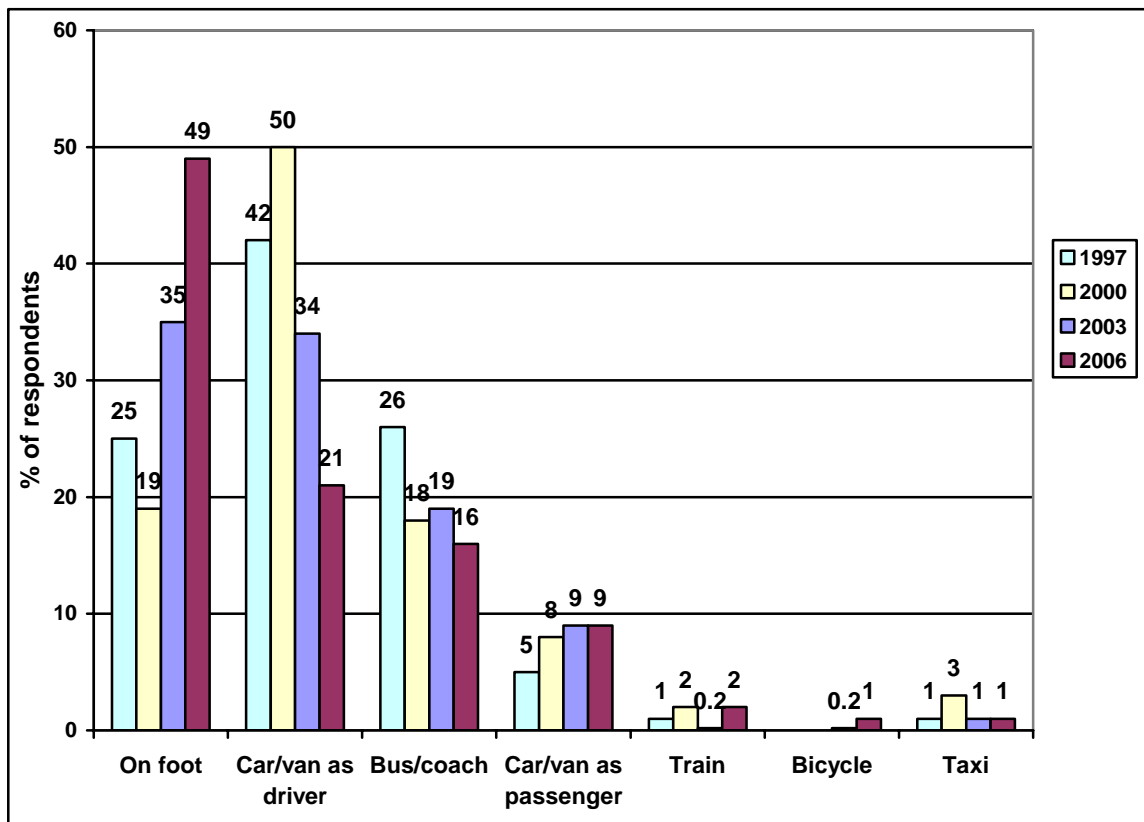
The majority of respondents (97%) had gone straight from home to Bargoed, with the remainder doing so from Work or a relative's house.

Specifically, three quarters had come from Bargoed (75%), with New Tredegar (6%) and Aberbargoed (5%) being the other points of origin of note.

Shoppers were then asked about the mode of transport that they used to travel to Bargoed town centre.

The results of the past 4 surveys are displayed in Figure 4.2.1.

Figure 4.2.1 – How did you travel here today? (% of all respondents)



Base: 150 respondents

The most popular method of transport was on foot, as just under half (49%) of all respondents stated that they had walked to the town centre. This fact would tend to suggest that the town centre is failing to attract shoppers from the wider area. Those travelling by car or van as driver equated for slightly over a fifth (21%) and this method of transport has continued to decrease in popularity, since its high point in the 2000 survey.

Those who travelled by car, some 46 respondents, were asked the exact location where they parked. The results can be seen in the following table.

Figure 4.2.2 – Where did you park? (% of all respondents)

Car park location	All respondents	Point of interview		Passenger type	
		High Street	Hanbury Road	Driver	Passenger
A free public car park	70	74	25	78	50
On street	17	17	25	19	14
Dropped off	11	7	50	-	36
Disabled parking	2	2	-	3	-

Base: 46 respondents

Those respondents travelling by car were most likely to use a free public car park (70%) before on-street car parking (17%).

[Time taken to travel to Bargoed](#)

Figure 4.2.3 – How long did it take you to travel here today? (% of all respondents)

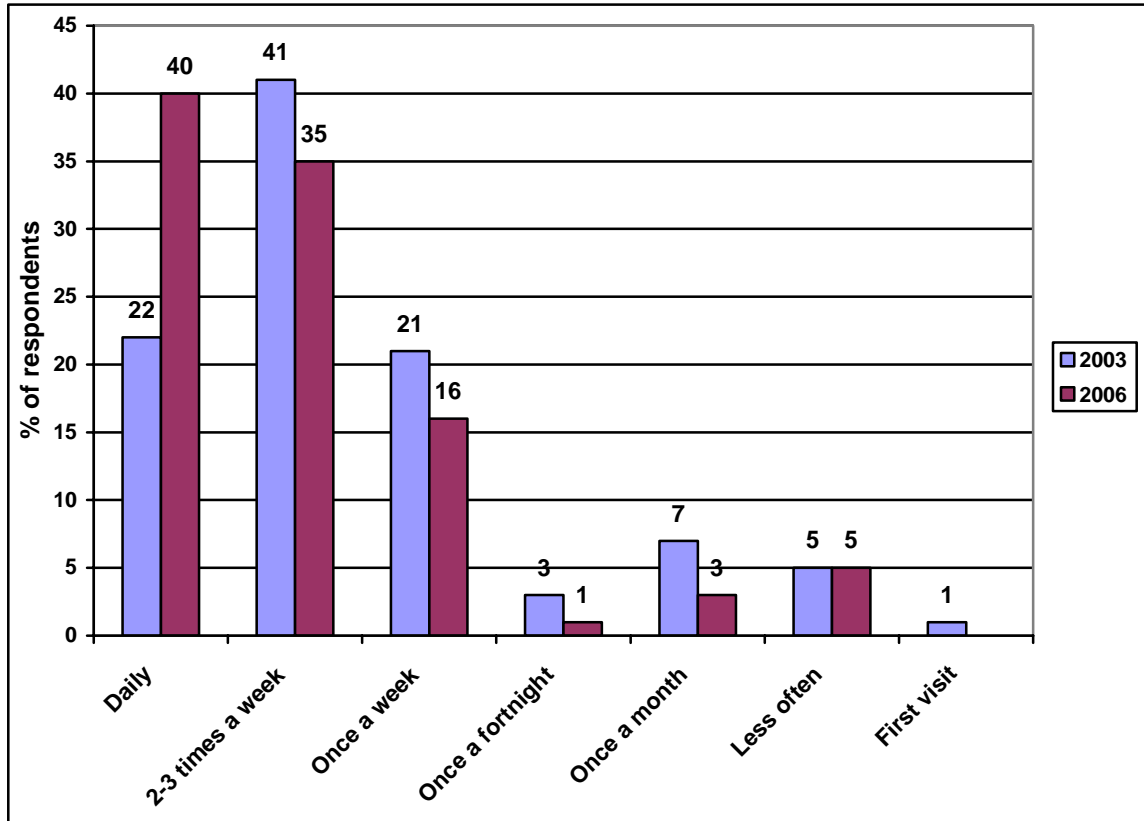
	1994	1997	2000	2003	2006
< 5 minutes	64	36	29	22	33
5-10 minutes	19	36	43	45	40
11-20 minutes	14	24	26	21	21
21-30 minutes	2	1	2	5	3
Over 30 minutes	1	3	1	8	3

The 2006 survey has revealed a similar pattern to the previous studies. The majority of shoppers, almost three quarters (73%), travel for less than 10 minutes, indicating that the catchment area for shoppers is localised. There has been a slight decrease in the number of visitors travelling for over 20 minutes from the previous (2006 – 6%, 2003 – 13%)

The number of respondents taking less than 5 minutes to reach the centre has increased from the previous survey (2003 – 22%, 2006 - 33%) which is another statistic demonstrating the localised nature of Bargoed’s draw as a shopping destination.

Frequency of visits to Bargoed

Figure 4.2.4 – How often do you visit this town centre? (% of all respondents)



Base: 150 respondents

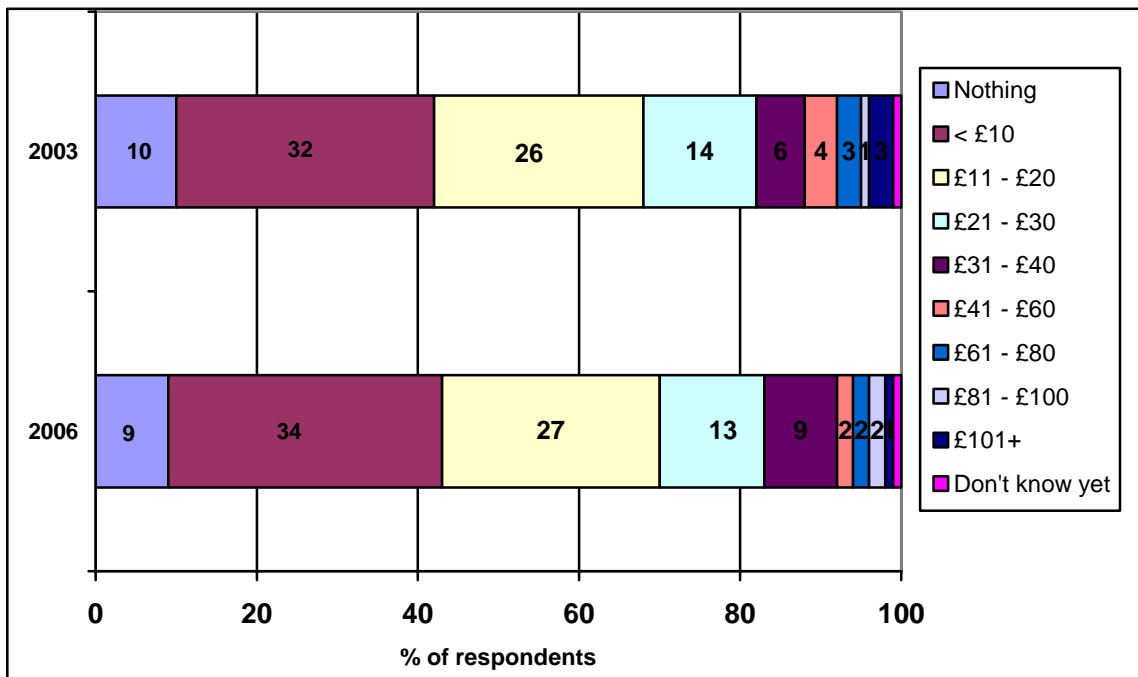
Three quarters (75%) of all respondents visit the town centre at least twice a week or more frequently. This breaks down to over a third (35%) who visit 2-3 times a week and two fifths who visit Bargoed on a daily basis. Collectively this figure is greater than the equivalent figure from the 2003 survey. However, the number visiting between 2-3 times per week has shown a decrease of 6% from 2003.

Those visiting once a week or less frequently, accounted for the remaining quarter of all respondents. Of this group 16% said they visited once a week and 5% said they visited Bargoed less often than once a month.

4.3 Spending behaviour

Shoppers were asked how much they have spent, or how much they intended to spend, on their visit to the town centre on the day of interview. The results of the past two surveys can be seen in Figure 4.3.1 below.

Figure 4.3.1 – How much have you/will you spend on your trip to this town centre today? (% of all respondents)



Base: 150 respondents

The majority of respondents (61%) stated that they had or were likely to spend between £0-£20 during their visit. Around a third (34%) said that they would be spending / have spent less than ten pounds, with a further quarter (27%) stating somewhere in between £11 - £20.

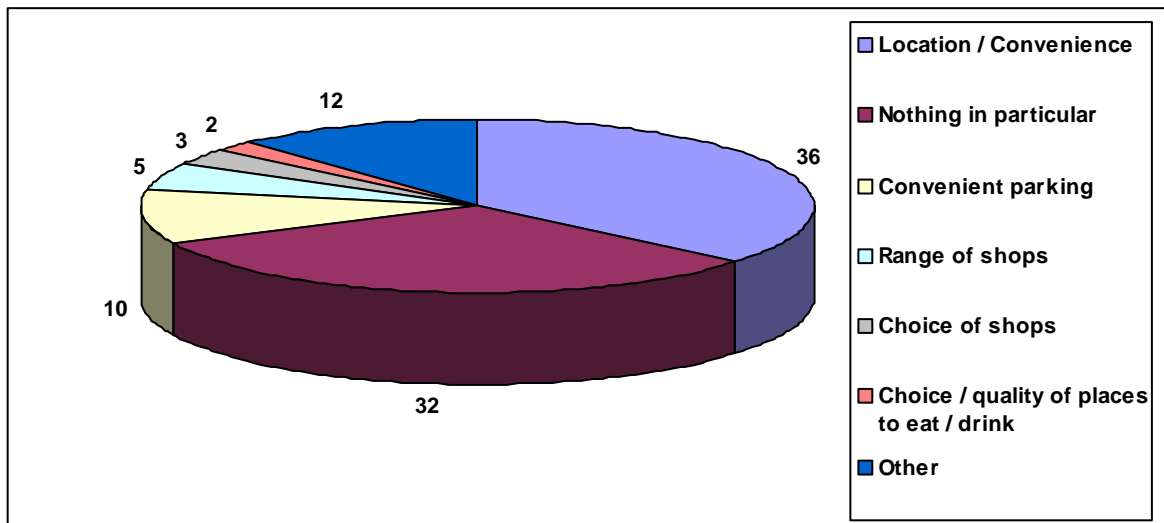
Just under a tenth (9%) said that they would be spending/have spent £31 - £40 and 3% stated over £80. A further tenth (9%) didn't expect to be spending any money whilst on their visit.

Spending behaviour doesn't seem to have changed significantly from 2003 to 2006, as the recent results almost mirror those of the previous survey.

4.4 Likes and Dislikes about Bargoed town centre

Finally in the on-street survey, respondents were asked which one thing they particularly like and dislike about Bargoed town centre. The results can be seen in Figure 4.4.1 and Figure 4.4.2 below

Figure 4.4.1 – What one thing do you particularly like about this town centre? (% of all respondents)



Base: 150 respondents

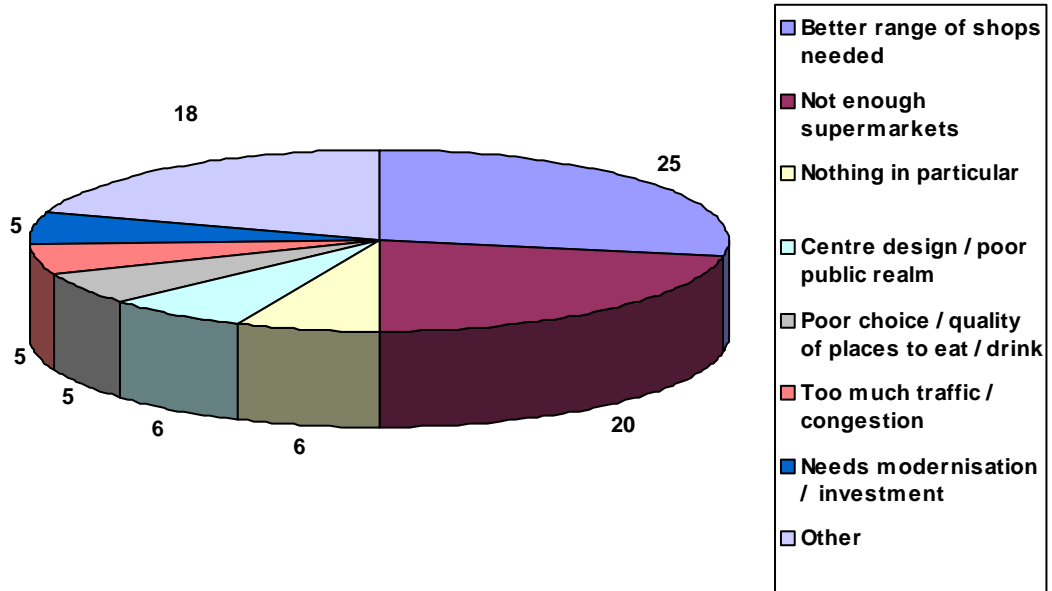
Bargoed's location and convenience was the aspect that respondents most liked about the town centre (36%). Just less than a third (32%) could not state a specific reason and said that there was nothing in particular they liked. A tenth (10%) were impressed with the convenient parking in Bargoed town centre.

Of the 'other' responses given (12%), the following aspects proved to be favourable for a number of respondents:

- "Range of shops" (5% of all respondents)
- "Friendliness/good atmosphere" (3%)
- "Choice of shops" (3%)
- "Choice quality of places to eat/drink" (2%)

Respondents were then asked which one thing they particularly disliked about Bargoed.

Figure 4.4.2 – What one thing do you particularly dislike about this town centre? (% of all respondents)



Base: 150 respondents

A “better range of shops needed” (25%) was the most popular response given by on-street interviewees when asked what one thing they particularly disliked about Bargoed. A lack of supermarkets was also a common theme as a fifth of all respondents (20%) stated that there was “not enough supermarkets”.

Of the ‘other’ responses given (18%), the following aspects proved to be unfavourable for a selection of respondents:

- “Poor choice/quality of places to eat/drink” (6% of all respondents)
- “Centre design/unattractive environment” (6%)
- “Too much traffic/congestion” (5%)

Previous results (2000 – 2003)

	2000	2003
Nothing in particular	11	12
Poor choice/range of shops	37	32
Volume of traffic/poor roads	21	19
Poor physical condition of centre	24	14
Lack of services/facilities	2	5
Inadequate/expensive car parking provision	1	5
All others	3	14

The wording in the options used in previous surveys is slightly different to the 2006 study. However when looking at the themes, it is apparent that dissatisfaction with the choice and range of shops has been evident for some time. In 2000 and 2003 the most frequent aspect stated by respondents that they were most dissatisfied with was the “poor

choice/range of shops" (37% and 32% of all respondents respectively).

It appears that, somewhat positively, people's satisfaction with the physical condition of the town centre is improving as the trend for those people stating this as an unfavourable aspect is decreasing (2000 – 24%, 2003 – 14%, 2006 – 6%).

4.5 Demographics

The breakdown of SEG, age and gender of those who took part can be seen in figure 4.5.1.

By SEG

	Base: All respondents		LOCATION				GENDER			
	Num	%	High St		Hanbury Road		Male		Female	
			Num	%	Num	%	Num	%	Num	%
Base: All respondents	150	100.0%	104	100.0%	46	100.0%	68	100.0%	82	100.0%
A/B	5	3.3%	4	3.8%	1	2.2%	2	2.9%	3	3.7%
C1	26	17.3%	16	15.4%	10	21.7%	13	19.1%	13	15.9%
C2	37	24.7%	20	19.2%	17	37.0%	21	30.9%	16	19.5%
D/E	77	51.3%	63	60.6%	14	30.4%	31	45.6%	46	56.1%
Refused	5	3.3%	1	1.0%	4	8.7%	1	1.5%	4	4.9%

Base: 150 respondents

By age group

	Base: All respondents		SEG								GENDER					
	Num	%	A/B		C1		C2		D/E		Refused		Male		Female	
			Num	%	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	150	100.0%	5	100.0%	26	100.0%	37	100.0%	77	100.0%	5	100.0%	68	100.0%	82	100.0%
18 - 25 years	24	16.0%			7	26.9%	6	16.2%	11	14.3%			11	16.2%	13	15.9%
26 - 34 years	16	10.7%	2	40.0%	1	3.8%	3	8.1%	10	13.0%			4	5.9%	12	14.6%
35 - 44 years	20	13.3%			6	23.1%	1	2.7%	12	15.6%	1	20.0%	13	19.1%	7	8.5%
45 - 54 years	31	20.7%			5	19.2%	9	24.3%	15	19.5%	2	40.0%	9	13.2%	22	26.8%
55 - 64 years	25	16.7%	3	60.0%	2	7.7%	7	18.9%	13	16.9%			12	17.6%	13	15.9%
65 years or more	34	22.7%			5	19.2%	11	29.7%	16	20.8%	2	40.0%	19	27.9%	15	18.3%

Base: 150 respondents

By gender

	Base: All respondents		LOCATION				SEG									
	Num	%	High St		Hanbury Road		A/B		C1		C2		D/E		Refused	
			Num	%	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	150	100.0%	104	100.0%	46	100.0%	5	100.0%	26	100.0%	37	100.0%	77	100.0%	5	100.0%
Male	68	45.3%	48	46.2%	20	43.5%	2	40.0%	13	50.0%	21	56.8%	31	40.3%	1	20.0%
Female	82	54.7%	56	53.8%	26	56.5%	3	60.0%	13	50.0%	16	43.2%	46	59.7%	4	80.0%

Base: 150 respondents

5.0 Leisure Activities

In 2006, a series of questions relating to leisure activities were asked for the first time. These included discovering in which leisure activities respondents participate, and in which locations, and how frequently, they undertake these activities.

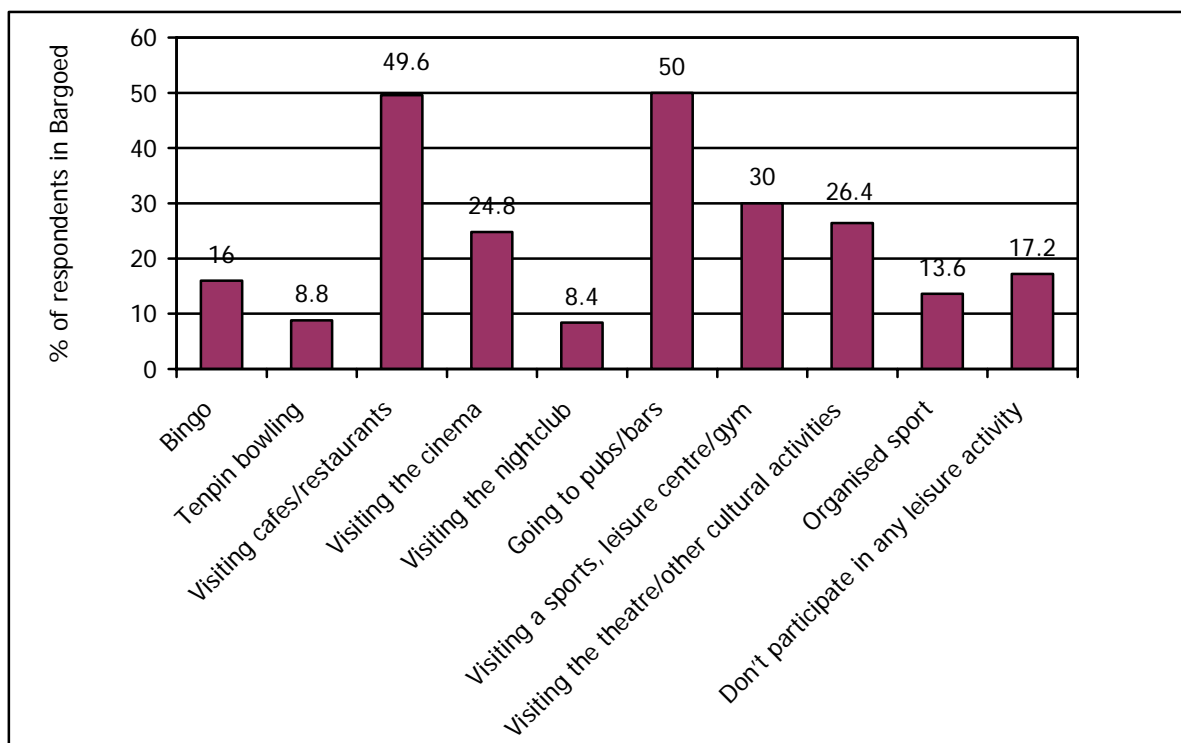
(N.B. The breakdown of the demographics for those who took part can be seen in figure 3.6.1 on page 21.)

A list of activities was read out to the respondents (including an option for those who do not participate in any leisure activity), which were as follows:

- Bingo
- Tenpin bowling
- Visiting cafes/restaurants
- Visiting the cinema
- Visiting the nightclub
- Going to pubs/bars
- Visiting a sports, leisure centre/gym
- Visiting the theatre/other cultural activities
- Organised sport
- Don't participate in any leisure activity

Respondents were able to state as many activities that applied and the following chart (Figure 5.0.1) demonstrates the findings that were discovered:

Figure 5.0.1 – Which of the following leisure activities do you or members of your household regularly participate in? (% of all respondents)



Base: 250 respondents overall; multiple choice

It can be seen that the most popular leisure activity that respondents in the Bargoed area participated in, was socialising in either a pub or at a bar (50%), of which they visit once a week (37.6%). The same amount also said that they visit cafés and restaurants as a leisure activity. Just under a third (30%) of respondents visit a leisure centre or gym. The majority of respondents who partake in this type of activity do so in Bargoed 2-3 times a week. Only 43 respondents (17.2%) indicated that they do not participate in any leisure activity.

Bingo

Merthyr Tydfil was the most popular for this activity with nearly a quarter (22.5%) choosing to go there. Bargoed was the second most popular area to play Bingo, with just over a seventh (15%) of all respondents stating this particular location.

The most popular frequency of playing Bingo for those living in the Bargoed catchment area was once a week, as indicated by nearly half of all respondents (47.5%).

Tenpin Bowling

Nearly three fifths of all respondents (59.1%) participate in playing Tenpin Bowling at Nantgarw. There is no Tenpin Bowling facility in Bargoed, but one respondent had stated they visit London to play this type of activity.

Of respondents who partake in Tenpin Bowling, nearly two thirds (63.6%) usually do this less than once a month, while nearly a quarter (22.7%) of them play once a month.

Cafés/Restaurants

Those who visited a café or a restaurant preferred to go to Cardiff with just over a fifth (22.6%) stating this. Blackwood was second choice with 13.7%, followed by Bargoed and Merthyr Tydfil equally (both 12.1%).

Nearly a third of those respondents living in the Bargoed area regularly visit a café or a restaurant once a week.

Cinema

Nantgarw was the most popular area to visit the Cinema, with over half (56.5%) indicating they go there. Caerphilly was the second location of choice (17.7%) with Cardiff (14.5%) following closely behind. Since Caerphilly has no dedicated Cinema it is possible that respondents actually meant Nantgarw as well. Only one respondent (1.6%) stated that they go to the Cinema in Bargoed.

The respondents who visit the Cinema stated that they go either once a month (45.2%) or less often (46.8%).

Nightclubs

The residents of the Bargoed catchment area prefer to visit nightclubs in Cardiff, with nearly two thirds (61.9%) choosing there. A small number of respondents (14.3%) visit nightclubs in Bargoed.

The majority of respondents visit a nightclub once a month or less often (both 28.6%).

Pubs/Bars

Bargoed was the most popular location in which to visit a pub or a bar; with around a third (32%) indicating they go there. The greatest percentage of respondents who visit a pub or a bar stated that they go once a week (37.6%).

Leisure Centre/Gym

Of those visited a leisure centre or a gym, nearly half (46.7%) preferred to visit Bargoed. New Tredegar was second with 9.3% followed by Rhymney, which was listed by 6.7% of respondents.

A third (33.3%) of respondents regularly visit a leisure centre or a gym 2-3 times a week.

Theatre/other cultural activities

Over three quarters (77.3%) of the respondents within the Bargoed area prefer to go to Cardiff, as a place to visit the theatre or any other cultural activities, but participate in this activity less often than once a month (90.9%).

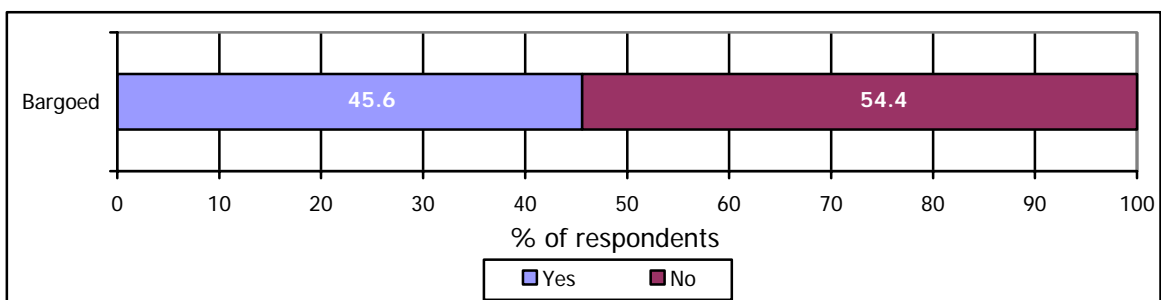
Organised sport

Only an eighth of all respondents indicated that they play an organised sport. Nearly three in ten (29.4%) of these respondents stated Bargoed as the place in which they play an organised sport. Nearly half of the respondents (47.1%) said they participate in this type of activity once a week.

5.1 Walking in the countryside

Another topic introduced in 2006 that Caerphilly County Borough Council was interested in was to discover the number of respondents who regularly participate in walking in the countryside and in which area(s) they do this. The following table (Figure 5.1.1) shows the main findings:

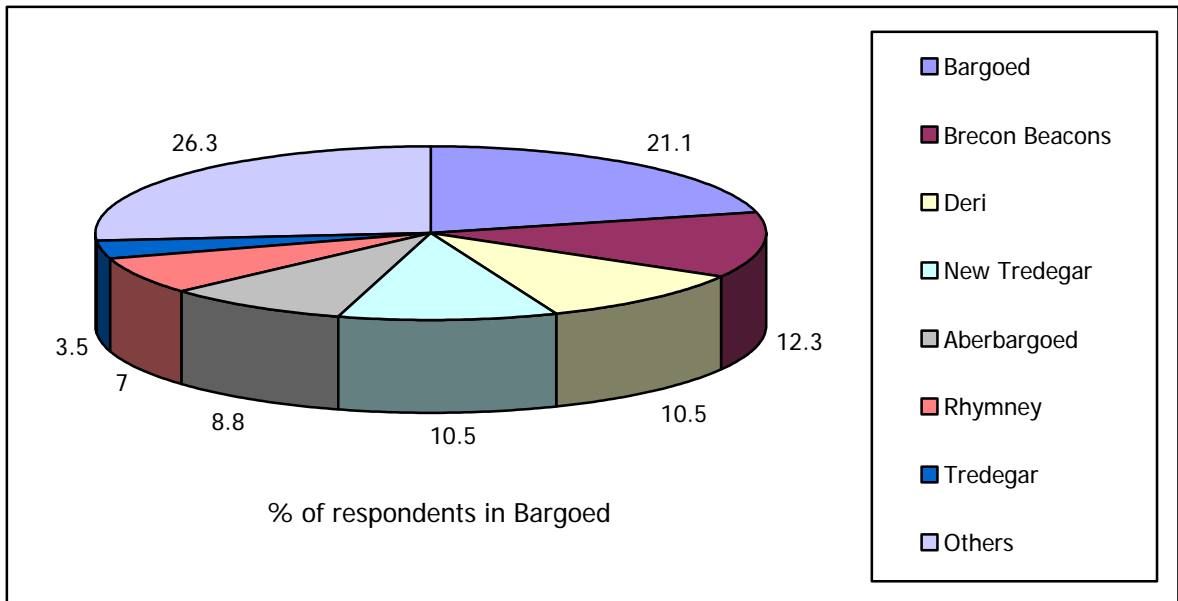
Figure 5.1.1 – Do you or members of your household regularly walk in the countryside? (% of all respondents)



Base: 250 respondents overall

Those who regularly walk in the countryside from the Bargoed catchment area, some 114 respondents, were asked the location that they visit. The following chart demonstrates the main locations where respondents go walking:

Figure 5.1.2 – In which area do you go walking in the countryside? (% of all respondents)



Base: 114 respondents overall

Of those respondents who go walking and live within the Bargoed catchment area, just over a fifth (21.1%) go walking Bargoed and over a tenth (12.3%) set off to the Brecon Beacons. A tenth (10.5%) of all respondents go to New Tredegar and Deri and slightly less (8.8%) visit Aberbargoed countryside.