



**Caerphilly County  
Borough Council**

Shopper Attitude Survey  
2006

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**Blackwood 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 18<sup>th</sup> July – 28<sup>th</sup> July. In Blackwood 201 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 and leisure 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) as a place for shopping
- 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 17<sup>th</sup> July – 29<sup>th</sup> 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 Blackwood 201 interviews were completed at the High Street, Market Place, Market Square and North Blackwood Retail Park 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 451 local residents were interviewed, who resided across the area. Interviewing was conducted within the catchment area of Blackwood over a period, from July 18<sup>th</sup> – July 28<sup>th</sup> 2006.

### 2.2 Main Findings

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

- Respondents living in the Blackwood area identified a large number of different stores which they visited to purchase their food and grocery items. In the earlier surveys there was a pattern of decreasing numbers of residents using Blackwood as a location for food shopping. Trade decreased from 86.9% in 1994 to 64.2% in 2000 with catchment residents being attracted to the Tesco store at Ystrad Mynach by 2000, and also increasingly to Caerphilly.
- This all changed in 2003 with the opening of Asda in Blackwood and Morrisons in Rogerstone. By 2006 survey results have revealed that the number of residents shopping for food and grocery items in Blackwood has decreased once more, but this time from 72.2% in 2003 to 55.6% in 2006. Of those that shop in Blackwood, the majority, 46.4% shop at Asda in Blackwood (a reduction from 49.4% in 2003).
- Looking at the 2006 results overall, nearly half of all respondents listed Asda in Blackwood as the store where they buy most of their household food and grocery items. Morrisons, Rogerstone, was second, and was listed by just under a fifth (17.6%) of respondents, with a tenth (10%) of respondents stating Tesco, Ystrad Mynach as the third most popular location. The fourth most quoted store was Somerfield, Blackwood (listed by 5.6% of respondents), with Pioneer, Pontllanfraith at number five (4.8%) and Aldi, Blackwood at number six (2.4%).
- These figures show that Asda in Blackwood is the most popular choice for top-up shopping (16% of all respondents), which is consistent with its use for main food shopping also (46.4% of all respondents). Others most used were the local stores in Blackwood, Pontllanfraith and Oakdale. In fact the majority of respondents in the Blackwood catchment area tend to do their top-up shopping within it.
- When reviewing the previous survey data, the 2003 results for non-bulky non-food items showed that the highest proportion of respondents shopped in Cardiff for non-food goods (33.1%). That year was the only time Cardiff led the field, but every survey has shown that Blackwood, Newport and Cardiff, were the top locations visited for these types of goods, by respondents in the Blackwood catchment area.
- In 2006 the results show that the towns with the greatest proportion of visits were Blackwood and Newport (listed by 30.4% and 28.4% of respondents respectively), and the next most visited place was Cardiff totalling a fifth (20.4%) of all respondents.

- Caerphilly remains the leading destination to shop for bulky non-food items within the Blackwood catchment area with over a fifth of respondents who buy bulky non-food items (20.4%) choosing to shop there. Newport was the second location of choice as a place for shopping for these items but the percentage of people visiting there has decreased from 19.9% in 2003 to 17.2% in 2006. Conversely Cardiff, the third choice, has fallen from 15.9% in 2003 to 12% in 2006.
- Some 220 respondents (88%) travelled by car/van for shopping, and they were asked how often they have access to the vehicle. Over four fifths stated that they have access to a car/van all the time.
- Some 213 respondents indicated they visited Blackwood and they stated a number of reasons for visiting their local area for shopping. Almost two thirds of the respondents (60.6%) stated it was because it was close and/or convenient to home and under a tenth (6.6%) said they go to Blackwood to visit a particular shop.
- Similarly those respondents, who indicated they did not visit Blackwood, also stated a number of reasons for not visiting their local area for shopping. Nearly a third (29.7%) of respondents stated that it was inconvenient and just under a fifth (18.9%) stated it was because of poor access and parking.
- Apart from a third of respondents who feel no improvements are needed, the next highest proportion of respondents, just over a sixth (17.6%), would prefer to have a better choice/range of non-food shops within their local area for shopping.
- Since the four surveys started, Blackwood has had the highest (70.8%) approval rating out of all six centres in the County Borough from 1994 to 2003. The 2006 survey has shown that Blackwood still remains the highest of all six centres.
- 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.
- The highest proportion of respondents (56.8%) within the Blackwood area participate in a leisure activity by either visiting a café or a restaurant, of which they visit once a week (29.6%). Other respondents stated that they'd rather go to a pub or a bar also within the Blackwood area, and just over half (50.8%) stated this. The majority of respondents who participate in this type of activity do so in Blackwood once a week. Only 45 respondents (18%) 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.
- The 2006 survey revealed that of the respondents living within the Blackwood catchment area, nearly a sixth (15.9%) of all respondents who go walking in the countryside, visit Blackwood. Over 13% visit Cwmcarn and 8% set off to the Brecon Beacons. Almost over a tenth of all respondents go to Oakdale (10.6%) and under a tenth (7.1%) of the respondents visit the Crosskeys and Pontllanfraith countryside.

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

- Food and grocery shopping (42%) and non-food shopping (39%) were the main reasons for respondents visits to Blackwood. This is a familiar pattern from previous surveys, with the number of non-food shoppers increasing slightly from the 2003 survey (36%).
- The majority of respondents (98%) had gone straight from home to Blackwood, with the remainder doing so from work (2%).
- Specifically, just over two fifths came from Blackwood (43%), with Pontllanfraith (12%) Newbridge (5%) and New Tredegar (5%) being the other starting locations of note.
- The most popular method of transport was on using a car/van as driver, as just under half (45%) of all respondents stated that they had driven to the town centre. Those travelling by bus/coach equated for slightly under a quarter (24%). The number of people walking to Blackwood has declined, from 21% in 2003 to 16% in the current survey.
- Those respondents travelling by car were most likely to use a pay and display car park (43%) or the Asda voucher car park (24%) when parking in Blackwood.
- The majority of shoppers, approximately half (50%), travel for between 5 and 10 minutes, indicating that there is a strong local component to the nature of the catchment area for shoppers. A further quarter (27%) travel somewhere between 11 and 20 minutes to get to Blackwood.
- Three fifths (60%) of all respondents visit the town centre at least twice a week or more frequently. Of those, just under a fifth (18%) visit Blackwood on a daily basis and a further two fifths visit 2-3 times a week (42%).
- Around a quarter of all respondents had spent, or were expecting to spend, between £11 - £20 during their shopping trip, with a further fifth (21%) estimating less than a ten pound spend.
- Only 5% of those people surveyed in Blackwood didn't expect to be spending any money whilst on their visit.
- Blackwood's location and convenience was the aspect that respondents most liked about the town centre (34%). Around a quarter (24%) liked the range of shops available in Blackwood and one seventh (14%) were impressed with the choice of shops in the town.
- Somewhat positively, two fifths of respondents (40%) couldn't state anything that they particularly disliked about Blackwood town centre. Around a quarter thought that there was "too much through traffic / congestion / buses" (23%). A small percentage showed a particular dislike for the difficulty to find parking (6%)



### 3.0 Household Telephone survey

A total of 250 interviews were conducted in the catchment area of Blackwood, one of the two sub-regional centres, over a period from July 18<sup>th</sup> – July 28<sup>th</sup> 2006. A random selection of local residents within the Blackwood area were asked for their opinions on a variety of subjects relating to their shopping behaviour. This included establishing which centre the respondents use for their food shopping, as well as where they go for bulky and non-bulky purchases. The survey also documents how respondents rate Blackwood as a place for general shopping, leisure activities and to go walking in the countryside.

#### 3.1 Food and grocery shopping

##### Main food

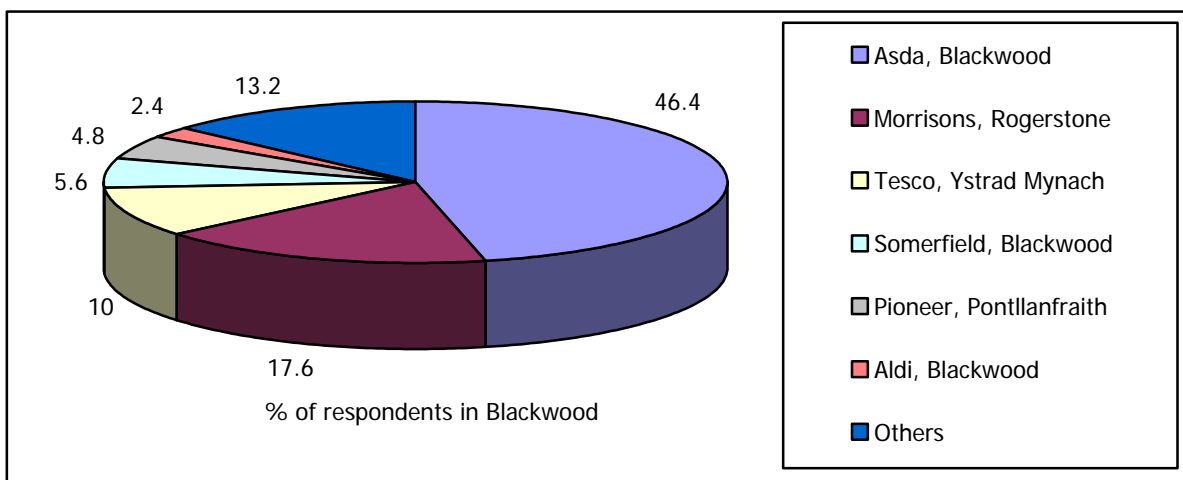
To begin with, respondents were asked to state the location where they buy most of their household food and grocery items. The following table shows the percentage of respondents from within the Blackwood catchment area that shop in each town for food shopping, building on the information given in the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

**Table 3.1.1 – Blackwood catchment area – choice of town for food shopping (% of all respondents)**

	1994	1997	2000	2003	2006
Blackwood	86.9	74.6	64.2	72.2	55.6
Newport C.B.	4.7	2.7	0.7	10.4	20
Ystrad Mynach	0	0	18.6	12	10
Caerphilly	4.7	9.8	11.5	0.8	2
Other	3.8	12.9	5	4.8	12.4

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 Blackwood 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

Respondents living in the Blackwood area identified a large number of different stores which they visited to purchase their food and grocery items. In the earlier surveys there was a pattern of decreasing numbers of residents using Blackwood as a location for food shopping. Trade decreased from 86.9% in 1994 to 64.2% in 2000 with catchment residents attracted to the Tesco store at Ystrad Mynach by 2000, and also increasingly to Caerphilly.

This all changed in 2003 with the opening of Asda in Blackwood and Morrisons in Rogerstone. By 2006 survey results have revealed that the number of residents shopping for food and grocery items in Blackwood has decreased once more, but this time from 72.2% in 2003 to 55.6% in 2006. Of those that shop in Blackwood, the majority, 46.4% shop at Asda in Blackwood (a reduction from 49.4% in 2003). Therefore, it could be said that the bulk of the reduction has hit food stores in Blackwood other than Asda.

Looking at the 2006 results overall, nearly half of all respondents listed Asda in Blackwood as the store where they buy most of their household food and grocery items. Morrisons, Rogerstone, was second, and was listed by just under a fifth (17.6%) of respondents, with a tenth (10%) of respondents stating Tesco, Ystrad Mynach as the third most popular location. The fourth most quoted store was Somerfield, Blackwood (listed by 5.6% of respondents), with Pioneer, Pontllanfraith at number five (4.8%) and Aldi, Blackwood at number six (2.4%).

Only 2 respondents (0.8%) stated that they used the Internet for their household's food and grocery shopping.

With regards to the respondents frequency, travelling habits and expenditure, almost three fifths (58.4%) of all respondents normally shop at their main food store once a week, with the majority of respondents (91.2%) traveling from their home in Blackwood to their main food store and over half (54.4%) as driver of a car/van.

A fifth (22%) of all respondents spend in the region of £51 - £75 on their main food and grocery shopping, compared with only 13.2% who spend £30 or less.

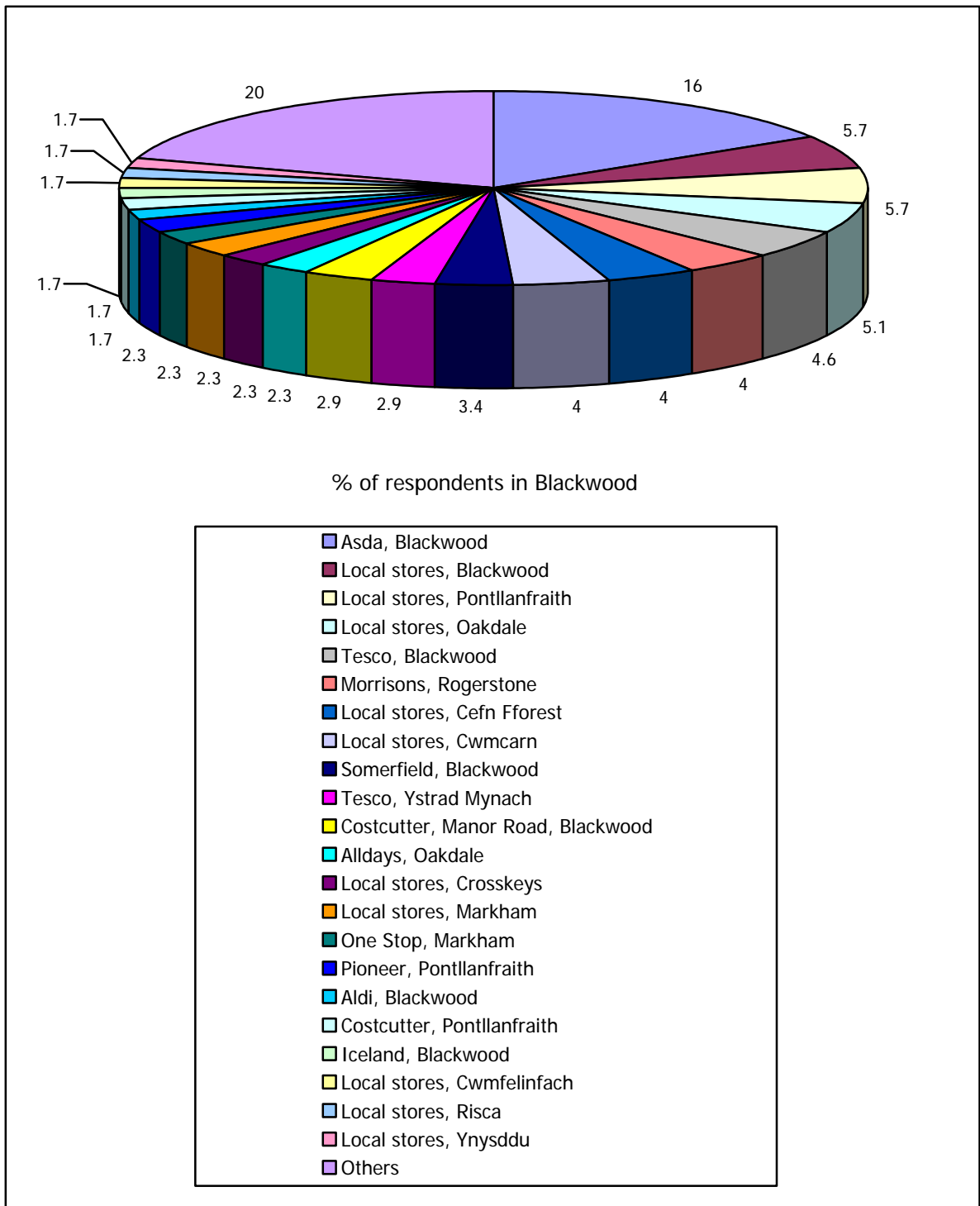
Just over two fifths (42.4%) specified that they combine their main food shopping with visits to other shops to buy any non-food items.

Nearly three quarters (70%) 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. Respondents from the Blackwood catchment area specified a large number of stores where they purchased their top-up food and convenience shopping, and these are shown in figure 3.1.3:

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



Base: 175 respondents overall

These figures show that Asda in Blackwood is the most popular choice for top-up shopping (16% of all respondents), which is consistent with its use for main food shopping also (46.4% of all respondents). Others most used were the local stores in Blackwood, Pontllanfraith and Oakdale. In fact the majority of respondents in the Blackwood catchment area tend to do their top-up shopping within it.

### 3.2 Non-food shopping

#### Non-bulky non-food

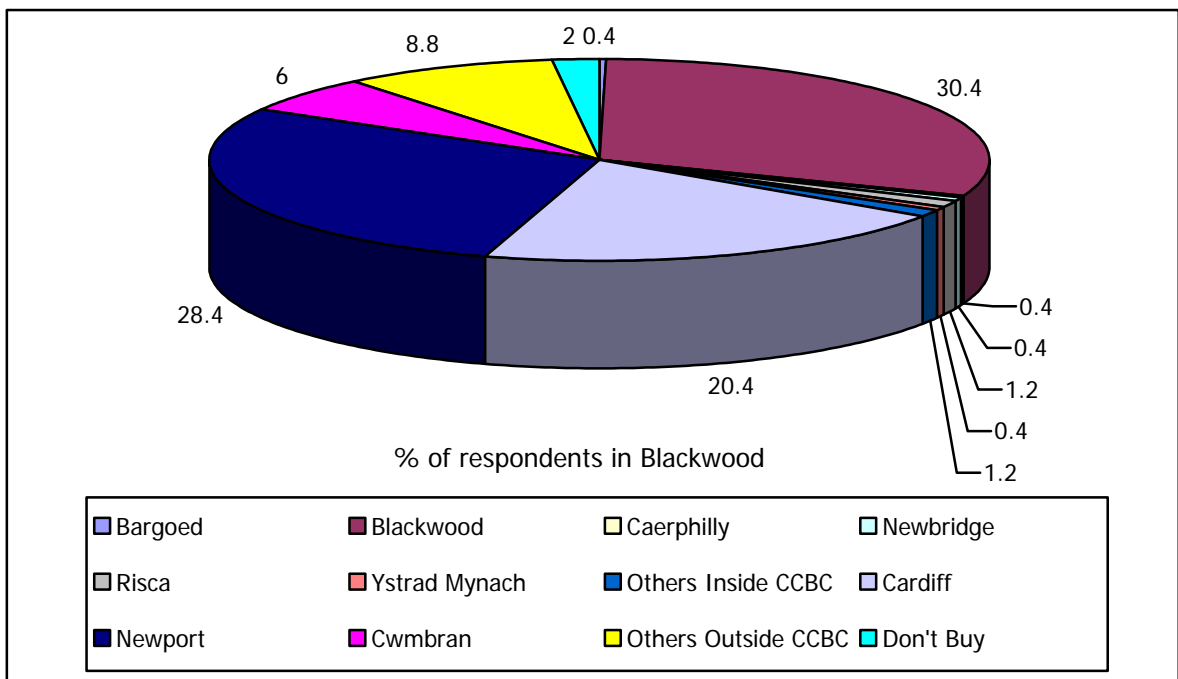
The following table shows the respondents first choice of town for non-food shopping within the Blackwood catchment area, building on the information given in the 2003, 2000, 1997 and 1994 surveys:

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

	1994	1997	2000	2003	2006
Blackwood	33.4	44.7	35.1	31.1	30.4
Newport	36.2	22.7	31.4	23.5	28.4
Cardiff	17.7	25.4	23.6	33.1	20.4
Cwmbran	0	0	4.7	4	6
Mail Order	1.7	2.3	2	4	4.4
Other	11	4.9	3	4.4	10.4

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 Blackwood 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

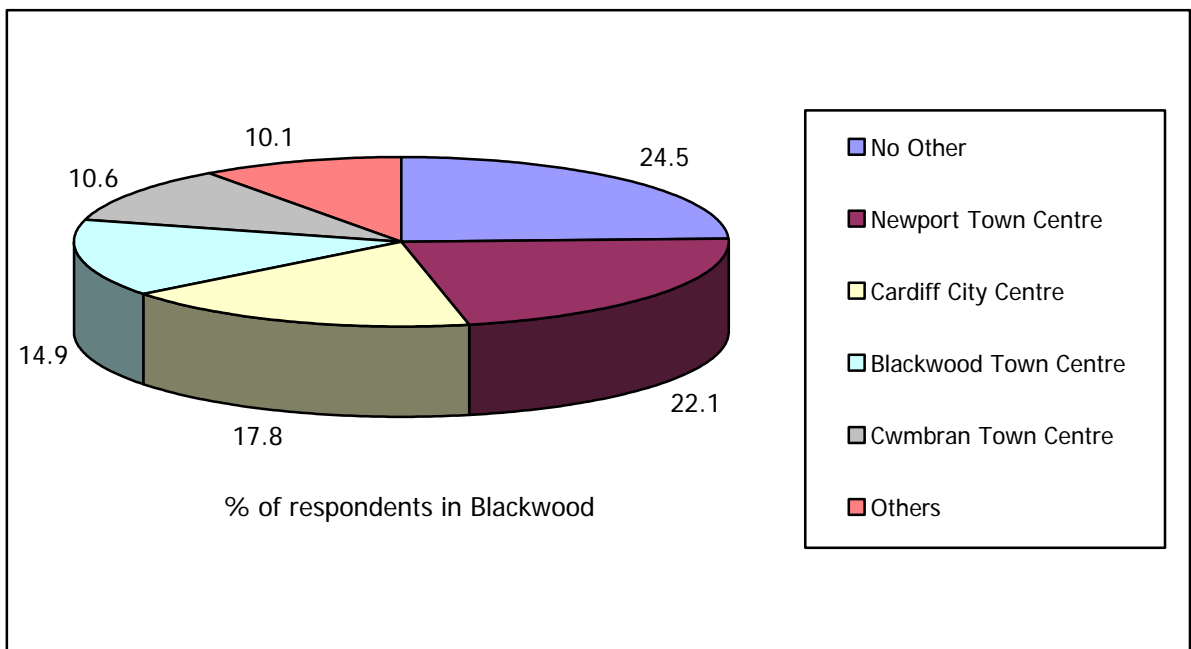
When reviewing the previous years' survey data, the 2003 results for non-bulky non-food items showed that the highest proportion of respondents shopped in Cardiff for non-food goods (33.1%). That year was the only time Cardiff led the field, but every survey has shown that Blackwood, Newport and Cardiff, were the top locations visited for these types of goods, by respondents in the Blackwood catchment area.

In 2006 the results show that the towns with the greatest proportion of visits were Blackwood and Newport (listed by 30.4% and 28.4% of respondents respectively), and the next most visited place was Cardiff City Centre totalling a fifth (20.4%) of all respondents.

The numbers of people shopping in Blackwood have decreased by 2.3% from 2003, and those visiting Cardiff declined 38.4% in the same period, whereas visits to Newport have increased by 20.8%.

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: 208 respondents overall

Nearly a quarter of respondents 24.5% (a reduction from 27.9% in 2003) do not visit any other centre for non-bulky non-food shopping. Over a fifth of respondents (22.1%) stated that they visit Newport (an increase from 16.4% in 2003) as an alternative to their main centre of choice. Cardiff came in third with around a sixth (17.8%) stating this centre, then Blackwood, 14.9% and just over a fifth of respondents stating Cwmbran (10.6%). The 31 respondents stating Blackwood as a second choice of place to visit was a large increase from 6.1% in 2003.

**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.

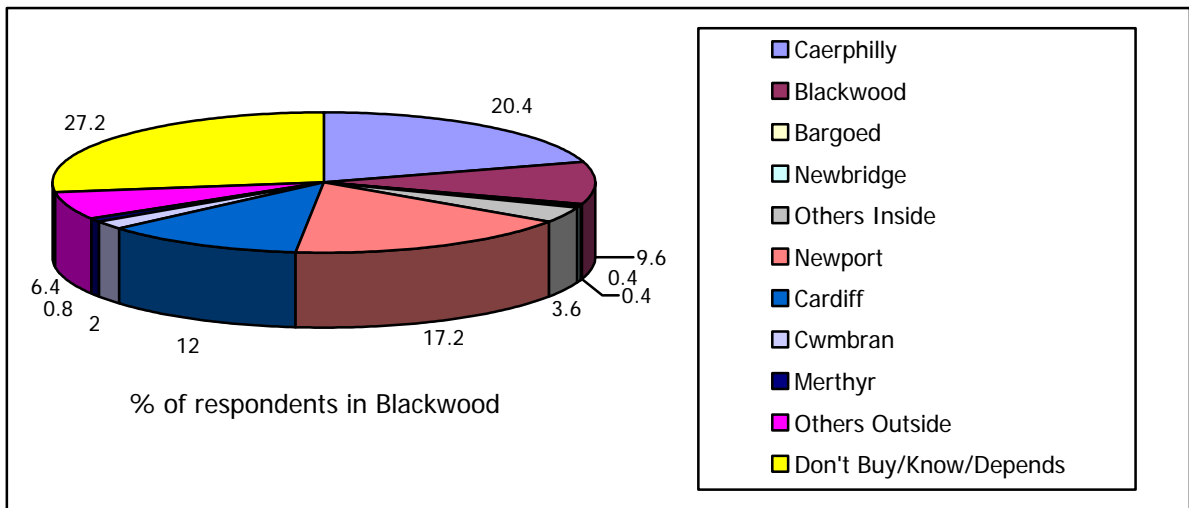
The following table shows the proportion of respondent’s choice of town for bulky non-food shopping within the Blackwood catchment area, building on the information given in the 2003, 2000, 1997 and 1994 surveys:

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

	1994	1997	2000	2003	2006
Caerphilly	1.1	3.8	2.8	20.3	20.4
Newport	29.8	21.2	16.8	19.9	17.2
Cardiff	11.2	15.2	15.2	15.9	12
Blackwood	24.7	33	22.8	17.7	9.6
Ystrad Mynach	3.1	17.1	22	1.6	0
Other	14.3	7.8	10.2	12.6	19.6
Don't Buy	15.8	1.9	11.2	12.4	21.2

Building on the above data, 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 Blackwood catchment area.

**Figure 3.2.5 – BULKY non-food purchases from the Blackwood catchment area (% of all respondents)**

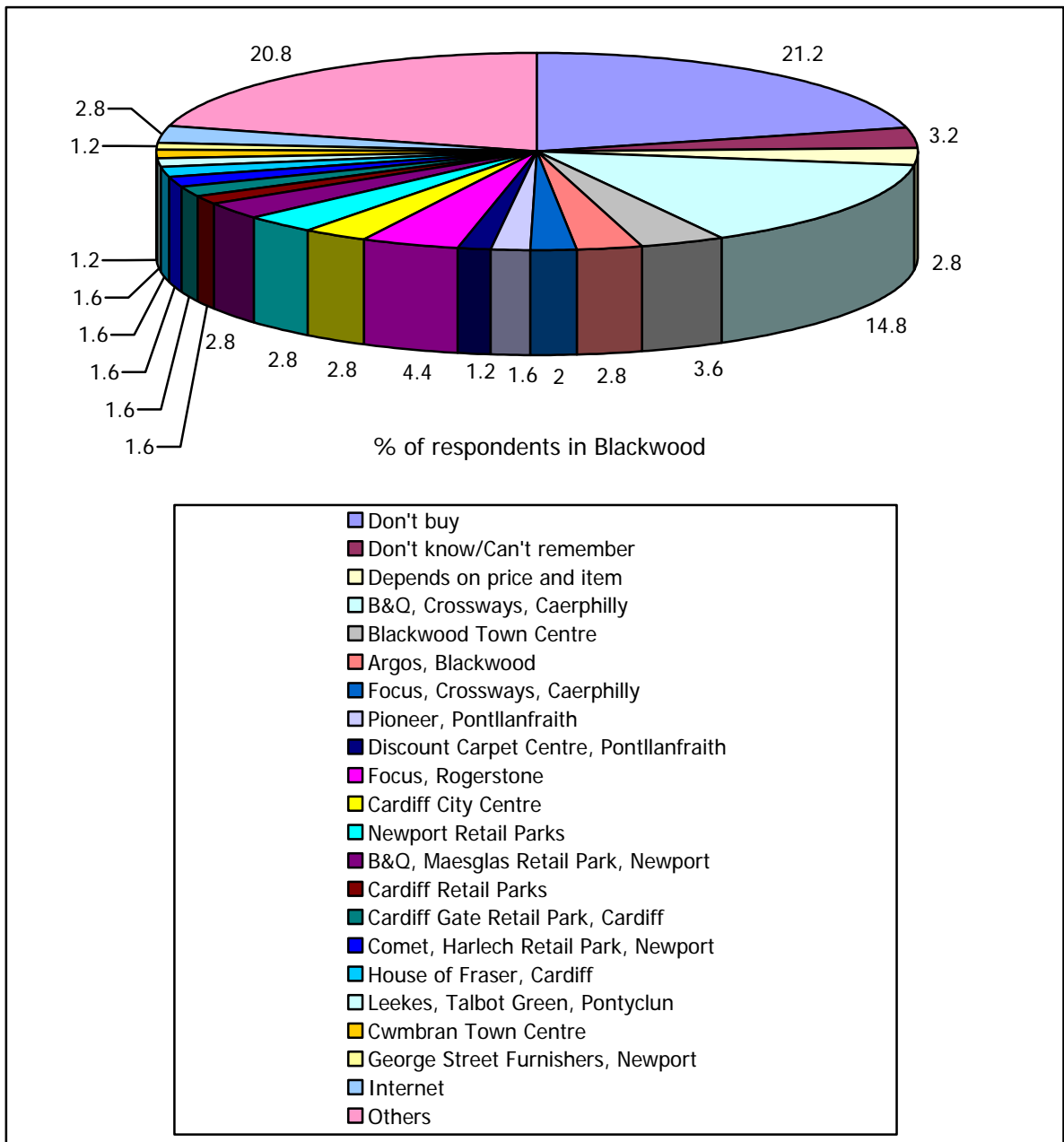


Base: 250 respondents overall

When looking at table 3.2.4, it is apparent that Caerphilly remains the leading destination to shop for bulky non-food items within the Blackwood catchment area with over a fifth of respondents who buy bulky non-food items (20.4%) choosing to shop there.

Newport was the second location of choice as a place for shopping for these items but the percentage of people visiting there has decreased from 19.9% in 2003 to 17.2% in 2006. Conversely Cardiff, the third choice, has fallen from 15.9% in 2003 to 12% in 2006.

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



Base: 250 respondents overall

With regards to the individual areas/stores used to purchase these items (Figure 3.2.6), just over a fifth of respondents (21.2%) do not buy bulky non-food items. This represents an increase from the previous two surveys (2000 – 11.2%, 2003 – 12.4%).

Respondents based in the Blackwood catchment area specified a large number of stores, which they visited to purchase most of bulky non-food items. The top two stores/areas indicated can be seen in figure 3.2.6, although there were no areas/stores that largely stood out as being popular with respondents. Under a sixth (14.8%) visit B&Q, Crossways, in Caerphilly, which has increased from 12.4% in 2003 and overall this was the most popular destination.

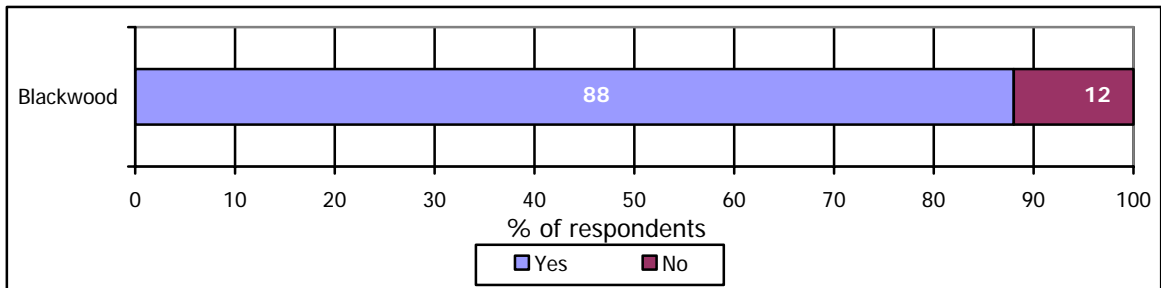
The next most popular store visited was Focus, Rogerstone, but named by only 4.4% of respondents.

Overall as a choice of town for bulky non-food shopping, Caerphilly still remains the most popular place compared with Blackwood where only 8.8% of respondents stay within the catchment area for such purchases.

### 3.3 Mode of transport

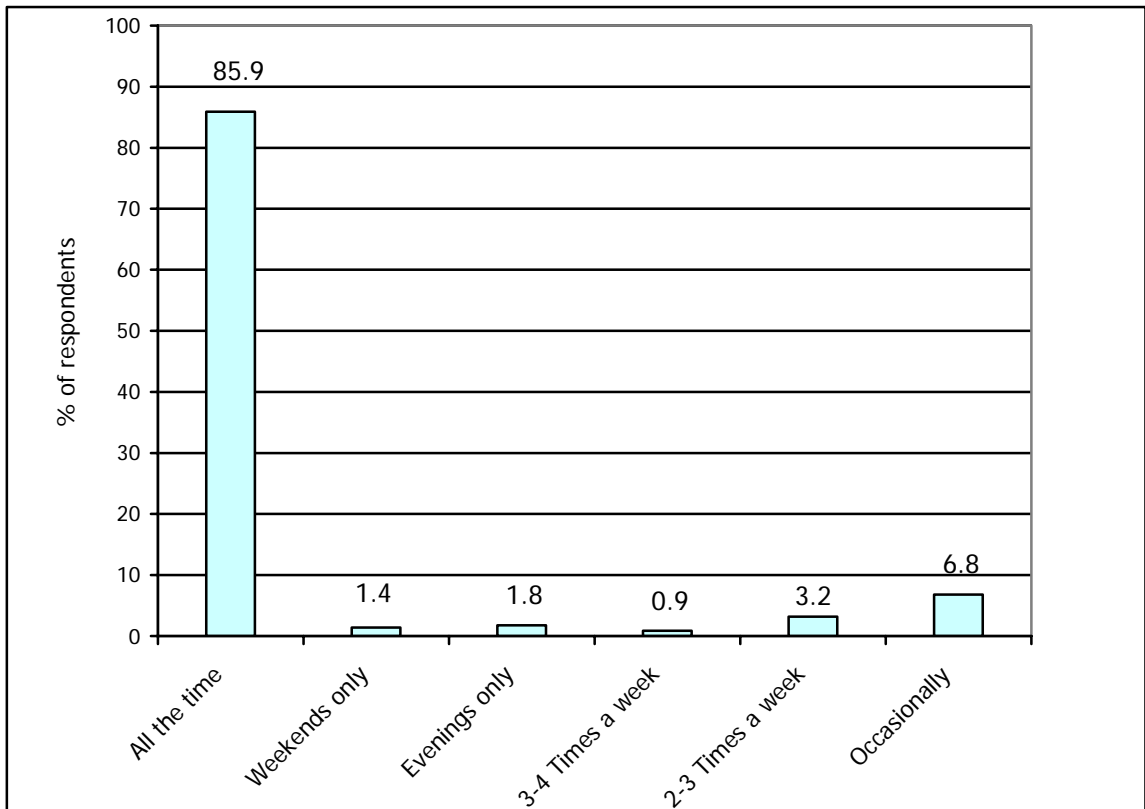
Respondents were next asked questions about their journey for shopping in general. These included whether they have access to a car/van and how often they have access to the car/van. The following data was uncovered:

**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: 220 respondents overall

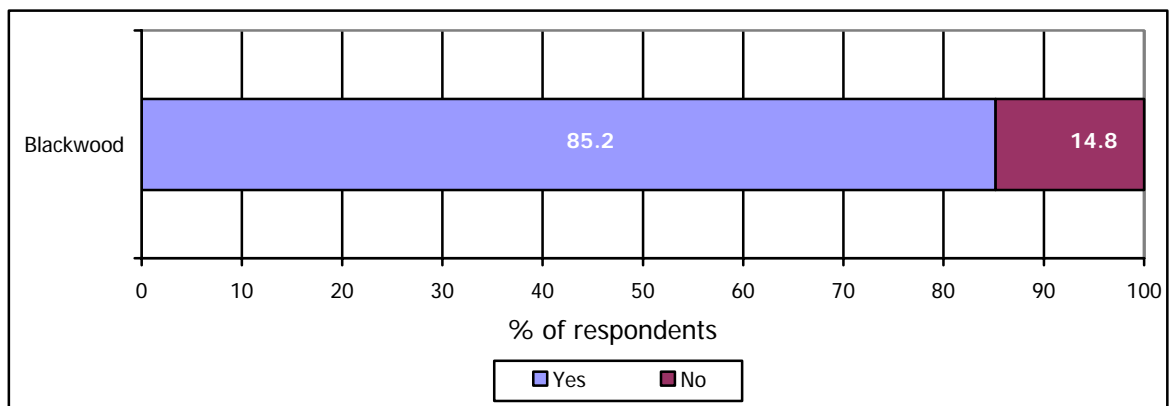


Some 220 respondents (88%) travelled by car/van for shopping, and they were asked how often they have access to the vehicle. Over four fifths stated that they have access to a car/van all the time.

### 3.4 Shopping in Blackwood

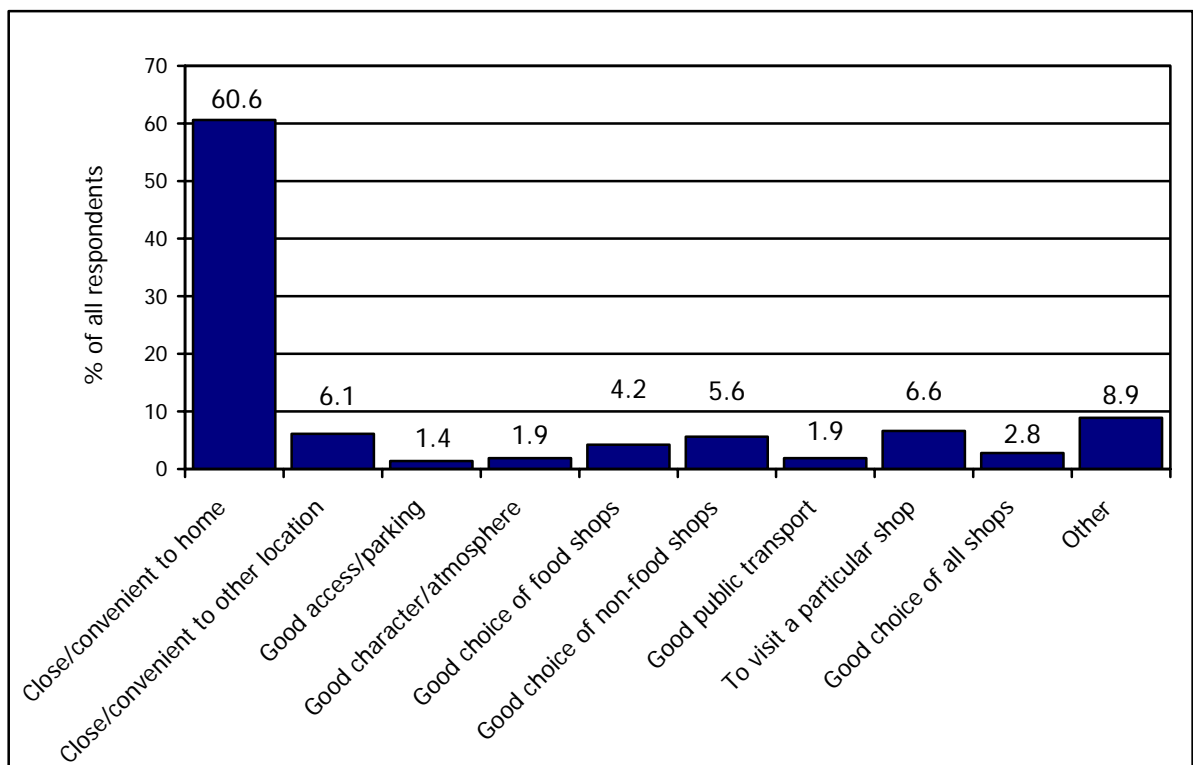
Respondents were asked a series of questions about shopping in Blackwood. These included whether they visit Blackwood for shopping, if so why, and if not, why not, as well as what potential improvements would make them use Blackwood as a shopping location more frequently. The following graphs demonstrate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

**Figure 3.4.1 – Do you ever visit BLACKWOOD 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; 213 visiting Blackwood

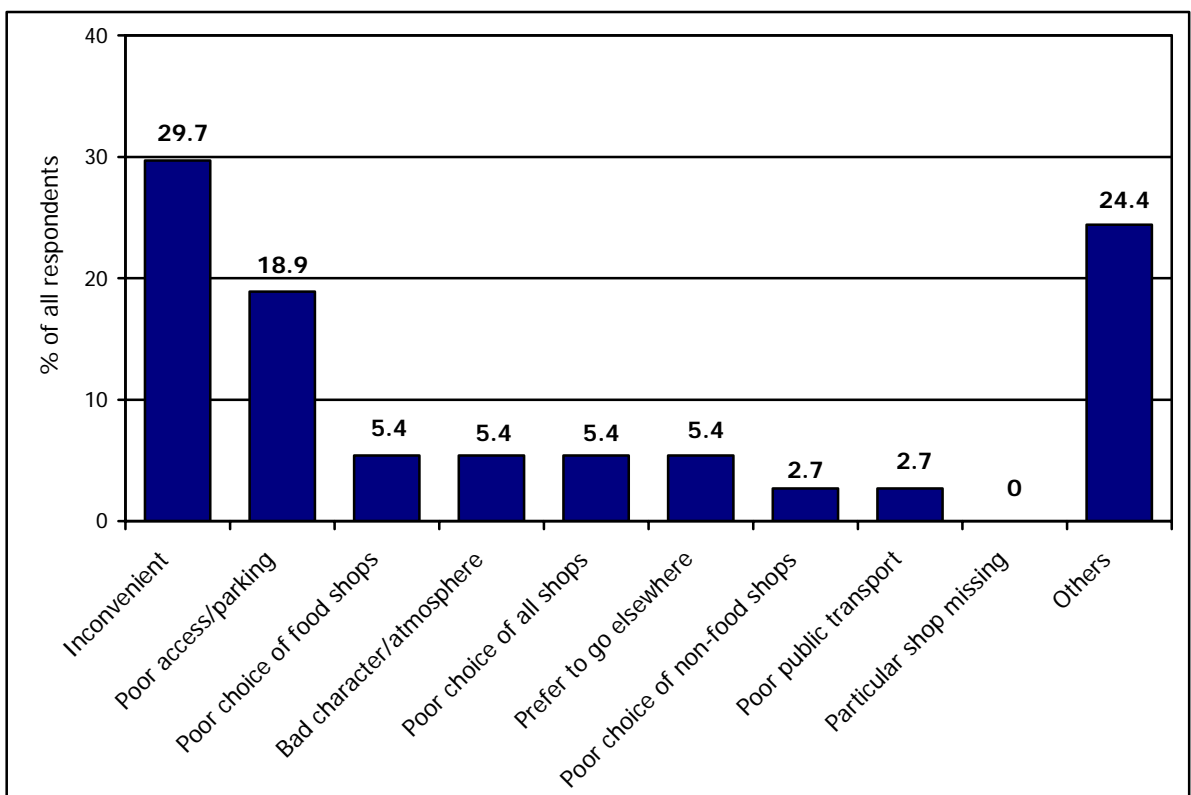
The survey found that over four fifths (Figure 3.4.1) visit Blackwood for shopping.

Some 213 respondents indicated they visited Blackwood (Figure 3.4.2) and they stated a number of reasons for visiting their local area for shopping. Almost two thirds of the respondents (60.6%) stated it was because it was close and/or convenient to home and under a tenth (6.6%) said they go to Blackwood to visit a particular shop.

The responses contained under the category 'other' (8.9%) in figure 3.4.2, included the following aspects which proved to be positive for a number of respondents:

- *"To visit particular services" (2.3% of all respondents in Blackwood)*

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



Base: Overall 250 respondents; 37 not visiting Blackwood

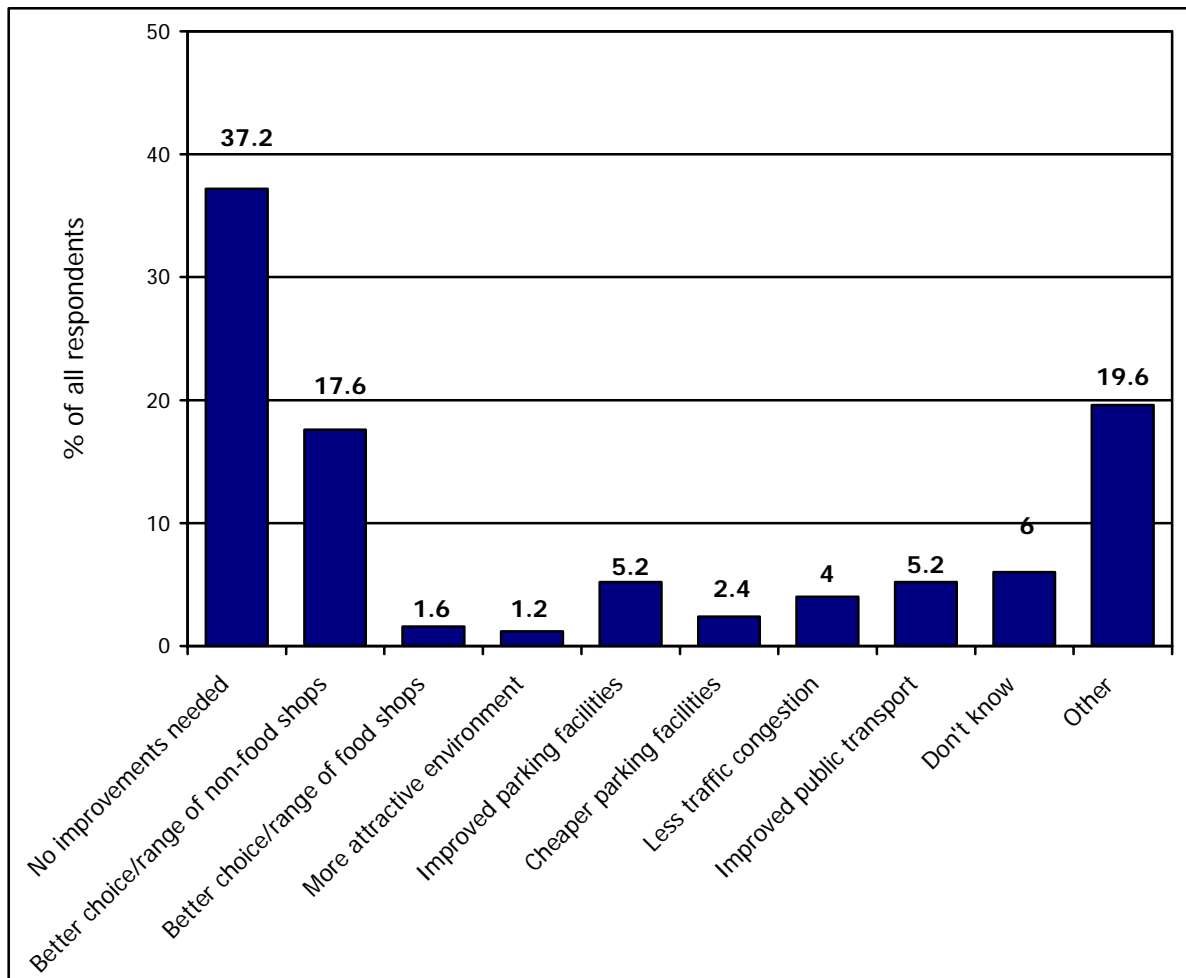
Similarly those respondents, who indicated they did not visit Blackwood (Figure 3.4.3), also stated a number of reasons for not visiting their local area for shopping. Nearly a third (29.7%) of respondents stated that it was inconvenient and just under a fifth (18.9%) stated it was because of poor access and parking.

The responses contained under the category 'other' (24.4%) in figure 3.4.3, included the following aspects which proved to be negative for a number of respondents:

- *"Traffic congestion" (2.7% of all respondents in Blackwood)*
- *"Unfamiliar with area" (2.7%)*

All respondents within the catchment area of Blackwood were asked the following question in figure 3.4.4, whether they visited their local area or not. The respondents were asked what would make them use Blackwood more frequently and the results are as follows:

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



Base: 250 respondents overall

Apart from a third of respondents who feel no improvements are needed, the next highest proportion of respondents, just over a sixth (17.6%), would prefer to have a better choice/range of non-food shops within their local area for shopping.

Over a tenth (overall 10.4%; 5.2% each option) of respondents stated they would prefer to have improved parking facilities and improved public transport.

The overall results indicate that better choice/range of non-food shops within their local area is the main concern of respondents who see room for improvement.

The responses contained under the category 'other' (19.6%) in figure 3.4.4, included the following requirement for development which would satisfy a number of respondents:

- "Better choice/range of all shops" (2.8% of all respondents in Blackwood)

### 3.5 Approval rating

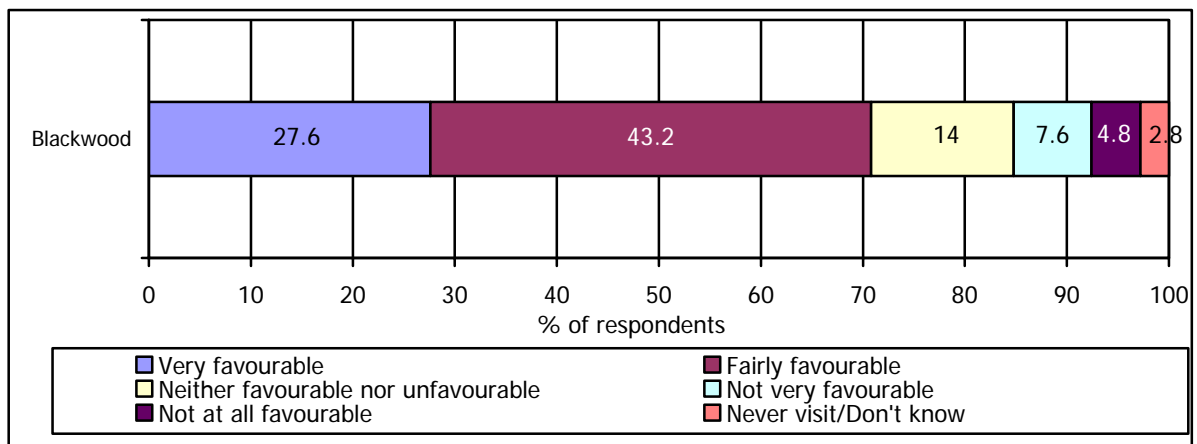
Finally on the CATI survey, respondents were asked how they would rate Blackwood as a place for shopping on a scale from 'very favourable' to 'not at all favourable'. The results can be seen in table 3.5.1 and figure 3.5.2 below:

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

	1994	1997	2000	2003	2006
<b>Blackwood</b>	<b>84.6</b>	<b>84.5</b>	<b>80.3</b>	<b>79.7</b>	<b>70.8</b>
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 BLACKWOOD as a place for shopping? (% of all respondents)**



Base: 250 respondents overall

Since the four surveys started, Blackwood has had the highest approval rating out of all six centres in the County Borough from 1994 to 2003. The 2006 survey data shows that Blackwood still remains the highest of all six centres (70.8%).

However, this figure has declined by just under a seventh (decreased by 13.8 points) since 1994. This is the largest decrease in the proportion since the surveys were started.

Just over a quarter of respondents (27.6%) stated that they rate the town as 'very favourable' and over two fifths (43.2%) stating 'fairly favourable'.

### 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		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 Blackwood

#### By age group

	Base: Respondents in Blackwood		A/B		C1		C2		D/E		Refused	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: Respondents in Blackwood	250	100.0%	46	100.0%	52	100.0%	73	100.0%	73	100.0%	6	100.0%
18 - 24 years	5	2.0%			1	1.9%	1	1.4%	2	2.7%	1	16.7%
25 - 34 years	14	5.6%	3	6.5%	4	7.7%	5	6.8%	2	2.7%		
35 - 44 years	41	16.4%	10	21.7%	11	21.2%	13	17.8%	7	9.6%		
45 - 54 years	44	17.6%	6	13.0%	10	19.2%	16	21.9%	11	15.1%	1	16.7%
55 - 64 years	60	24.0%	11	23.9%	9	17.3%	19	26.0%	19	26.0%	2	33.3%
65 years or above	85	34.0%	16	34.8%	17	32.7%	19	26.0%	32	43.8%	1	16.7%
Refused	1	.4%									1	16.7%

Base: 250 respondents in Blackwood

#### By gender

	Base: All respondents		Location											
	Num	%	Bargoed		Blackwood		Newbridge		Risca		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%
Male	395	26.3%	60	24.0%	67	26.8%	71	28.4%	65	26.0%	63	25.2%	69	27.6%
Female	1105	73.7%	190	76.0%	183	73.2%	179	71.6%	185	74.0%	187	74.8%	181	72.4%

Base: 250 respondents in Blackwood

## 4.0 On-Street survey

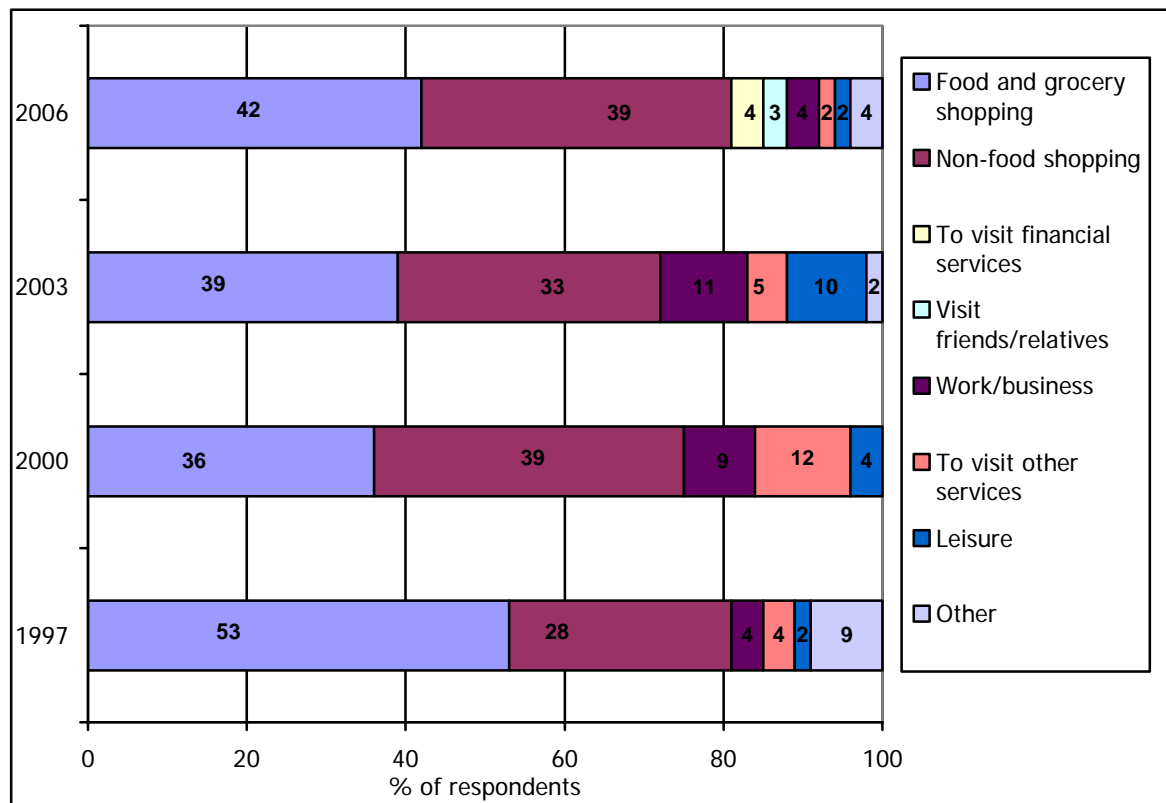
A total of 201 face-to-face interviews were conducted in Blackwood town centre, in July 2006. Interviews were conducted in four locations, namely

- 1) On the High Street
- 2) Market Place
- 3) Market square
- 4) North Blackwood retail park

### 4.1 Reasons for visiting Blackwood 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: 201 respondents

Food and grocery shopping (42%) and non-food shopping (39%) were the main reasons for respondents visits to Blackwood. This is a familiar pattern from previous surveys, with the number of non-food shoppers increasing slightly from the 2003 survey (36%).

Collectively, those visiting Blackwood for shopping equates to just over four fifths of all respondents (81%), with non-food shopping being the highest percentage it has ever been.

A small number of people were visiting for work/business reasons or to visit financial services (both 4%).

When asked which other activities they would be carrying out on their visit to Blackwood town centre, those who were combining other activities were most likely to be combining their main reason for visiting with non-food shopping (33%) and food shopping (18%).

#### 4.2 Travelling to Blackwood

Respondents were next asked a series of questions about their journey to Blackwood. 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.

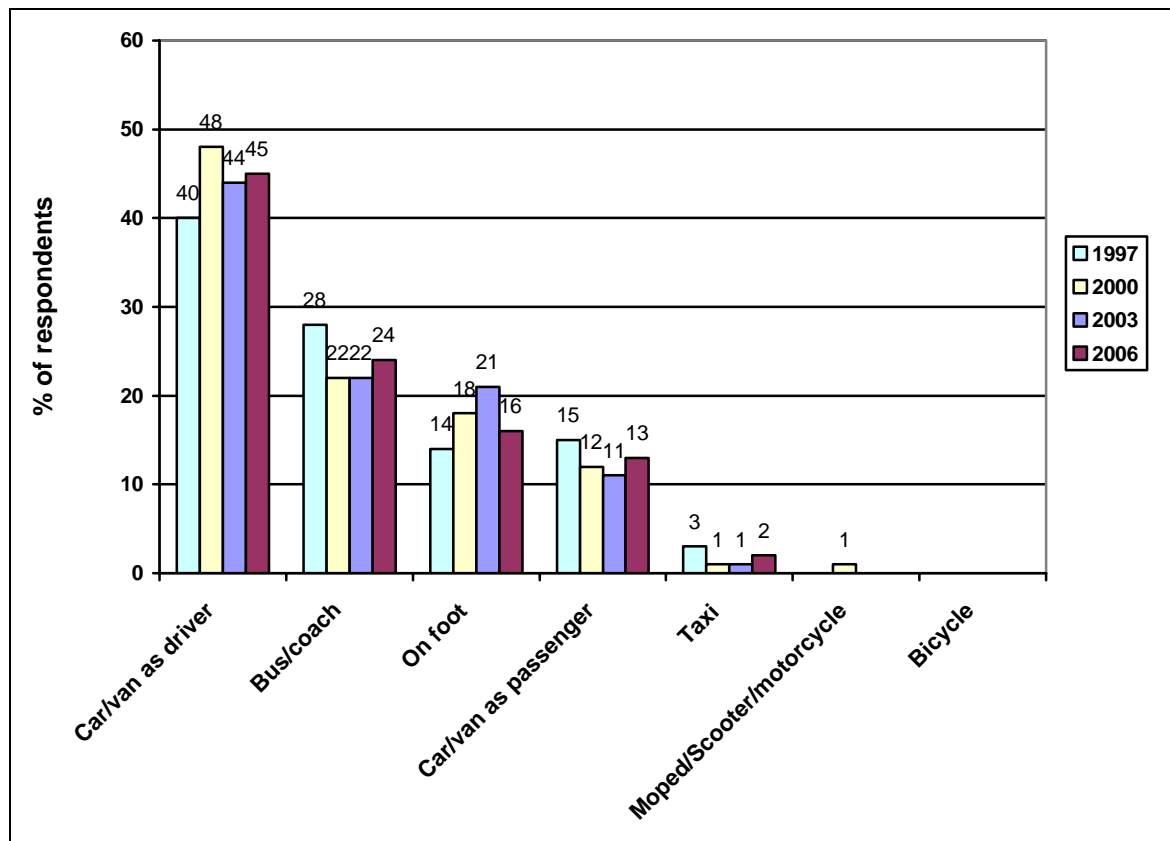
The majority of respondents (98%) had gone straight from home to Blackwood, with the remainder doing so from work (2%).

Specifically, just over two fifths came from Blackwood (43%), with Pontllanfraith (12%) Newbridge (5%) and New Tredegar (5%) being the other starting locations of note.

Shoppers were then asked about the mode of transport that they used to travel to Blackwood 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: 201 respondents

The most popular method of transport was using a car/van as driver, as just under half (45%) of all respondents stated that they had driven to the town centre. Those travelling by bus/coach equated for slightly under a quarter (24%). The number of people walking to Blackwood has declined, from 21% in 2003 to 16% in the current survey.

Those who travelled by car, some 117 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			
		High Street	Market Place	Market square	North Blackwood retail park
Somerfield store Car park	17	12	27	38	5
A pay and display Car park	43	65	49	38	21
On-street	4	-	7	13	3
Asda voucher car park	24	8	4	13	61
Along the Stretch at Richeleys	7	12	4	-	8
Dropped off	4	4	7	-	3
Place of employment	1	-	2	-	-

Base: 117 respondents

Those respondents travelling by car were most likely to use a pay and display car park (43%) or the Asda voucher car park (24%) when parking in Blackwood.

[Time taken to travel to Blackwood](#)

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

	1994	1997	2000	2003	2006
< 5 minutes	33	21	17	20	15
5-10 minutes	38	40	45	40	50
11-20 minutes	19	28	28	27	27
21-30 minutes	7	7	7	9	3
Over 30 minutes	4	4	3	5	6

The majority of shoppers, approximately half (50%), travel for between 5 and 10 minutes, indicating that there is a strong local component to the nature of the catchment area for shoppers. A further quarter (27%) travel somewhere between 11 and 20 minutes to get to Blackwood.

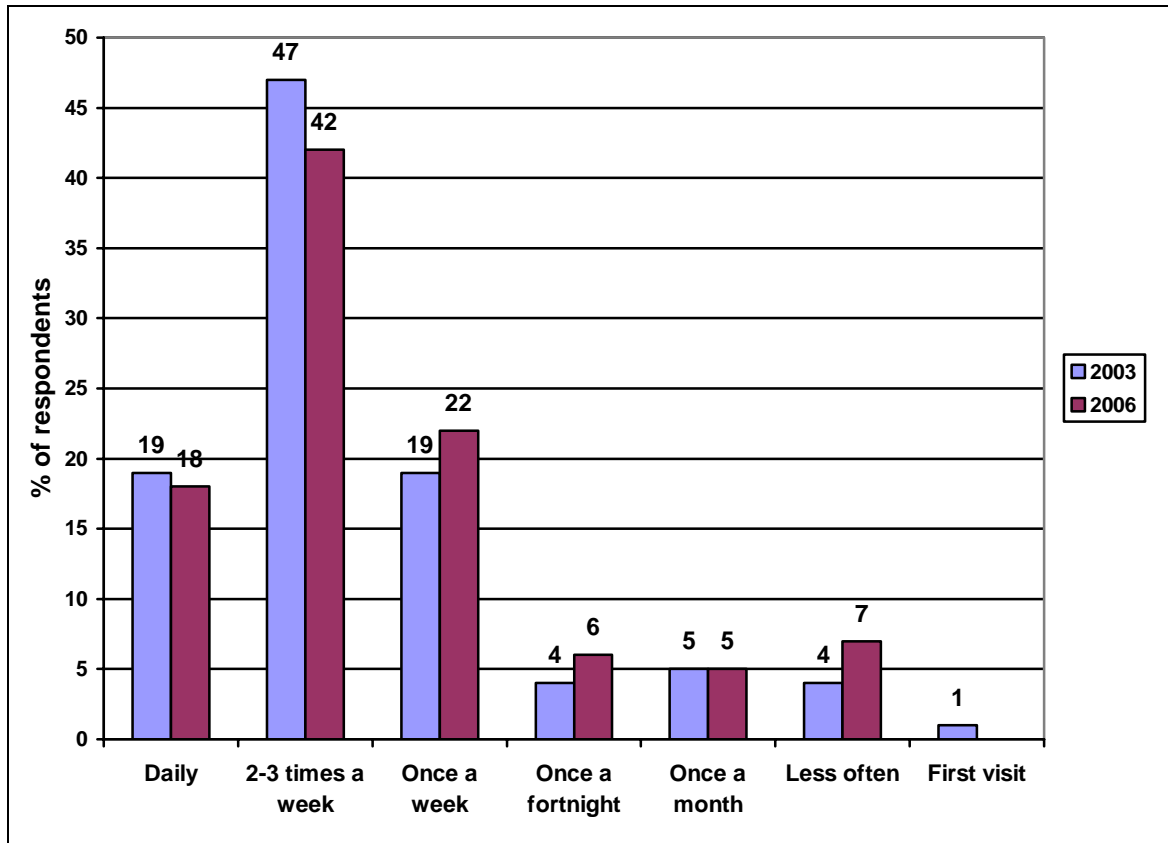
The number of respondents travelling for less than 5 minutes was at its lowest since the surveys began (15%) and perhaps reiterates the drop in the number of people who walk to the town centre.

There has been a slight decrease in the number of visitors travelling for over 20 minutes from the previous survey (2006 – 9%, 2003 – 14%)



Frequency of visits to Blackwood

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



Base: 201 respondents

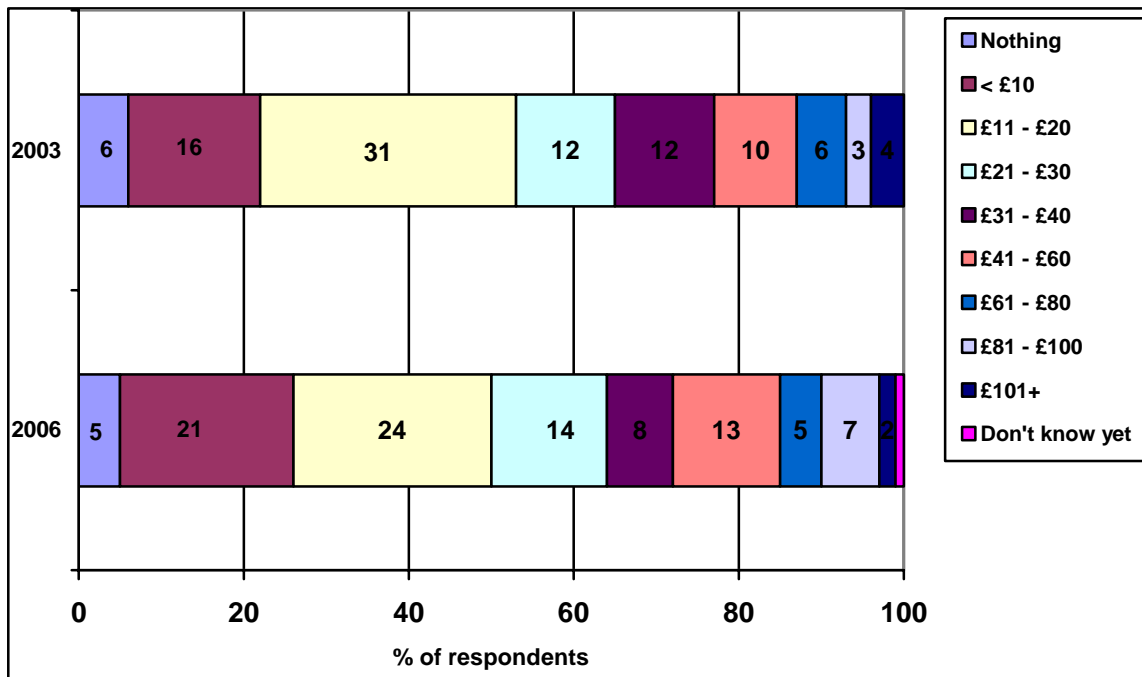
Three fifths (60%) of all respondents visit the town centre at least twice a week or more frequently. Of those, just under a fifth (18%) visit Blackwood on a daily basis and a further two fifths visit 2-3 times a week (42%).

The equivalent figure from the 2003 survey was slightly higher (66% of people visiting at least twice a week or more frequently) and coupled with the fact that the number of people visiting just once a week has gone up (22%) in 2006, it appears that in general the trend is that respondents are choosing to visit Blackwood slightly less often than three years ago.

### 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: 201 respondents

Around a quarter of all respondents had spent or were expecting to spend between £11 - £20 during their shopping trip, with a further fifth (21%) estimating less than a ten pound spend.

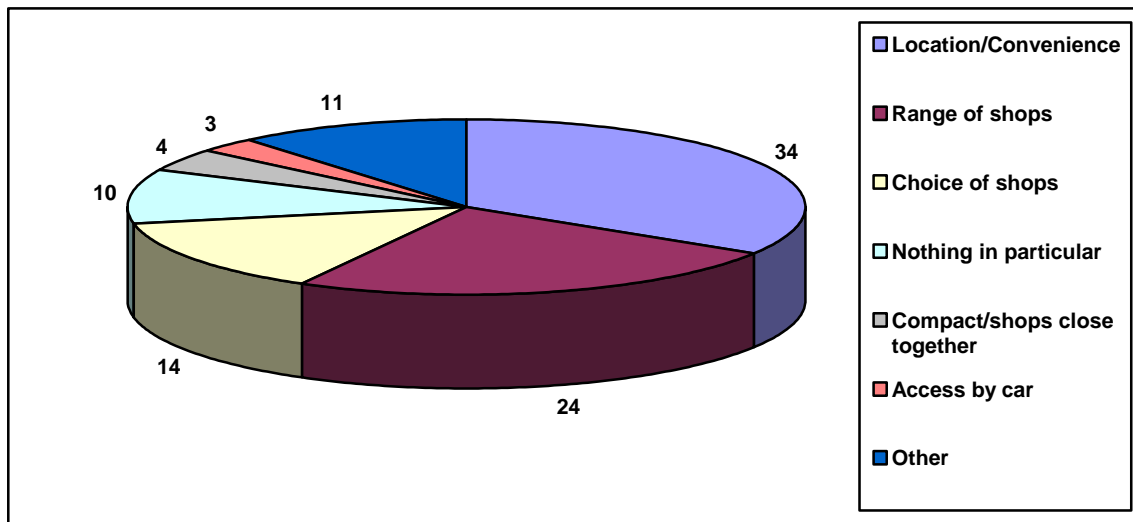
There are no substantial changes in expenditure categories when the 2006 figures are compared with those of 2003. Almost the same percentage of shoppers each year had spent, or were expecting to spend, less than £20 (45% in 2006 and 47% in 2003). Similarly the percentages for expenditures fitting between £21 and £60 were 35% in 2006 and 34% in 2003. The percentage of people who were expecting to spend, or had spent, £60 or more on their shopping trip was identical for each year.

Only 5% of those people surveyed in Blackwood didn't expect to be spending any money whilst on their visit.

#### 4.4 Likes and Dislikes about Blackwood town centre

Finally on the on-street survey, respondents were asked which one thing they particularly like and dislike about Blackwood 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: 201 respondents

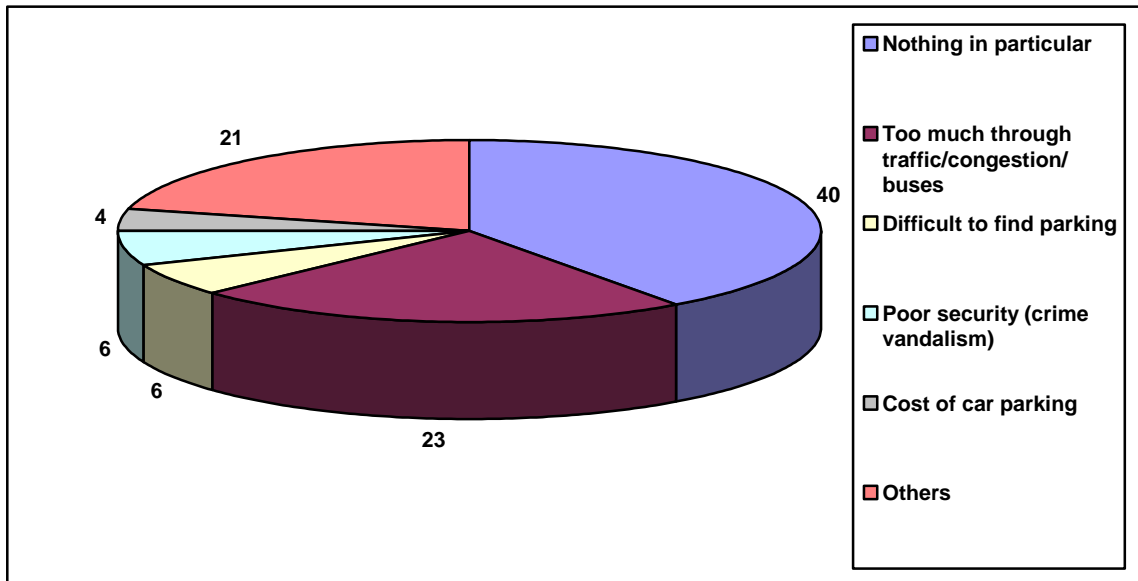
Blackwood's location and convenience was the aspect that respondents most liked about the town centre (34%). Around a quarter (24%) liked the range of shops available in Blackwood and one seventh (14%) were impressed with the choice of shops in the town.

Of the 'other' responses given (11%), the following aspects proved to be favourable for a selection of respondents:

- *"Friendliness/good atmosphere" (3% of all respondents)*
- *"Convenient parking" (2%)*
- *"Has everything I need here" (2%)*

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

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



Base: 201 respondents

Somewhat positively, two fifths of respondents (40%) couldn't think of anything that they particularly disliked about Blackwood town centre. Around a quarter thought that there was "too much through traffic / congestion / buses" (23%). A small percentage showed a particular dislike for the difficulty in finding a parking space (6%).

Of the 'other' responses given (21%), 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
Dislike nothing	38	31
Inadequate/expensive car parking provision	18	17
Volume of traffic/poor roads	14	16
Poor physical condition of centre	5	14
Lack of services/facilities	4	8
Poor choice/range of shops	14	6
All others	10	7

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 Inadequate/expensive car parking provision has been markedly reduced in 2006 (10% of all respondents) compared with 2000 and 2003 (18% and 17% respectively). Unfortunately, people's dissatisfaction with Volume of traffic/poor roads is increasing quite substantially (2000 – 14%, 2003 – 16%, 2006 – 23%).

## 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							
	Num	%	High St		Market place		Market square		North Blackwood retail park	
			Num	%	Num	%	Num	%	Num	%
Base: All respondents	201	100.0%	48	100.0%	89	100.0%	14	100.0%	50	100.0%
A/B	11	5.5%	2	4.2%	4	4.5%			5	10.0%
C1	39	19.4%	8	16.7%	21	23.6%	1	7.1%	9	18.0%
C2	63	31.3%	12	25.0%	32	36.0%	3	21.4%	16	32.0%
D/E	86	42.8%	26	54.2%	32	36.0%	10	71.4%	18	36.0%
Refused	2	1.0%							2	4.0%

Base: 201 respondents

### By age group

	Base: All respondents		SEG									
	Num	%	A/B		C1		C2		D/E		Refused	
			Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	201	100.0%	11	100.0%	39	100.0%	63	100.0%	86	100.0%	2	100.0%
18 - 25 years	14	7.0%	1	9.1%	4	10.3%	2	3.2%	7	8.1%		
26 - 34 years	17	8.5%	2	18.2%	5	12.8%	5	7.9%	5	5.8%		
35 - 44 years	35	17.4%	4	36.4%	7	17.9%	11	17.5%	12	14.0%	1	50.0%
45 - 54 years	36	17.9%	1	9.1%	7	17.9%	9	14.3%	19	22.1%		
55 - 64 years	49	24.4%	3	27.3%	7	17.9%	16	25.4%	22	25.6%	1	50.0%
65 years or more	50	24.9%			9	23.1%	20	31.7%	21	24.4%		

Base: 201 respondents

### By gender

	Base: All respondents		SEG									
	Num	%	A/B		C1		C2		D/E		Refused	
			Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	201	100.0%	11	100.0%	39	100.0%	63	100.0%	86	100.0%	2	100.0%
Male	77	38.3%	2	18.2%	13	33.3%	34	54.0%	28	32.6%		
Female	124	61.7%	9	81.8%	26	66.7%	29	46.0%	58	67.4%	2	100.0%

Base: 201 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, in which location and how frequently they participate in these activities.

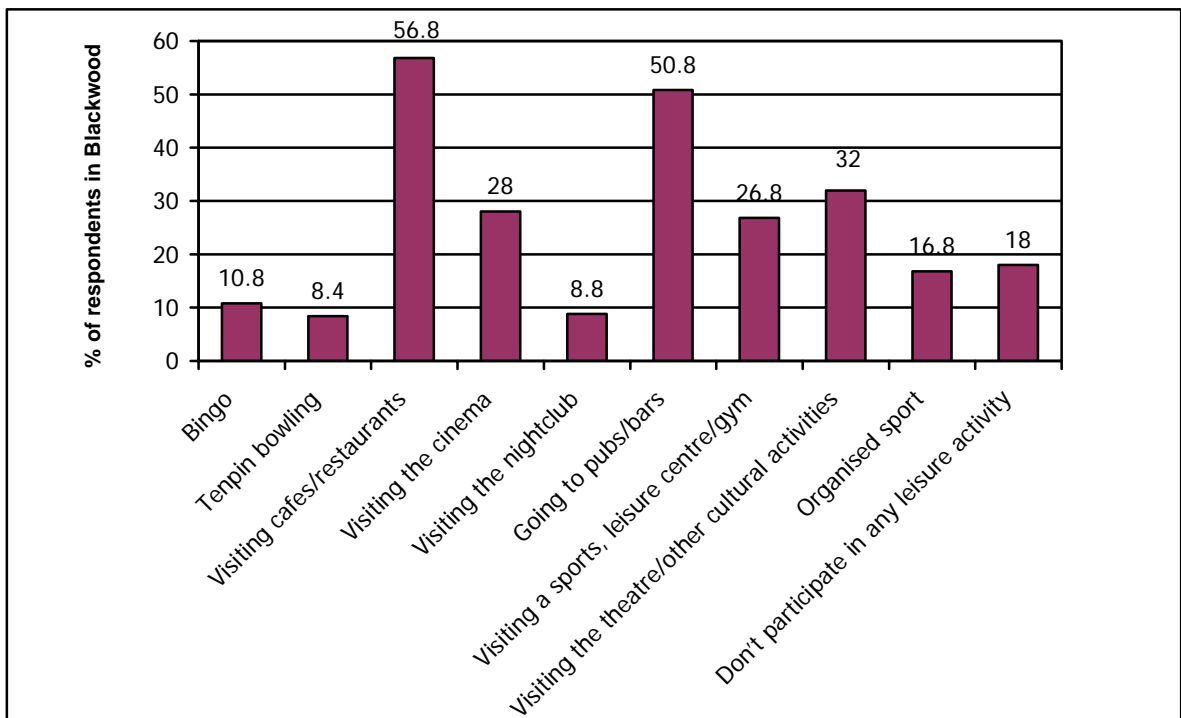
(N.B. The breakdown of the demographics for those who took part can be seen in figure 3.6.1 on page 21.)

A list of activities was read out to the respondents (including an option for those who do not participate in any leisure activity). The following were listed within the survey:

- o Bingo
- o Tenpin bowling
- o Visiting cafes/restaurants
- o Visiting the cinema
- o Visiting the nightclub
- o Going to pubs/bars
- o Visiting a sports, leisure centre/gym
- o Visiting the theatre/other cultural activities
- o Organised sport
- o 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

From the above data, it can be seen that the highest proportion of respondents (56.8%) within the Blackwood area participate in a leisure activity by either visiting a café or a restaurant, of which they visit once a week (29.6%). Other respondents stated that they'd rather go to a pub or a bar also within the Blackwood area, and just over half (50.8%) stated this. The majority of respondents who participate in this type of activity do so in Blackwood once a week. Only 45 respondents (18%) indicated that they do not participate in any leisure activity.

### Bingo

Newport was the most popular location for this activity with a third (33.3%) stating this. Blackwood was the second most popular place to play Bingo, with just under a sixth (14.8%) of all respondents stating this particular location.

The most popular frequency for playing Bingo, was once a week with over half of all respondents (55.6%) indicating this.

### Tenpin Bowling

Respondents based in the Blackwood catchment area specified a large number of locations, which they visited to play tenpin bowling. Over half of all respondents (52.4%) played Tenpin Bowling at Nantgarw. There are no such facilities locally.

The respondents, who do participate in Tenpin Bowling, usually do this less than once a month with over half (52.4%) indicating this and a third (33.3%) stating they play once a month.

### Cafés/Restaurants

Those who visited a café or a restaurant preferred to go to Blackwood with just over a third (36.6%) stating this. Cardiff was second with 22.6%, followed by Newport (listed by 15.5% of respondents).

Nearly a third (29.6%) of those respondents living in the Blackwood area visit a café or a restaurant once a week.

### Cinema

Nantgarw was the most popular area to visit the Cinema, with nearly half (48.6%) indicating they go there. Only one respondent (1.4%) stated that they go to Blackwood to visit the Cinema.

The respondents who visit the Cinema stated that they go either once a month (44.3%) or less often (41.4%).

### Nightclubs

The place that the respondents of Blackwood prefer to frequently visit a nightclub is Cardiff, with nearly two thirds (63.6%) visiting there. Not one respondent had said that they visit Blackwood as an area to visit a nightclub.

The majority of respondents visit a nightclub less often than once a month with nearly a third (31.8%) indicating this.

Pubs/Bars

Blackwood was the most popular area to visit a pub or a bar; with nearly half (43.3%) indicating they go there. The respondents who visit a pub or a bar stated that they go once a week (37.8%).

Leisure Centre/Gym

Those who visited a leisure centre or a gym preferred to go to Blackwood with nearly a third (29.9%) stating this. Newbridge was second with 28.4% followed by Pontllanfraith (listed by 13.4% of respondents).

Just over two fifths (40.3%) of those respondents living in the Blackwood area go regularly to a leisure centre or a gym 2-3 times a week.

Theatre/other cultural activities

Nearly two thirds (62.5%) of all the respondents within the Blackwood area prefer to go to Cardiff, as a place to visit the theatre or any other cultural activities, although 15 respondents (18.8%) stated they go to Blackwood.

Just over two thirds (67.5%) of those respondents living in the Blackwood area regularly visit the theatre or any other cultural activities, but less often than once a month.

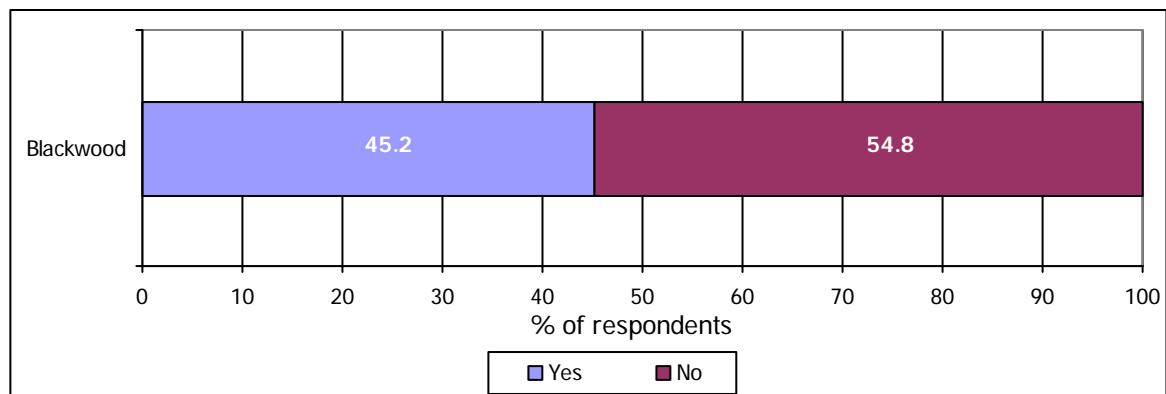
Organised sport

Nearly a sixth (16.8%) of all respondents indicated that they play an organised sport. Nearly a fifth (19%) of these respondents stated Blackwood as the place they play and just over two fifths of the respondents (42.9%) said they play this type of activity once a week.

**5.1 Walking in the countryside**

Another topic that was 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)**

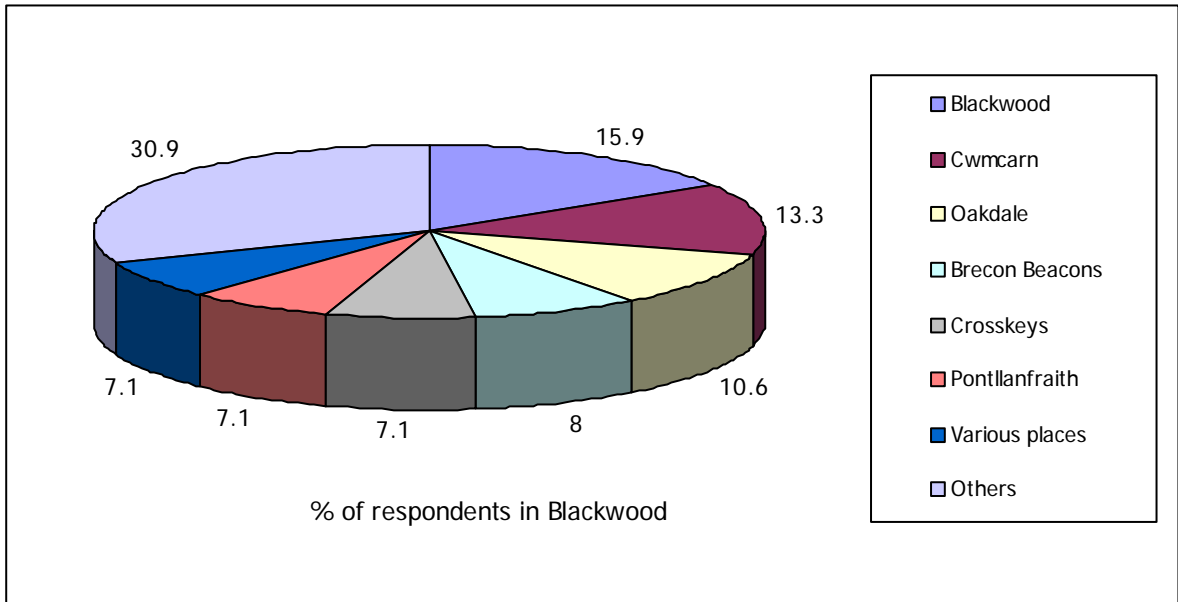


Base: 250 respondents overall



Those who regularly walk in the countryside from the Blackwood catchment area, some 113 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: 113 respondents overall

The 2006 survey revealed that of the respondents living within the Blackwood catchment area, nearly a sixth (15.9%) of all respondents who go walking in the countryside, visit Blackwood. More than 13% visit Cwmcarn and over a tenth of all respondents go to Oakdale (10.6%). Another 8% set off to the Brecon Beacons and under a tenth (7.1%) of the respondents visit the Crosskeys and Pontllanfraith countryside.