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Caerphilly County Borough Council

Shopper Attitude Survey 2006

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Caerphilly Report – August 2006

Finalised by Caerphilly CBC

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1.0 Introduction

1.1 Project Overview

Caerphilly County Borough Council (C.C.B.C.) 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 C.C.B.C. 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 Caerphilly 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) 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 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 Caerphilly 201 interviews were completed at the Castle Court and Cardiff 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 was 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 Caerphilly the period 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 Caerphilly catchment area specified a large number of different stores that they visited to purchase their food and grocery items. In all previous studies the number of respondents who shopped in Caerphilly had remained consistently above the 80% figure, although in the 2006 survey the figure fell below this (77.2%).

- Nearly half (46%) of all respondents listed Asda, Pontygwyndy Road, Caerphilly as the store where they buy most of their household food and grocery items. Morrisons, Caerphilly Town Centre was second, and was listed by just under a fifth (19.2%) of respondents, with under a tenth (7.2%) of respondents stating Tesco Metro in Caerphilly Town Centre as the third most popular location. The fourth most quoted store was Tesco in Ystrad Mynach (listed by 5.6% of respondents); with Tesco, Upper Boat, and Sainsburys, Thornhill, Cardiff both at number five (4% of respondents each store).

- Three respondents within the Caerphilly catchment area had stated that they used the Internet for their household's food and grocery shopping. This represents a tiny percentage, but is the highest number of respondents using this method to shop for food compared with the findings from the five other catchments.

- Morrisons in Caerphilly was the most favoured choice for top-up shopping (13.8% of respondents). The second most used, was Tesco Metro, Caerphilly Town Centre (listed by 12.8% of respondents). The majority of respondents in the Caerphilly area tend to do their top-up shopping within the catchment area.

- When reviewing the previous surveys for this study, the results show that Cardiff has dominated the market for non-food purchases. These previous surveys also showed that Caerphilly was the other top location to visit for these types of goods.

- The 2006 results show that the Cardiff area was once again the location attracting the greatest proportion for non-bulky non-food items (listed by 45.6% of respondents), and the next most visited place was still Caerphilly, totalling just under a third (32%) of all respondents.

- As an alternative to their main centre of choice, the largest number of respondents visit Caerphilly Town Centre (16.4%) for non-bulky non-food items. A further eighth of respondents (12.4%) stated that they visit Cardiff City Centre. Newport City Centre came in a close third with 11.9% choosing this location. A third of respondents stated that they do not visit any other centre for non-food shopping.

- It is apparent that Caerphilly has become the leading destination to shop for bulky non-food items for respondents from within the Caerphilly catchment area. Over two fifths of respondents (41.6%) who buy bulky non-food items choosing to shop there. This figure was a reduction from the 49.2% found in 2003).

- Cardiff was the second location of choice as a place for shopping for these items, with just over a sixth (17.2%) of respondents stating so, of which has shown that the proportion of people visiting this area has decreased since 2003.

- Respondents based in the Caerphilly catchment area specified a large number of stores, which they visited to purchase most of their bulky non-food items. The stores/areas they indicated can be seen in figure 3.2.5. 20.4% of respondents chose B&Q, Crossways, Caerphilly. The remainder of stores at the Crossways retail park attracted a further 18%. The next most popular area was Cardiff City Centre, named by 6.8% of respondents.

- Through the survey years, Caerphilly has become the most popular choice for bulky non-food shopping, having displaced Cardiff into second place.

- Some 206 respondents (82.4%) travelled by car/van for shopping, and they were asked how often they have access to the vehicle. The majority stated that they have access to a car/van all the time.

- Those 234 respondents who indicated they visited Caerphilly (Figure 3.4.2) stated a range of reasons for visiting their local area for shopping. Over two thirds of the respondents (70.1%) stated it was because it was close and/or convenient to home and just over a tenth (11.1%) said they go to Caerphilly to visit a particular shop.

- The small number of respondents (6.4%) who indicated they did not visit Caerphilly were also asked for their reasons. A quarter of them gave poor choice of shops as their reason. In addition, almost a fifth of respondents (18.8%) cited the poor choice of non-food shops, and a similar percentage stated it was due to Caerphilly being inconvenient.

- The highest proportion of respondents, (28.4%), would prefer to have better choice/range of non-food shops within their local area for shopping. Under a tenth of respondents stated they would prefer to have improved parking facilities (7.6%).

- 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 (63.6%) from the Caerphilly catchment area participate in a leisure activity by either visiting a café or a restaurant. They choose a Caerphilly location most often (50.3%), and in terms of frequency, the largest numbers visit once a week (27%). Other respondents stated that they'd rather go to a pub or a bar, with just over half (53.2%) stating this. The largest number of respondents who participate in this type of activity do so in Caerphilly once a week.

- An overwhelming majority of respondents (88%) indicated that they participate in some leisure activity, which is the highest percentage found in the six catchment areas.

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

- The most popular reason for visiting Caerphilly town centre continues to be non-food shopping, as just under a third (32%) stated this as the main reason for their visit. In past surveys there had been a continuing increase in numbers giving this reason to visit. However, this trend appears to have stopped, as the 2006 figure represents a drop in percentage points of 19%.

- The second most popular reason for visiting Caerphilly town centre was, as mirrored in previous surveys, to go food and grocery shopping (28%). In a contrary pattern to the non-food shopping trend, the increased number of respondents going food shopping has reversed the declining trend from previous surveys.

- The majority of respondents (90%) had gone straight from their home to Caerphilly, with the remainder doing so from Work (7%) or a relative's house (2%). Specifically, just over half had come from Caerphilly (57%), with Cardiff (7%) and Ystrad Mynach, Blackwood and Machen (all 4%) being the other starting locations of note.

- The most popular mode of travelling to Caerphilly was by means of a car or van as the driver of the vehicle, which was chosen by over half (54%) of all respondents. This figure is an increase from 2003 when around two-fifths (41%) of all respondents stated they used this mode. Conversely, the proportion of people travelling to Caerphilly on foot, one fifth of all respondents (20%), has decreased dramatically by ten percentage points from the 2003 figure. Both the increase in car users and the decline of those who walk to Caerphilly town centre, are the reverse of the culture from 1997 – 2000.

- The most popular parking location used by those travelling by car to Caerphilly town centre was the Castle Court/Morrisons store car park, which was used by three fifths (60%) of respondents travelling by car.

- The proportion of people travelling to Caerphilly for over 20 minutes and longer (15%) has increased by one-third from 2000 (10%), and more than doubled from the 1997 figure (7%). This suggests that Caerphilly is attracting people from an ever wider area. This year's survey also saw the highest proportion of people travelling for more than 30 minutes (8%) to Caerphilly. However, the number of respondents travelling for up to 5 minutes remains relatively low (14%), as it was in 2003.

- Half of all respondents (50%) stated that they had spent, or were likely to spend, between £1 and £20 during their visit. Of those, just over a quarter (27%) said that they would be spending/had spent less than ten pounds, with a further quarter (23%) stating somewhere in between £11 - £20.

- Caerphilly's location and convenience was the aspect that respondents most liked about the town centre (34%). The second most popular factor (15%) that respondents liked was the castle and the historical aspects associated with Caerphilly. One tenth of respondents particularly liked the range of shops on offer in the town.

- 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 Caerphilly. Just over a tenth (12%) found it "difficult to find parking" in Caerphilly and a similar number (10%), thought that there was too much traffic/congestion.

3.0 Household Telephone survey

A total of 250 interviews were conducted in the catchment area of Caerphilly, over a period, from July 18th – July 28th 2006. A random selection of local resident's within the Caerphilly 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 Caerphilly as a place for shopping.

3.1 Food and grocery shopping

Main food

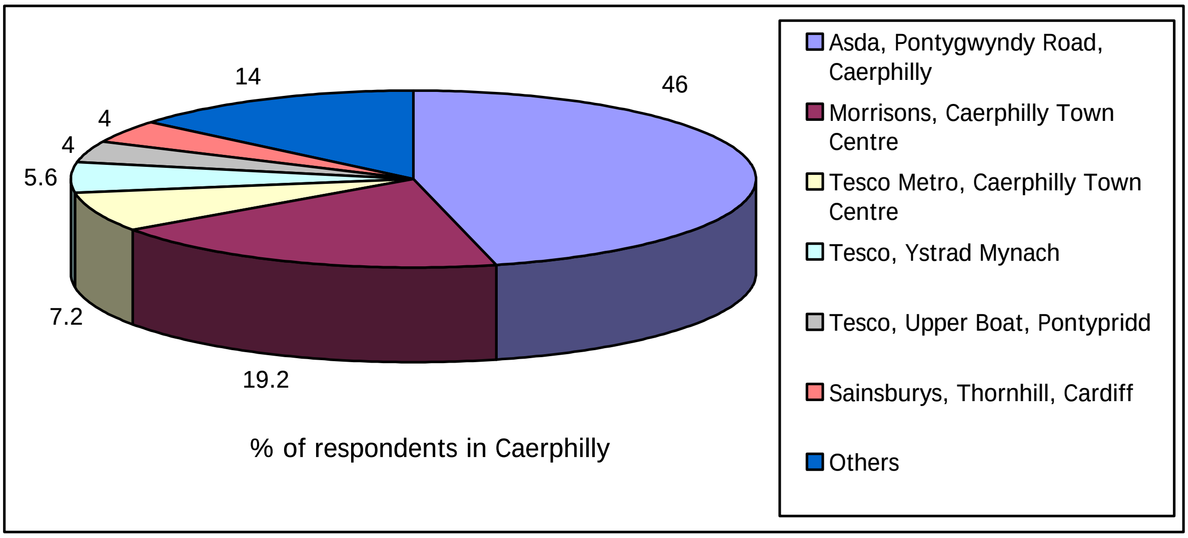
To begin with, respondents were asked to state the location where they buy most of their household food and grocery items. The following table shows the percentage of respondents from within the Caerphilly catchment area that shop in each town for food shopping, building on the information given in the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

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

	1994	1997	2000	2003	2006
Caerphilly	81.6	89.1	88.4	84.1	77.2
Cardiff	7.3	3.5	3.5	5.2	6
Ystrad Mynach	0	0	3.9	2.8	6
Pontypridd	5.6	5.5	3.7	4	4
Other	5.5	1.9	0.5	3.9	6.8

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 Caerphilly 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 Caerphilly catchment area specified a large number of different stores that they visited to purchase their food and grocery items. In all previous studies the number of respondents who shopped in Caerphilly had remained consistently above the 80% figure, although in the 2006 survey the figure fell below this (77.2%).

Looking at the 2006 results overall, nearly half (46%) of all respondents listed Asda, Pontygwyndy Road, Caerphilly as the store where they buy most of their household food and grocery items. Morrisons, Caerphilly Town Centre was second, and was listed by just under a fifth (19.2%) of respondents, with under a tenth (7.2%) of respondents stating Tesco Metro in Caerphilly Town Centre as the third most popular location. The fourth most quoted store was Tesco in Ystrad Mynach (listed by 5.6% of respondents); with Tesco, Upper Boat, Pontypridd and Sainsburys, Thornhill, Cardiff both at number five (listed by 4% of respondents each store).

Comparing the previous survey with the 2006 results, it has shown that Asda still remains the most popular with respondents from the Caerphilly catchment area. The overall decrease of respondents using the Asda store dipped from 56.3% in 2003 to 46% in 2006.

Three respondents within the Caerphilly catchment area had stated that they used the Internet for their household's food and grocery shopping. This is the highest number of respondents using this method to shop for food compared with the findings from the five other catchments.

With regards to the respondents' frequency of visits, travelling habits and expenditure patterns, three fifths (60%) of all respondents normally shop at their main food store once a week, with the majority of respondents (89.6%) travelling from their home in Caerphilly to their main food store, and almost three fifths (57.1%) as driver of a car/van.

Just over a quarter (25.6%) of all respondents spend in the region of £51 - £75 on their main food and grocery shopping, compared with only 17.6% who spend £30 or less.

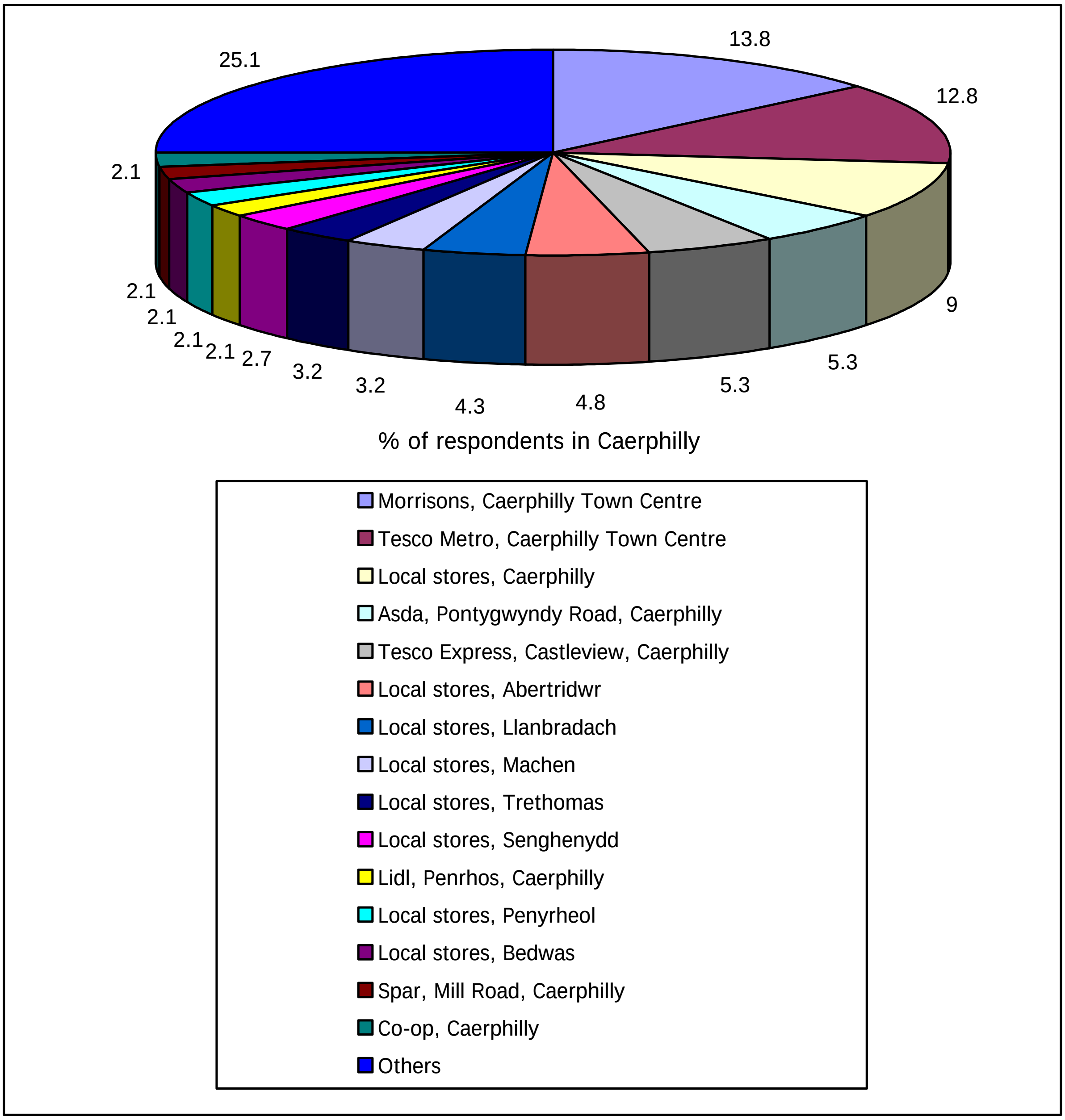
Two thirds (66%) specified that they do not combine their main food shopping with visits to other shops to buy any non-food items.

Just over three quarters (75.2%) 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 in the Caerphilly catchment area specified a large number of stores where they purchased their top-up food and convenience shopping. The main 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: 188 respondents overall

These figures show that Morrisons in Caerphilly was the most favoured choice for top-up shopping (13.8% of respondents). The second most used, was Tesco Metro, Caerphilly Town Centre (listed by 12.8% of respondents).

The table shows that the majority of respondents in the Caerphilly area tend to do their top-up shopping within the catchment area.

3.2 Non-food shopping

Non-bulky non-food

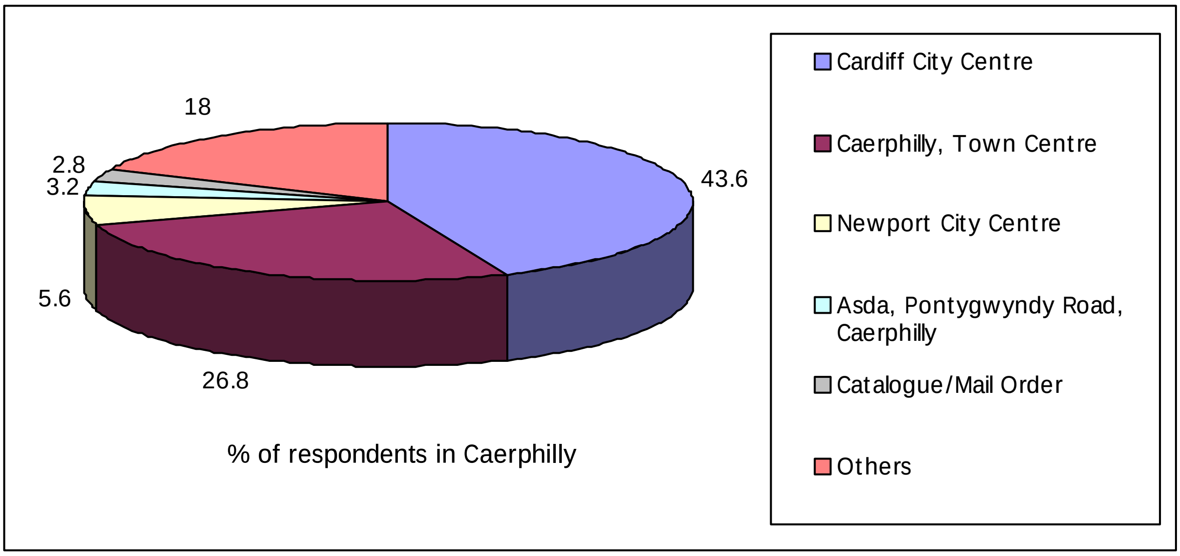
The following table shows the number of respondent's first choice of town for non-food shopping within the Caerphilly catchment area, building on the information given in the 2003, 2000, 1997 and 1994 surveys:

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

	1994	1997	2000	2003	2006
Cardiff	62.8	55.1	49.2	52.4	45.6
Caerphilly	17.1	33.2	33.5	28.2	32
Newport	10.3	7	8.4	9.9	5.6
Mail Order	4.7	2.3	4	4.4	2.8
Other	5.1	2.4	5	5.2	14

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 Caerphilly 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 surveys for this study, the results show that Cardiff has dominated the market for non-food purchases. These previous surveys also showed that Caerphilly was the other top location to visit for these types of goods.

The 2006 results show that the Cardiff area was once again the location attracting the greatest proportion for non-bulky non-food items (listed by 45.6% of respondents), and the next most visited place was still Caerphilly, totalling just under a third (32%) of all respondents.

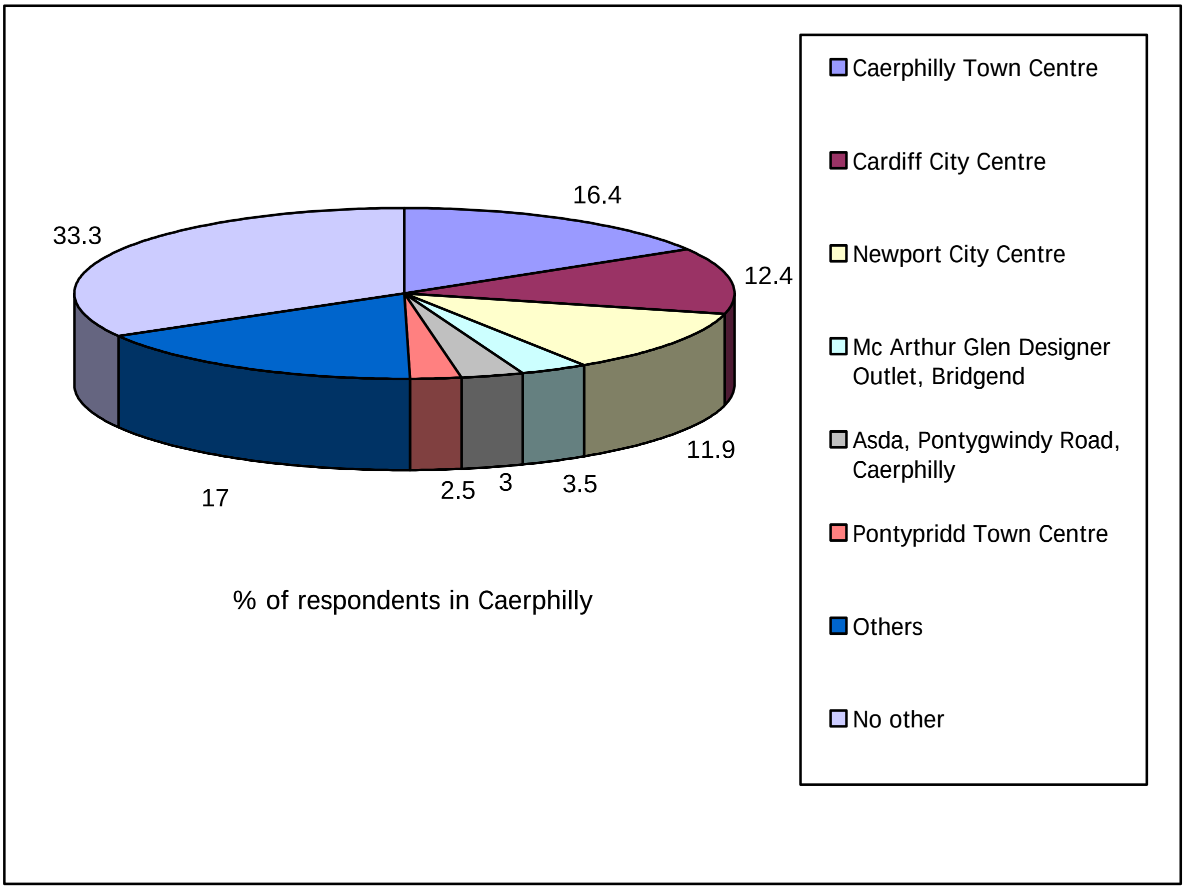
Comparing the 2003 survey data with the 2006 results, there has been a large reduction in those visiting Cardiff (from 52.4% in 2003 to 45.6% in 2006) and Caerphilly was the only choice that achieved an increase of 3.4%.

Overall, most non-food purchases made by people from the Caerphilly catchment area were made in the two main locations, Cardiff and Caerphilly.

With regards to the individual centres visited to purchase non-bulky non-food items (Figure 3.2.2), Cardiff City Centre was still the first choice location (listed by 43.6%), and Caerphilly Town Centre was also second (listed by 26.8%).

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: 201 respondents overall

As an alternative to their main centre of choice, the largest number of respondents visit Caerphilly Town Centre (16.4%) for non-bulky non-food items. A further eighth of respondents (12.4%) stated that they visit Cardiff City Centre. Newport City Centre came in a close third with 11.9% choosing this location. A third of respondents stated that they do not visit any other centre 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.

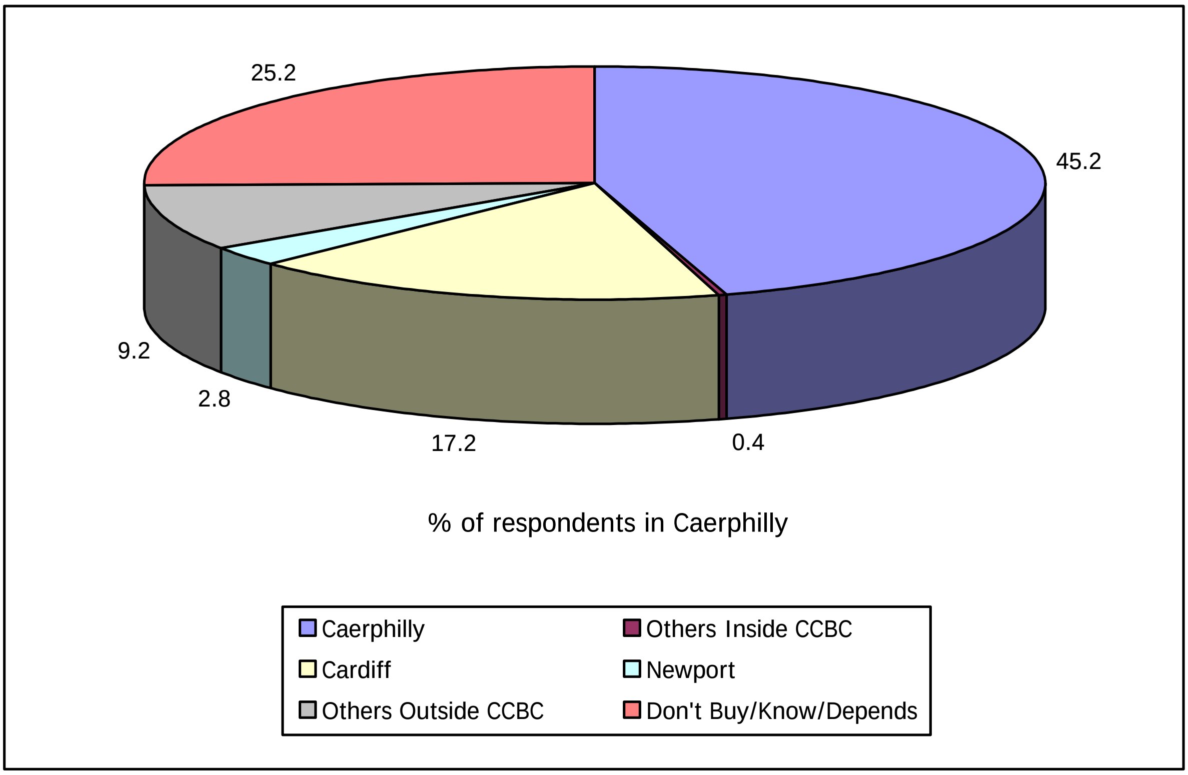
The following table shows respondents' choices of town for bulky non-food shopping from within the Caerphilly catchment area, building on the information given in the 2003, 2000, 1997 and 1994 surveys:

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

	1994	1997	2000	2003	2006
Caerphilly	19.7	30.4	35.2	49.2	45.2
Cardiff	38.9	47.4	29.2	24.2	17.2
Newport	6	8.2	5.6	4.4	2.8
Other	27.3	12.2	18.8	10.4	17.2
Don't do	8.1	2	11.2	11.9	17.6

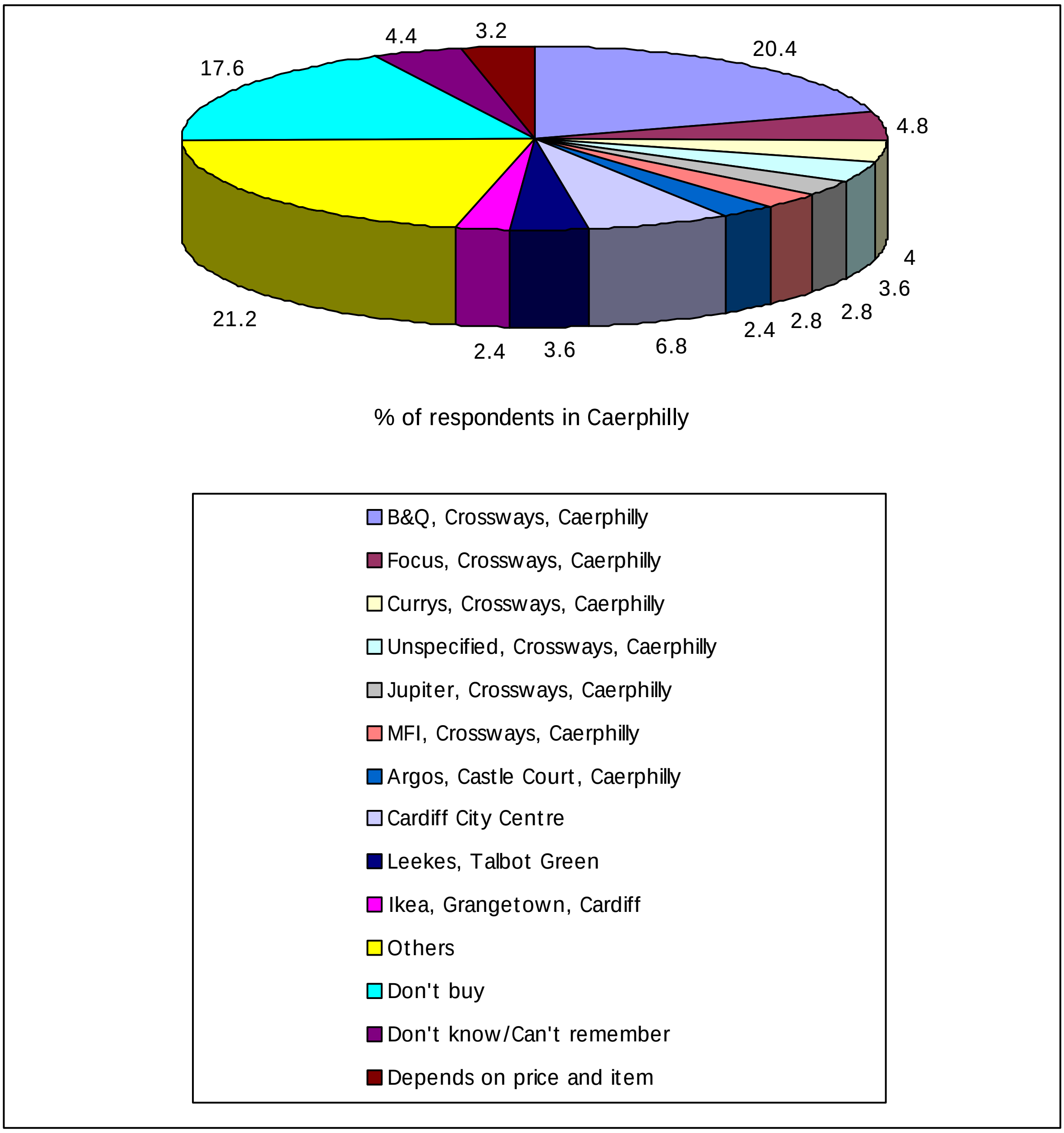
Building on the above data, respondents were asked which specific store they do most of their bulky non-food shopping. The following charts summarise the destinations chosen by respondents from the Caerphilly catchment area.

Figure 3.2.5 – BULKY non-food purchases from the Caerphilly 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: 250 respondents overall

As table 3.2.4 shows, it is apparent that Caerphilly has become the leading destination to shop for bulky non-food items for respondents from within the Caerphilly catchment area. Over two fifths of respondents (41.6%) who buy bulky non-food items choosing to shop there. This figure was a reduction from the 49.2% found in 2003).

Cardiff was the second location of choice as a place for shopping for these items, with just over a sixth (17.2%) of respondents stating so, of which has shown that the proportion of people visiting this area has decreased since 2003.

Of the larger centres, Newport remains a poor third as the choice among respondents from the catchment area for purchasing bulky non-food items.

With regards to the individual areas/stores used to purchase these items (Figure 3.2.6), just over a sixth of respondents (17.6%) do not buy bulky non-food items. This represents a fair increase from all four previous surveys (in 1994 8.1%, in 1997 2%, in 2000 11.6%, in 2003 11.2% and in 2006 11.9%).

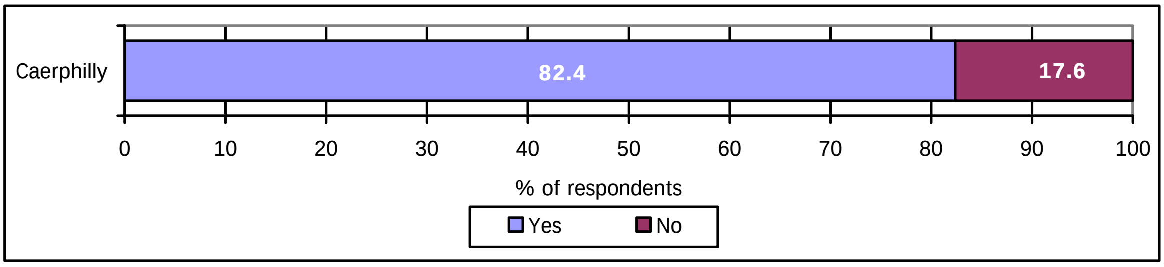
Respondents based in the Caerphilly catchment area specified a large number of stores, which they visited to purchase most of their bulky non-food items. The stores/areas they indicated can be seen in figure 3.2.5. 20.4% of respondents chose B&Q, Crossways, Caerphilly. The remainder of stores at the Crossways retail park attracted a further 18%. The next most popular area after Crossways was Cardiff City Centre, named by 6.8% of respondents.

Through the survey years, Caerphilly has become the most popular choice for bulky non-food shopping, having displaced Cardiff into second place.

3.3 Mode of transport

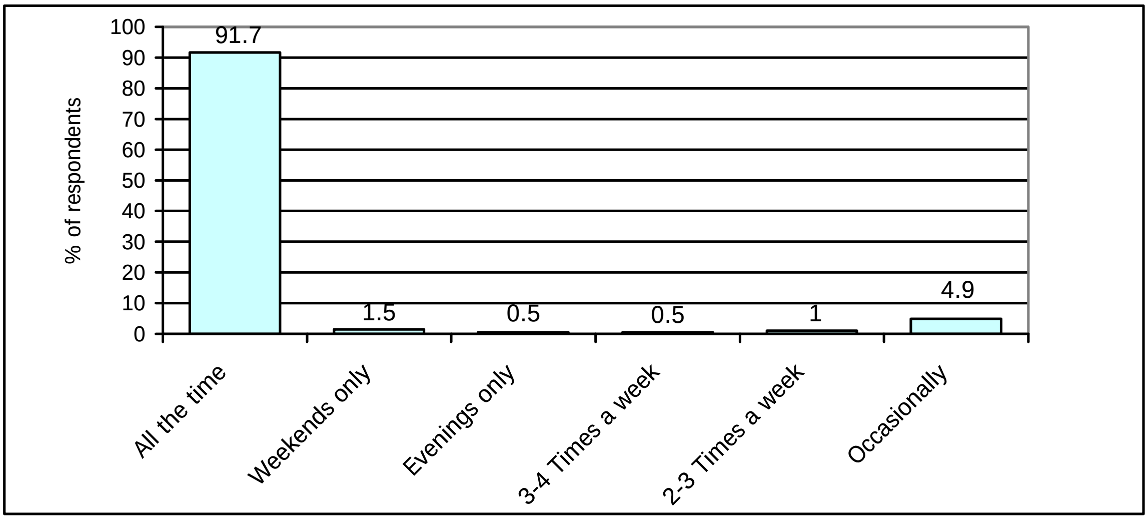
Respondents were next asked a couple of questions about their journey for shopping in general. These included whether they have access to a car/van and how often they have access to the car/van. The following data was uncovered:

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)



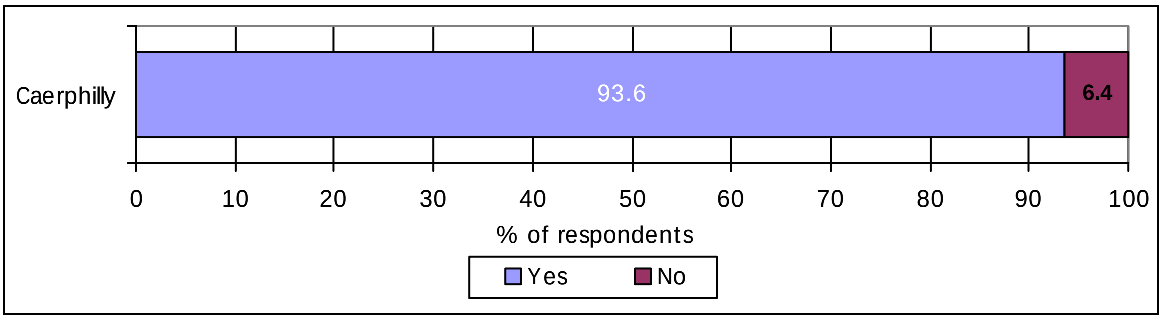
Base: 206 respondents overall

Some 206 respondents (82.4%) travelled by car/van for shopping, and they were asked how often they have access to the vehicle. The majority stated that they have access to a car/van all the time.

3.4 Shopping in Caerphilly

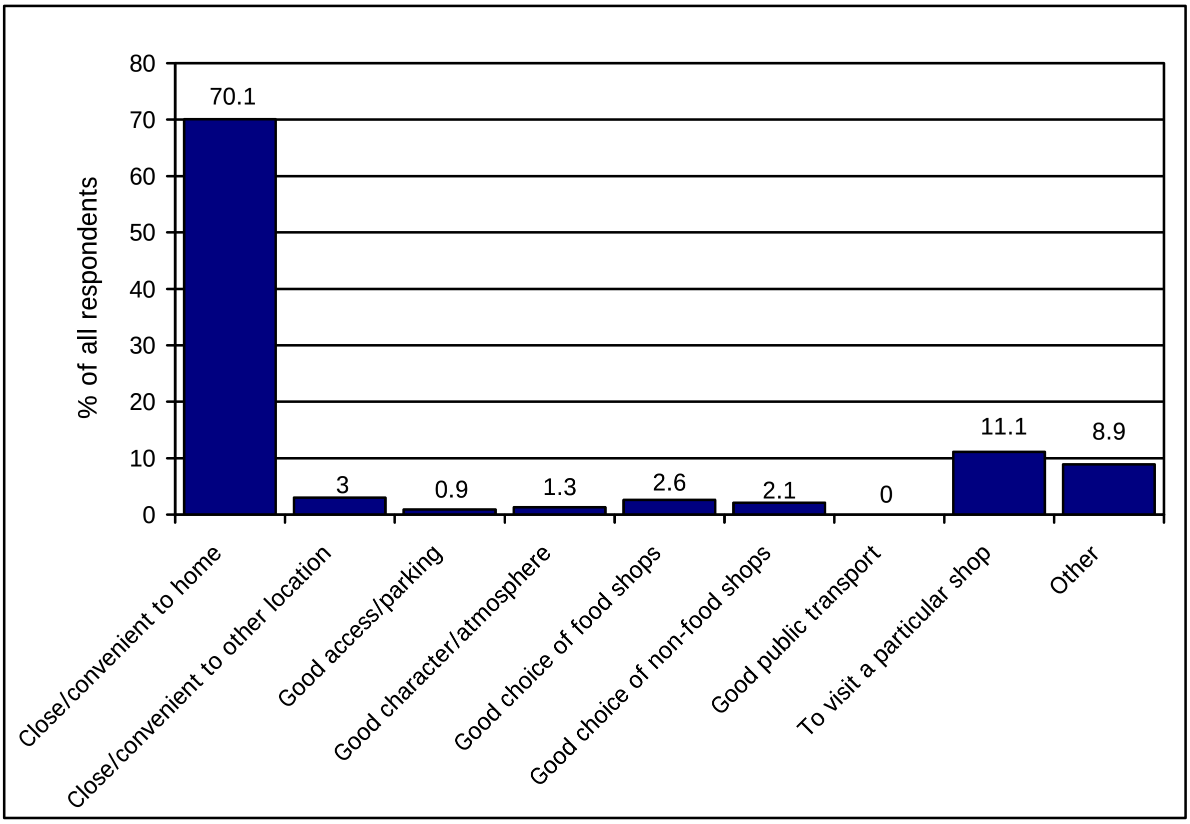
Respondents were asked a series of questions about shopping in Caerphilly. These included whether they visit Caerphilly for shopping, if so why and if not, why not, as well as what potential improvements would make them use Caerphilly as a shopping location more frequently. The following graphs demonstrate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

Figure 3.4.1 – Do you ever visit CAERPHILLY 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; 234 visiting Caerphilly

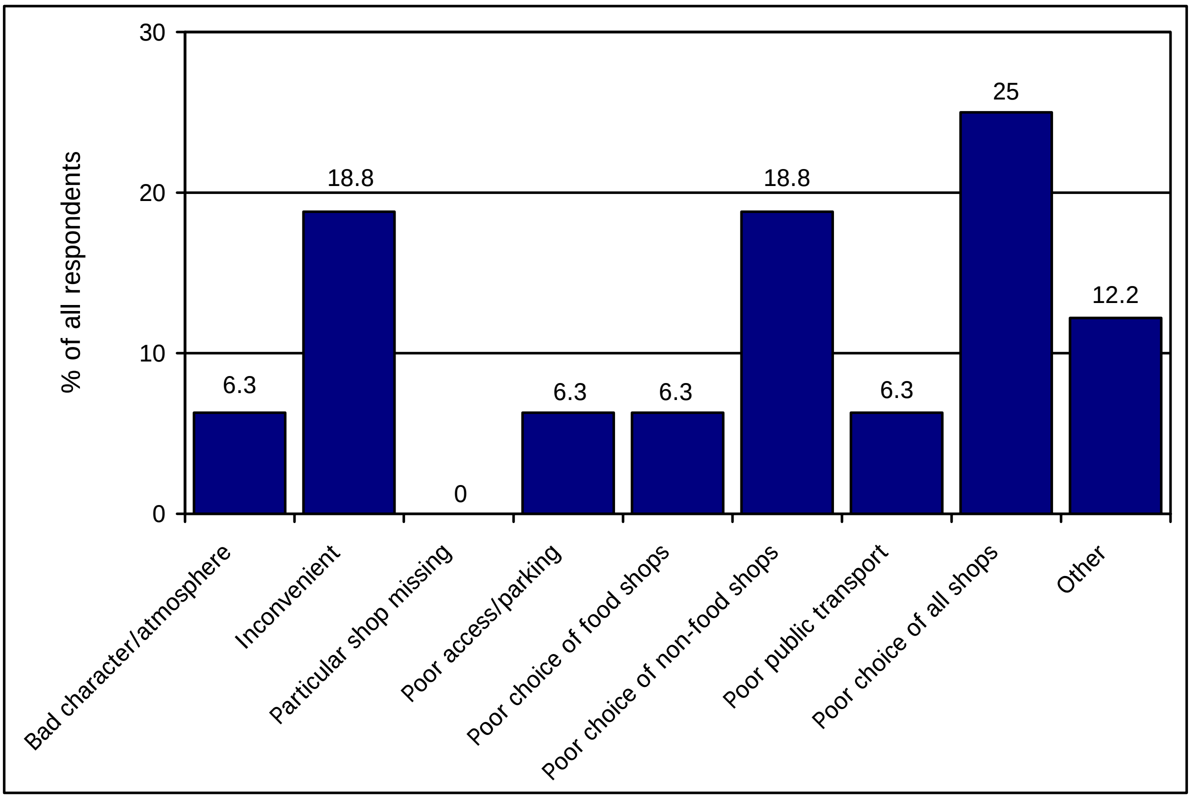
The survey found that the majority of respondents (Figure 3.4.1) visit Caerphilly for shopping.

Those 234 respondents who indicated they visited Caerphilly (Figure 3.4.2) stated a range of reasons for visiting their local area for shopping. Over two thirds of the respondents (70.1%) stated it was because it was close and/or convenient to home and just over a tenth (11.1%) said they go to Caerphilly 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:

- *"Good choice of all shops" (3.8% of all respondents in Caerphilly)*
- *"To visit particular services" (1.3%)*
- *"Habit/familiarity" (1.3%)*

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



Base: Overall 250 respondents; 16 not visiting Caerphilly

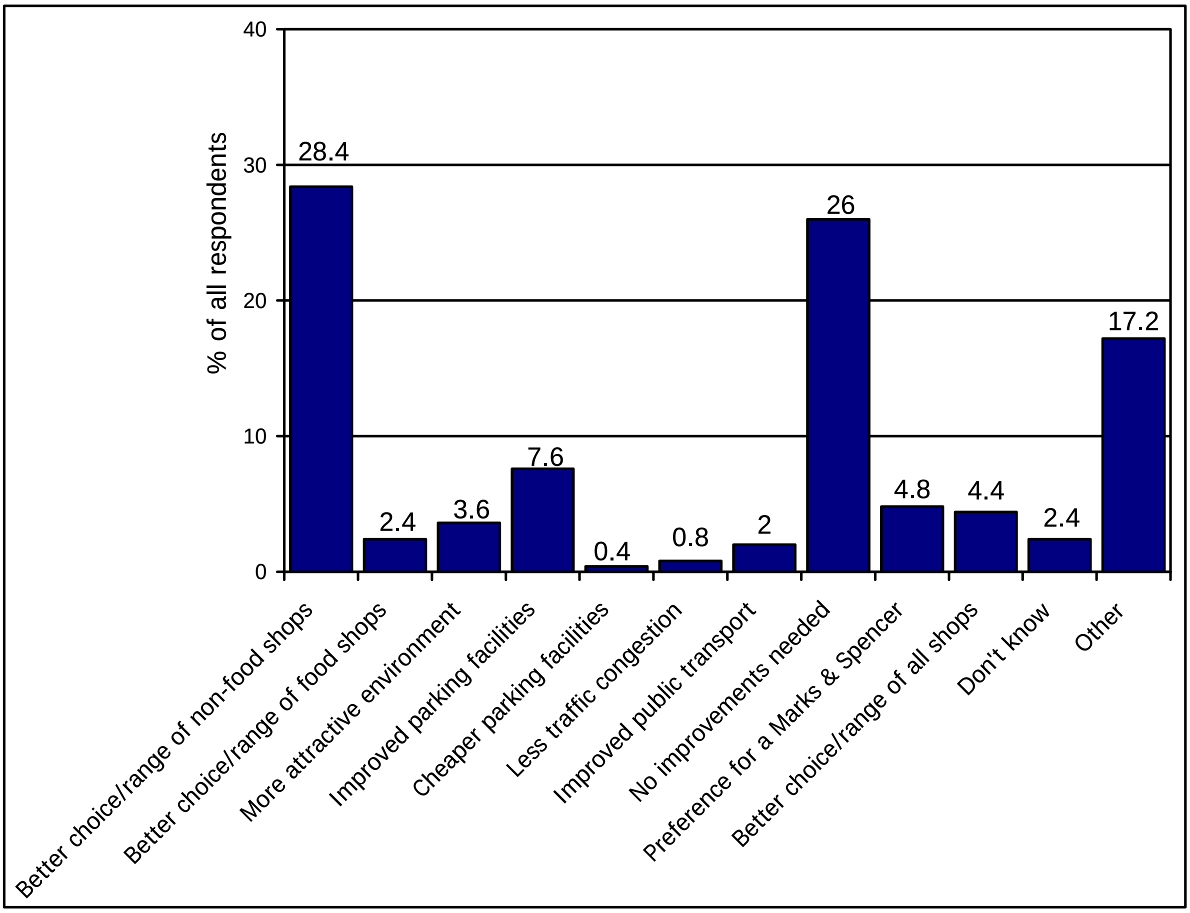
The small number of respondents (6.4%) who indicated they did not visit Caerphilly were also asked for their reasons (Figure 3.4.3). A quarter of them gave poor choice of shops as their reason. In addition, almost a fifth of respondents (18.8%) cited the poor choice of non-food shops, and a similar percentage stated it was due to Caerphilly being inconvenient.

The responses contained under the category 'other' (12.2%) in figure 3.4.3, included the following aspect which proved to be negative for a number of respondents:

- *"Prefer to go elsewhere" (6.3% of all respondents in Caerphilly)*

All respondents within the catchment area of Caerphilly 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 Caerphilly more frequently. The results are indicated in the chart below:

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



Base: 250 respondents overall

It can be seen that the highest proportion of all respondents, (28.4%), would prefer to have better choice/range of non-food shops within their local area for shopping. Under a tenth of respondents stated they would prefer to have improved parking facilities (7.6%).

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

The responses contained under the category 'other' (17.2%) in figure 3.4.4, included the following requirements for development which would satisfy a number of respondents:

- *"Improve the High Street" (1.2% of all respondents in Caerphilly)*
- *"Cleaner streets" (0.8%)*
- *"Preference for a cinema" (0.8%)*

3.5 Approval rating

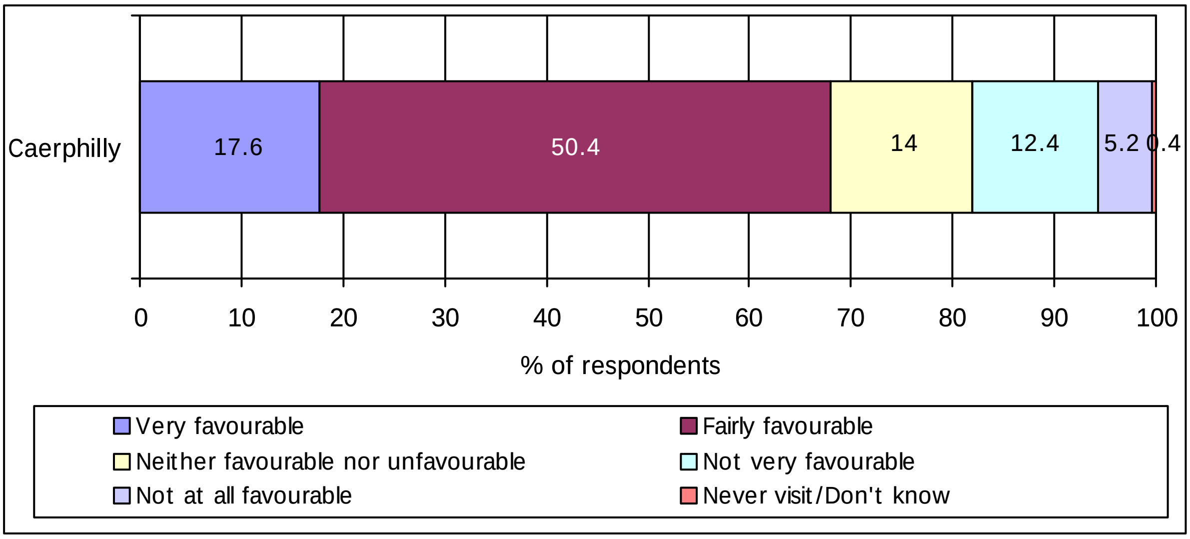
Finally on the CATI survey, respondents were asked how they would rate Caerphilly as a place for shopping on a scale from 'very favourable' to 'not at all favourable'. The results can be seen in table 3.5.1 and figure 3.5.2 below:

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 CAERPHILLY as a place for shopping? (% of all respondents)



Base: 250 respondents overall

Over the past three surveys, Caerphilly had the second highest approval rating out of the sub regional and district centres in the County Borough from 1997 to 2003. In the 2006 survey it has shown that Caerphilly still remains the second highest of all the sub regional and district centres.

However, this figure has decreased by 10.1 percentage points since the previous survey and this was the highest decrease among all six centres over the 2003 level.

Over a sixth of respondents (17.6%) stated that they rate the town as 'very favourable' and over half (50.4%) stating 'fairly favourable'.

Overall, Caerphilly still remains the second highest rated centre, behind Blackwood, which indicates the strength of the town within the County Borough.

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 Caerphilly

By age group

	Base: Respondents in Caerphilly		A/B		C1		C2		D/E		Refused	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: Respondents in Caerphilly	250	100.0%	53	100.0%	70	100.0%	67	100.0%	56	100.0%	4	100.0%
18 - 24 years	2	.8%							2	3.6%		
25 - 34 years	32	12.8%	11	20.8%	14	20.0%	6	9.0%	1	1.8%		
35 - 44 years	40	16.0%	14	26.4%	7	10.0%	11	16.4%	8	14.3%		
45 - 54 years	34	13.6%	9	17.0%	14	20.0%	7	10.4%	3	5.4%	1	25.0%
55 - 64 years	69	27.6%	9	17.0%	20	28.6%	20	29.9%	18	32.1%	2	50.0%
65 years or above	70	28.0%	9	17.0%	14	20.0%	23	34.3%	23	41.1%	1	25.0%
Refused	3	1.2%	1	1.9%	1	1.4%			1	1.8%		

Base: 250 respondents in Caerphilly

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 Caerphilly

4.0 On-Street survey

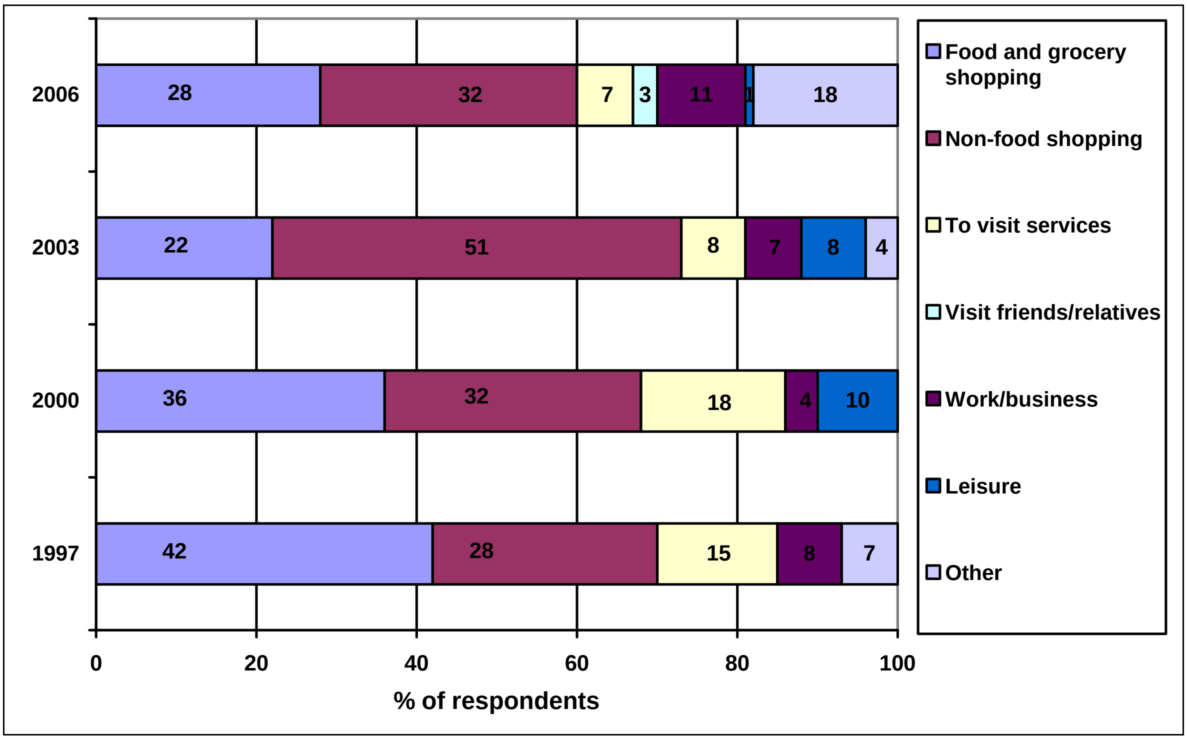
A total of 201 face-to-face interviews were conducted in Caerphilly town centre, in July 2006. Interviews were conducted in two locations, namely

1) The Castle Court area
2) The Cardiff Road area

4.1 Reasons for visiting Caerphilly 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

The most popular reason for visiting Caerphilly town centre continues to be non-food shopping, as just under a third (32%) stated this as the main reason for their visit. In past surveys there had been a continuing increase in numbers giving this reason to visit. However, this trend appears to have stopped, as the 2006 figure represents a drop in percentage points of 19%.

The second most popular reason for visiting Caerphilly town centre was, as mirrored in previous surveys, to go food and grocery shopping (28%). In a contrary pattern to the non-food shopping trend, the increased number of respondents going food shopping has reversed the declining trend from previous surveys.

Collectively, those visiting Caerphilly for shopping equates for three fifths of all respondents (60%).

Just over a tenth were visiting whilst at work, or conducting some form of business, however only 1% were there to use leisure services, dropping from 8% of all respondents in the 2003 survey and 10% in the 2000 study.

Of the other main reasons that were given, browsing and window shopping (7%) and visiting 'The Big Cheese' (4%) were the most noticeable standouts.

When asked which other activities they would be carrying out on their visit to Caerphilly town centre, those who were combining other activities were equally likely to be non-food shopping (18%) or food and grocery shopping (18%) as well. Slightly over a half of all respondents (53%) were not doing anything else, whilst on their trip.

4.2 Travelling to Caerphilly

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

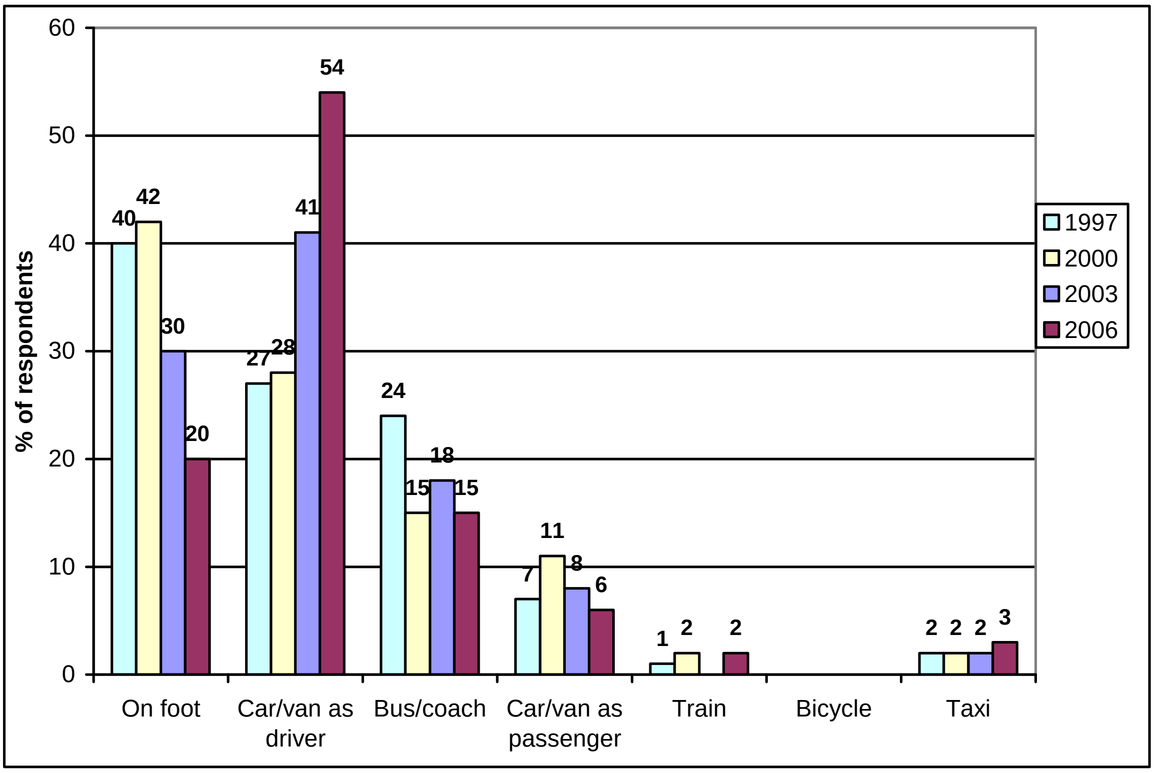
The majority of respondents (90%) had gone straight from their home to Caerphilly, with the remainder doing so from Work (7%) or a relative's house (2%).

Specifically, just over half had come from Caerphilly (57%), with Cardiff (7%) and Ystrad Mynach, Blackwood and Machen (all 4%) being the other starting locations of note.

Shoppers were then asked about the mode of transport that they had used to travel to Caerphilly 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 mode of travelling to Caerphilly was by means of a car or van as the driver of the vehicle, which was chosen by over half (54%) of all respondents. This figure is an increase from 2003 when around two-fifths (41%) of all respondents stated they used this mode.

Conversely, the proportion of people travelling to Caerphilly on foot, one fifth of all respondents (20%), has decreased dramatically by ten percentage points from the 2003 figure.

Both the increase in car users and the decline of those who walk to Caerphilly town centre, are the reverse of the culture from 1997 – 2000.

The respondents who travelled by car 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	
		Castle Court	Cardiff Road	Driver	Passenger
Castle Court/Morrisons store car park	60	77	36	62	36
A pay and display car park	17	14	20	18	-
On Street	13	1	30	11	36
Dropped off	2	-	4	1	9
Place of employment	3	4	2	3	9
Private parking	3	1	4	3	-
Disabled parking	1	-	2	-	9
Rugby club	1	1	-	1	-
Park & ride	1	-	2	1	-

Base: 120 respondents

The most popular parking location used by those travelling by car to Caerphilly town centre was the Castle Court / Morrisons store car park, which was used by three fifths (60%) of respondents travelling by car.

Pay and display car parks were the second most popular choice (17%) and a little over an eighth (13%) parked on-street.

Time taken to travel to Caerphilly

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

	1994	1997	2000	2003	2006
< 5 minutes	36	20	18	12	14
5-10 minutes	34	44	46	51	40
11-20 minutes	22	30	17	27	31
21-30 minutes	5	3	6	8	7
> 30 minutes	3	4	4	3	8

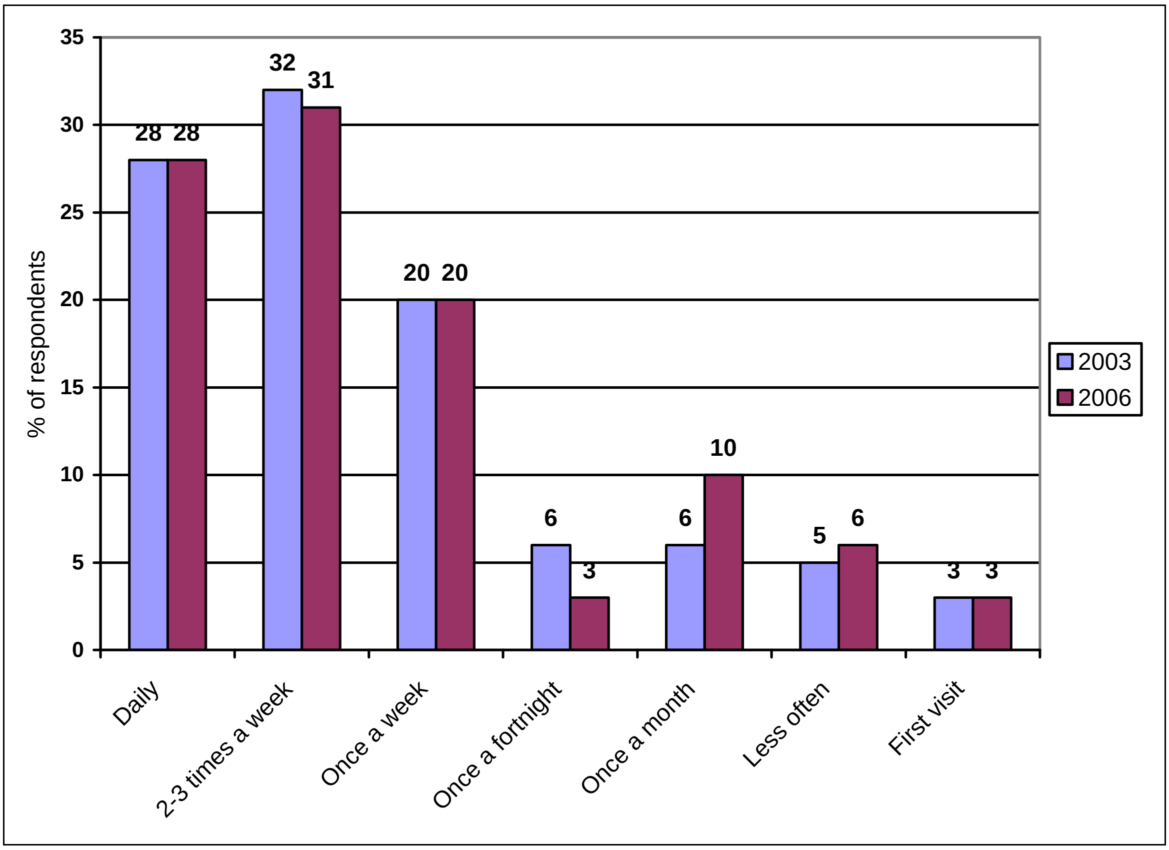
As with the previous three surveys (1997-2003) the highest proportion of respondents travel for between 5-10 minutes to get to Caerphilly.

The proportion of people travelling to Caerphilly for over 20 minutes and longer (15%) has increased by one-third from 2000 (10%), and more than doubled from the 1997 figure (7%). This suggests that Caerphilly is attracting people from an ever wider area. This year's survey also saw the highest proportion of people travelling for more than 30 minutes (8%) to Caerphilly.

However, the number of respondents travelling for up to 5 minutes remains relatively low (14%), as it was in 2003.

Frequency of visits to Caerphilly

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



Base: 201 respondents

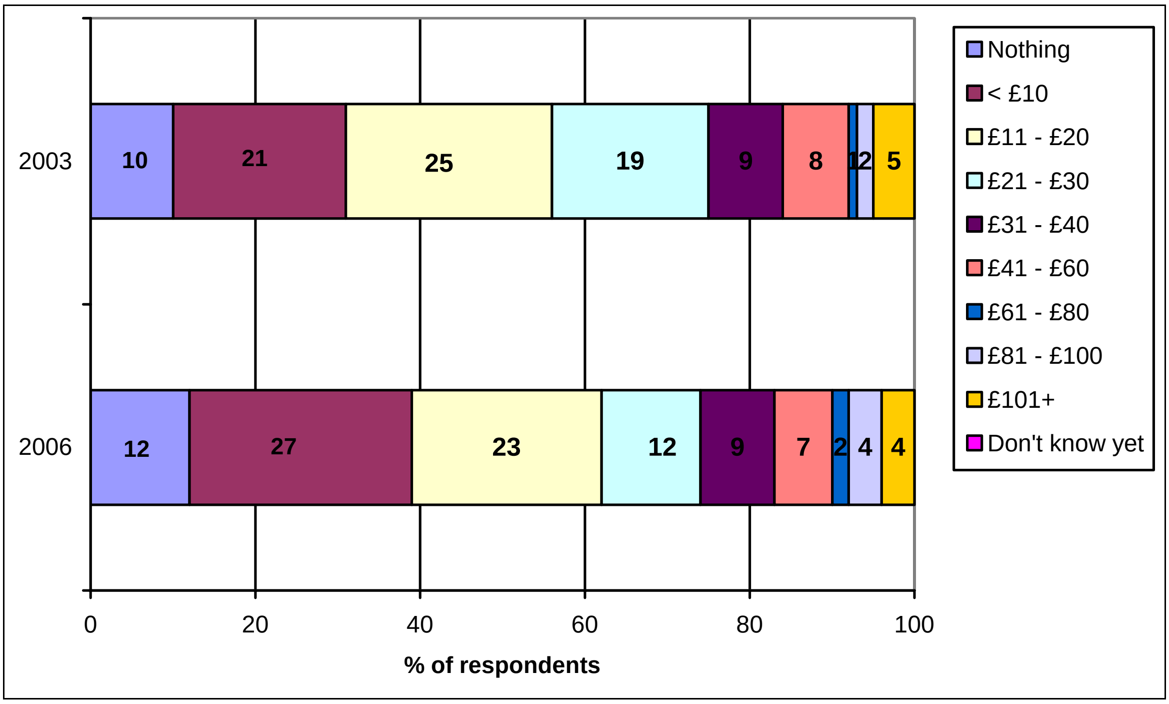
Almost three fifths (59%) of all respondents visit Caerphilly town centre at least twice a week, or more frequently. This includes over a quarter (28%) who visit on a daily basis.

Those visiting once a week or less frequently, accounted for the remaining two fifths of all respondents. Of this group one fifth (20%) said they visited once a week and 6% said they visited Caerphilly 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: 201 respondents

Half of all respondents (50%) stated that they had spent, or were likely to spend, between £1 and £20 during their visit. Of those, just over a quarter (27%) said that they would be spending/had spent less than ten pounds, with a further quarter (23%) stating somewhere in between £11 - £20.

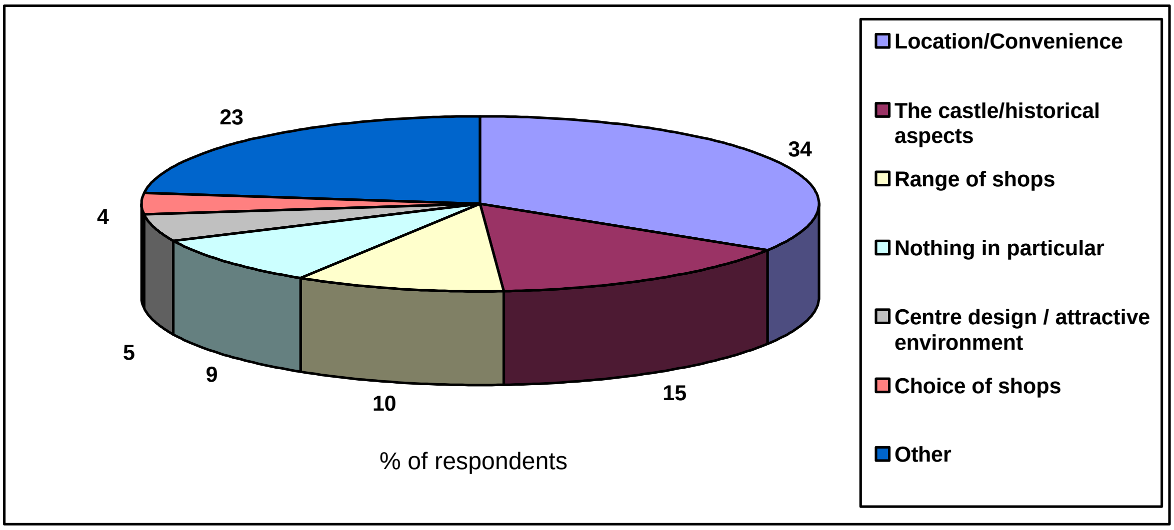
Just under a tenth (9%) said that they would be spending/had spent £31 - £40 and those who didn't expect to be spending any money whilst on their visit accounted for a similar proportion (12%).

The percentage of those who had spent or were expecting to spend greater than £60 on their trip has also slightly increased (2006 – 10%, 2003 – 8%).

4.4 Likes and Dislikes about Caerphilly town centre

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

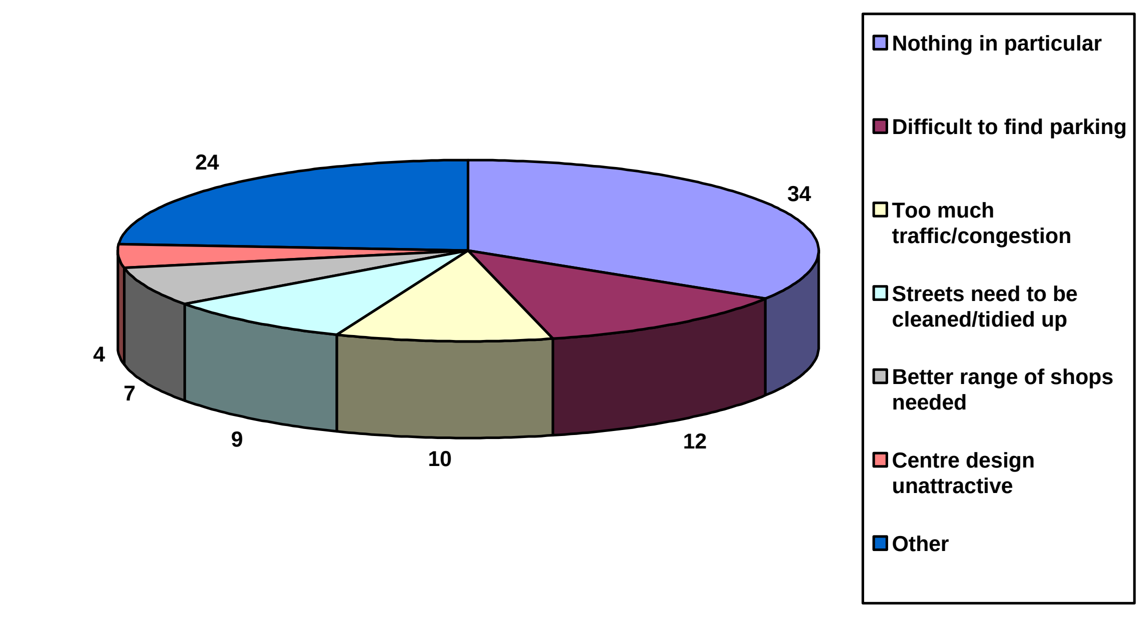
Caerphilly's location and convenience was the aspect that respondents most liked about the town centre (34%). The second most popular factor (15%) that respondents liked was the castle and the historical aspects associated with Caerphilly. One tenth of respondents particularly liked the range of shops on offer in the town.

Of the 'other' responses given (23%), the following aspects proved to be favourable for a number of respondents:

- *"Centre design/attractive environment" (5% of all respondents)*
- *"Choice of shops" (4%)*
- *"Floral displays" (3%)*
- *"Access by car" (3%)*
- *Convenient parking (3%)*

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

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



Base: 201 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 Caerphilly. Just over a tenth (12%) found it "difficult to find parking" in Caerphilly and a similar number (10%), thought that there was too much traffic/congestion.

Of the 'other' responses given (24%), the following aspects proved to be unfavourable for a selection of respondents:

- *"Split into areas/spread out" (3% of all respondents)*
- *"Poor access by car" (3%)*
- *"Poor choice/quality of places to eat/drink" (3%)*

Previous results (2000 – 2003)

	2000	2003
Dislike nothing	43	40
Poor choice / range of shops	14	17
Inadequate/expensive car parking provision	10	15
Volume of traffic/poor roads	8	7
Lack of services/facilities	6	6
Poor physical condition of centre	10	3
All others	10	12

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 is no longer the most frequently stated factor as something that is disliked about Caerphilly. In the latest survey this dislike was overtaken by concerns over 'difficulty in parking', by 'traffic/congestion' and by quality of the 'street environment'.

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	%	Castle Court		Cardiff Road		Male		Female	
			Num	%	Num	%	Num	%	Num	%
Base: All respondents	201	100.0%	101	100.0%	100	100.0%	88	100.0%	113	100.0%
A/B	20	10.0%	10	9.9%	10	10.0%	12	13.6%	8	7.1%
C1	76	37.8%	35	34.7%	41	41.0%	30	34.1%	46	40.7%
C2	73	36.3%	37	36.6%	36	36.0%	34	38.6%	39	34.5%
D/E	31	15.4%	19	18.8%	12	12.0%	11	12.5%	20	17.7%
Refused	1	.5%			1	1.0%	1	1.1%		

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%	20	100.0%	76	100.0%	73	100.0%	31	100.0%	1	100.0%
18 - 25 years	14	7.0%	1	5.0%	3	3.9%	5	6.8%	4	12.9%	1	100.0%
26 - 34 years	15	7.5%	4	20.0%	6	7.9%	4	5.5%	1	3.2%		
35 - 44 years	34	16.9%	2	10.0%	15	19.7%	14	19.2%	3	9.7%		
45 - 54 years	36	17.9%	4	20.0%	15	19.7%	13	17.8%	4	12.9%		
55 - 64 years	57	28.4%	5	25.0%	19	25.0%	21	28.8%	12	38.7%		
65 years or more	45	22.4%	4	20.0%	18	23.7%	16	21.9%	7	22.6%		

By gender

	Base: All respondents		LOCATION				SEG											
	Num	%	Castle Court		Cardiff Road		A/B		C1		C2		D/E		Refused	
			Num	%	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	201	100.0%	101	100.0%	100	100.0%	20	100.0%	76	100.0%	73	100.0%	31	100.0%	1	100.0%
Male	88	43.8%	48	47.5%	40	40.0%	12	60.0%	30	39.5%	34	46.6%	11	35.5%	1	100.0%
Female	113	56.2%	53	52.5%	60	60.0%	8	40.0%	46	60.5%	39	53.4%	20	64.5%		

5.0 Leisure Activities

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

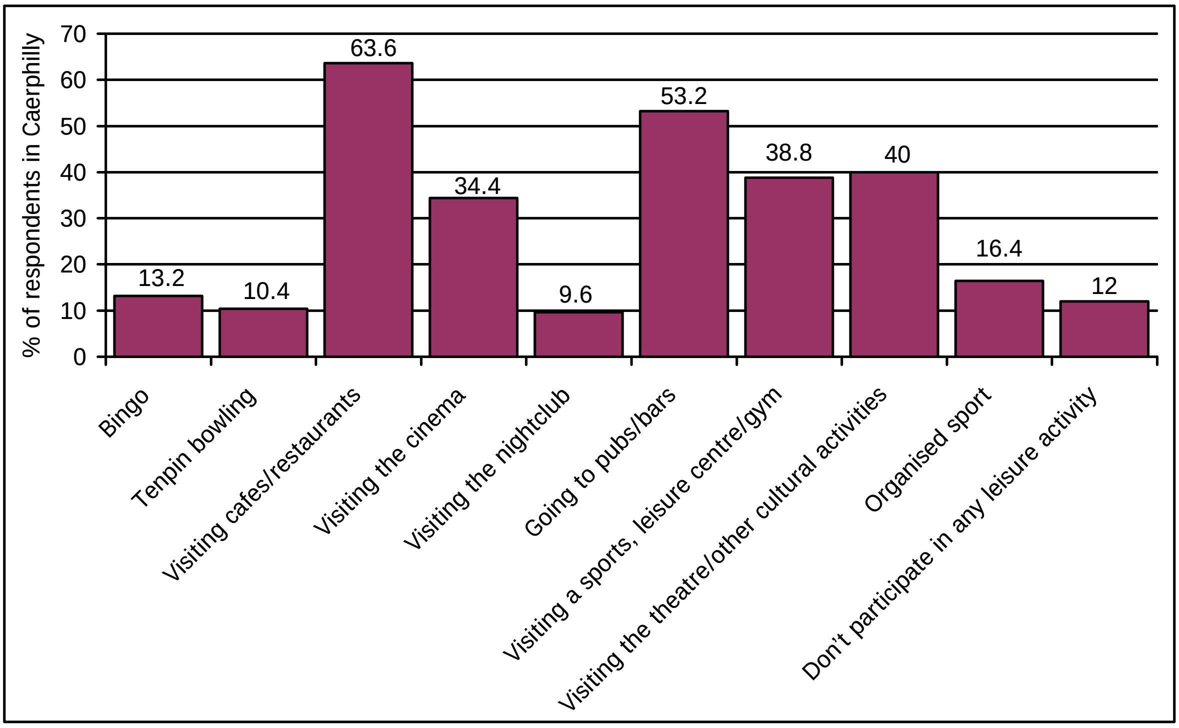
(N.B The breakdown of the demographics for those who took part can be seen in figure 3.6.1 on page 21.)

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:

- 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

From the above data, it can be seen that the highest proportion of respondents (63.6%) from the Caerphilly catchment area participate in a leisure activity by either visiting a café or a restaurant. They choose a Caerphilly location most often (50.3%), and in terms of frequency, the largest numbers visit once a week (27%). Other respondents from the Caerphilly catchment area stated that they'd rather go to a pub or a bar, with just over half (53.2%) stating this. The largest number of respondents who participate in this type of activity do so in Caerphilly once a week.

A large majority of respondents (88%) indicated that they participate in some leisure activity, which is the highest percentage found in the six catchment areas.

Bingo

Nantgarw was the most popular location for this activity with under a third (30.3%) stating this. Only eight respondents (24.2%) had said that they visit Caerphilly to play Bingo.

The most popular frequency of playing Bingo was for those living in Caerphilly, once a week with nearly two fifths of all respondents (39.4%) indicating this.

Tenpin Bowling

Respondents from the Caerphilly catchment area specified a small number of locations, which they visited to play tenpin bowling. Over half of all respondents (53.8%) participate in playing Tenpin Bowling within the Nantgarw area with only three respondents (11.5%) stating Caerphilly.

Those respondents who do partake in Tenpin Bowling usually do this less often than once a month with over two thirds (69.2%) indicating this.

Cafés/Restaurants

Those who visited a café or a restaurant preferred to go to Caerphilly with over half (50.3%) stating this, while a further 34% of respondents chose Cardiff.

Over a quarter (27%) of those respondents living in the Caerphilly area regularly visit a café or a restaurant once a week.

Cinema

A large proportion of respondents visit the cinema in Nantgarw (55.8%). Only 12.8% of respondents had said that they visit Caerphilly as an area to go to the cinema. Since the town doesn't possess a Cinema it may be that many of these respondents really also meant Nantgarw.

The respondents who visit the Cinema stated that they go either once a month or less often (40.7% each).

Nightclubs

The vast majority of respondents from the Caerphilly catchment area who visit a nightclub, prefer to go to Cardiff (91.7%).

The largest number of respondents visit a nightclub once a month with a third (33.3%) indicating this.

Pubs/Bars

Respondents based in the Caerphilly catchment area specified a large number of locations when visiting a pub or a bar. Caerphilly was the most popular area to visit for this type of activity; with half (55.6%) indicating they go there. The respondents who visit a pub or a bar stated that they go once a week (32.3%).

Sports, Leisure Centre/Gym
Those who visited a sport, leisure centre or a gym preferred to go to Caerphilly with nearly three quarters (73.2%) stating this.

Nearly two fifths (39.2%) of those respondents living in the Caerphilly area regularly visit a sport, leisure centre or a gym 2-3 times a week.

Theatre/other cultural activities
The majority (94%) of all the respondents within the Caerphilly area prefer to go to Cardiff, as a place to visit the theatre or any other cultural activities. Not one respondent stated they visit Caerphilly for this type of activity.

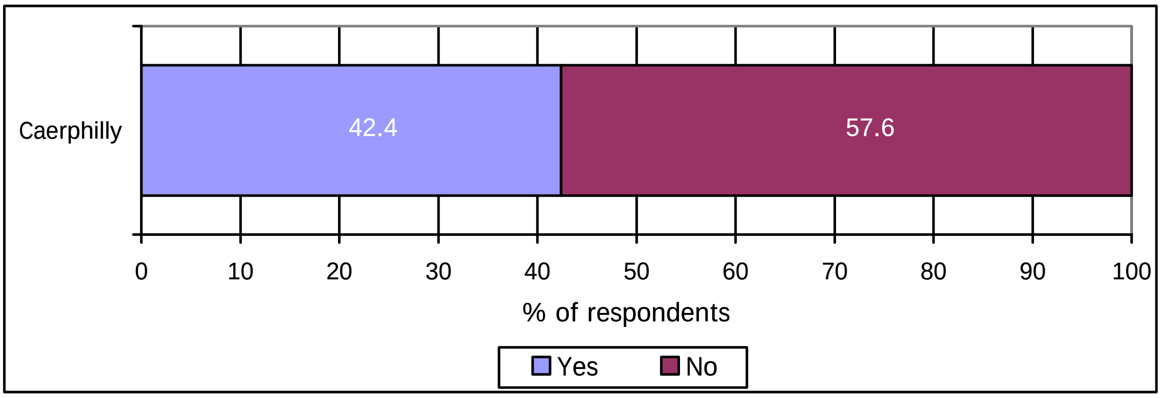
Just over four fifths (84%) of those respondents living in the Caerphilly area regularly visit the theatre or any other cultural activities but less often than once a month.

Organised sport
Just under a sixth (16.4%) of all respondents indicated that they play an organised sport. Almost half (48.8%) of these respondents gave Caerphilly as the place they play an organised sport and nearly a fifth of the respondents (39%) said they play this type of activity once a week.

5.1 Walking in the countryside

Another topic that was introduced in 2006 that the 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:

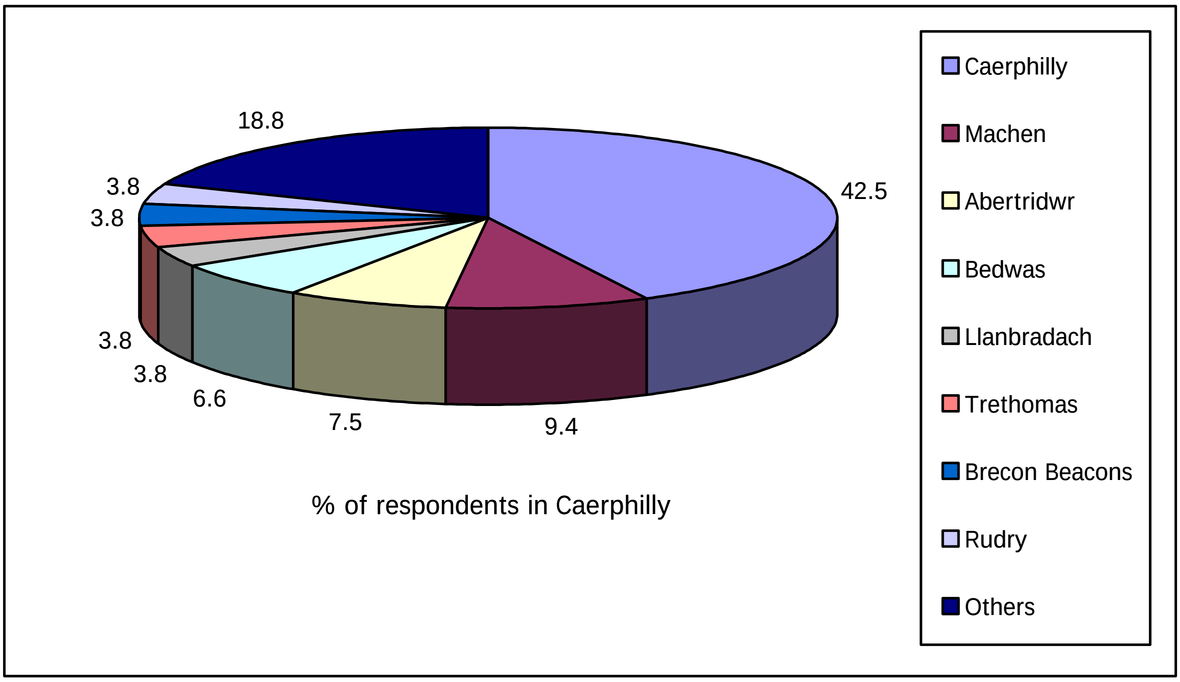
Figure 5.1.1 – Do you or members of your household regularly walk in the countryside? (% of all respondents)



Base: 250 respondents overall

The 106 respondents who regularly walk in the countryside from the Caerphilly catchment area, were asked the location 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: 106 respondents overall

The 2006 survey revealed that of the respondents living within the Caerphilly catchment area, over two fifths (42.5%) of all respondents who go walking in the countryside, visit Caerphilly and under a tenth (9.4%) set off to Machen. Others go to Abertridwr and Bedwas (7.5% and 6.6% respectively).