Caerphilly County Borough Council

Shopper Attitude Survey 2006

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Newbridge 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 Newbridge 153 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 Newbridge 153 interviews were completed in two locations, namely the Victoria Terrace area and the High Street area.

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 403 local residents were interviewed, who resided across the area. Interviewing was conducted within the catchment area of Newbridge over a period, from July 18th – July 28th 2006.

2.2 Main Findings

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

- Respondents living in the Newbridge catchment area specified a large number of different stores that they visited to purchase their food and grocery items. Previous surveys have shown a pattern of declining numbers of respondents from the Newbridge catchment area who shop for food within the area. Custom has decreased from 28.6% in 1994 to only 9.2% in 2006, with more being attracted to the Blackwood area.

- The 2006 survey results have revealed that the number of residents from the Newbridge catchment area shopping for food and grocery items declined in most of the major centres compared with 2003. The only exception was Ystrad Mynach which experienced a slight increase in custom. There was an increase in visits to a large number of alternative centres instead (23.2%).

- In 2006 nearly two fifths of respondents visited Asda, Blackwood to buy most of their household food and grocery items. The second most popular choice was Morrisons, Rogerstone, listed by just under a sixth (16.4%) of respondents. Under a tenth (8.8%) of respondents chose Somerfield, Newbridge which was the third most popular location. The fourth most cited store was Tesco, Ystrad Mynach (6% of respondents), with Sainsburys, Cwmbran fifth (4%) and Asda, Newport sixth (2.8%).

- In 2003 the highest proportion of respondents chose Newport for non-bulky non-food goods (44.8%). That survey also showed that Blackwood and Cardiff were the other two relatively important locations visited to buy these types of goods, and that these three main areas together accounted for the bulk of visits by respondents from the Newbridge catchment area.

- The 2006 results show that respondents from the Newbridge catchment area shopping for non-bulky non-food goods purchases showed a marked preference to visit three foremost locations almost equally. Shops in the Newport area accounted for 22.8% while Blackwood and Cwmbran attracted 21.6 and 21.2% of respondents respectively. The next most visited place for non-bulky non-food items was Cardiff totalling just under one eighth (12%) of respondents.

- In terms of visits to specific town centres for non-bulky non-food purchases, Newport Town Centre was the most chosen location (listed by 21.2%), Cwmbran Town Centre was second (listed by 20.8%) and Blackwood Town Centre was third (listed by 18.8%).

- For respondents from within the Newbridge catchment area Newport has historically been the leading destination to shop for bulky non-food items. In 2006 nearly a fifth of respondents (18.8%) chose to shop there. However, this figure represented a major reduction from that in earlier surveys.

- Cardiff was the second location of choice to shop for these items in 2006, with a tenth of respondents stating so, a proportion that has remained fairly constant throughout the surveys.

- Overall as a choice of town for bulky non-food shopping, Newport still remains the most popular place compared with Cardiff, Cwmbran and Newbridge.

- The survey found that very nearly four fifths (79.6%) visit Newbridge for shopping. Those 199 respondents who indicated they visited Newbridge stated a number of reasons for visiting their local area for shopping. Almost half of the respondents (47.2%) stated it was because it was close and/or convenient to home and over a seventh (14.6%) said they go to Newbridge to visit a particular shop.

- Similarly those 51 respondents who indicated they did not visit Newbridge, were also asked their reasons for not doing so. Nearly a seventh (13.7%) of respondents stated that it was due to poor access and parking and over a tenth (11.8%) stated it was because it was inconvenient.

- While a third of respondents saw no need for improvements, nearly a quarter (23.2%) would prefer to have improved parking facilities within their local area for shopping. Over a fifth of respondents stated they would prefer to have better choice/range of non-food and food shops (overall 18.4%; 6.8% and 11.6 respectively).

- 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 (49.6%) from the Newbridge catchment area participate in a leisure activity by either visiting a café or a restaurant. Respondents from the Newbridge catchment area also stated that they go to a pub or a bar, with just under half (48%) stating this. The majority of respondents who participate in this type of activity do so in Newbridge once a week. Only 35 respondents (14%) 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 Newbridge catchment area who go walking in the countryside, under a sixth (14.9%) visit Abercarn and over a tenth (11.4%) set off to Newbridge. Just under a tenth of all respondents go to Crumlin (9.6%), and 6.1% of the respondents visit Pentwynmawr countryside.

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

- The most popular reason for visiting Newbridge town centre was to for food and grocery shopping, as nearly half (46%) of all respondents were in town for this reason. In a change from the previous survey, non-food shopping was the second highest reason for going to Newbridge, with around a fifth of respondents (21%) visiting for this reason and those using services accounted for 14% of all respondents. In the previous survey in 2003, accessing services had been the second most frequently stated reason for visiting Newbridge (27% of all respondents) and non-food shopping the third (19%).

- The majority of respondents (97%) had gone straight from their home to Newbridge, with the remainder doing so from work (2%) and one respondent coming from another shopping area (1%).

- The most popular method of transport used to travel to Newbridge was by bus/coach, which was used by slightly over a third of all respondents (37%). This figure is a significant increase from the previous surveys and suggests that more people are using public transport.

- Respondents travelling to Newbridge by car chose to park in a public car park (47%) and on-street (46%) on a roughly equal basis.

- The travel time pattern in 2006 for those visiting Newbridge was fairly similar to the trends in the 1997 and 2000 surveys. That is, at least half of all those interviewed (53%) had travelled for a period of between 5 and 10 minutes to get to Newbridge.

- Over two fifths (45%) of all respondents visit Newbridge town centre on a daily basis. This figure has increased slightly from the previous survey (2003 - 39%). Those visiting 2 times per week or more frequently accounted for nearly four fifths of all respondents (78%).

- Over half of all respondents (52%) stated that they had spent or were likely to spend between £1 and £10 during their visit in Newbridge. Around a fifth (21%) of all respondents were spending between £11 and £20 and only 5% of people were intending to spend or had spent more than £80 during their visit.

- The majority of respondents (53%) stated that Newbridge's location and convenience was the one aspect that they most liked about the town centre (figure 4.4.1). The second most popular aspect that respondents liked was the range of shops in the town, although only a tenth stated this (11%). The same percentage (11%) said that there was 'nothing in particular' that they liked about Newbridge.

- When asked what they particularly disliked about Newbridge the most popular response given by respondents was, somewhat positively, 'nothing in particular', which was given by over a third of all those interviewed.

- The highest single negative factor was the difficulty in finding parking, which was stated by 14.4% of all respondents.

- The design, cleanliness and layout of the centre put some people off, as 6% stated that they particularly disliked the centre design and unattractive environment, and the same percentage stated that they would like the streets to be cleaned up.

3.0 Household Telephone survey

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

3.1 Food and grocery shopping

Main food

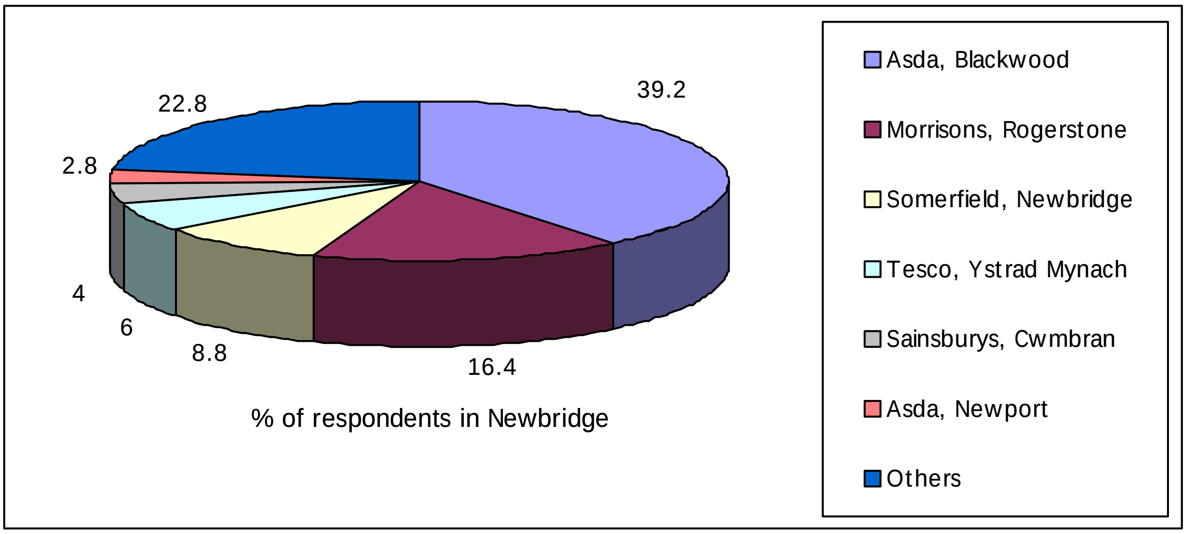
To begin with, respondents were asked to state the location where they buy most of their household food and grocery items. The following table shows the percentage of respondents from within the Newbridge catchment area that shop in each town for food shopping, building on the information given in the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

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

	1994	1997	2000	2003	2006
Blackwood	39.7	36	29.2	42.4	41.6
Newport	12.7	15.6	16.9	28.4	20
Newbridge	28.6	26.4	14.3	14	9.2
Ystrad Mynach	0	0	12.3	4.4	6
Other	19	22	27.3	10.8	23.2

Building on the data above, respondents were asked in which specific store they do most of their food and grocery shopping in. The following chart summarises the store destinations chosen by respondents from the Newbridge 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 Newbridge catchment area specified a large number of different stores that they visited to purchase their food and grocery items. Previous surveys have shown a pattern of declining numbers of respondents from the Newbridge catchment area who shop for food within the area. Custom has decreased from 28.6% in 1994 to only 9.2% in 2006, with more being attracted to the Blackwood area.

The 2006 survey results have revealed that the number of residents from the Newbridge catchment area shopping for food and grocery items declined in most of the major centres compared with 2003. The only exception was Ystrad Mynach which experienced a slight increase in custom. There was an increase in visits to a large number of alternative centres instead (23.2%).

In 2006 nearly two fifths of respondents visited Asda, Blackwood to buy most of their household food and grocery items. The second most popular choice was Morrisons, Rogerstone, listed by just under a sixth (16.4%) of respondents. Under a tenth (8.8%) of respondents chose Somerfield, Newbridge which was the third most popular location. The fourth most cited store was Tesco, Ystrad Mynach (6% of respondents), with Sainsburys, Cwmbran fifth (4%) and Asda, Newport sixth (2.8%).

Newbridge was the only catchment area where none of the respondents mentioned use of the Internet for their household's food and grocery shopping.

With regards to the respondents visiting frequency, travelling habits and expenditure, three fifths (60%) of all respondents normally shop at their main food store once a week, with the vast majority of respondents (94.4%) travelling from their home in Newbridge to their main food store and almost three fifths (57%) travelling by car/van as a driver.

Just over a fifth (22.8%) of all respondents spend in the region of £51 - £75 on their main food and grocery shopping, compared with only 11.6% who spend £30 or less.

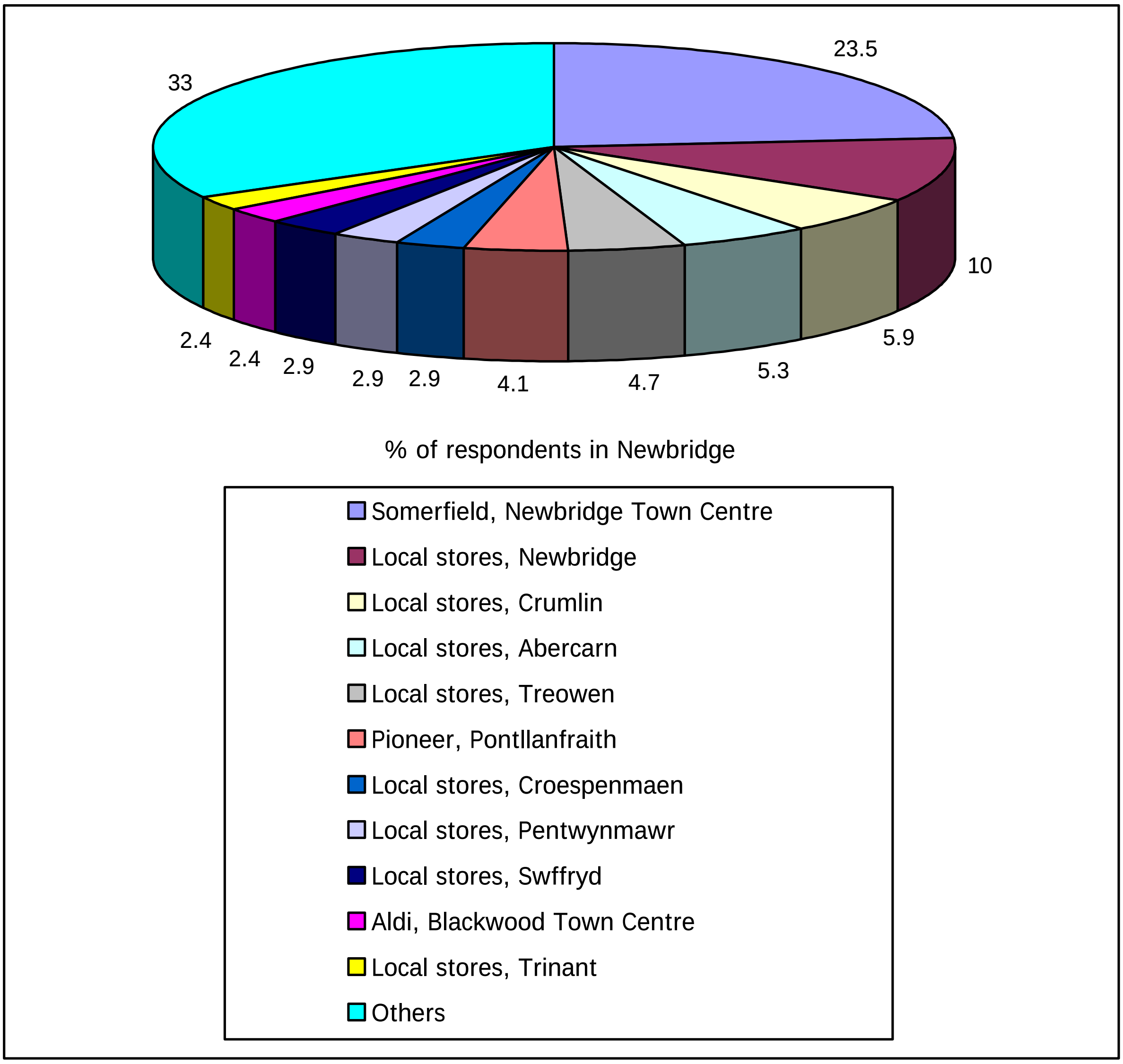
Just over three fifths (62.8%) specified that they do not combine their main food shopping with visits to other shops to buy any non-food items.

Over two thirds (68%) indicated that they carry out a top-up food and convenience shop in addition to their main food shopping.

Top-up food

Those who carried out top-up food shopping were asked where they were most likely to do so. A large number of stores were specified by respondents in the Newbridge catchment area to purchase most of 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: 250 respondents overall

These figures show that Somerfield in Newbridge is also a major destination for top-up shopping (23.5% of all respondents). The second most used, were the local stores in Newbridge (listed by 10% of respondents).

The majority of respondents from the Newbridge catchment area tend to do their top-up shopping within it.

The results have also shown that respondents based within the Newbridge area tend to do their top-up shopping at one supermarket and at numerous local stores surrounding the main shopping centres.

3.2 Non-food shopping

Non-bulky non-food

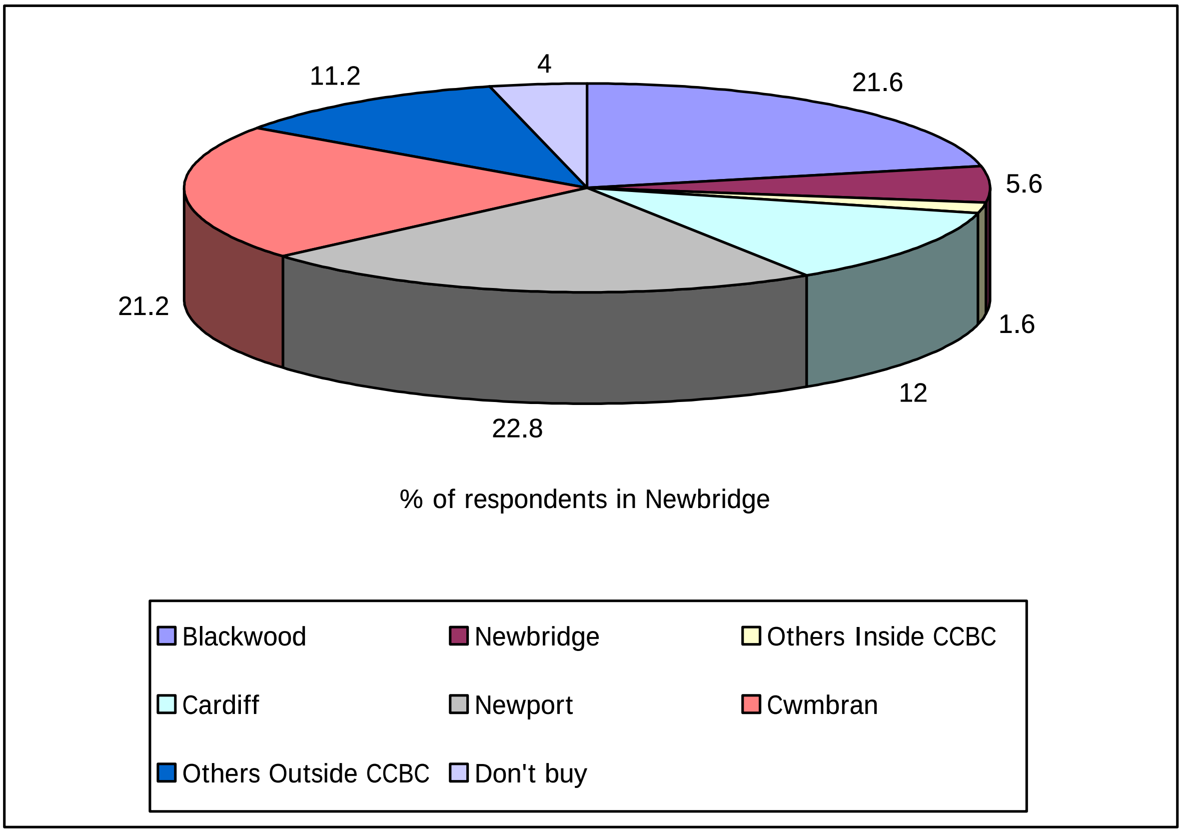
The following table shows the number of respondent's first choice of town for non-food shopping within the Newbridge catchment area, building on the information given in the 2003, 2000, 1997 and 1994 surveys:

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

	1994	1997	2000	2003	2006
Newport	50.3	51.6	48	44.8	22.8
Blackwood	14.8	18	14.5	20.4	21.6
Cwmbran	10.1	10.4	11.2	8.8	21.2
Cardiff	10.1	10	14.5	19.6	12
Newbridge	1.6	4	3.3	0.8	5.6
Mail Order	4.2	3.6	4.6	3.2	4.4

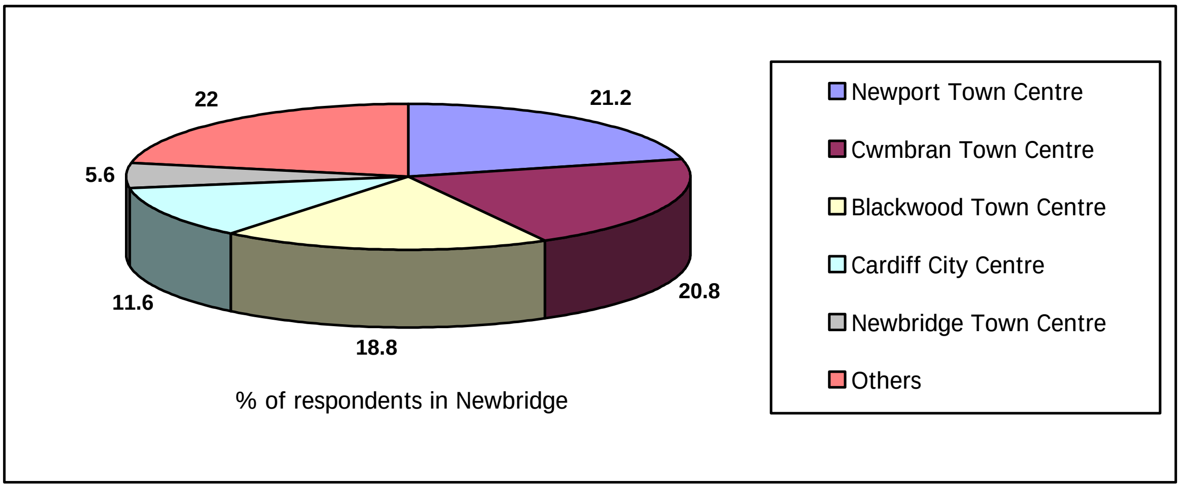
Building on the above data, respondents were asked which specific store they do most of their non-bulky non-food shopping. The following chart summarises the destinations chosen by respondents from the Newbridge catchment area.

Figure 3.2.2 – Non-bulky non-food purchases from the Newbridge catchment area (% of all respondents)



Base: 250 respondents overall

Figure 3.2.3 – Where do you buy MOST of your NON-bulky non-food items? – First Choice (% of all respondents)



Base: 250 respondents overall

In 2003 the highest proportion of respondents chose Newport for non-bulky non-food goods (44.8%). That survey also showed that Blackwood and Cardiff were the other two relatively important locations visited to buy these types of goods, and that these three main areas together accounted for the bulk of visits by respondents from the Newbridge catchment area.

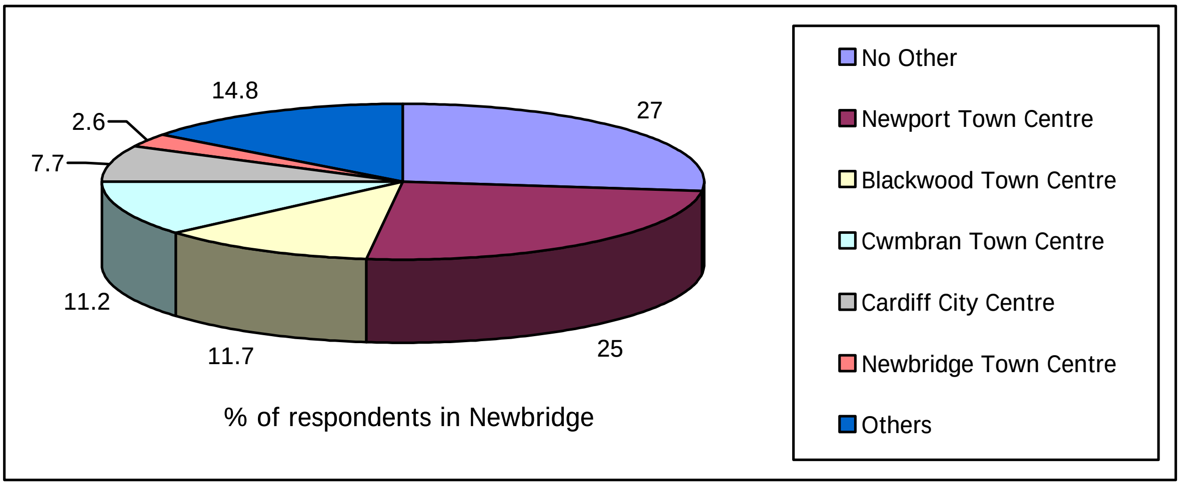
The 2006 results show that respondents from the Newbridge catchment area shopping for non-bulky non-food goods purchases showed a marked preference to visit three foremost locations almost equally. Shops in the Newport area accounted for 22.8% while Blackwood and Cwmbran attracted 21.6 and 21.2% of respondents respectively. The next most visited place for non-bulky non-food items was Cardiff totalling just under one eighth (12%) of respondents.

The number of respondents from within the catchment who shop for non-bulky non-food goods in Newbridge has increased markedly in 2006 from a very low base in 2003. Conversely, Newport has suffered a very large decline in its popularity, with the percentage choosing that location cut almost in half, from 44.8% in 2003 to 23.6%. Cardiff also suffered a noticeable decline from a high base in 2003, while Cwmbran's share of the catchment area's custom more than doubled to 21.2% in the same period.

In terms of visits to specific town centres for non-bulky non-food purchases, Newport Town Centre was the most chosen location (listed by 21.2%), Cwmbran Town Centre was second (listed by 20.8%) and Blackwood Town Centre was third (listed by 18.8%).

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



Base: 196 respondents overall

Over a quarter, 27% of respondents have stated that they do not visit any other centre for non-bulky non-food shopping. A quarter of respondents (25%) stated that they visit Newport Town Centre (an increase from 21.2% in 2003) as an alternative to their main centre of choice. Blackwood Town Centre came in second with around a tenth (11.7%) stating this centre, then Cwmbran with 11.2%, and next Cardiff Town Centre at 7.7%. There were only 5 respondents (2.6%) who cited Newbridge Town Centre as a second choice of place to visit for non-bulky non-food shopping.

Bulky non-food

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

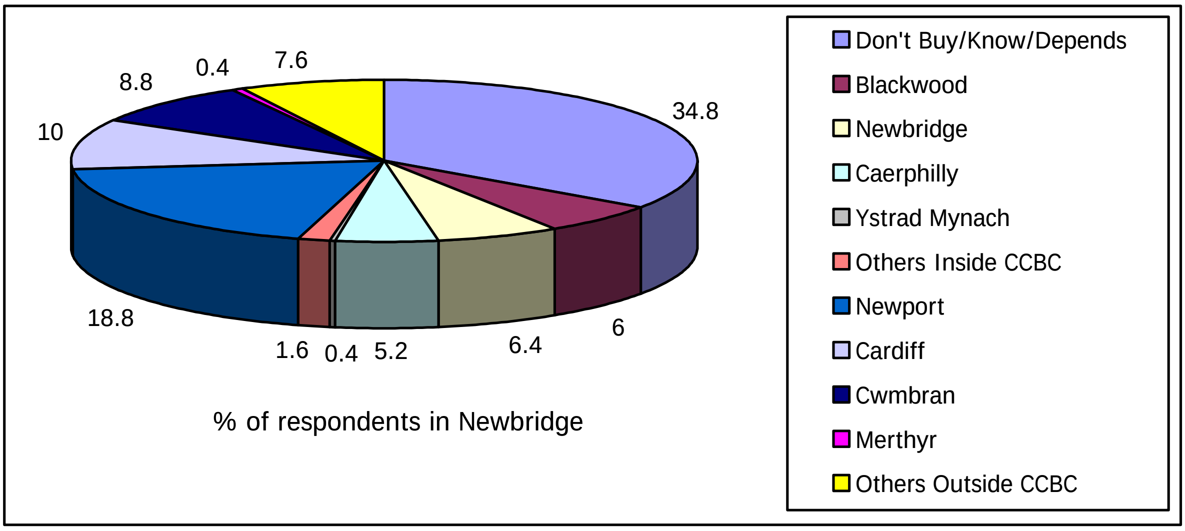
The following table shows the proportion of respondent's choice of town for bulky non-food shopping within the Newbridge catchment area, building on the information given in the 2003, 2000, 1997 and 1994 surveys:

Table 3.2.5 – Blackwood catchment area – choice of town for bulky non-food shopping (% of all respondents)

	1994	1997	2000	2003	2006
Newport	37.6	45.2	42.4	32	18.8
Newbridge	5.8	7.2	10.4	13.6	6.4
Cardiff	8.5	5.6	9.2	10	10
Cwmbran	9.5	8.4	4.4	7.2	8.8
Blackwood	2.1	11.6	8.8	5.2	6
Other	4.2	16.4	12.4	14.4	21.2
Mail Order	18	2	2.4	3.2	2.4
Don't buy	14.3	3.6	10	10.8	26.4

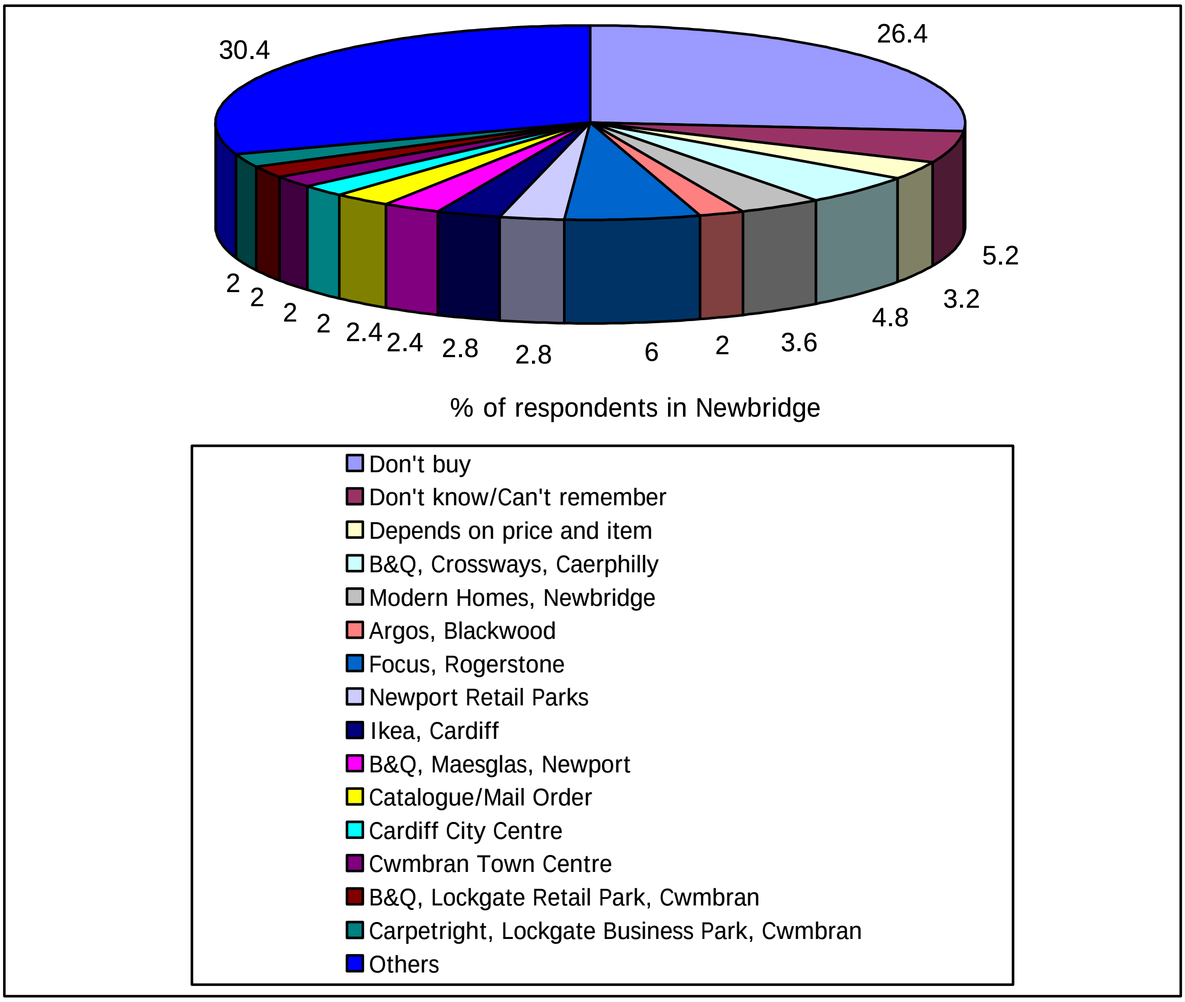
Building on the above data, respondents were asked which specific store they do most of their bulky non-food shopping. The following charts summarise the destinations chosen by respondents from the Newbridge catchment area.

Figure 3.2.6 – Bulky non-food purchases from the Newbridge catchment area (% of all respondents)



Base: 250 respondents overall

Figure 3.2.7 – Where do you buy most of your Bulky non-food items? (% of all respondents)



Base: 250 respondents overall

Table 3.2.5 shows that for respondents from within the Newbridge catchment area Newport has historically been the leading destination to shop for bulky non-food items. In 2006 nearly a fifth of respondents (18.8%) chose to shop there. However, this figure represented a major reduction from that in earlier surveys.

Cardiff was the second location of choice to shop for these items in 2006, with a tenth of respondents stating so, a proportion that has remained fairly constant throughout the surveys.

Respondents based in the Newbridge catchment area specified a large number of locations / stores, which they visited to purchase most of their bulky non-food items (Figure 3.2.7). However, just over a quarter of respondents (26.4%) indicated that they do not buy bulky non-food items. This is a fairly large proportion and quite an increase from the four previous surveys (in 1994 14.3%, in 1997 3.6%, in 2000 10%, and in 2003 10.8%).

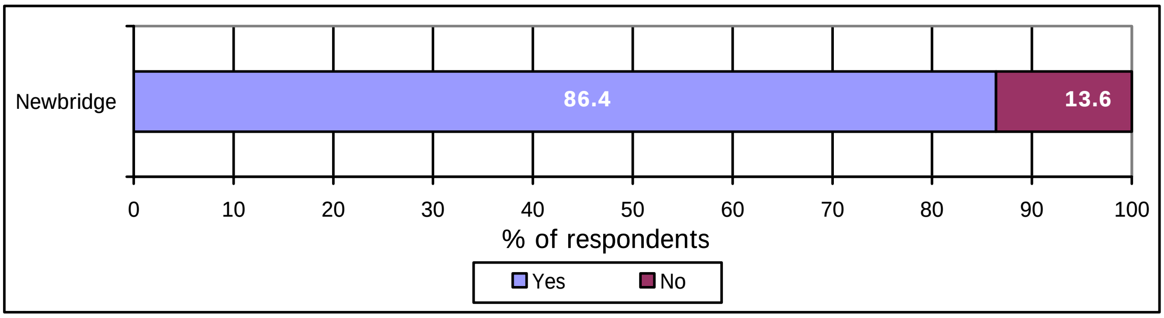
The top three stores / areas visited by respondents from within the Newbridge catchment area to purchase most of their bulky non-food items can also be seen in figure 3.2.7. There were no areas / stores that stood out as being overwhelmingly popular with respondents, as only 6% of them visited Focus, Rogerstone, which was the most quoted answer. The next most popular store cited was B&Q, Crossways, Caerphilly, named by 4.8% of respondents.

Overall as a choice of town for bulky non-food shopping, Newport still remains the most popular place compared with Cardiff, Cwmbran and Newbridge.

3.3 Mode of transport

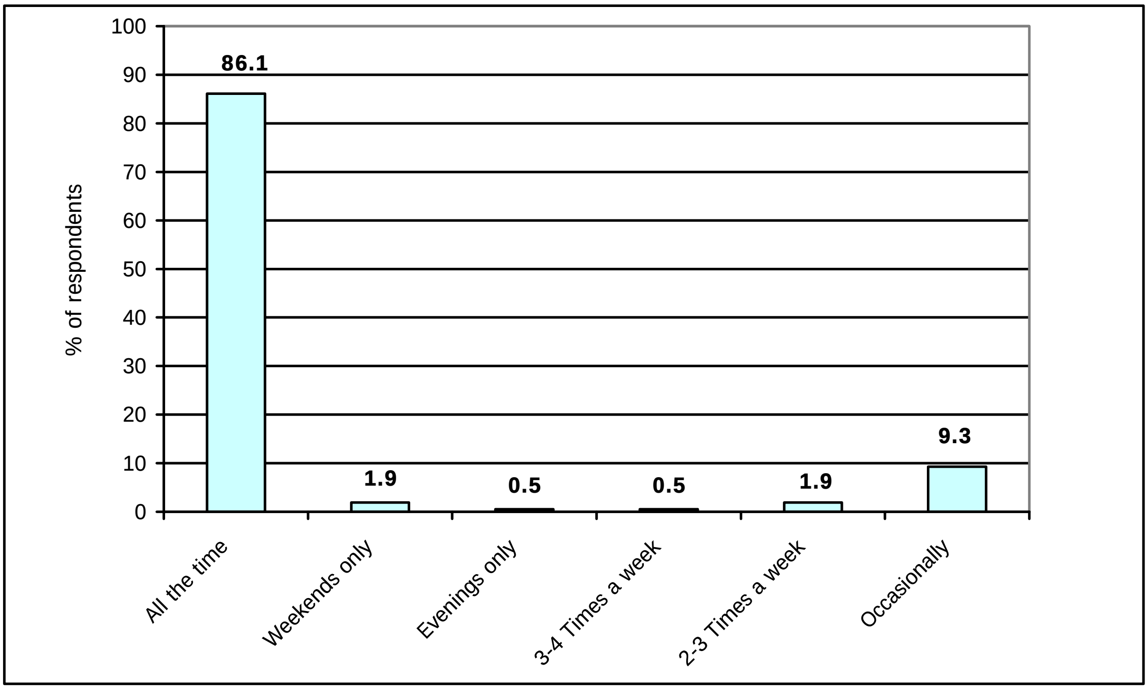
Respondents were next asked a couple of questions about their journey for shopping in general. These included whether they have access to a car / van and how often they have access to the car / van. The following data was found:

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)



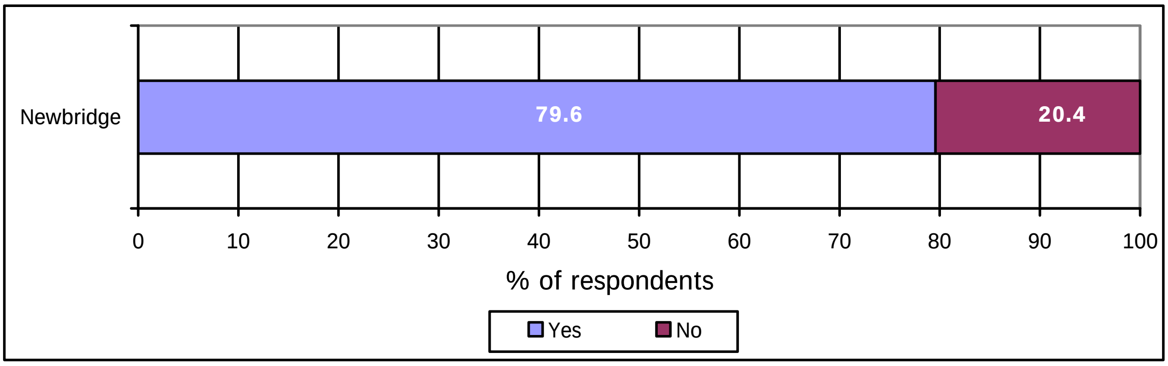
Base: 216 respondents overall

Those who travelled by car/van for shopping, some 216 respondents (86.4%), 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 Newbridge

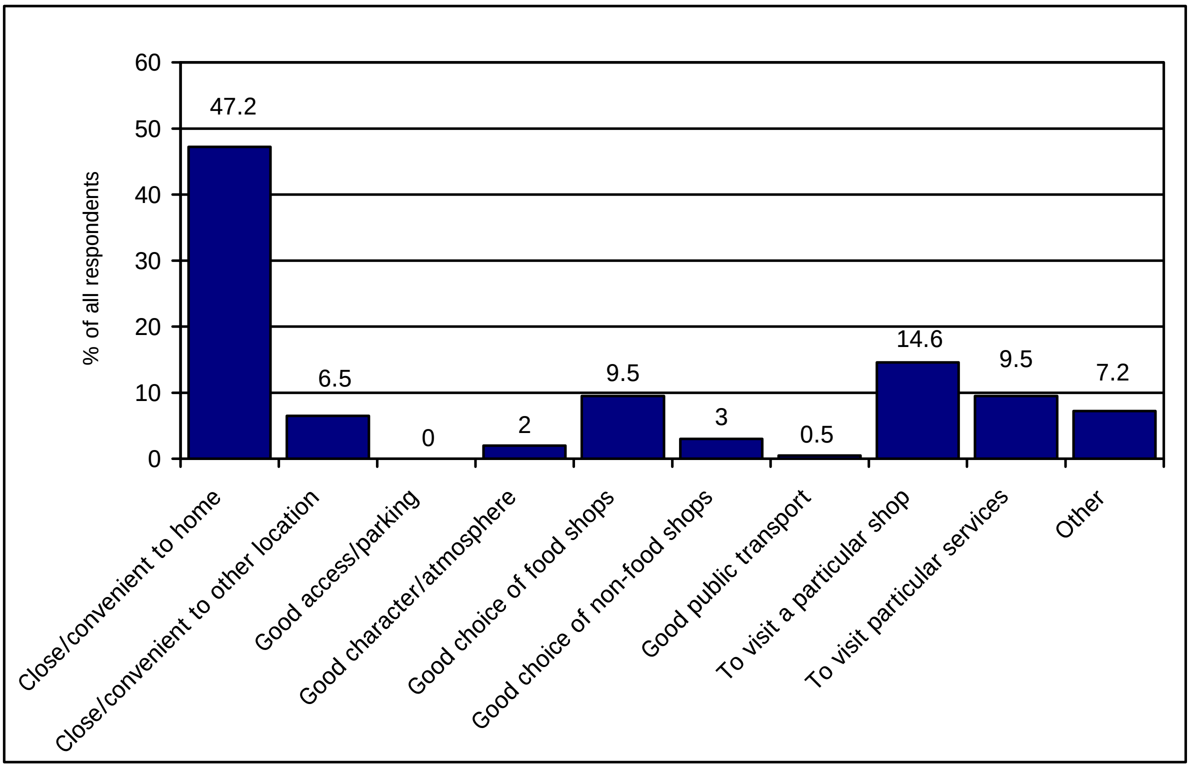
Respondents were asked a series of questions about shopping in Newbridge. These included whether they visit Newbridge for shopping, if so why and if not, why not, as well as what potential improvements would make them use Newbridge as a shopping location more frequently. The following graphs demonstrate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

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



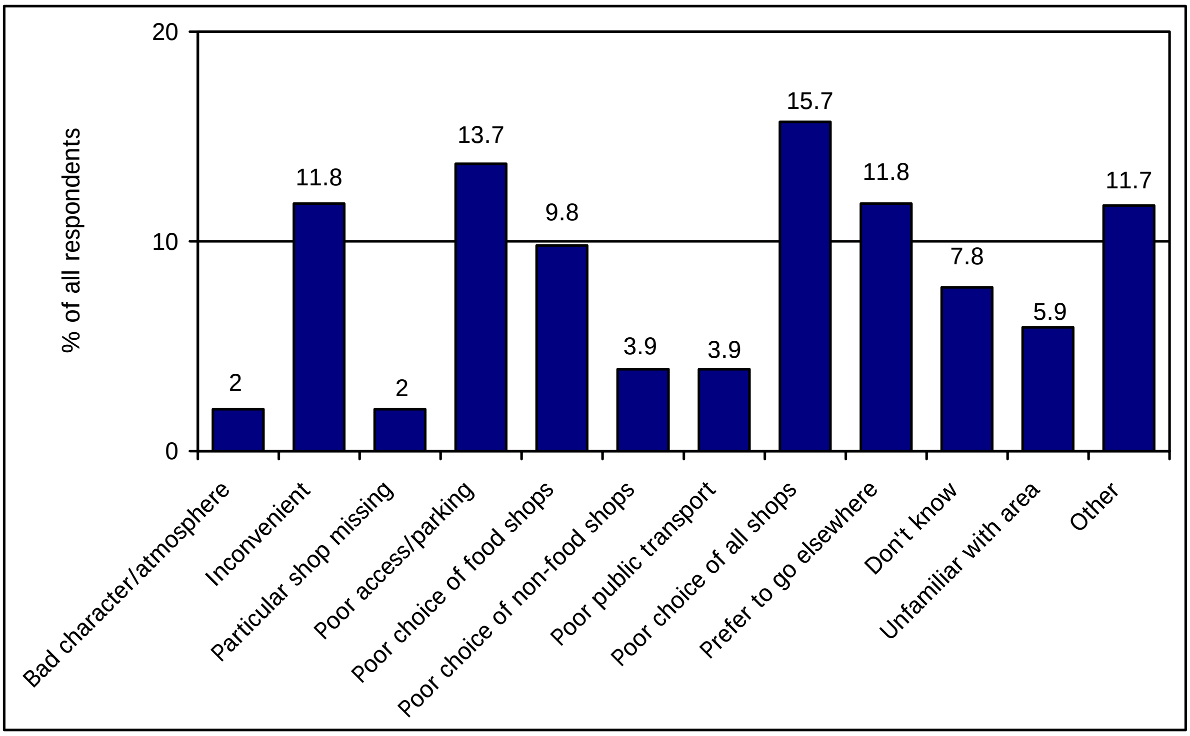
Base: 250 respondents overall

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



Base: Overall 250 respondents; 199 visiting Newbridge

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



Base: Overall 250 respondents; 51 not visiting Newbridge

The survey found that very nearly four fifths (79.6%) visit Newbridge for shopping (Figure 3.4.1).

Those 199 respondents who indicated they visited Newbridge (Figure 3.4.2) stated a number of reasons for visiting their local area for shopping. Almost half of the respondents (47.2%) stated it was because it was close and/or convenient to home and over a seventh (14.6%) said they go to Newbridge to visit a particular shop.

The responses contained under the category 'other' (7.2%) in figure 3.4.2, included the following aspect which proved to be positive for a number of respondents:

- *"Good choice of all shops" (2.5% of all respondents in Newbridge)*

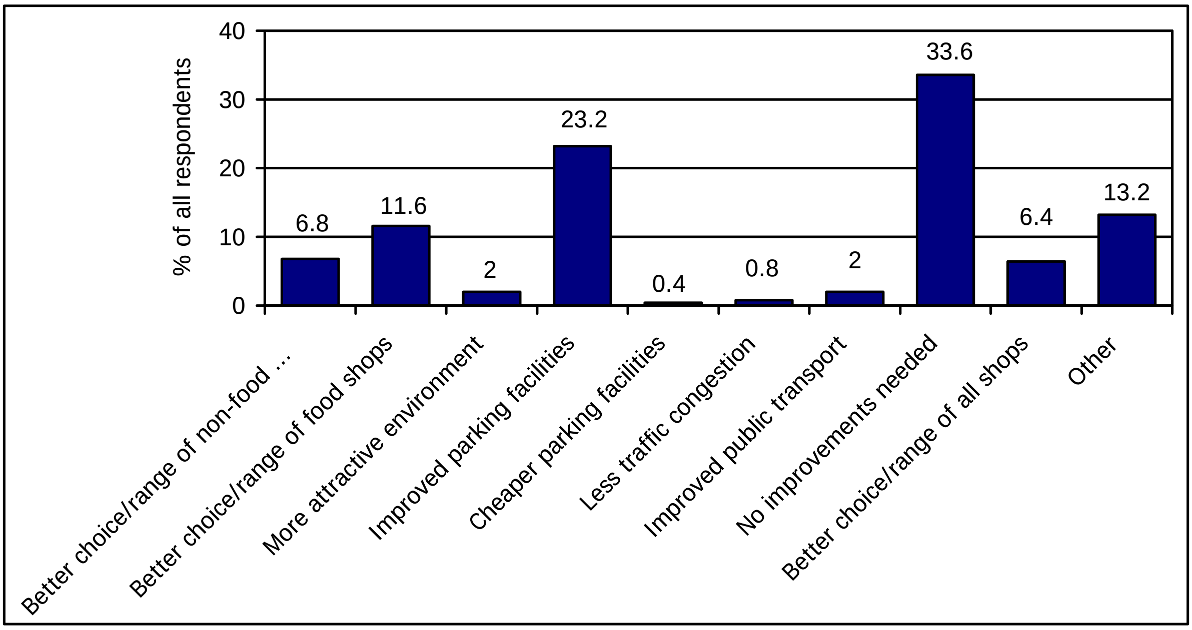
Similarly those 51 respondents, who indicated they did not visit Newbridge (Figure 3.4.3), were also asked their reasons for not doing so. Nearly a seventh (13.7%) of respondents stated that it was due to poor access and parking and over a tenth (11.8%) stated it was because it was inconvenient.

The responses contained under the category 'other' (11.7%) in figure 3.4.3, included the following aspect which proved to be negative for a number of respondents:

- *"Poor facilities" (2.0% of all respondents in Newbridge)*
- *"Poor quality of all shops" (2.0%)*

All respondents within the catchment area of Newbridge were asked the following question in figure 3.5.4, whether they visited their local area or not. The respondents were asked what would make them use Newbridge more frequently the results are as follows:

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



Base: 250 respondents overall

While a third of respondents saw no need for improvements, nearly a quarter (23.2%) would prefer to have improved parking facilities within their local area for shopping.

Over a fifth of respondents stated they would prefer to have better choice/range of non-food and food shops (overall 18.4%; 6.8% and 11.6 respectively).

The overall results indicate that improved parking facilities within their local area are the main concern to the respondents.

The responses contained under the category 'other' (13.2%) in figure 3.4.4, included the following requirements for development which would satisfy a number of respondents:

- *"Lower prices" (1.2% of all respondents in Newbridge)*
- *"More shops" (0.4%)*

3.5 Approval rating

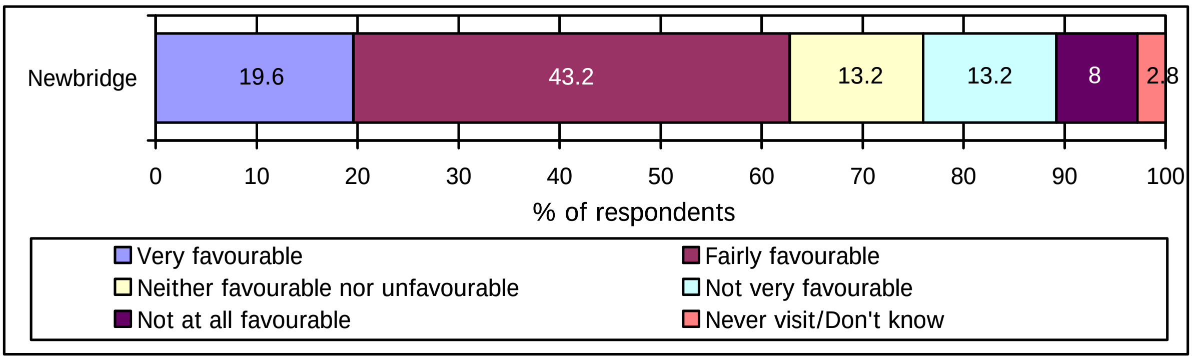
Finally on the CATI survey, respondents were asked how they would rate Newbridge as a place for shopping on a scale from 'very favourable' to 'not at all favourable'. The results can be seen in table 3.6.1 and figure 3.5.2 below:

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



Base: 250 respondents overall

Since the four surveys started, Newbridge has had the highest approval rating out of the four district centres from 1994 to 2003. Newbridge retains this position in 2006 as well (table 3.6.1).

Nearly a fifth of respondents (19.6%) 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 Newbridge

By age group

	Base: Respondents in Newbridge		A/B		C1		C2		D/E		Refused	
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: Respondents in Newbridge	250	100.0%	38	100.0%	53	100.0%	84	100.0%	70	100.0%	5	100.0%
18 - 24 years	2	.8%			1	1.9%	1	1.2%				
25 - 34 years	27	10.8%	8	21.1%	3	5.7%	7	8.3%	9	12.9%		
35 - 44 years	20	8.0%	4	10.5%	4	7.5%	7	8.3%	5	7.1%		
45 - 54 years	44	17.6%	8	21.1%	14	26.4%	10	11.9%	11	15.7%	1	20.0%
55 - 64 years	61	24.4%	7	18.4%	11	20.8%	27	32.1%	15	21.4%	1	20.0%
65 years or above	92	36.8%	11	28.9%	20	37.7%	31	36.9%	30	42.9%		
Refused	4	1.6%					1	1.2%			3	60.0%

Base: 250 respondents in Newbridge

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 Newbridge

4.0 On-Street survey

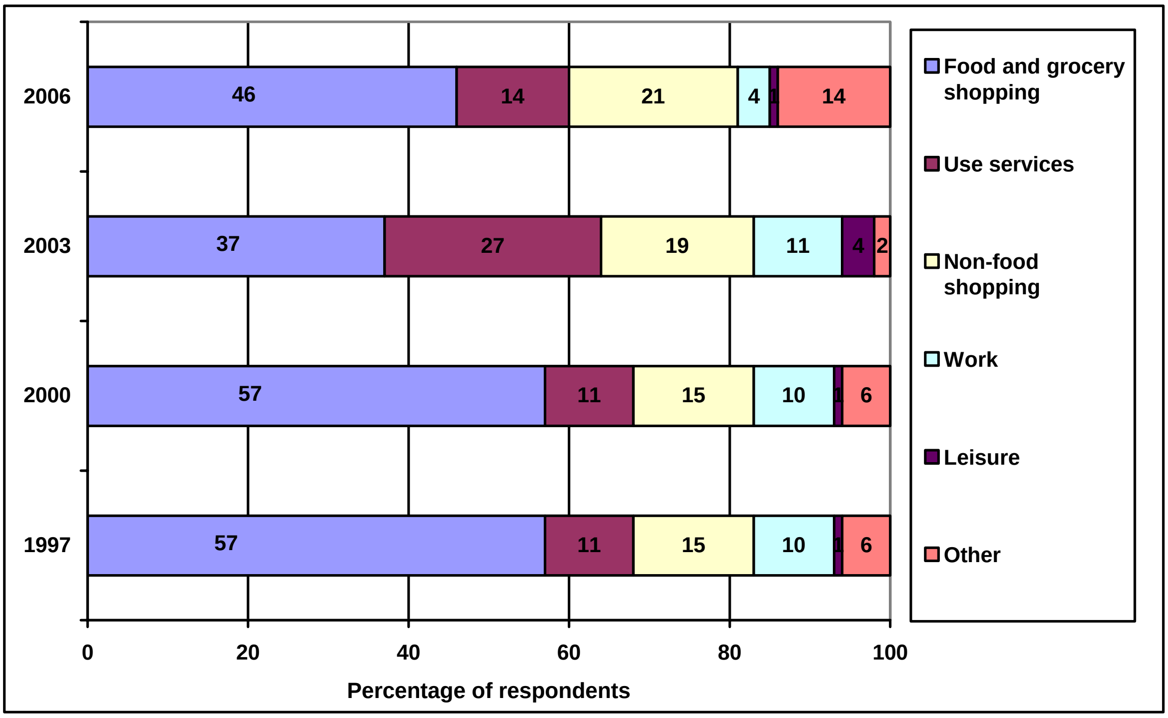
A total of 153 face-to-face interviews were conducted in Newbridge town centre, in July 2006. Interviews were conducted in two locations, namely

1) The Victoria Terrace area
2) The High Street area

4.1 Reasons for visiting Newbridge 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: 153 respondents

The most popular reason for visiting Newbridge town centre was to for food and grocery shopping, as nearly half (46%) of all respondents were in town for this reason. In a change from the previous survey, non-food shopping was the second highest reason for going to Newbridge, with around a fifth of respondents (21%) visiting for this reason and those using services accounted for 14% of all respondents. In the previous survey in 2003, accessing services had been the second most frequently stated reason for visiting Newbridge (27% of all respondents) and non-food shopping the third (19%).

Collectively, those visiting Newbridge for every type of shopping in 2006 equates for two thirds of all respondents (67%).

A small percentage were visiting whilst at work, or conducting some form of business (4%), however only 1% were there to use leisure services, a decrease of 3% from the 2003 survey.

When asked which other activities they would be carrying out on their visit to Newbridge town centre, those who were combining other activities were most likely to be non-food shopping (38%), food and grocery shopping (22%) or to visit financial services (15%). Around a quarter of all respondents (26%) were not doing anything else whilst on their trip.

4.2 Travelling to Newbridge

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

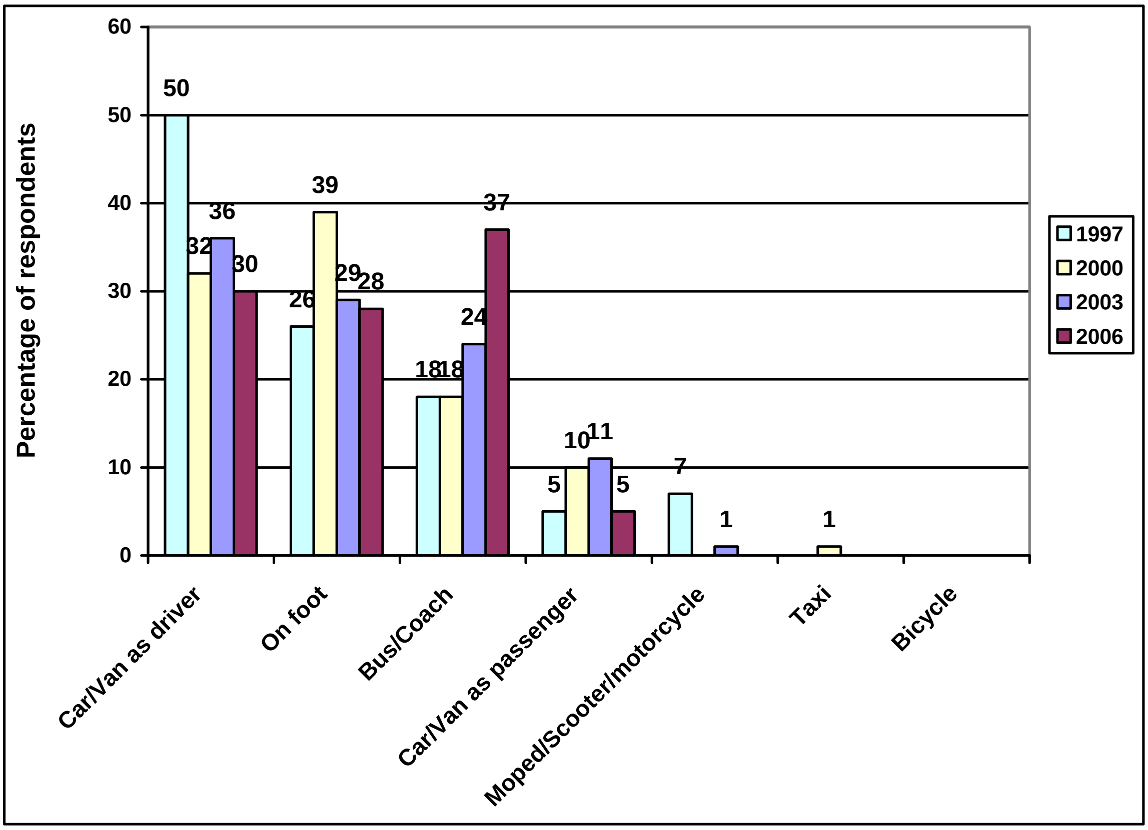
The majority of respondents (97%) had gone straight from their home to Newbridge, with the remainder doing so from work (2%) and one respondent coming from another shopping area (1%).

Specifically, around two-thirds came from Newbridge (67%), with Abercarn (12%) and Newport (7%) being the other starting locations of note.

Shoppers were then asked about the mode of transport that they used to travel to Newbridge 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: 153 respondents

The most popular method of transport used to travel to Newbridge was by bus/coach, which was used by slightly over a third of all respondents (37%). This figure is a significant increase from the previous surveys and suggests that more people are using public transport.

The proportion of people travelling to Newbridge by car or van as the driver has decreased slightly from 36% in 2003 to 30% in 2006.

The proportion of people travelling to Newbridge on foot, (28%), has is similar to that found during the 2003 survey.

Those 55 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	
		Victoria Terrace	High Street	Driver	Passenger
Public car park	47	47	47	54	11
On-street	46	41	47	46	44
Dropped off	7	12	5	-	44

Base: 55 respondents

Respondents travelling to Newbridge by car chose to park in a public car park (47%) and on-street (46%) on a roughly equal basis.

A small percentage (7%) of those travelling in a car/van as passenger were dropped off in Newbridge.

Time taken to travel to Newbridge

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

	1994	1997	2000	2003	2006
< 5 minutes	42	34	39	44	29
5-10 minutes	41	54	50	38	53
11-20 minutes	12	9	7	14	13
21-30 minutes	1	2	4	3	2
> 30 minutes	4	1	-	2	3

The travel time pattern in 2006 for those visiting Newbridge was more similar to the trends in the 1997 and 2000 surveys than other years. At least half of all those interviewed (53%) had travelled for a period of between 5 and 10 minutes to get to Newbridge.

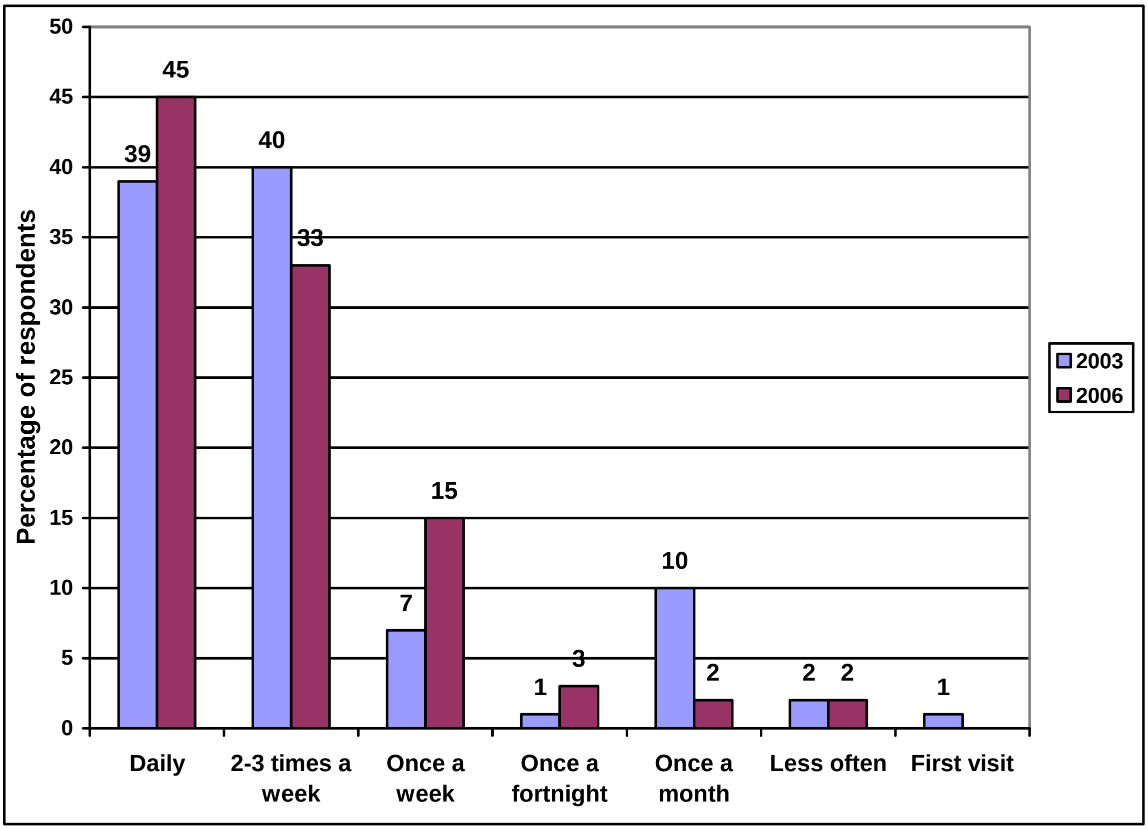
Those travelling for less than 5 minutes to arrive in Newbridge (29%) was the next highest response and collectively, those travelling for under 10 minutes accounted for over four fifths (82%) of all respondents.

However, when comparing 2006 with the 2003 results, the number travelling for less than 5 minutes has gone down (2003 - 44%, 2006 – 29%) and those taking between 5 to 10 minutes has increased in compensation (2006 – 53%, 2003 – 38%).

The proportion of people travelling to Newbridge for a period of 10 minutes or longer (18%) is consistent with the 2003 survey (19%) and does not suggest any change in the wider catchment area.

Frequency of visits to Newbridge

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



Base: 153 respondents

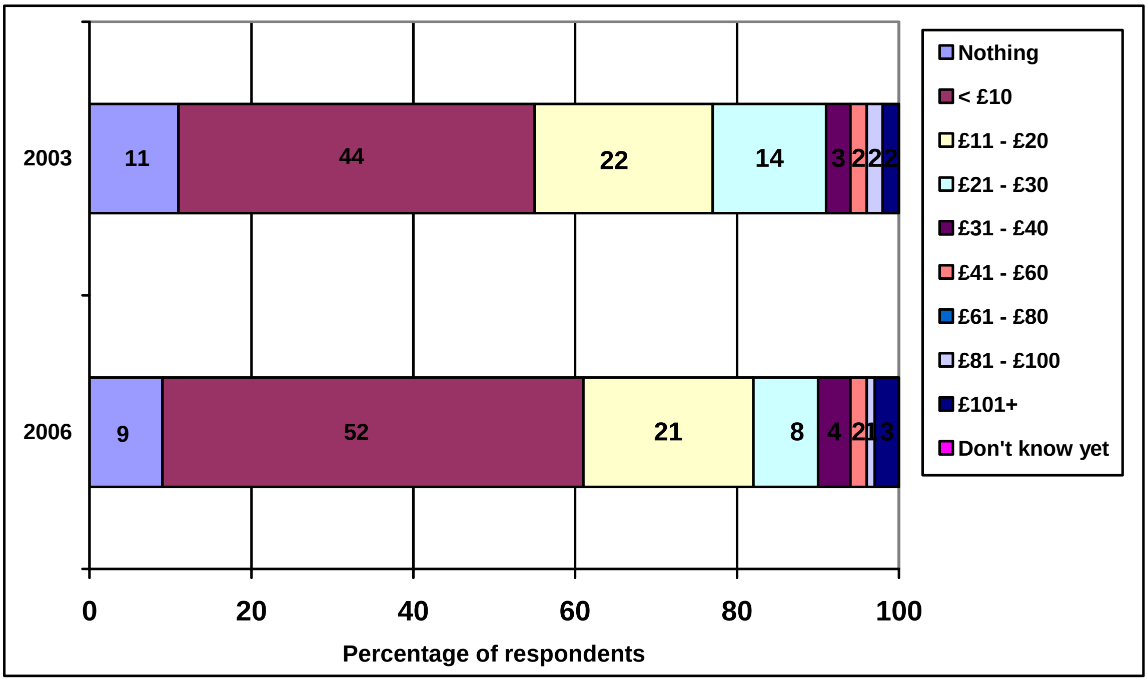
Over two fifths (45%) of all respondents visit Newbridge town centre on a daily basis. This figure has increased slightly from the previous survey (2003 - 39%). Those visiting 2 times per week or more frequently accounted for nearly four fifths of all respondents (78%).

While 15% of respondents chose to visit Newbridge only once a week, a total 7% visited even less often.

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 spent / will you spend on your trip to this town centre today? (% of all respondents)



Base: 153 respondents

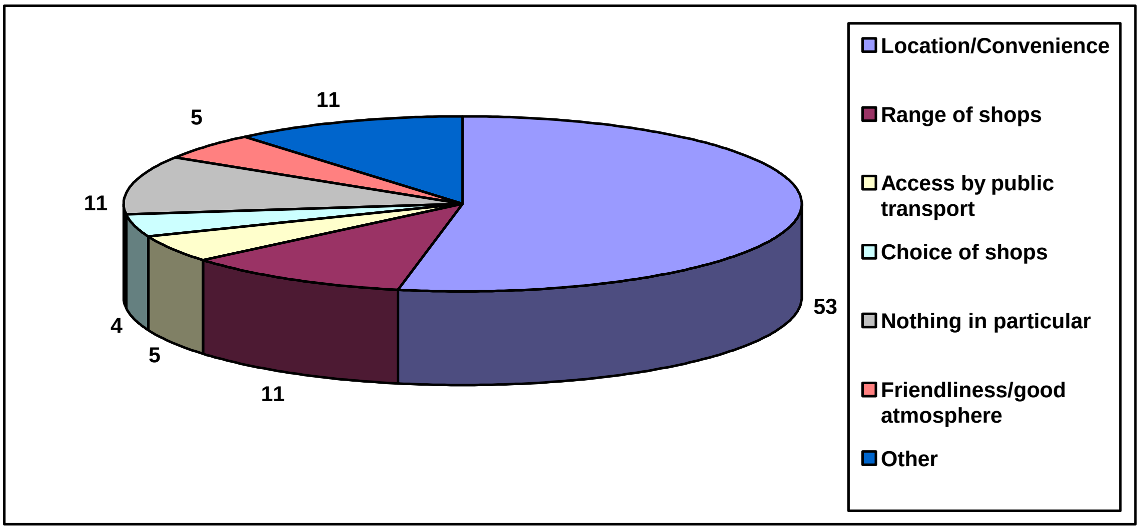
Over half of all respondents (52%) stated that they had spent or were likely to spend between £1 and £10 during their visit in Newbridge. Around a fifth (21%) of all respondents were spending between £11 and £20 and only 5% of people were intending to spend or had spent more than £80 during their visit.

When comparing with the spending behaviour from the 2003 survey, the proportion of people spending £20 or less has increased in 2006 (2003 – 66%, 2006 - 73%).

4.4 Likes and Dislikes about Newbridge town centre

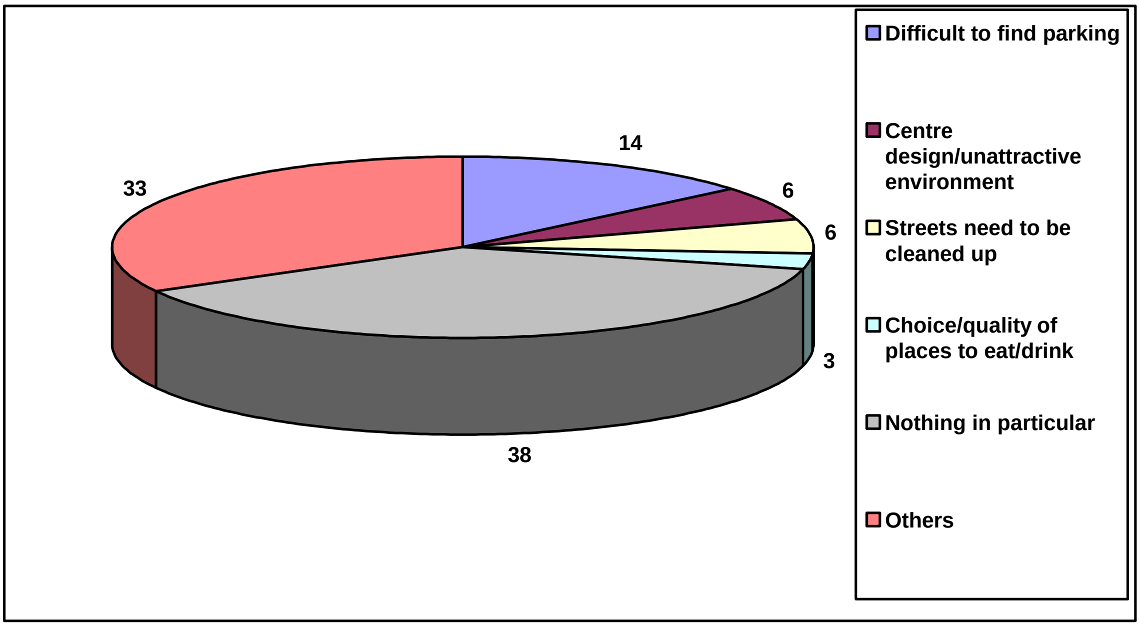
Finally on the on-street survey, respondents were asked what was the one thing that they particularly like and dislike about Newbridge town centre. The results can be seen in Figure 4.4.1 and Figure 4.4.2 below

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



Base: 153 respondents

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



Base: 153 respondents

The majority of respondents (53%) stated that Newbridge's location and convenience was the one aspect that they most liked about the town centre (figure 4.4.1). The second most popular aspect that respondents liked was the range of shops in the town, although only a tenth stated this (11%). The same percentage (11%) said that there was 'nothing in particular' that they liked about Newbridge.

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

- *"Friendliness/good atmosphere" (5% of all respondents)*
- *"Familiarity/live/work here" (3%)*
- *"Has everything I need here" (3%)*

Respondents were then asked which one thing they particularly disliked about Newbridge. (Figure 4.4.2)

When asked what they particularly disliked about Newbridge the most popular response given by respondents was, somewhat positively, 'nothing in particular', which was given by over a third of all those interviewed.

The highest single negative factor was the difficulty in finding parking, which was stated by 14.4% of all respondents.

The design, cleanliness and layout of the centre put some people off, as 6% stated that they particularly disliked the centre design and unattractive environment, and the same percentage stated that they would like the streets to be cleaned up.

Of the 'other' responses given (33%), the following aspects proved to be unfavourable for a number of respondents:

- *"Better range of shops generally needed" (3% of all respondents)*
- *"Shops closing down/too many empty shops" (3%)*
- *"Has declined/needs modernisation/investment" (3%)*
- *"Not enough choice of supermarkets/no supermarkets" (2%)*

Previous results (2000 – 2003)

	2000	**2003**
Nothing in particular	23.3	40.8
Poor choice / range of shops	20.7	27
All others	6.6	13.9
Inadequate/expensive car parking provision	22	9.2
Volume of traffic/poor roads	18.7	6
Poor physical condition of centre	8	3.3
Lack of services/facilities	0.7	0

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 approximately the same number of people could not state one particular thing that they dislike about Newbridge (approx 40%). The level of dissatisfaction with the choice and range of shops has declined, although those upset about parking difficulties in general, has shown a slight increase.

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	%	Victoria Terrace		High Street		Male		Female	
			Num	%	Num	%	Num	%	Num	%
Base: All respondents	153	100.0%	45	100.0%	108	100.0%	73	100.0%	80	100.0%
A/B	9	5.9%	5	11.1%	4	3.7%	4	5.5%	5	6.3%
C1	28	18.3%	7	15.6%	21	19.4%	16	21.9%	12	15.0%
C2	43	28.1%	8	17.8%	35	32.4%	24	32.9%	19	23.8%
D/E	73	47.7%	25	55.6%	48	44.4%	29	39.7%	44	55.0%

By age group

	Base: All respondents		SEG								GENDER			
	Num	%	A/B		C1		C2		D/E		Male		Female	
			Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	153	100.0%	9	100.0%	28	100.0%	43	100.0%	73	100.0%	73	100.0%	80	100.0%
18 - 25 years	14	9.2%	1	11.1%	3	10.7%	3	7.0%	7	9.6%	8	11.0%	6	7.5%
26 - 34 years	16	10.5%			4	14.3%	6	14.0%	6	8.2%	6	8.2%	10	12.5%
35 - 44 years	17	11.1%	2	22.2%	2	7.1%	2	4.7%	11	15.1%	8	11.0%	9	11.3%
45 - 54 years	17	11.1%	1	11.1%	2	7.1%	3	7.0%	11	15.1%	7	9.6%	10	12.5%
55 - 64 years	37	24.2%	3	33.3%	7	25.0%	13	30.2%	14	19.2%	17	23.3%	20	25.0%
65 years or more	52	34.0%	2	22.2%	10	35.7%	16	37.2%	24	32.9%	27	37.0%	25	31.3%

By gender

	Base: All respondents		LOCATION				SEG							
	Num	%	Victoria Terrace		High Street		A/B		C1		C2		D/E	
			Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	153	100.0%	45	100.0%	108	100.0%	9	100.0%	28	100.0%	43	100.0%	73	100.0%
Male	73	47.7%	17	37.8%	56	51.9%	4	44.4%	16	57.1%	24	55.8%	29	39.7%
Female	80	52.3%	28	62.2%	52	48.1%	5	55.6%	12	42.9%	19	44.2%	44	60.3%

4.0 Leisure Activities

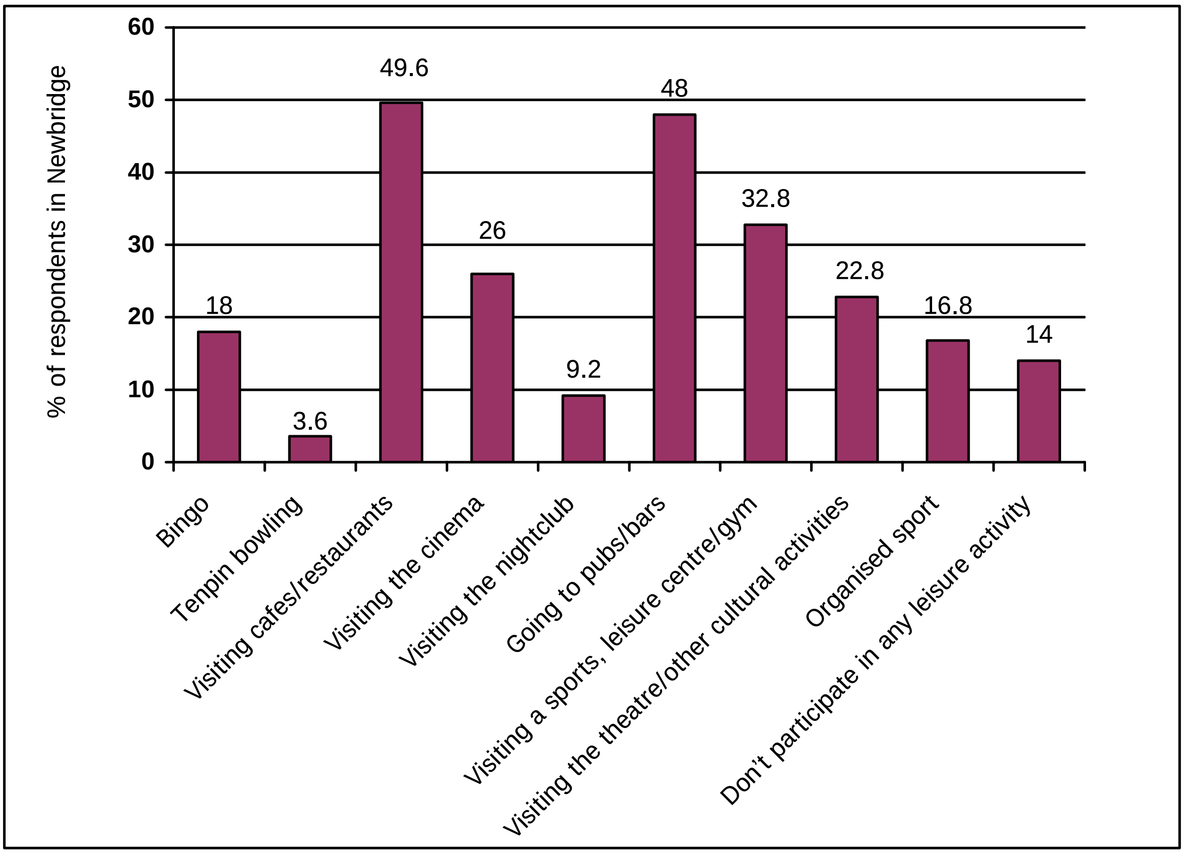
In 2006, a series of questions relating to leisure activities were asked for the first time. These included discovering which leisure activities respondents partake in, in which area and how frequent they participate in these activities.

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 3.3.1) demonstrates the findings that were discovered:

Figure 3.3.1 – 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 (49.6%) from the Newbridge catchment area participate in a leisure activity by either visiting a café or a restaurant. Respondents from the Newbridge catchment area also stated that they go to a pub or a bar, with just under half (48%) stating this. The majority of respondents who participate in this type of activity do so in Newbridge once a week. Only 35 respondents (14%) indicated that they do not participate in any leisure activity.

Bingo

Newbridge was the most popular location for this activity with a fifth (20%) stating this location. Crumlin was the second most popular area to play Bingo for just over a sixth (17.8%) of respondents.

The most popular frequency of playing Bingo was once a week, with almost half of respondents (48.9%) indicating this.

Tenpin Bowling

Respondents based in the Newbridge catchment area specified a small number of locations, which they visited to play tenpin bowling. Over two fifths of all respondents (44.4%) participate in playing Tenpin Bowling within the Newport area. There is no facility to play Tenpin Bowling in the Newbridge area.

Those respondents who do go Tenpin Bowling, usually do this less often than once a month with over half (55.6%) 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 Cardiff, with just under a sixth (16.1%) stating this. Newport was a close second cited by 15.3% of respondents, followed by Newbridge with 12.9%.

Nearly a third (32.3%) of those respondents living in the Newbridge area regularly visit a café or a restaurant once a week.

Cinema

Just over half of respondents visit the cinema in Newport (50.8%). There is no Cinema facility in the Newbridge area.

Those respondents who visit the Cinema stated that they go either once a month (32.3%) or less often (33.8%).

Nightclubs

The respondents of Newbridge prefer to frequent Cardiff to go to a nightclub, with over half (52.2%) visiting there. Not one respondent had cited Newbridge as an area to visit a nightclub.

The majority of respondents visit a nightclub once a fortnight with over a quarter (26.1%) indicating this.

Pubs/Bars

Newbridge was the most popular location to visit a pub or a bar; with over a quarter (26.7%) indicating they go there. The respondents who visit a pub or a bar stated that they go once a week (31.7%).

Sports, Leisure Centre/Gym

Those living in the Newbridge catchment area who visited a sport, leisure centre or a gym preferred to go to Newbridge with over four fifths (80.5%) stating this.

Just over two thirds (35.4%) of those respondents regularly visit a sport, leisure centre or a gym 2-3 times a week.

Theatre/other cultural activities

Over half (52.6%) of all the respondents within the Newbridge catchment area prefer to go to Cardiff, as a place to visit the theatre or any other cultural activities.

Just over three quarters (75.4%) of those respondents living in the Newbridge area regularly visit the theatre or any other cultural activities, but less often than once a month.

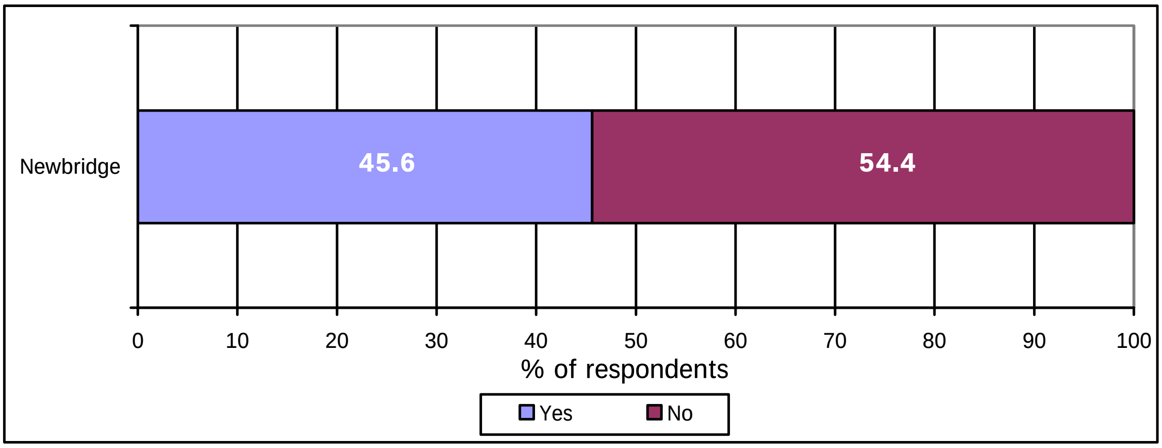
Organised sport

Over a sixth (16.8%) of all respondents living in the Newbridge catchment area indicated that they play an organised sport. Nearly a quarter (23.8%) of these respondents stated Newbridge is the place they play an organised sport and almost half of the respondents (47.6%) 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:

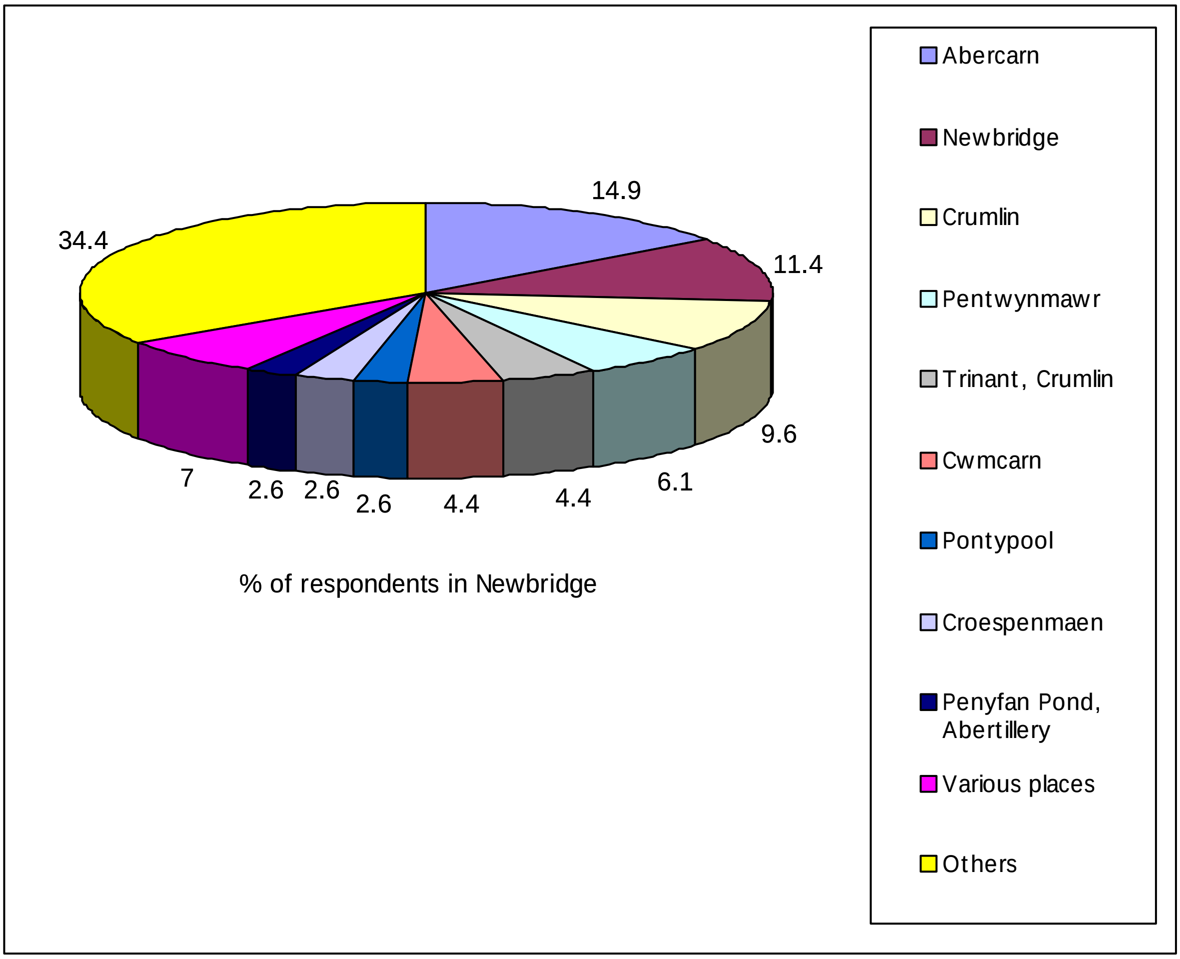
Figure 5.1.1 – Do you or members of your household regularly walk in the countryside? (% of all respondents)



Base: 250 respondents overall

Some 114 respondents who regularly walk in the countryside from the Newbridge catchment area 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 Newbridge catchment area who go walking in the countryside, under a sixth (14.9%) visit Abercarn and over a tenth (11.4%) set off to Newbridge. Just under a tenth of all respondents go to Crumlin (9.6%), and 6.1% of the respondents visit Pentwynmawr countryside.