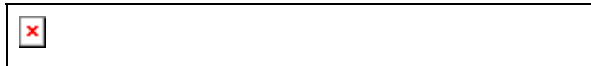




**Caerphilly County
Borough Council**

**Shopper Attitude Survey
2006**

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**Ystrad Mynach 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 Ystrad Mynach 201 interviews were completed, building on the information given in the previous surveys conducted every three years from 1994 to present.

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

Questionnaire

The survey covered a range of aspects relating to shopping 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 Ystrad Mynach 201 interviews were completed at locations on Bedwlwyn Road and Penallta Road, Ystrad Mynach.

Questionnaire

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

In particular, the survey sought to establish the following:

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

2.0 Executive summary

2.1 Introduction

This report presents the findings of the 2006 Shopper Attitude Survey, carried out by Research and Marketing Plus. The overall aim of the project is to obtain information on shopping patterns within the county borough. In order to obtain the relevant information Household Telephone and On-Street Surveys were conducted. Throughout the duration of the surveys a total of 401 local residents were interviewed, who resided across the area. Interviewing was conducted within the catchment area of Ystrad Mynach the period July 18th – July 28th 2006.

2.2 Main Findings

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

- Tesco in Ystrad Mynach is the most popular choice of store for main food shop, being used by just over three fifths (62%) of respondents from within the Ystrad Mynach catchment area. The other stores chosen were Asda in Blackwood town centre (11.2% of respondents), Asda on Pontygwyndy Road in Caerphilly (10.4%) and a small number of respondents who used Somerfield in Tir y Berth.
- Analysing the chosen locations by main town, it is Ystrad Mynach (63.2%) which continues to dominate as the first choice for main food shopping, and it is at its most popular level since the surveys began. The next most popular locations of choice were Caerphilly (14%) and Blackwood (12%).
- These figures show that Tesco in Ystrad Mynach (22.9%) is the store most frequently used for top up shopping by those living in the Ystrad Mynach catchment area. The next most popular choices were local stores in Ystrad Mynach (7.3%), in Hengoed (6.7%), in Penpedairheol (6.1%), and in Cefn Hengoed (5.6%).
- The fact that shoppers choose to carry out both their main food and top-up food shopping at Tesco on New Road in Ystrad Mynach indicates the popularity of this store.
- When shopping for non-bulky non-food goods over 50% of respondents from the Ystrad Mynach catchment area had consistently chosen Cardiff in previous surveys between 1994 and 2003. However, the 2006 results show that this proportion has declined by 17.5 percentage points to 34.8%.
- Behind the most popular destination of Cardiff for non-bulky non-food items, other respondents from the catchment area chose Blackwood (22.4%) and Caerphilly (10%). The number of respondents purchasing non-bulky non-food items in Ystrad Mynach has increased significantly (to 8%).
- When asked what alternative centres they used for non-bulky non-food shopping, nearly a quarter of respondents (22.5%) said they do not visit any other centre. Around an eighth of respondents (12.6%) stated that they would use Blackwood Town Centre as an alternative and a similar percentage (12.1%) said they would choose Caerphilly Town Centre, with Cardiff City Centre chosen by a further 11%.

- It is apparent that Caerphilly remains the leading destination to shop for bulky non-food items within the Ystrad Mynach catchment area with over a quarter of respondents who buy bulky non-food items (27.2%) choosing to shop there. Ystrad Mynach was the third location of choice as a place for shopping for these items and there has been a small increase in the percentage of people visiting, from 4.6% in 2003 to 6% in 2006.
- There were no areas/stores that stood out as being overwhelmingly popular with respondents for shopping for bulky non-food items. However, just over a seventh (14.4%) visit B&Q at Crossways, Caerphilly. The next most popular area given was Cardiff City Centre, named by 4% of respondents.
- Visiting cafes/restaurants was the most popular leisure activity that respondents from the Ystrad Mynach catchment area participated in, with over half (52.8%) of all respondents doing so. Slightly more than two fifths (43.2%) go to pubs and bars, while around a third of respondents visit each of the following; a cinema, a sports/leisure centre, and the theatre or other cultural events. Very few people (3.6%) visit nightclubs and well under a fifth participate in organised sport (16.8%).
- Of those respondents who go walking in the countryside and live within the Ystrad Mynach catchment area, around a quarter (24.1%) go walking along the routes in Ystrad Mynach and around a tenth (11.2%) set off to the Brecon Beacons. Slightly fewer visit Hengoed (7.8%) and roughly the same numbers choose to walk in either Maesycwmmmer or Penallta in Hengoed (both 6.9% of all respondents). A small number go to the walking paths in Caerphilly (4.3%).
- Nearly half of the respondents (48.7%) who indicated that they visit Ystrad Mynach for shopping stated it was because it was close and/or convenient to home and over a quarter (25.6%) said they go to Ystrad Mynach to visit a particular shop.
- Of those respondents who indicated they did not visit Ystrad Mynach for shopping, a quarter (25.5%) gave 'Poor choice of all shops' as the reason, and another sixth (16.4%) stated 'Poor choice of non-food shops'. Slightly more than an eighth (12.7%) of respondents thought that Ystrad Mynach was inconvenient for them and the same number thought that it had 'Poor access and parking'.
- Just under a fifth (18.8%) of all respondents would use Ystrad Mynach more frequently if there was a better choice/range of non-food shops and slightly over a tenth (10.8%) would if it had a better choice/range of food shops.
- Around half (54%) of all respondents rated Ystrad Mynach as either fairly, or very favourable, as a place for shopping. This is a slight decline from the equivalent figure from 2003 (57.4%), although it is an improvement on the 2000 figure (49%).

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

- Around two fifths of all respondents (38%) were in Ystrad Mynach to go food and grocery shopping. A further fifth (19%) were in town for non-food shopping, with around an eighth (13%) visiting for work or business purposes. Just under a sixth (16%) were in town for health and financial services.
- The majority of respondents (95%) had gone straight from home to Ystrad Mynach, with the remainder doing so from work (5%). Just over half came from Ystrad Mynach

itself (56%), with Hengoed (14%), Cefn Hengoed (9%) and Maesycwmmmer (7%) being the other starting locations of note.

- The most popular means of travel was on foot, as over two fifths (42%) of respondents had walked to Ystrad Mynach. Those travelling by car/van as a driver, accounted for a similar amount (39%), and slightly over a tenth (11%) had travelled using a bus/coach. Slightly fewer people are travelling by foot to Ystrad Mynach than in 2003, when the equivalent figure was just under half (49%). However, those travelling by car/van as a driver have increased markedly (2003 – 27%, 2006 – 39%).
- The frequency of visits to Ystrad Mynach town centre has changed from those trends evident when the 2003 survey was conducted. Half of all respondents (50%) stated that they visit Ystrad on a daily basis, an increase from the 2003 survey, when just over a third of respondents (35%) admitted to doing so.
- In terms of spending behaviour, over half of all respondents (53%) had spent or were expecting to spend up to £10 whilst on their shopping trip, with just under a fifth (17%) estimating to spend between £11 and £20. A further fifth (21%) were not expecting to spend anything during their visit. Under a tenth (9%) of all respondents had spent or were expecting to spend over £20 on their trip, with very few people expecting to spend large amounts of money.
- Ystrad Mynach's location and convenience was the aspect that the overwhelming majority of visitors most liked about the town centre (74%). A small number particularly liked the following aspects about Ystrad Mynach: the range of shops (6%) and the choice and quality of places to eat/drink (3%). Very few people (5%) were unable to specify anything that they liked.
- A quarter of all respondents (25%) couldn't state anything that they particularly disliked about Ystrad Mynach. However, another quarter (27%) of respondents stated it was difficult to find parking in the town centre. Around a tenth (9%) disliked the centre's design or found Ystrad Mynach to have an unattractive environment. A small number of respondents (5%) thought that there was too much through traffic / congestion / buses, and the same percentage thought that a better range of shops is generally needed.

3.0 Household Telephone survey

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

3.1 Food and grocery shopping

Main food

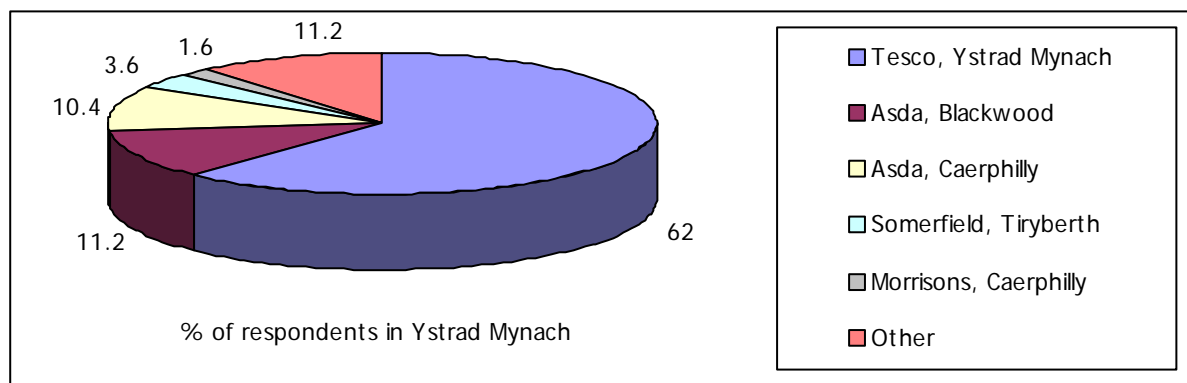
To begin with, respondents were asked to state the location where they buy most of their household food and grocery items. The following table shows the percentage of respondents that shop in each town for food shopping, within the Ystrad Mynach catchment area, building on the information given in the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

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

	1994	1997	2000	2003	2006
Ystrad Mynach	14.2	8	54.5	49.4	63.2
Caerphilly	15	30.9	21.3	18.7	14
Blackwood	7.3	11.7	5	10.9	12
Tir y Berth	21.9	14.2	2	5.7	3.6
Other	12.9	9.3	5	6.1	3.6
Pontypridd	10.7	11.7	3	0.6	1.6
Cardiff	7.3	3.5	1.5	0.6	1.2
Nelson	18	14.2	7.9	8	0.8

Building on the data above, respondents were asked 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 Ystrad Mynach 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

Tesco in Ystrad Mynach is the most popular choice of store for main food shop, being used by just over three fifths (62%) of respondents from within the Ystrad Mynach catchment area. The other stores chosen were Asda in Blackwood town centre (11.2% of respondents), Asda on Pontygwyndy Road in Caerphilly (10.4%) and a small number of respondents who used Somerfield in Tir y Berth.

Analysing the chosen locations by main town, it is Ystrad Mynach (63.2%) which continues to dominate as the first choice for main food shopping, and it is at its most popular level since the surveys began. The next most popular locations of choice were Caerphilly (14%) and Blackwood (12%).

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

With regards to the respondent trip frequencies, traveling habits and expenditure, just under three fifths of respondents from within the Ystrad Mynach catchment area (57.6%) normally shop at their main food store once a week, with a further quarter (26.8%), carrying out a main food shop 2-3 times a week.

The majority of respondents (92%) start their journey from home, with a small number doing so from their place of employment (5.2%). Over half (55.2%) travel to their main food shopping location by car/van as the driver, with an additional 29% doing so by car/van as the passenger, and around a tenth (11%) who choose to walk.

Almost half of all the respondents spend in the region of £51 - £100; this being split between a quarter (26%) spending £51 - £75 and a fifth (20%) spending £76 - £100. However, about another quarter (26%) of respondents expected to spend £40 or less on their main food and grocery shopping.

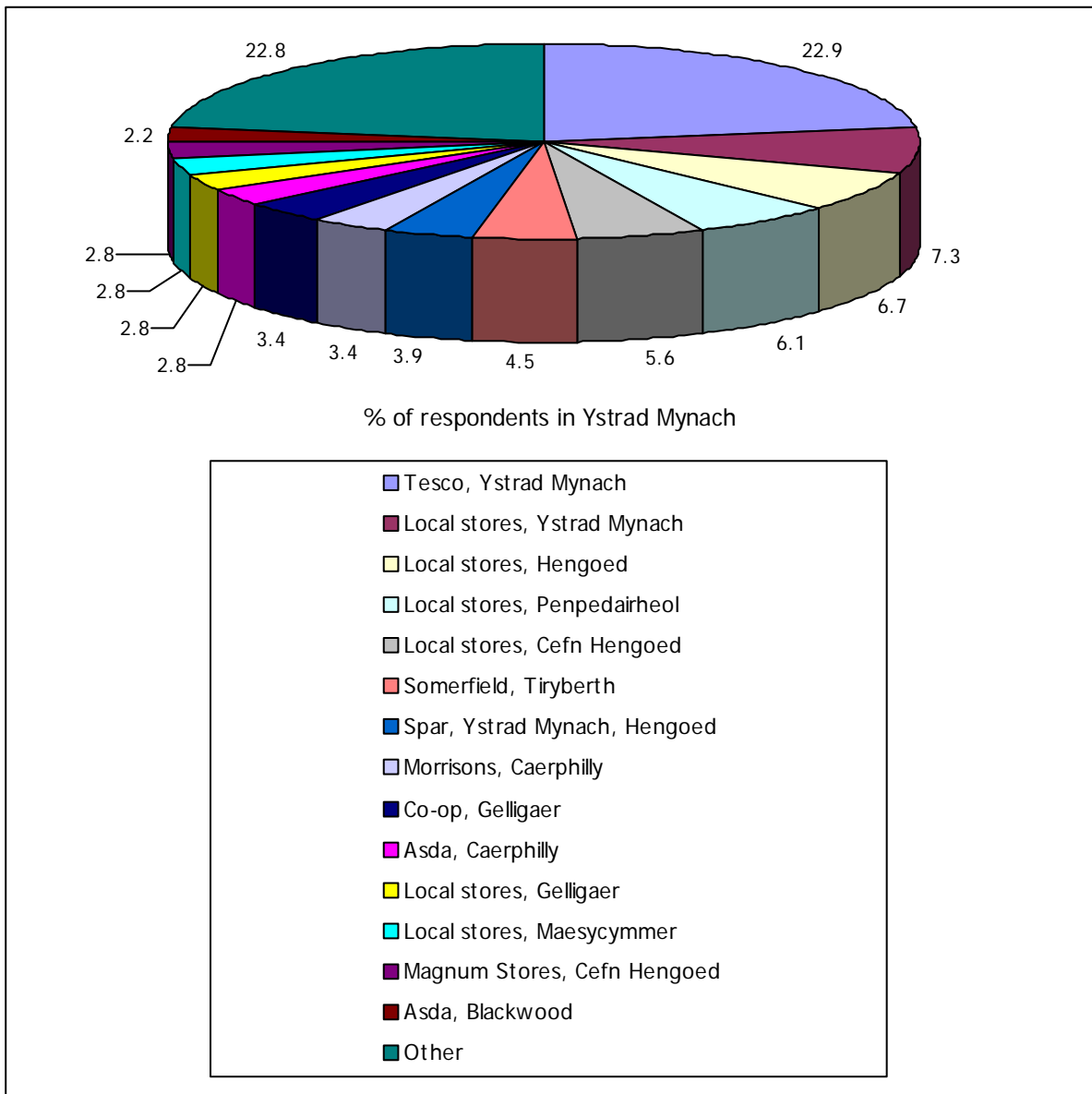
A third of respondents (32.8%) specified that they combine their main food shopping with visits to other shops to buy any non-food items.

More than seven in ten respondents (71.6%) indicated that they carry out a top-up food and convenience shop in addition to their main food shopping.

Top-up food shopping

Some 179 respondents from within the Ystrad Mynach catchment area carry out top-up food shopping, and they were asked where they were most likely to go. Respondents specified a large number of stores, which they use for this shopping task. The main choices 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: 179 respondents overall

These figures show that Tesco in Ystrad Mynach (22.9%) is the store most frequently used for top up shopping by those living in the Ystrad Mynach catchment area. The next most popular choices were local stores in Ystrad Mynach (7.3%), local stores in Hengoed (6.7%), local stores in Penpedairheol (6.1%), and local stores in Cefn Hengoed (5.6%).

The fact that shoppers choose to carry out both their main food and top-up food shopping at Tesco on New Road in Ystrad Mynach indicates the popularity of this store.

3.2 Non-food shopping

Non-bulky non-food

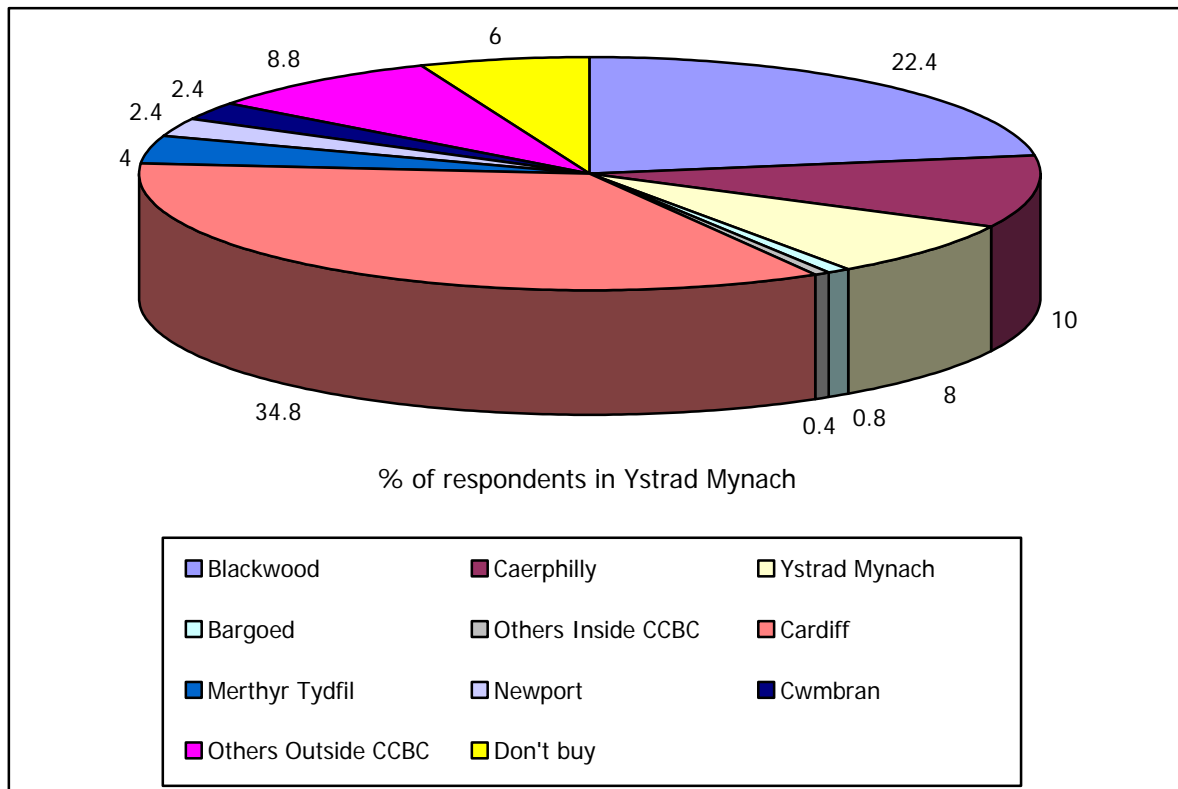
The following table shows the number of respondent's first choice of town for non-food shopping within the Ystrad Mynach catchment area, building on the information given in the 2003, 2000, 1997 and 1994 surveys:

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

	1994	1997	2000	2003	2006
Cardiff	54.1	58	52	52.3	34.8
Blackwood	15.5	10.5	12.4	16.5	22.45
Caerphilly	1.7	3.7	8.9	7.4	10
Ystrad Mynach	3.4	1.9	3.5	1.1	8
Newport	5.2	2.5	4	2.3	2.4
Pontypridd	5.2	8	4.5	8.5	2
Bargoed	3.9	4.3	1.5	2.3	0.8
Mail Order	3.9	4.9	5.4	4.5	2.4
Other	7.3	6.2	7.9	5.1	17.2

Building on the above data, respondents were asked which specific store they do most of their non-bulky non-food shopping. The following chart concentrates on the results of respondents in the Ystrad Mynach catchment area within the County Borough of Caerphilly.

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

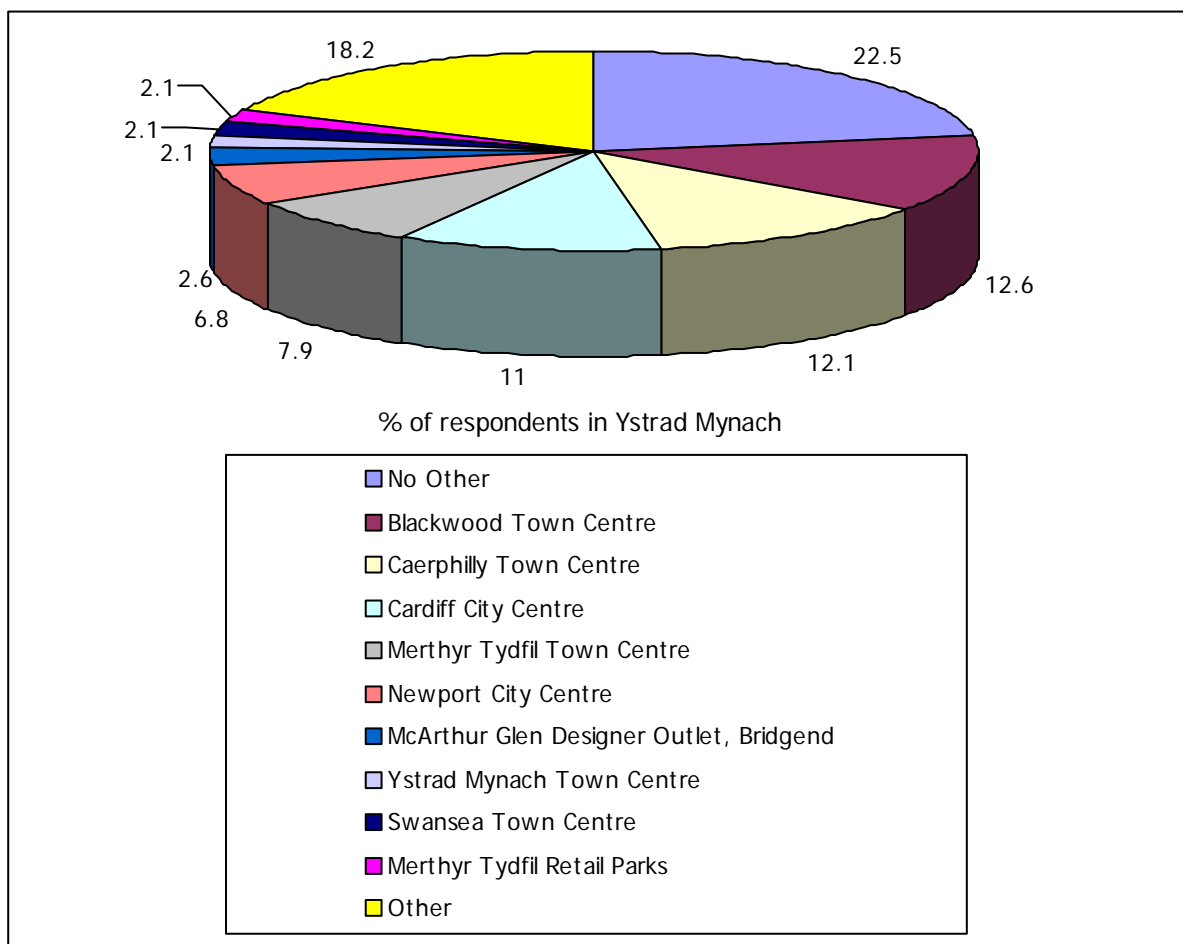
When reviewing the previous surveys (Table 3.2.1), the 2003 results showed that the highest proportion of respondents shopped in Cardiff for non-food goods (52.3%). The 2006 results show that this is still the case even though the numbers visiting Cardiff are much reduced from then (34.8%).

There had been a consistency in previous surveys where the proportion of respondents shopping for these types of goods in Cardiff has been over 50% since 1994. However, the 2006 results show that this proportion has declined by 17.5 percentage points.

Behind the most popular destination of Cardiff for non-bulky non-food items, other respondents from the catchment area chose Blackwood (22.4%) and Caerphilly (10%). The number of respondents purchasing non-bulky non-food items in Ystrad Mynach has increased significantly (to 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: 191 respondents overall

Nearly a quarter of respondents (22.5%) do not visit any other centre for non-bulky non-food shopping. Around an eighth of respondents (12.6%) stated that they would use Blackwood Town Centre as an alternative and a similar percentage (12.1%) said they would choose Caerphilly Town Centre, with Cardiff City Centre chosen by a further 11%.

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.

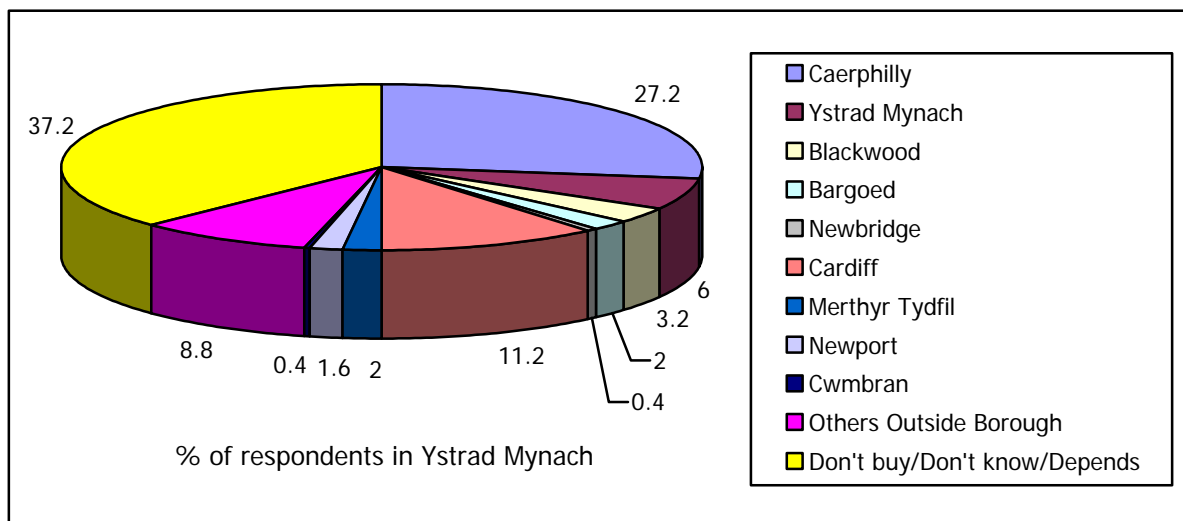
The following table shows the proportion of respondent's choice of town for bulky non-food shopping within the Ystrad Mynach catchment area, building on the information given in the 2003, 2000, 1997 and 1994 surveys:

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

	1994	1997	2000	2003	2006
Caerphilly	4.3	9.3	8.4	24.4	27.2
Cardiff	26.6	38.3	26.4	22.2	11.2
Ystrad Mynach	27.5	13	21.6	4.6	6
Blackwood	6	9.9	3.6	5.1	3.2
Pontypridd	0.8	10.5	8	8	2.4
Merthyr Tydfil	1.7	4.3	8	1.2	2
Newport	3	4.4	3.2	4	1.6
Don't do	5.3	1.2	8	11.4	26
Other	24.9	9.2	8	15.4	20.4

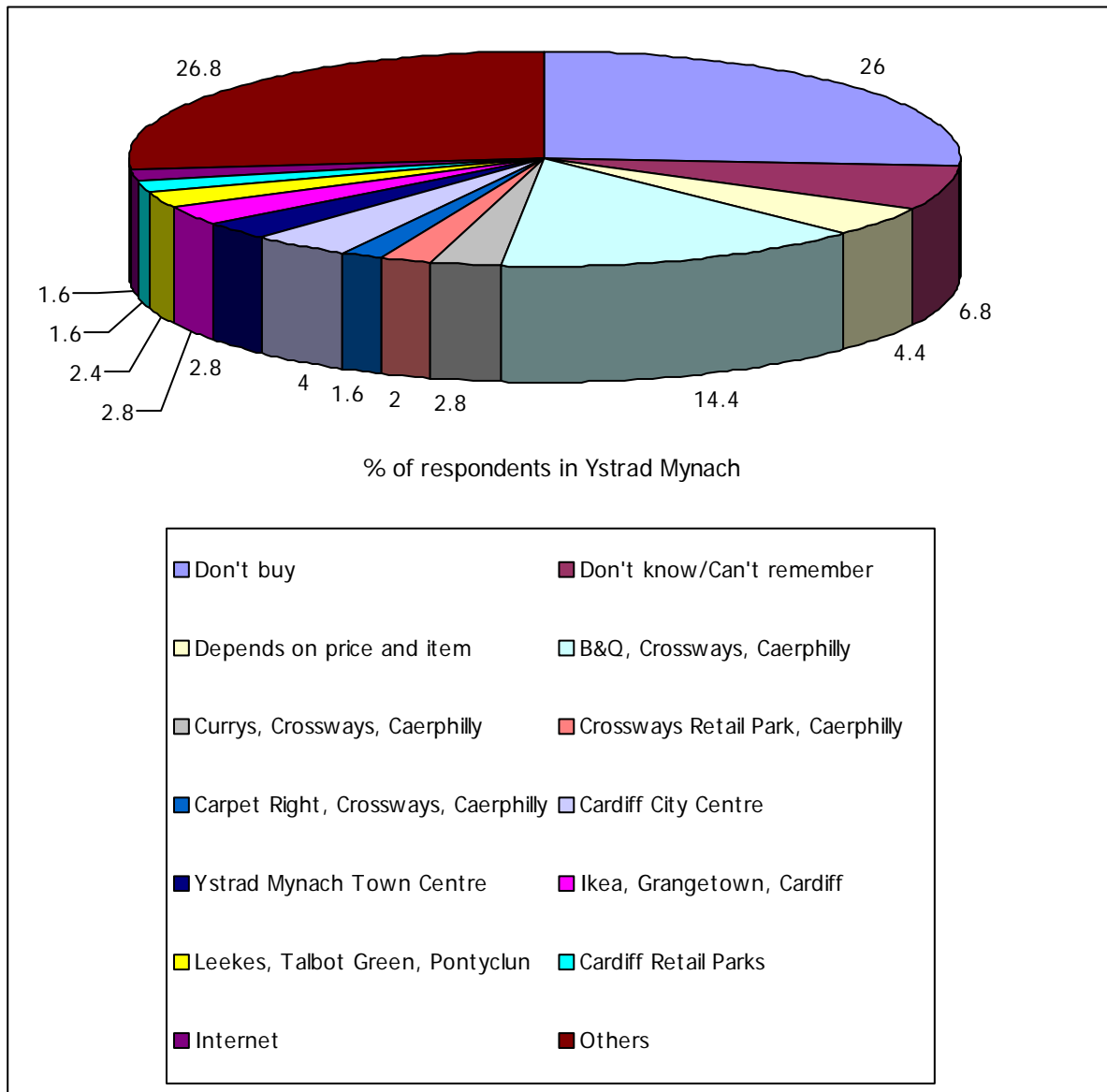
Building on the above data, respondents were asked which specific store they do most of their bulky non-food shopping. The following charts summarise the destinations chosen by respondents from the Ystrad Mynach catchment area.

Figure 3.2.5 – BULKY non-food purchases from the Ystrad Mynach 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

When looking at table 3.2.4, it is apparent that Caerphilly remains the leading destination to shop for bulky non-food items within the Ystrad Mynach catchment area with over a quarter of respondents who buy bulky non-food items (27.2%) choosing to shop there.

This figure for Caerphilly is roughly consistent with the previous survey (2003 – 24.4%). However, the percentage choosing Cardiff has halved in 2006 compared with 2003.

Ystrad Mynach was the third location of choice as a place for shopping for these items and there has been a small increase in the percentage of people visiting, from 4.6% in 2003 to 6% in 2006.

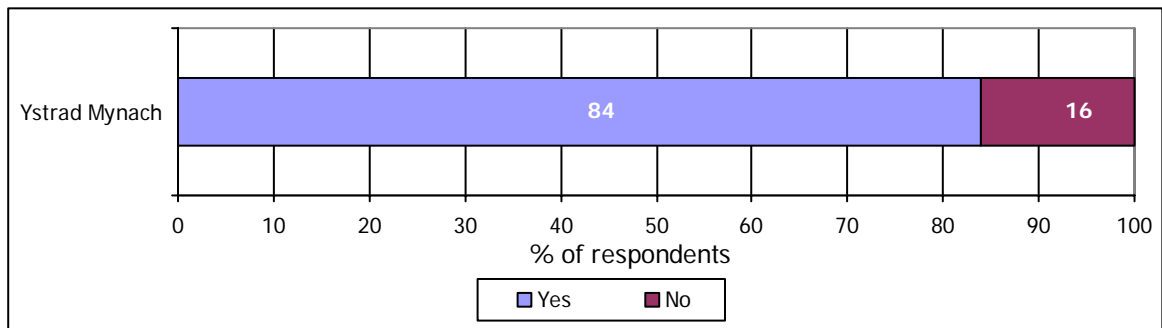
With regards to the individual stores/areas used to purchase these items (Figure 3.2.6), just over a quarter of respondents (26%) indicated that they do not buy bulky non-food items. This has shown a large increase from the previous wave (2003 – 11.4%).

The most popular stores / areas visited by respondents from the Ystrad Mynach catchment area, when purchasing bulky non-food items, can also be seen in figure 3.2.6. There were no areas/stores that stood out as being overwhelmingly popular with respondents. However, just over a seventh (14.4%) visit B&Q, at Crossways, Caerphilly. The next most popular area given was Cardiff City Centre, named by 4% of respondents.

3.3 Mode of transport

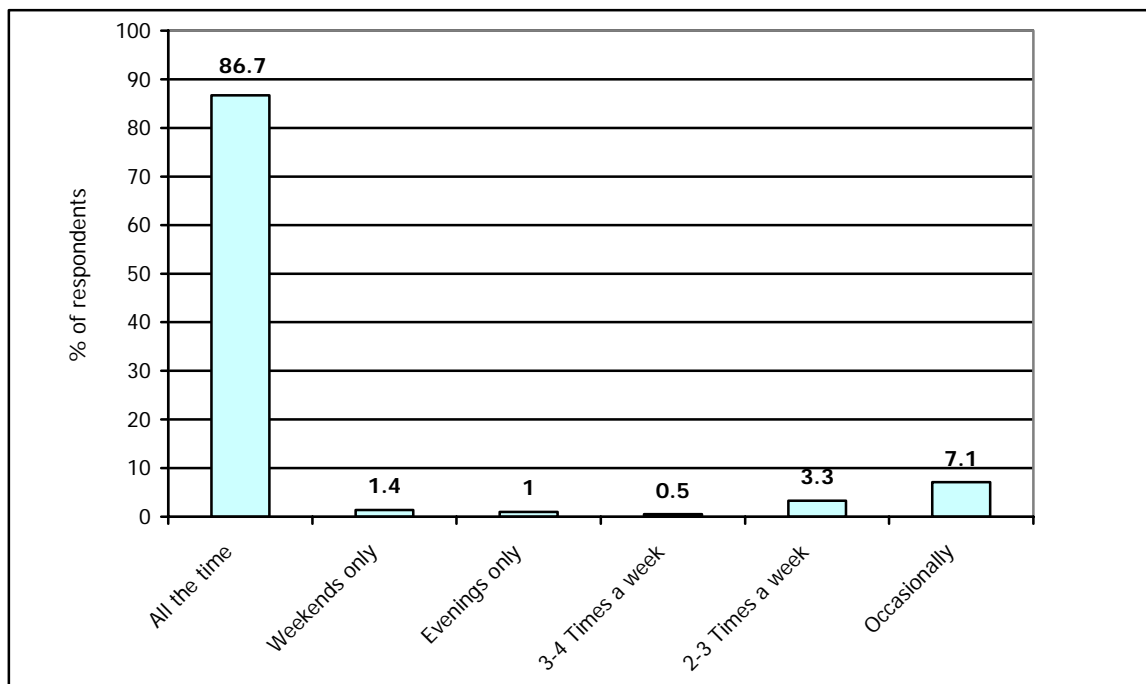
Respondents were next asked a couple of questions about their journey for shopping in general. These included whether they have access to a car / van and how often they have access to the car/van. The following data was found:

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)



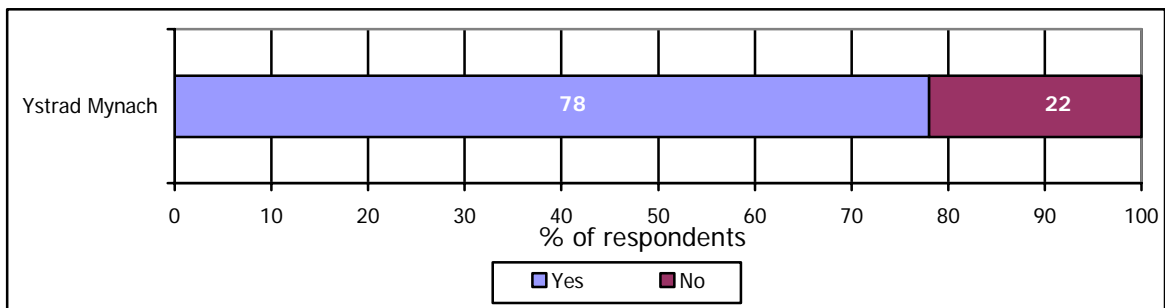
Base: 210 respondents

Some 210 respondents travelled by car / van for shopping, and they were asked how often they have access to a vehicle. Almost nine out of ten people (86.7%) who had access to a car stated that they have access to their vehicle all the time.

3.4 Shopping in Ystrad Mynach

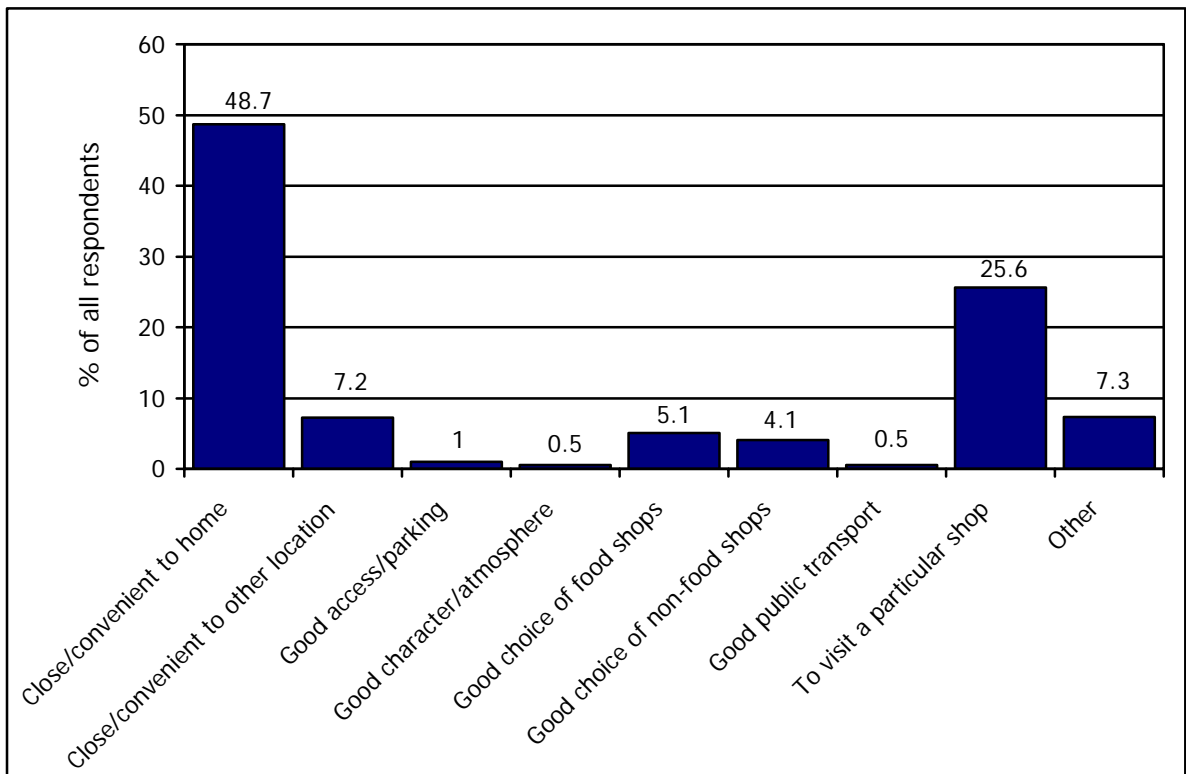
Respondents were asked a series of questions about shopping in Ystrad Mynach. These included whether they visit Ystrad Mynach for shopping; if so why, and if not, why not? They were also asked which potential improvements would make them use Ystrad Mynach as a shopping location more frequently. The following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

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



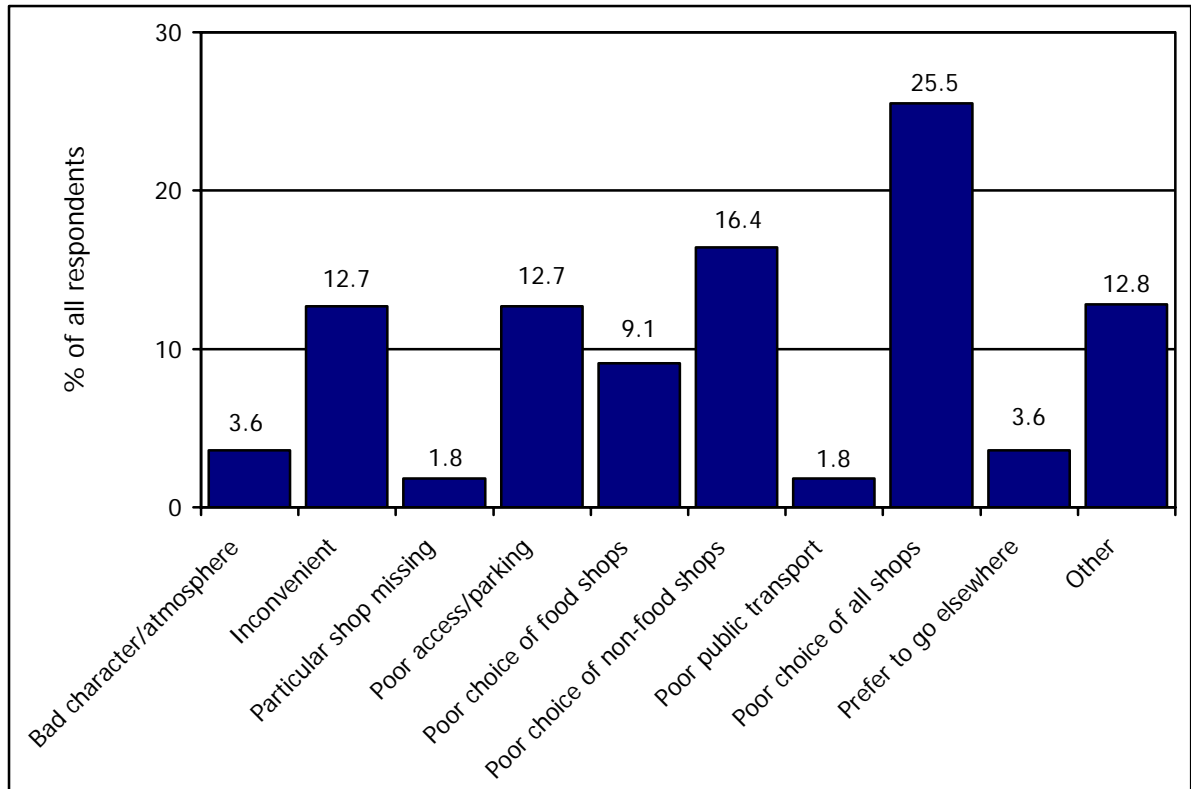
Base: 250 respondents overall

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



Base: Overall 250 respondents; 195 visiting Ystrad Mynach

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



Base: Overall 250 respondents; 55 not visiting Ystrad Mynach

The survey found (see figure 3.4.1) that over three quarters of respondents residing in the Ystrad Mynach catchment area visited Ystrad Mynach for shopping.

Some 195 respondents who indicated they visited Ystrad Mynach for shopping (Figure 3.4.2) gave a range of reasons for doing so. Nearly half of the respondents (48.7%) stated it was because it was close and/or convenient to home and over a quarter (25.6%) said they go to Ystrad Mynach to visit a particular shop.

The responses contained under the category 'other' (7.3%) in figure 3.4.2, included the following aspects which proved to be positive for a number of respondents:

- *"To visit particular services"* (4.1% of all respondents in Ystrad Mynach)
- *"Good choice of all shops"* (1.5%)

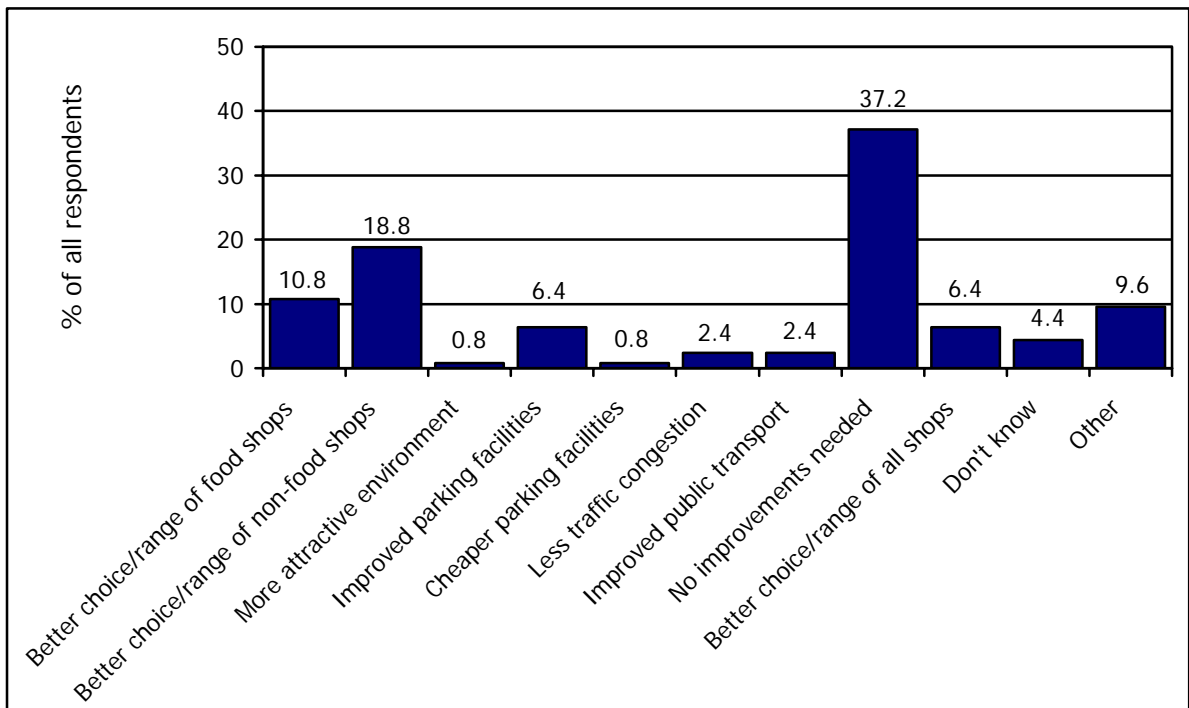
Similarly those respondents, who indicated they did not visit Ystrad Mynach for shopping (Figure 3.4.3), also stated reasons for not doing so. A quarter (25.5%) of respondents not visiting Ystrad Mynach for shopping stated that there is *"Poor choice of all shops"*. Around a sixth stated that there is *"Poor choice of non-food shops"* (16.4%). Slightly more than a tenth thought that Ystrad Mynach was *"Inconvenient"* (12.7%) for them and the same amount thought that there was *"Poor access and parking"* (12.7%) within the Ystrad Mynach area.

The responses contained under the category 'other' (12.8%) in figure 3.4.3, included the following aspect which proved to be negative for a number of respondents:

- "Traffic congestion" (1.8% of all respondents in Ystrad Mynach)
- "Too rundown/too many shops closed down" (1.8%)

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

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



Base: 250 respondents overall

Somewhat positively, over a third of all respondents (37.2%) thought that there are "No improvements needed" that would make them use Ystrad Mynach more frequently, perhaps reflecting the large proportion of respondents already shopping there.

Just under a fifth (18.8%) of all respondents would use Ystrad Mynach more frequently if there was a better choice/range of non-food shops and slightly over a tenth (10.8%) would if it had a better choice/range of food shops.

The responses contained under the category 'other' (9.6%) in figure 3.4.4, included the following requirements for development which would satisfy a number of respondents:

- "Swimming pool" (2% of all respondents in Ystrad Mynach)
- "Lower prices" (0.8%)
- "More shops" (0.4%)

3.5 Approval rating

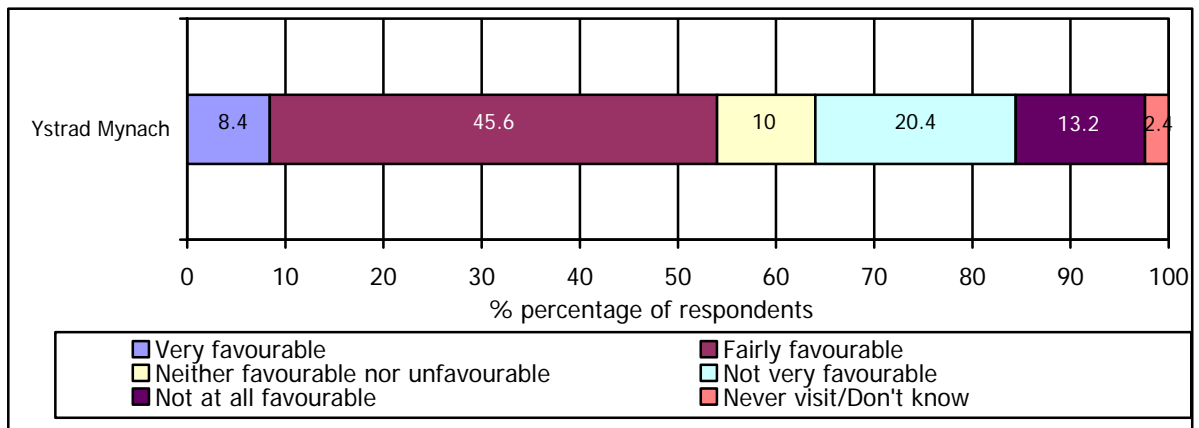
Finally on the telephone survey, respondents were asked how they would rate Ystrad Mynach as a place for shopping on a scale from 'very favourable' to 'not at all favourable'. The results can be seen in table 3.5.1 and figure 3.5.2 below:

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



Base: 250 respondents overall

Around half (54%) of all respondents rated Ystrad Mynach as either fairly, or very favourable, as a place for shopping. This is a slight decline from the equivalent figure from 2003 (57.4%), although it is an improvement on the 2000 figure (49%).

In 2003, Ystrad Mynach had the fourth lowest approval rating of the six retail centres, and in 2006, the results have shown that this is again the case.

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 Ystrad Mynach

By age group

	Base: Respondents in Ystrad Mynach		A/B		C1		C2		D/E		Refused		Gender			
	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%	Male		Female	
													Num	%	Num	%
Base: Respondents in Ystrad Mynach	250	100.0%	44	100.0%	73	100.0%	71	100.0%	59	100.0%	3	100.0%	69	100.0%	181	100.0%
18 - 24 years	3	1.2%	1	2.3%	1	1.4%	1	1.4%					1	1.4%	2	1.1%
25 - 34 years	15	6.0%	7	15.9%	6	8.2%	1	1.4%	1	1.7%			3	4.3%	12	6.6%
35 - 44 years	31	12.4%	6	13.6%	9	12.3%	11	15.5%	5	8.5%			5	7.2%	26	14.4%
45 - 54 years	50	20.0%	8	18.2%	14	19.2%	15	21.1%	13	22.0%			8	11.6%	42	23.2%
55 - 64 years	61	24.4%	8	18.2%	15	20.5%	17	23.9%	21	35.6%			21	30.4%	40	22.1%
65 years or above	87	34.8%	14	31.8%	28	38.4%	26	36.6%	18	30.5%	1	33.3%	31	44.9%	56	30.9%
Refused	3	1.2%							1	1.7%	2	66.7%			3	1.7%

Base: 250 respondents in Ystrad Mynach

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 Ystrad Mynach

4.0 On-Street survey

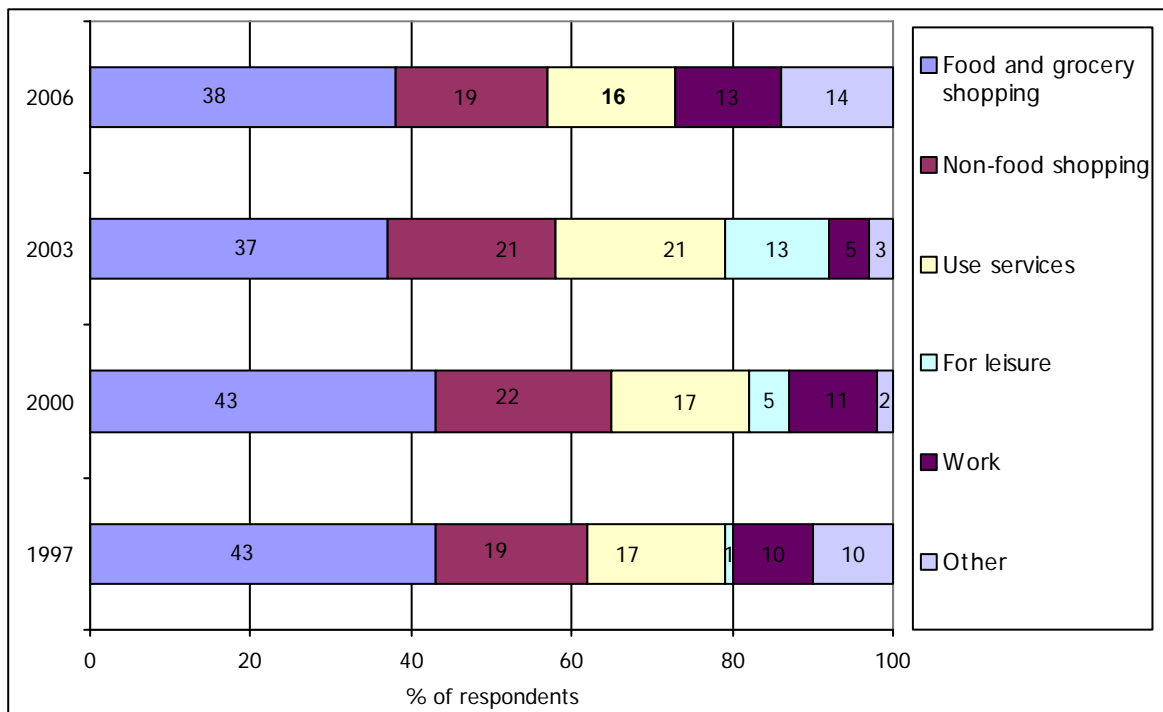
A total of 151 face-to-face interviews were conducted in Ystrad Mynach town centre, in July 2006. Interviews were conducted in two locations, namely

- 1) Bedwlwyn Road
- 2) Penallta Road

4.1 Reasons for visiting Ystrad Mynach town centre

Respondents were asked to give the one reason for their visit to the town centre, without being prompted.

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



Base: 151 respondents

Around two fifths of all respondents (38%) were in Ystrad Mynach to go food and grocery shopping. A further fifth (19%) were in town for non-food shopping, with around an eighth (13%) visiting for work or business purposes. These trends are fairly consistent with the previous surveys.

Further to this, the other main reasons for visiting Ystrad Mynach were fairly widespread. Just under a sixth (16%) were in town for health and financial services.

Of the other main reasons given for visiting Ystrad Mynach, a small number of people were visiting/meeting friends / relatives (4%), as were those who were in town to eat / visit a restaurant / café / pub (3%).

When asked which other activities they would be carrying out on their visit to Ystrad Mynach town centre, those who were combining other activities were most likely to be non-food shopping (21%), food shopping (20%) or visiting financial services (10%). A large proportion of respondents, just over half (51%) were not conducting any other activities whilst in Ystrad Mynach.

4.2 Travelling to Ystrad Mynach

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

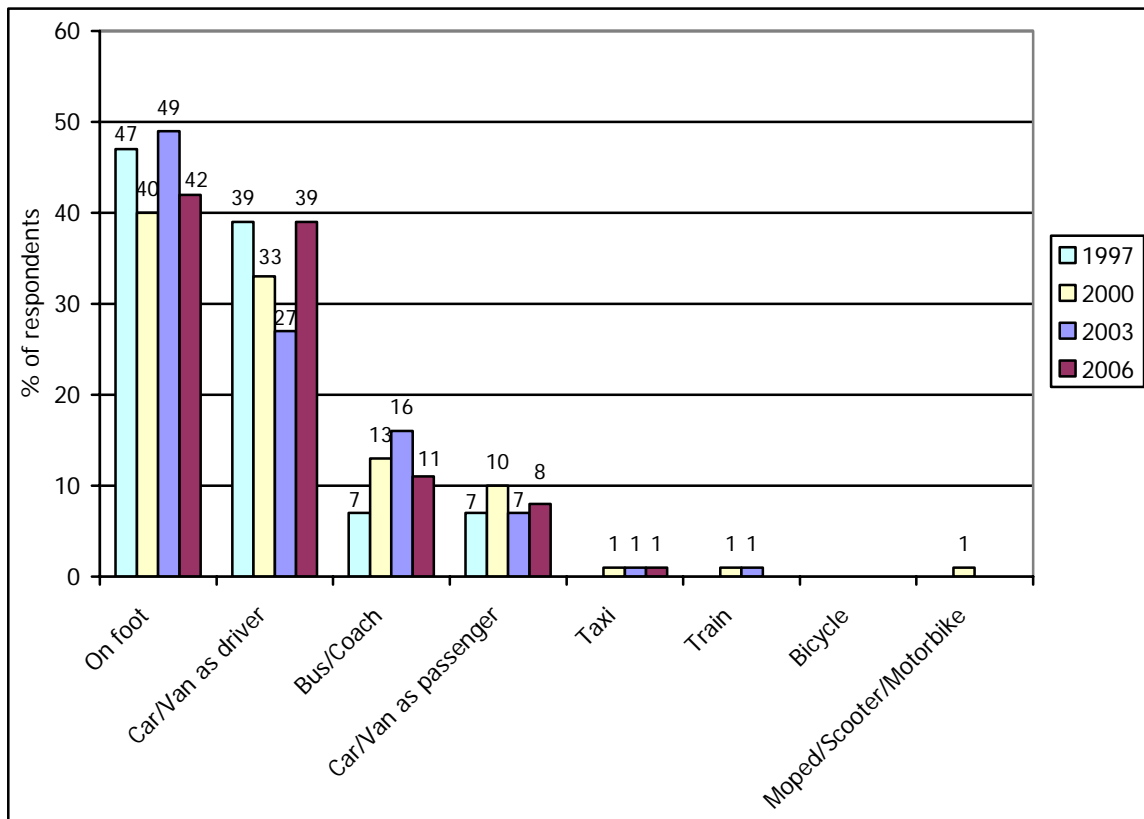
The majority of respondents (95%) had gone straight from home to Ystrad Mynach, with the remainder doing so from work (5%).

Specifically, just over half came from Ystrad Mynach (56%), with Hengoed (14%), Cefn Hengoed (9%) and Maesycwmmwr (7%) being the other starting locations of note.

Shoppers were then asked about the mode of transport that they used to travel to Ystrad Mynach 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: 151 respondents

The most popular means of travel was on foot, as over two fifths (42%) of respondents had walked to Ystrad Mynach. Those travelling by car/van as a driver, accounted for a similar amount (39%), and slightly over a tenth (11%) had travelled using a bus/coach.

Slightly fewer people are travelling by foot to Ystrad Mynach than in 2003, when the equivalent figure was just under half (49%). However, those travelling by car/van as a driver has increased markedly (2003 – 27%, 2006 – 39%).

There was a slight decrease in the number of people travelling by bus/coach from the previous survey.

Those 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	
		Bedwlwyn Road	Penallta Road	Car/van as driver	Car/van as passenger
A pay and display car park	22	21	26	24	17
On-street	68	73	59	70	58
Dropped off	4	-	11	-	25
Place of employment	3	5	-	3	-
Tesco car park	3	2	4	3	-

Base: 53 respondents

Those respondents travelling by car were most likely to use on-street car parking (68%) or a pay and display car park (22%) when parking in Ystrad Mynach. Other locations that were used were places of employment (3%) and Tesco car park (3%). A small amount of respondents (4%) who travelled as passengers in a car/van, were dropped off.

[Time taken to travel to Ystrad Mynach](#)

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

	1994	1997	2000	2003	2006
< 5 minutes	64	34	37	28	45
5-10 minutes	19	47	45	47	40
11-20 minutes	14	14	13	19	13
21-30 minutes	2	3	1	5	2
Over 30 minutes	1	1	3	2	-

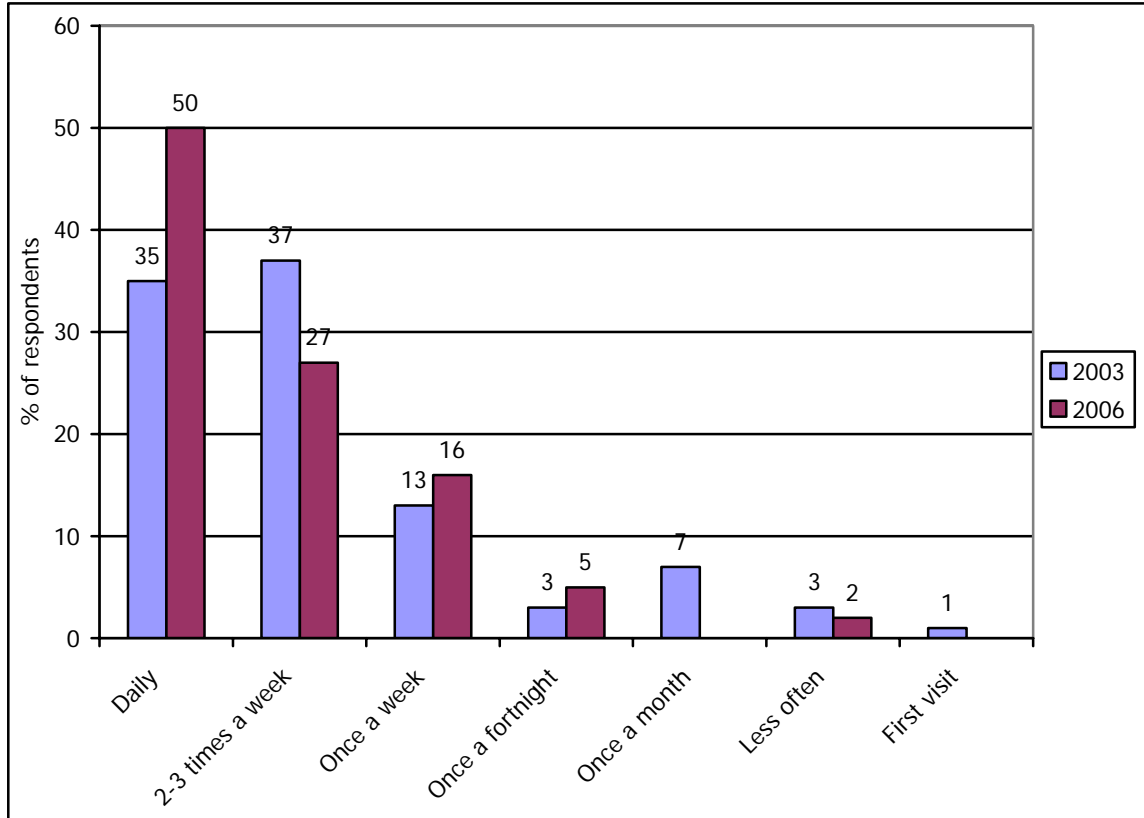
Over four fifths of all respondents (85%) had travelled to Ystrad Mynach in under ten minutes. This was made up by over two fifths (45%) who travelled for a period of less than five minutes and two fifths who travelled for between 5-10 minutes.

The remaining 15% travelled for between 10-30 minutes. Only 2% travelled for between 21-30 minutes to get to Ystrad Mynach and nobody travelled for a period of over 30 minutes.

The general travel time pattern to Ystrad Mynach has changed slightly from the previous study in that more people who live within a five minute period are travelling to Ystrad. It appears that the majority of shoppers are coming from within close proximity and that very few are travelling from outside the local catchment area.

Frequency of visits to Ystrad Mynach

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



Base: 151 respondents

The frequency of visits to Ystrad Mynach town centre has changed from those trends evident when the 2003 survey was conducted. Half of all respondents (50%) stated that they visit Ystrad on a daily basis, an increase from the 2003 survey, when just over a third of respondents (35%) admitted to doing so.

Consequently, the number visiting 2-3 times a week has fallen from just under two fifths of all respondents (37%) in 2003 to just over one quarter (27%) in 2006. The number of respondents visiting once a week (16%) has slightly increased.

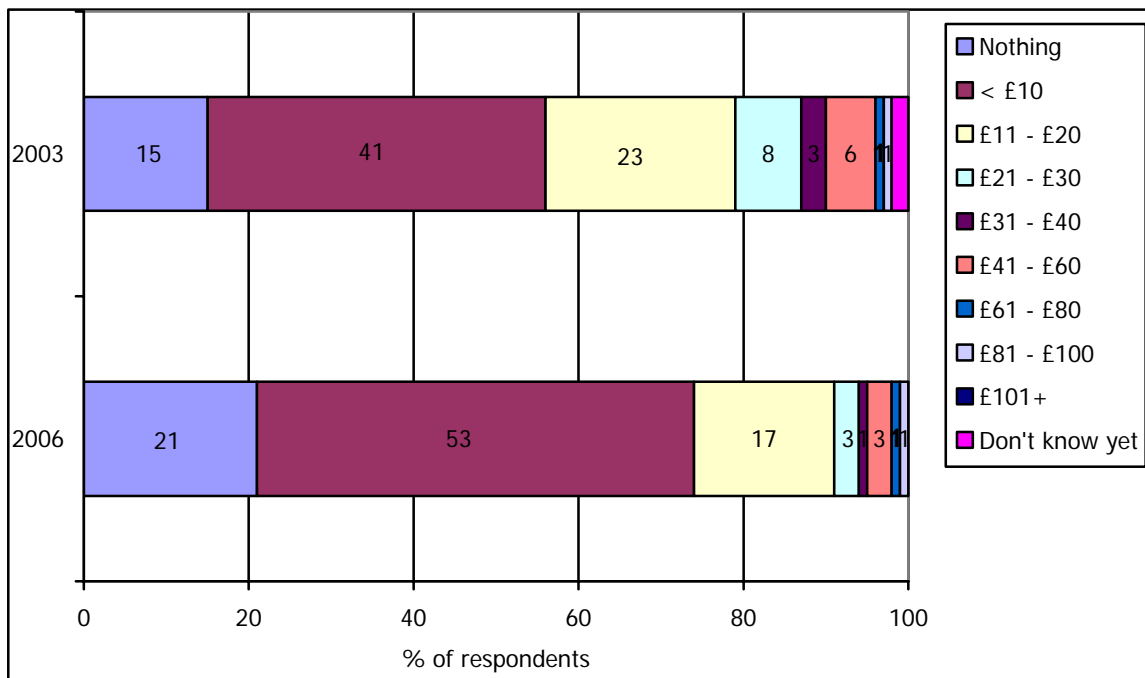
Those visiting once a fortnight or less frequently, accounted for the remaining 7% of respondents in 2006.

There has been a major shift in the number of respondents who visit Ystrad Mynach on a daily basis, but when looking at the number of respondents who visit the town twice a week or more frequently, the 2006 figure (77%) has only shown a slight increase from the equivalent figure in 2003 (72%).

4.3 Spending behaviour

Shoppers were asked how much they have, 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: 151 respondents

Over half of all respondents (53%) had spent or were expecting to spend up to £10 whilst on their shopping trip, with just under a fifth (17%) estimating to spend between £11 and £20. A further fifth (21%) were not expecting to spend anything during their visit.

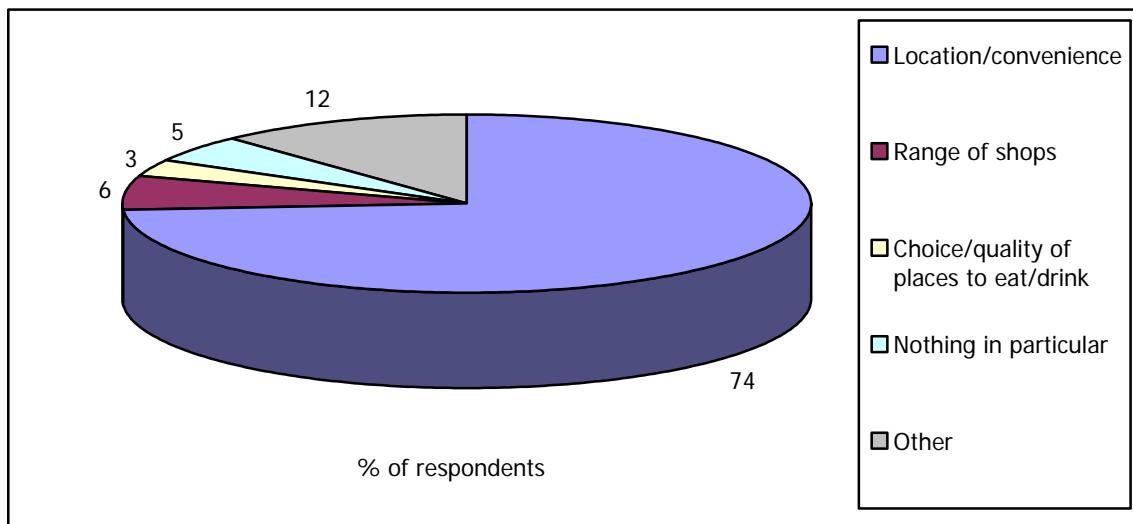
Under a tenth (9%) of all respondents had spent or were expecting to spend over £20 on their trip, with very few people expecting to spend large amounts of money.

The 2006 spending behaviour has changed slightly from the 2003 survey, as it appears that more people are spending smaller amounts of money or even nothing at all. For example, those spending £20 or less in 2003 accounted for just under two thirds of all respondents (64%). This figure has risen to 70% in 2006.

4.4 Likes and Dislikes about Ystrad Mynach town centre

Finally on the on-street survey, respondents were asked which one thing they particularly like and dislike about Ystrad Mynach 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: 151 respondents

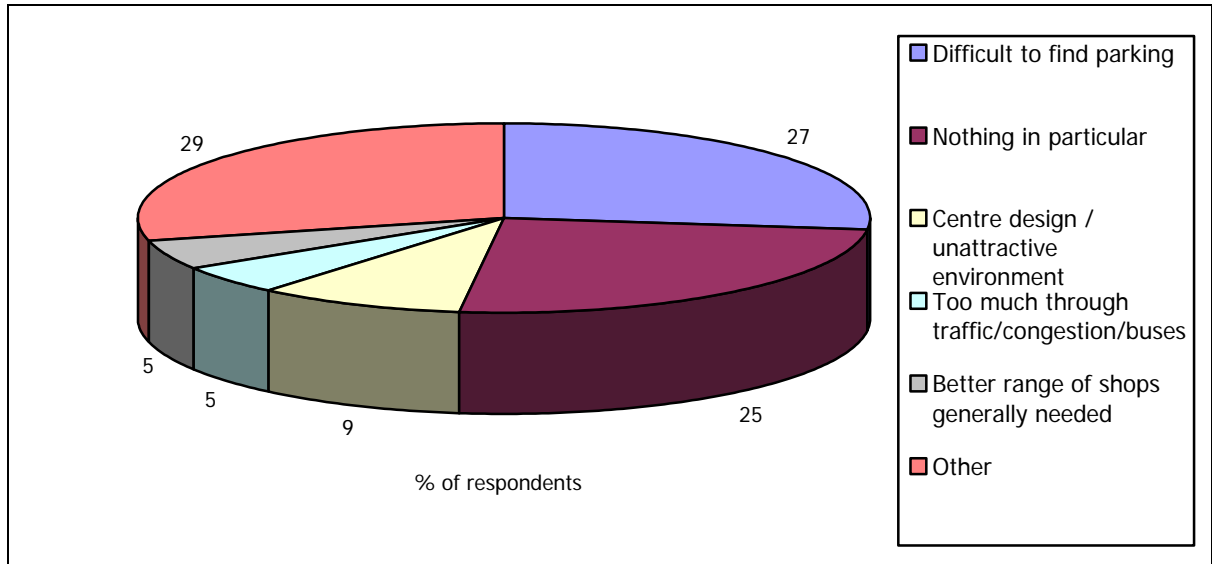
Ystrad Mynach's location and convenience was the aspect that the overwhelming majority of visitors most liked about the town centre (74%). A small number particularly liked the following aspects about Ystrad Mynach: the range of shops (6%) and the choice and quality of places to eat/drink (3%). Very few people (5%) were unable to specify anything that they liked.

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

- "Choice of shops" (3% of all respondents)
- "Access by public transport" (2%)
- "Cost of car parking" (1%)
- "Friendliness/good atmosphere" (1%)

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

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



Base: 151 respondents

A quarter of all respondents (25%) couldn't state anything that they particularly disliked about Ystrad Mynach. However, another quarter (27%) of respondents stated it was difficult to find parking in the town centre. Around a tenth (9%) disliked the centre's design or found Ystrad Mynach to have an unattractive environment. A small number of respondents (5%) thought that there was too much through traffic / congestion / buses, and the same percentage thought that a better range of shops is generally needed.

Of the 'other' responses given (29%), the following aspects proved to be unfavourable for a number of respondents:

- "Choice/quality of places to eat/drink" (4% of all respondents)
- "Poor security (crime/vandalism)" (4%)
- "Lack of leisure/recreation facilities" (3%)

Previous results (2000 – 2003)

	2000	2003
Nothing in particular	20	39
Poor choice /range of shops	23	19
Inadequate / expensive car parking provision	27	17
Lack of services/facilities	2	5
Volume of traffic/poor roads	21	4
Poor physical condition of centre	5	3
All others	3	12

The wording in the options used in previous surveys is slightly different to the 2006 study. However, the discontent with the parking appears to be on the increase again, as in 2003 around one fifth (17%) were dissatisfied parking facilities in the centre, whereas in this years survey the equivalent figure has increased to 27%, the same as it was in 2000.

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	%	Bedwlwyn Road		Penallta Road		Male		Female	
			Num	%	Num	%	Num	%	Num	%
Base: All respondents	151	100.0%	98	100.0%	53	100.0%	71	100.0%	80	100.0%
A/B	10	6.6%	10	10.2%			5	7.0%	5	6.3%
C1	33	21.9%	21	21.4%	12	22.6%	12	16.9%	21	26.3%
C2	46	30.5%	23	23.5%	23	43.4%	26	36.6%	20	25.0%
D/E	59	39.1%	43	43.9%	16	30.2%	28	39.4%	31	38.8%
Refused	3	2.0%	1	1.0%	2	3.8%			3	3.8%

Base: 151 respondents in Ystrad Mynach

By age group

	Base: All respondents		SEG								GENDER					
	Num	%	A/B		C1		C2		D/E		Refused		Male		Female	
			Num	%	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	151	100.0%	10	100.0%	33	100.0%	46	100.0%	59	100.0%	3	100.0%	71	100.0%	80	100.0%
18 - 25 years	13	8.6%			3	9.1%	4	8.7%	5	8.5%	1	33.3%	5	7.0%	8	10.0%
26 - 34 years	17	11.3%	1	10.0%	3	9.1%	5	10.9%	8	13.6%			9	12.7%	8	10.0%
35 - 44 years	19	12.6%	2	20.0%	8	24.2%	4	8.7%	5	8.5%			4	5.6%	15	18.8%
45 - 54 years	28	18.5%	3	30.0%	5	15.2%	7	15.2%	13	22.0%			10	14.1%	18	22.5%
55 - 64 years	29	19.2%	2	20.0%	9	27.3%	11	23.9%	7	11.9%			14	19.7%	15	18.8%
65 years or more	44	29.1%	2	20.0%	5	15.2%	15	32.6%	21	35.6%	1	33.3%	29	40.8%	15	18.8%
Refused	1	.7%									1	33.3%			1	1.3%

Base: 151 respondents in Ystrad Mynach

By gender

	Base: All respondents		LOCATION				SEG									
	Num	%	Bedwlwyn Road		Penallta Road		A/B		C1		C2		D/E		Refused	
			Num	%	Num	%	Num	%	Num	%	Num	%	Num	%	Num	%
Base: All respondents	151	100.0%	98	100.0%	53	100.0%	10	100.0%	33	100.0%	46	100.0%	59	100.0%	3	100.0%
Male	71	47.0%	51	52.0%	20	37.7%	5	50.0%	12	36.4%	26	56.5%	28	47.5%		
Female	80	53.0%	47	48.0%	33	62.3%	5	50.0%	21	63.6%	20	43.5%	31	52.5%	3	100.0%

Base: 151 respondents in Ystrad Mynach

5.0 Leisure Activities

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

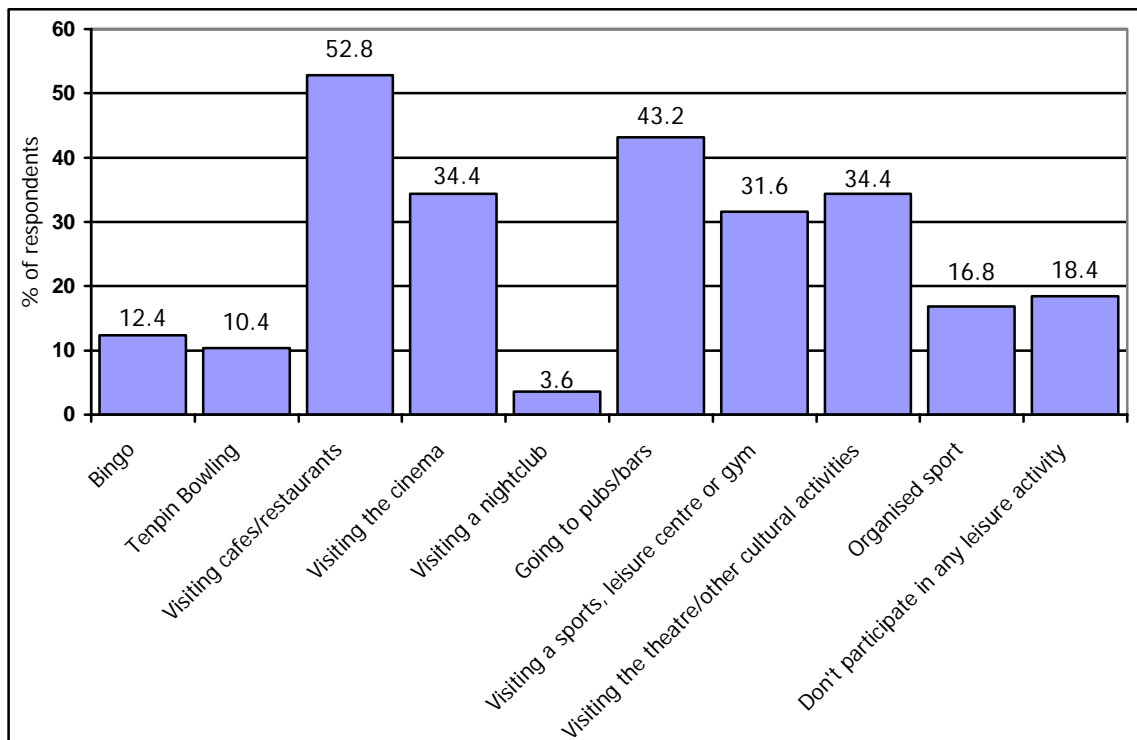
(N.B. The breakdown of the demographics for those who took part can be seen in figure 3.6.1 on page 21.)

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

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

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

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



Base: 250 respondents overall; multiple choice

Visiting cafes/restaurants was the most popular leisure activity that respondents from the Ystrad Mynach catchment area participated in, with over half (52.8%) of all respondents doing so. Slightly more than two fifths (43.2%) go to pubs and bars, while around a third of respondents visit each of the following, a cinema, a sports/leisure centre, and the theatre or other cultural events. Very few people (3.6%) visit nightclubs and well under a fifth participate in organised sport (16.8%).

The frequency and locations where respondents from the Ystrad Mynach catchment area participate in leisure activities are as follows:

Bingo

Ystrad Mynach was the most popular location for this activity, accounting for over a quarter (25.8%) of respondents. Merthyr Tydfil was the second most popular area to play Bingo, mentioned by just over a eighth (12.9%).

Those respondents who played Bingo tended to do so once a week, with nearly three fifths (58.1%) indicating this.

Tenpin Bowling

Over two thirds of respondents (69.2%) who participate in playing Tenpin Bowling do so in Nantgarw. There are no Tenpin Bowling facilities in Ystrad Mynach.

The majority who go Tenpin Bowling usually do this less often than once a month with over half (53.8%) indicating this, while nearly a quarter (22.7%) play once a month.

Cafés/Restaurants

Cardiff was the first choice (36.4%) for those who visited a café or a restaurant. Caerphilly was second choice with 21.2% of respondents, followed by Blackwood with 9.1%. Only six respondents (4.5%) visit a café or a restaurant in Ystrad Mynach.

Nearly a quarter of those respondents living in the Ystrad Mynach area regularly visit a café or a restaurant once a week.

Cinema

Nantgarw was the most popular venue to visit the Cinema; with over two thirds (67.4%) indicating they go there. Caerphilly (12.8%) was the next location of choice, followed closely by Cardiff (9.3%). However, since Caerphilly doesn't possess a Cinema it may be that many of these respondents really also meant Nantgarw.

Those respondents who visit the Cinema stated that they go either once a month (36%) or even less often (32.6%).

Nightclubs

Although very few respondents from the Ystrad Mynach catchment go nightclubbing (9 people), five respondents visited Cardiff, and one person each visited Newport and Tir y Berth.

Respondents' behaviour varied in how often they visited nightclubs from once a week to less often than once a month (each 22.2%).

Pubs/Bars

Ystrad Mynach was the most popular location for respondents to visit a pub or a bar; with over a quarter (26.9%) indicating that they go there. Those who visit a pub or a bar stated that they go once a week (38.9%) or 2 – 3 times a week (15.7%).

Sports, Leisure Centre/Gym

Those who visited a sport, leisure centre or a gym preferred to go to Caerphilly with nearly a third (31.6%) stating this. Bargoed was second choice listed by 15.2% of respondents, followed by Ystrad Mynach with 11.4%.

Nearly a third (32.9%) of those respondents living in the Ystrad Mynach area regularly visit a sport, leisure centre or a gym and they attend 2-3 times a week.

Theatre / other cultural activities

Nearly three quarters (73.3%) of the respondents within the Ystrad Mynach area prefer to go to Cardiff, as a place to visit the theatre or any other cultural activities. They participate in this activity less often than once a month (84.9%).

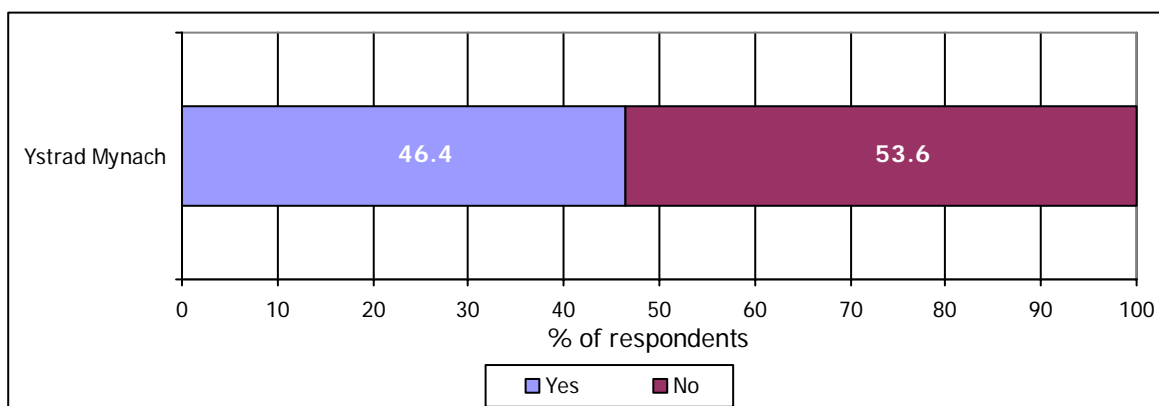
Organised sport

Over a fifth (21.4%) of respondents who play an organised sport, gave Cardiff as the place they participate in it, and over two fifths of the respondents (40.5%) 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:

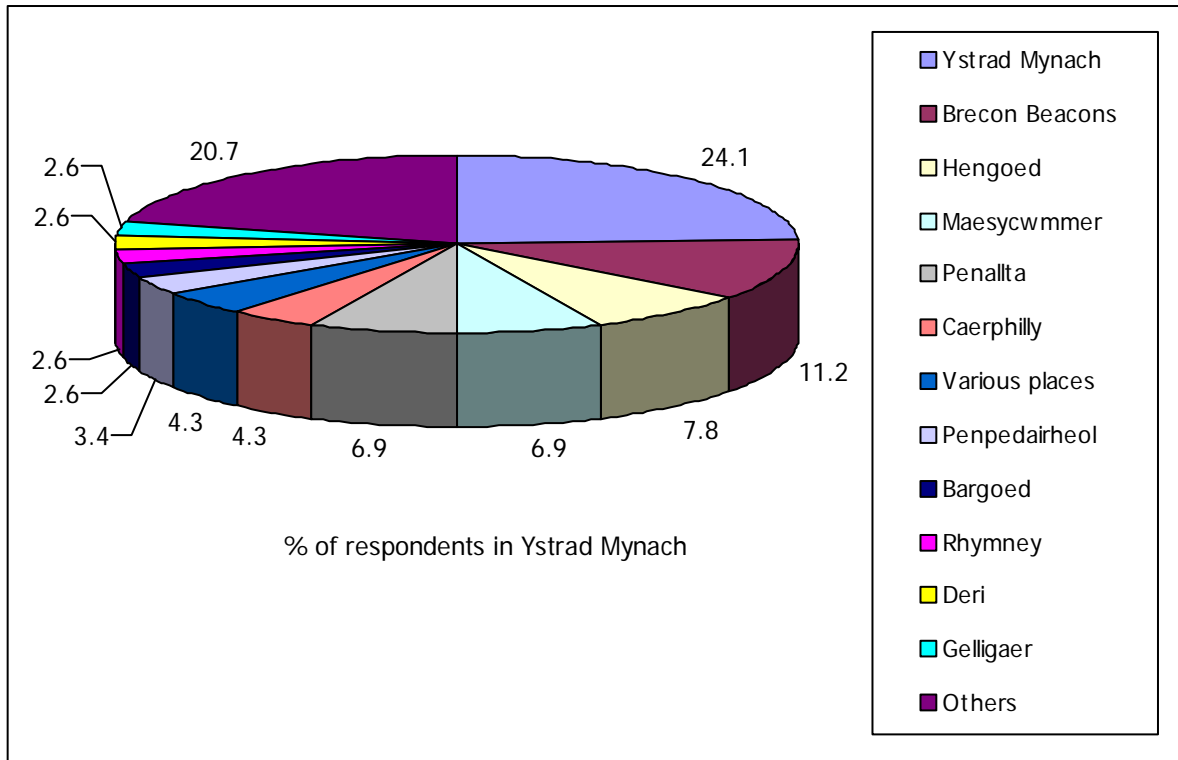
Figure 5.1.1 – Do you or members of your household regularly walk in the countryside? (% of all respondents)



Base: 250 respondents overall

The 116 respondents from the Ystrad Mynach catchment area who regularly walk in the countryside, 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: 116 respondents

Of those respondents who go walking in the countryside and live within the Ystrad Mynach catchment area, around a quarter (24.1%) go walking along the routes in Ystrad Mynach and around a tenth (11.2%) set off to the Brecon Beacons. Slightly fewer visit Hengoed (7.8%) and roughly the same numbers choose to walk in either Maesycwmmmer or Penallta in Hengoed (both 6.9% of all respondents). A small number go to the walking paths in Caerphilly (4.3%).