

Shopper Attitude Surveys 2008 – Tredegar Report
Heads of the Valleys
January 2009

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1.0 Introduction

1.1 Project Overview

1 Caerphilly County Borough Council (C.C.B.C.) regularly conducts market research to investigate the ever-changing shopping attitudes within the major shopping centres in the County Borough area. However, in September 2008 the Heads of the Valleys Town Centres Group (including C.C.B.C.) required updated information on shopping patterns in eleven Town Centres and two retail centres within the Heads of the Valleys Programme Area.

The following centres were surveyed:

- 2
 - Abertillery
 - Aberdare
 - Bargoed
 - Blaenavon
 - Brynmawr
 - Ebbw Vale Town Centre
 - Ebbw Vale Festival Park Factory Shopping Village
 - Ferndale
 - Merthyr Tydfil Town Centre
 - Merthyr Tydfil Cyfarthfa Retail Park
 - Mountain Ash
 - Tredegar
 - Treorchy

3 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.

1.2 The Research Objectives

4 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:

- 5
 - 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

- 6 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 3,250 households
 - A shopper/visitor survey at specified locations of 2,630 interviews

1.3 Methodology

Household (CATI) Survey

7 3,250 interviews were conducted in total during the period 7th November – 29th November 2008 with 250 interviews completed in Tredegar.

8 Interviews were conducted by 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
- 9 ▪ 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-food items (First and second choices)
- Where respondents buy most of their non-bulky non-food items (First and second choices)
- Whether respondents shop using the internet
 - Types of goods respondents purchase over the internet
- Whether respondents had used/visited the following stores/locations for any purpose and if so, where had respondents shopped before these had opened:
 - Asda, Nantyglo/Brynmawr
 - Asda, Colliers Way, Tonypany
 - Asda, Cwmbran Town Centre
 - Asda, Riverside Retail Park, Aberdare
 - Cyfarthfa Retail Park, Merthyr Tydfil
 - Tesco, Pontypool
- Which of the following leisure activities do the respondents or members of their household regularly participate in:
 - Bingo (excluding online)
 - 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 such as:
 - Abertillery
 - Aberdare
 - Bargoed
 - Blaenavon
 - Brynmawr
 - Ebbw Vale Town Centre
 - Ebbw Vale Festival Park Factory Shopping Village
 - Ferndale
 - Merthyr Tydfil Town Centre
 - Merthyr Tydfil Cyfarthfa Retail Park
 - Mountain Ash
 - Tredegar
 - Treorchy
- If they do, the reasons why
- If they do not, the reasons why not
- Whether respondents use their local shopping centre would visit the town for any other purpose, and if so what would this normally be for
- What would make respondents use their local shopping centre more frequently
- How respondents rate their local shopping centre 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 band of respondent
 - Quality control question
 - Gender of respondent

On-Street Survey

10 2,630 structured face-to-face interviews were conducted in total during the period 10th November – 9th December 2008. The target audience were males and females over 18 years of age.

11 Interviews were conducted in batches of 25 interviews at appropriate points in each shopping centre and were carried out from Mondays to Saturdays, which included days with the heaviest footfall. In Tredegar 205 interviews were completed in Commercial Street.

Questionnaire

12 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 in the Bargoed catchment area. The survey consisted predominantly of closed questions with allowance made for verbatim comments.

In particular, the survey sought to establish the following:

- 13
 - 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, other named tourist attractions 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/van specifically parked in each Town Centre
 - 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
 - All respondents were given a list of aspects of the centre and asked to rate their level of satisfaction
 - Whether respondents use their local shopping centre would visit the town for any other purpose, and if so what would this normally be for
 - 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
 - Walking in the countryside
 - What respondents like about the centre for shopping, leisure/evening activities or services
 - What types of improvements respondents would make that could encourage them to visit the centre more often and improve their day out experience

-
- Demographics:
 - Occupation of chief wage earner
 - SEG
 - Age band of respondent
 - Number of cars in the household
 - Gender of respondent
 - Quality control question

2.0 Executive Summary

2.1 Introduction

14 This report presents the findings of the 2008 Shopper Attitude Surveys, carried out by Research and Marketing Plus. The overall aim of the project is to obtain information on shopping patterns within the Heads of the Valleys Programme Area. In order to obtain the relevant information Household Telephone and On-Street Surveys were conducted. Throughout the duration of the surveys a total of 455 local residents were interviewed who resided across the area. Interviewing was conducted within the catchment area of Tredegar over a period, from 7th November – 9th December 2008.

2.2 Main Findings

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

- 15 ▪ Two fifths of respondents (40.0%) listed Morrisons, Beaufort Road in Ebbw Vale as the store where they buy the majority of their household food and grocery items. The second most popular store/location fell under the 'Other' responses - Tesco, North West Approach in Ebbw Vale and named by just under two fifths (19.2%) of respondents.
- 16 ▪ When reviewing respondents who shopped within their catchment area, under a fifth (18.0% - combined responses) stated stores within Tredegar.
- 17 ▪ In terms of locations to purchase non-food items, Cardiff was the most popular location with over a quarter (28.8%) visiting this area. Merthyr Tydfil Town Centre (22.4%) was the second most popular area. Tredegar was stated by 6.8% to purchase the majority of their non-food items.
- 18 ▪ In 2008, a series of questions were included for the first time, namely:
 - 18 ○ Internet shopping and types of goods
 - 18 ○ Current usages of recently opened food stores/shopping centres (inc. shopping patterns prior to these new establishments opening)
 - 18 ○ Current patterns of visiting the catchment areas for any other purpose other than retailing
- 19 ▪ The 67 respondents who stated they use the internet to shop were asked to indicate the categories of goods they have purchased. The largest proportion, indicated by over half of respondents, purchased Clothes (50.7%).
- 20 ▪ Respondents were prompted with a list of stores/locations and asked to state whether they had used or visited these stores for any purpose. When prompted, the majority of respondents had visited Cyfarthfa Retail Park, Merthyr Tydfil (66.8%), Asda in Nantyglo/Brynmaur (49.2%) and Asda in Cwmbran Town Centre (16.4%); whereas nearly a quarter (24.0%) indicated they had not used/visited these stores/locations for any other purpose.
- 21 ▪ The most popular leisure activity that respondents in the Tredegar catchment area

participated in was visiting cafes/restaurants (50.8%) of which they mainly visited once a month (30.7%).

- 22 ▪ Over two fifths of respondents (41.6%) stated that they partake in going to pubs/bars. The majority of respondents who partake in this type of activity do so once a week. Only 50 respondents (20.0%) indicated that they do not participate in any leisure activity.
- 23 ▪ Those respondents, who go walking in the countryside, mainly did so in Tredegar with just under three fifths (56.3%) stating this. The next highest proportion was less than a fifth (15.0%) of respondents that stated they visit Brynbach Park.
- 24 ▪ Those who travelled by car/van for shopping; some 203 respondents (81.2%), were asked how often they have access to the vehicle. The majority (85.2%) stated that they have access to a car/van all the time.
- 25 ▪ The survey has found that 81.6% of all respondents surveyed do visit Tredegar for shopping.
- 26 ▪ Those respondents who indicated they visited Tredegar, some 204 respondents stated a number of reasons for visiting their local area for shopping. Nearly three quarters of the respondents (74.0%) stated it was because it was close and/or convenient to home.
- 27 ▪ In 2008, a new question was introduced; whether respondents usually visit the town for any other purpose (and if so what for). Just under half (49.6%) of respondents visit Tredegar for any other purpose, apart from what is planned prior to their trip. However, the remaining proportion (50.4%) do visit the area for other usages.
- 28 ▪ All respondents within the catchment area of Tredegar were then asked what would make them visit the area more frequently. The most popular response stated by over two fifths (42.8%) was that respondents would prefer to have better choice/range of non-food shops. Just under a fifth (16.0%) said that a better choice/range of food shops would make them use Tredegar for shopping more frequently.
- 29 ▪ Nearly three quarters (72.0%) of respondents stated that they rate the town as either 'not very favourable' or 'not at all favourable', conversely only 11.6% of all respondents felt the town was either 'very favourable' or 'fairly favourable'.

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

- 30 ▪ Over a third (39.5%) of respondents stated they mainly visited Tredegar for Food and grocery shopping. The second most quoted response was Non-food shopping (33.2%) and in third place was Work/business (10.7%).
- 31 ▪ Collectively, those visiting Tredegar for shopping equates for nearly three quarters of all respondents (72.7%).
- 32 ▪ The most popular method of transport was on foot, with two fifths (41.5%) of all respondents stating this.
- 33 ▪ Over a quarter (29.3%) of all respondents visited the Town Centre daily, with over two fifths (42.4%) stated they visited Tredegar 2-3 times a week.

- The majority of respondents (68.3%) stated that they had or were likely to spend between £0-£20 during their visit:
 - 34 ○ 43.9% indicated they would be spending/have spent less than ten pounds
 - 24.4% stating somewhere in between £11 - £20
 - Under a tenth (9.8%) didn't expect to be spending any money whilst on their visit
- The majority of respondents rated the location/convenience of Tredegar Town Centre as either 'very good' or 'good' (combined responses - 78.0%), the next highest proportion was stated by over two thirds (69.8%) of respondents that 35 indicated the compact shopping centre was 'very good' or 'good'.
- There have also been some negative responses, where a large proportion of 36 respondents stated the choice of shops (81.0%) and/or range of shops (80.5%) were either 'poor' or 'very poor'.
- The survey has revealed a number of reasons for visiting Tredegar, and has found 37 the majority stated they also visit this area to use the financial services (60.8%).
- When surveying respondent's on-street as well as over the telephone, respondents 38 remain interested in going to pubs/bars stated by over a fifth (21.0%). The next most popular response was visiting cafes/restaurants (16.1%). 74 respondents indicated that they do not participate in any leisure activity.
- Tredegars' location and convenience was the aspect that respondents most liked 39 about the area (71.7%) for shopping, leisure/evening activities or services.
- A better range of food and non-food shops (80.0% and 69.8% respectively) were the 40 most popular responses given by on-street interviewees when asked what improvements they would particularly prefer in Tredegar to encourage them to visit Tredegar more often and improve their day out experience.

3.0 Household Telephone Survey

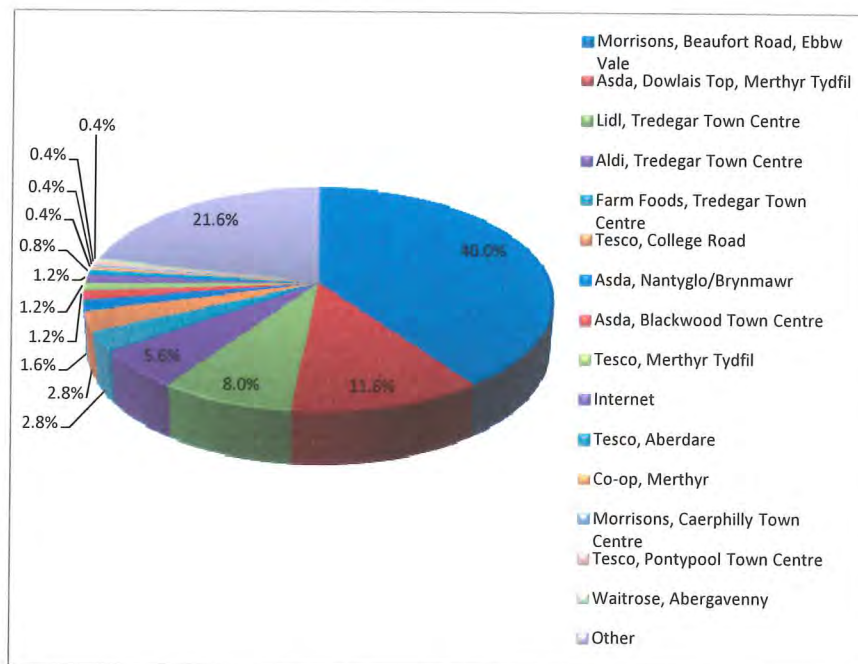
41 A total of 250 interviews were conducted in the catchment area of Tredegar over a period, from 7th November – 29th November 2008. A random selection of local resident’s within the Tredegar area were asked for their opinions on a variety of subjects relating to their shopping behaviour. This included establishing which centre respondent’s use for their food shopping, as well as where they go for non-food purchases. The survey also documents how respondents rate Tredegar as a place for shopping.

3.1 Food and grocery shopping

Main Food

42 To begin with, respondents were asked which specific store they do most of their food and grocery shopping in. The following chart concentrates on the results of respondents in the Tredegar catchment area, within the Heads of the Valleys Programme Area.

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



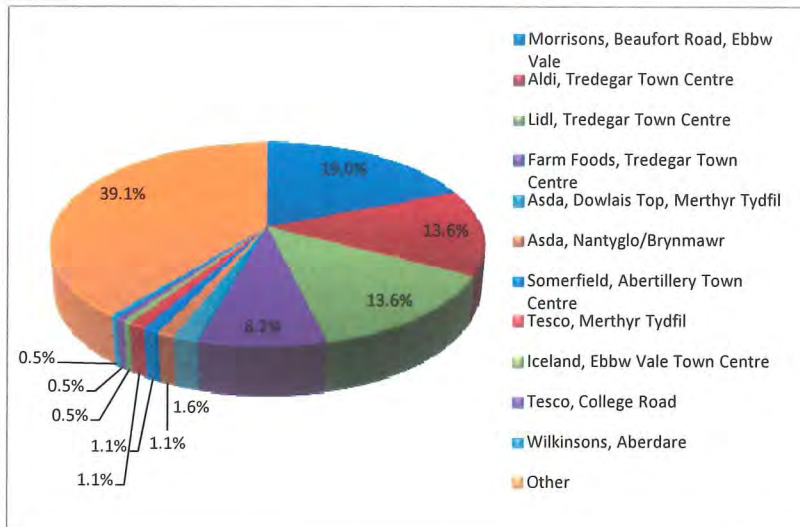
Base: 250 (All respondents)

- 43 Two fifths of respondents (40.0%) listed Morrisons, Beaufort Road in Ebbw Vale as the store where they buy the majority of their household food and grocery items. The second most popular store/location fell under the 'Other' responses - Tesco, North West Approach in Ebbw Vale and named by under two fifths (19.2%) of respondents.
- 44 When reviewing respondents who shopped within their catchment area, under a fifth (18.0% - combined responses) stated stores within Tredegar.
- 45 Only three respondents (1.2%) within the catchment area stated that they used the Internet for their household's food and grocery shopping.
- 46 With regards to the respondents frequency of visits, travelling habits and expenditure, over two thirds (67.2%) of all respondents normally shop at their main food store once a week, with the majority of respondents (91.5%) travelling from their home in Tredegar to their main food store and over three fifths (82.3%) travelling by car/van. Around a fifth (17.4%) of all respondents spends in the region of £51 - £75 on their main food and grocery shopping.
- 47 Over three fifths (61.9%) specified that they do not combine their main food shopping with visits to other shops to buy any non-food items. However, nearly three quarters (73.6%) indicated that they carry out a top-up food and convenience shop in addition to their main food shopping.

Top-Up Food

- 48 Those who carried out top-up food shopping were asked where they were most likely to do so. A number of stores were listed by respondents in the Tredegar catchment area. This is indicated in figure 3.1.3.

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



Base: 184 (Those top-up shopping)

49

The largest group of respondents (34.2%) indicated they visited their local stores in the Tredegar area to purchase top-up shopping; this answer fell under the 'Other' responses given.

Table 3.1.4 – Top-up shopping - Other verbatim stores/locations:

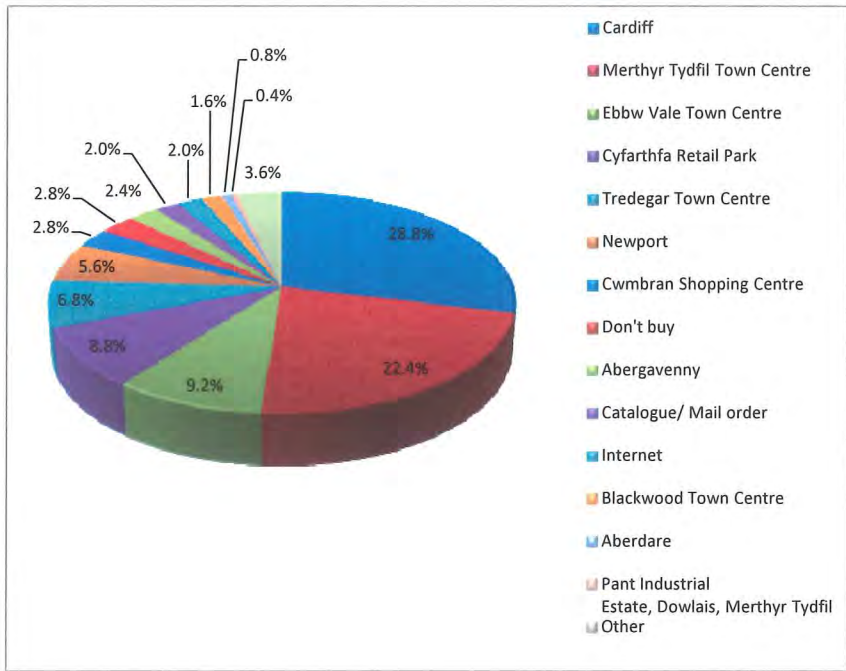
Local stores, Tredegar	34.2%
Tesco, North West Approach, Ebbw Vale	1.6%
Goods Delivered	0.5%
Local stores, Nantybawch	0.5%
Marks & Spencer, Culverhouse Cross, Cardiff	0.5%
Marks & Spencer, Queen Street, Cardiff	0.5%
Tesco, Swansea Marina, Swansea	0.5%
TV shopping channel	0.5%

3.2 Non-food shopping

50

Respondents were asked which specific store they do most of their non-food shopping. The following chart shows the results of respondents in the Tredegar catchment area within the Heads of the Valleys Programme Area:

Figure 3.2.2 – Where do you buy MOST of your non-food items such as clothing, footwear, etc? – First Choice (% of all respondents)

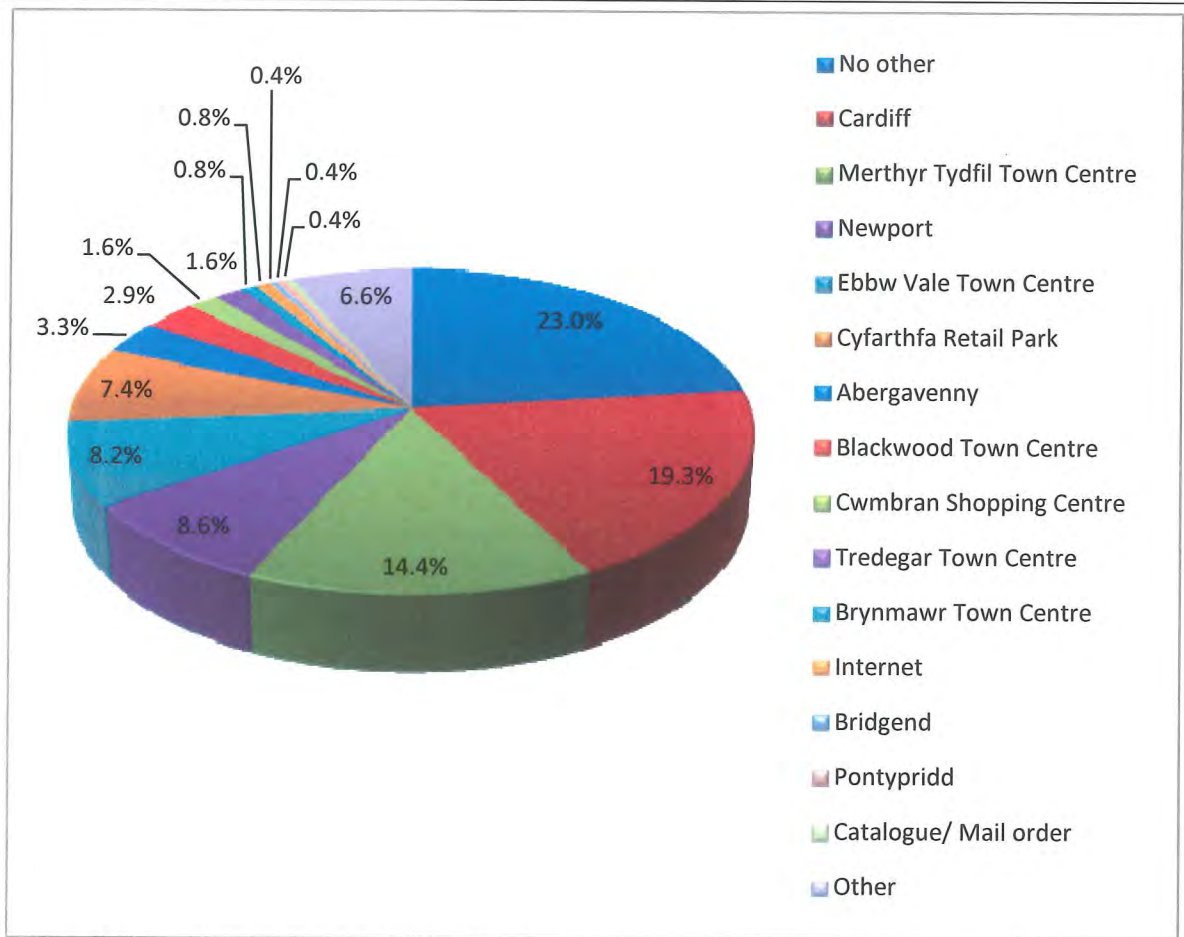


Base: 250 (All respondents)

51 In terms of locations to purchase non-food items, Cardiff was the most popular location with over a quarter (28.8%) visiting this area. Merthyr Tydfil Town Centre (22.4%) was the second most popular area. Tredegar was stated by 6.8% to purchase the majority of their non-food items.

52 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-food items such as clothing, footwear, etc? – Second Choice (% of all respondents)



Base: 243 (Those buying non-food items)

53 Nearly a quarter (23.0%) of respondents do not visit any other centre for non-food shopping. Whereas those that stated another location mainly visited Cardiff with under a fifth (19.3%) stating this as an alternative to their main centre of choice.

In order to collect data on other Town Centre functions, the Heads of the Valleys Town Centre Group requested additional questions to be introduced to the survey. These questions were as follows:

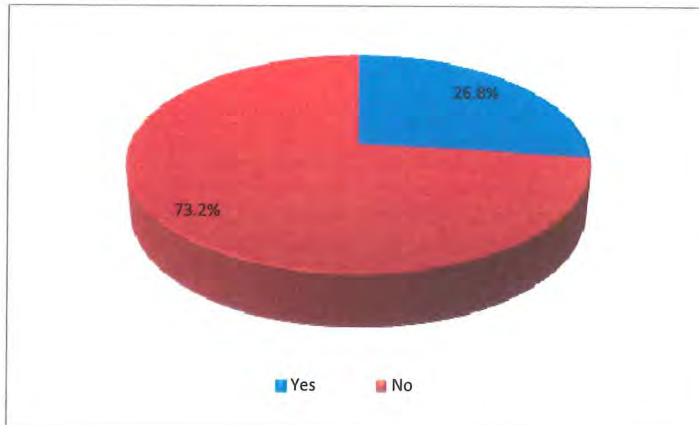
- 54
- Internet shopping and types of goods
 - Current usages of recently opened food stores/shopping centres (inc. shopping patterns prior to these new establishments)
 - Current patterns of the catchment areas for any other purpose other than retailing

3.3 Internet shopping

55 The survey went on to ask respondents about internet shopping. Respondents were asked whether they shop using the internet and if so to list the types of goods purchased, without being prompted.

56 The following charts concentrate on the results of respondents in the Tredegar catchment area within the Heads of the Valleys Programme Area.

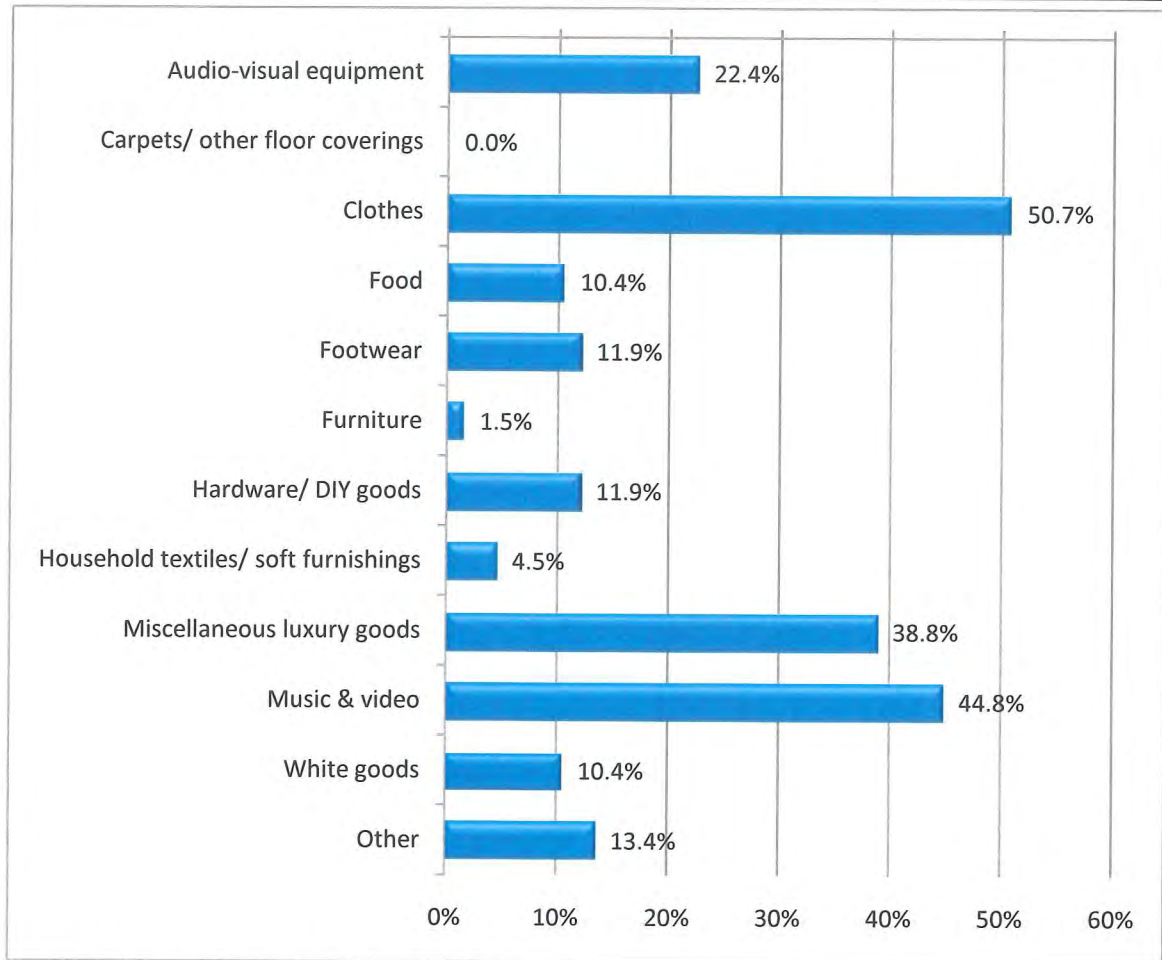
Figure 3.3.1 - Do you shop using the Internet? (% of all respondents)



Base: 250 (All respondents)

57 It is evident that the majority (73.2%) of respondents within this Tredegar catchment area do not use the internet to purchase goods and would rather view the items in person than on a computer, with only a quarter (26.8%) of respondents stating they shop using the internet.

Figure 3.3.2 - Which of the following categories of goods do you purchase over the internet? (% of respondents using the internet)



Base: 67 (Those using the internet)

58 The 67 respondents who stated they use the internet to shop were asked to indicate the categories of goods they have purchased. The largest proportion shown above clearly indicates that over half of respondents purchased Clothes (50.7%).

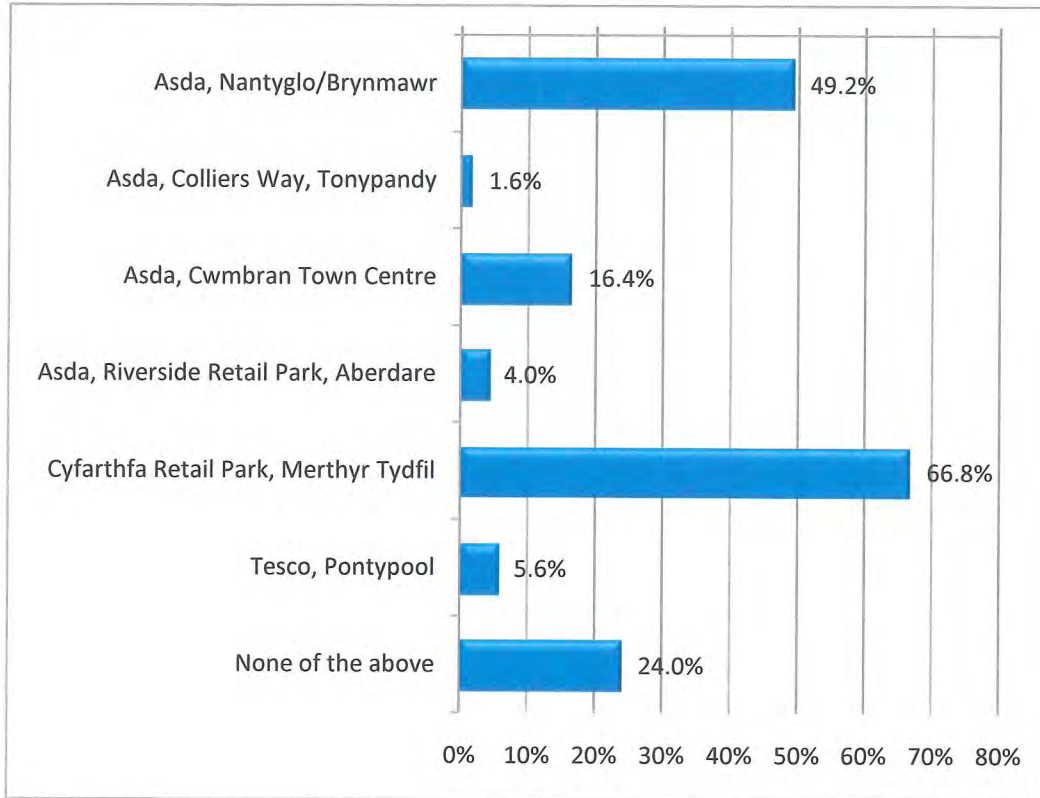
59 The next most popular responses given were Music & video (44.8%), Miscellaneous luxury goods (38.8%) and/or Audio-visual equipment (22.4%).

60 Only 10.4% within the Tredegar catchment area purchased their food and groceries via the internet.

3.4 Other activities

61 Respondents were prompted with a list of stores/locations and asked to state whether they had used or visited these stores/locations for any purpose.

Figure 3.4.1 - Which of the following stores/ locations have you used/ visited for any purpose? (% of all respondents)



Base: 250 (All respondents)

62 When prompted, the majority of respondents had visited Cyfarthfa Retail Park, Merthyr Tydfil (66.8%), Asda in Nantyglo/Brynmawr (49.2%) and Asda in Cwmbran Town Centre (16.4%); whereas nearly a quarter (24.0%) indicated they had not used/visited these stores/locations for any other purpose.

63 From the list of stores given, respondents were then asked to state which stores/locations had they used prior to the opening of the stores provided. The

following table shows the responses given:

Figure 3.4.2 - Where did you shop before these stores/locations opened? (% of respondents using stores)

Cardiff City Centre	16.8%
Asda, Dowlais Top, Merthyr Tydfil	13.2%
Tesco, Tredegar	10.0%
Tesco, North West Approach, Ebbw Vale	7.9%
Merthyr Tydfil Town Centre	6.3%
No other store used	5.8%
Tredegar Town Centre	5.3%
Morrisons, Beaufort Road, Ebbw Vale	4.2%
Kwik Save, Tredegar	3.7%
Local stores, Tredegar	3.2%
Newport City Centre	2.1%
Co-op, James Street, Ebbw Vale	1.6%
Cwmbran Town Centre	1.6%
Lidl, Tredegar Town Centre	1.6%
Newport or Cardiff	1.6%
Asda, High Street, Blackwood	1.1%
Ebbw Vale	1.1%
Festival Park, Ebbw Vale	1.1%
No particular shop	1.1%
Aberaman	0.5%
Abergavenny	0.5%
Aldi, Tredegar Town Centre	0.5%
Asda, Blackwood Town Centre	0.5%
B&Q, Pentrebach Retail Park, Merthyr Tydfil	0.5%
Brynmaur Town Centre	0.5%
Can't remember	0.5%
Cardiff/Newport/Cwmbran Town Centres	0.5%
Cardiff/Swansea City Centres	0.5%
Co-op, Tredegar	0.5%
Farm Foods, Tredegar	0.5%
Festival Park, Ebbw Vale or Merthyr Tydfil town centre	0.5%
Leo's, Ebbw Vale	0.5%
McArthur Glen, Bridgend	0.5%
Morrisons, Merthyr Tydfil	0.5%
Newport, City Centre	0.5%
Pentrebach, Merthyr Tydfil,	0.5%
Reading	0.5%
Refused	0.5%
Stores in Tredegar or Ebbw Vale	0.5%
Tesco, Tredegar or Asda, Merthyr Tydfil	0.5%

Base: 190 (Those using other stores/locations)

Figure 3.4.2 shows the majority of respondents used to shop at Cardiff City Centre (16.8%). Over a quarter (26.0%) surveyed indicated shops in Tredegar (combined responses).

3.5 Leisure activities

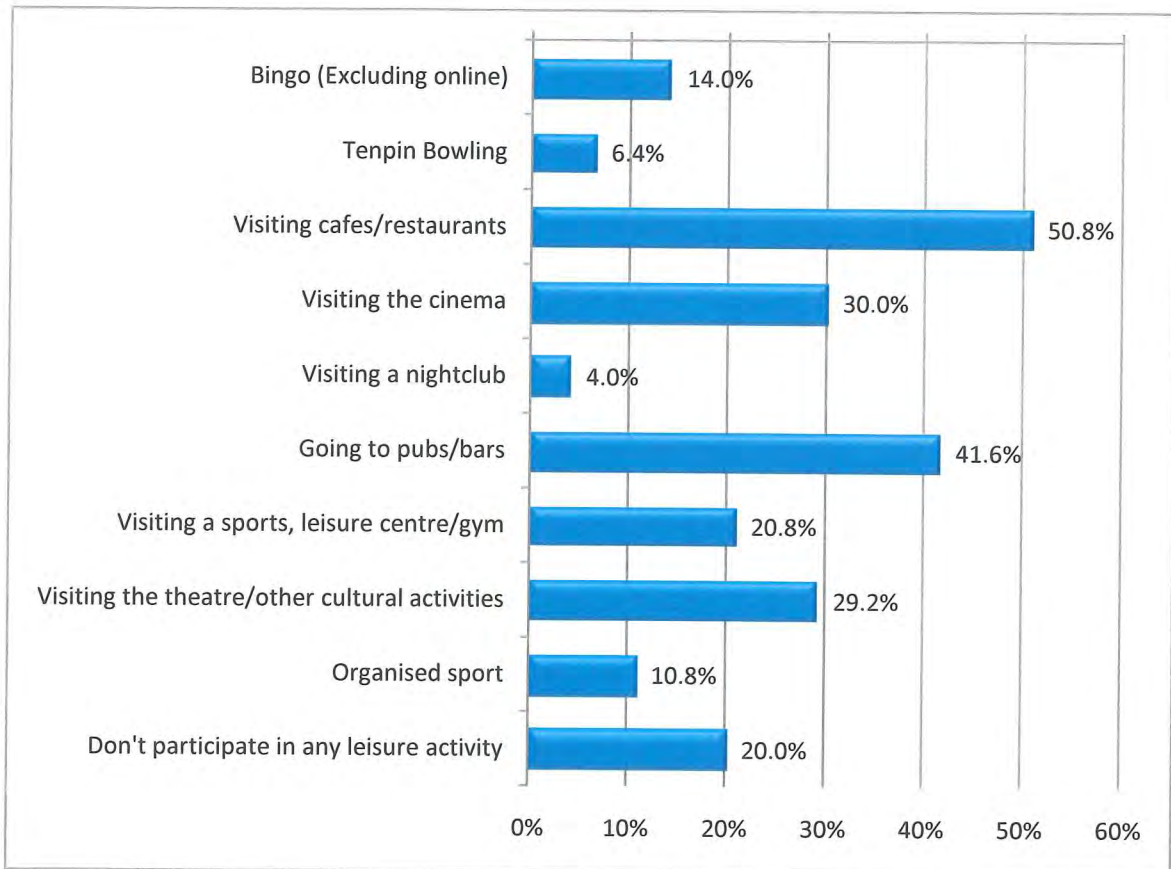
65 A series of questions relating to leisure activities were asked, these included discovering which leisure activities respondents partake in, in which area and how frequently they participate in these activities.

66 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:

- 67 ○ Bingo (Excluding online)
- 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
- Don't participate in any leisure activity

68 Respondents were able to state as many activities that applied and the following chart (Figure 3.5.1) demonstrates the findings that were discovered:

Figure 3.5.1 - Which of the following leisure activities do you or members of your household regularly participate in? (% of all respondents)



Base: 250 (All respondents)

69 The most popular leisure activity that respondents in the Tredegar catchment area participated in was visiting cafes/restaurants (50.8%) of which they mainly visited once a month (30.7%).

70 Over two fifths of respondents (41.6%) stated that they partake in going to pubs/bars. The majority of respondents who partake in this type of activity do so once a week. Only 50 respondents (20.0%) indicated that they do not participate in any leisure activity.

Bingo

71 Tredegar was the most popular area for this activity with just under half (48.6%) stating this. Merthyr Tydfil (34.3%) was the second most popular areas to play Bingo.

Over half (54.3%) of all respondents play Bingo once a week.

Tenpin Bowling

72 A small number of areas were stated for this type of activity, with the majority stating they visit Nantgarw (56.3%) to go Tenpin Bowling and mainly undertake this less often than once a month (81.3%).

Cafés/Restaurants

73 The largest group (29.9%) of respondents visited Tredegar to go to a café or a restaurant mainly once a month (30.7%).

Cinema

74 Most respondents visited Nantgarw (30.7%) to go to the Cinema, with the majority going less often than once a month (65.3%).

Nightclubs

75 The place that respondents of the Tredegar catchment area prefer to visit nightclubs was Cardiff, where over two thirds (70.0%) stated this location. The remaining proportion either visited Merthyr Tydfil (10.0%), Swansea (10.0%) or Tredegar (10%). The majority of respondents visit nightclubs more often than once a fortnight (60.0%).

Pubs/Bars

76 Tredegar was the most popular area to visit a pub or a bar with over four fifths (83.7%) indicated they go there and did so once a week (35.6%).

Sports, Leisure Centre/Gym

77 Those who visited a sport, leisure centre or a gym preferred to go to Tredegar with under three fifths (57.7%) stating this, Ebbw Vale was second with 26.9%.

78 Over a third (36.5%) of respondents visited a sport, leisure centre or a gym 2-3 times a week.

Theatre/other cultural activities

79 The majority (56.2%) of respondents within the catchment area preferred to go to Cardiff, as a place to visit the theatre or any other cultural activities and participated in this activity less often than once a month (80.8%).

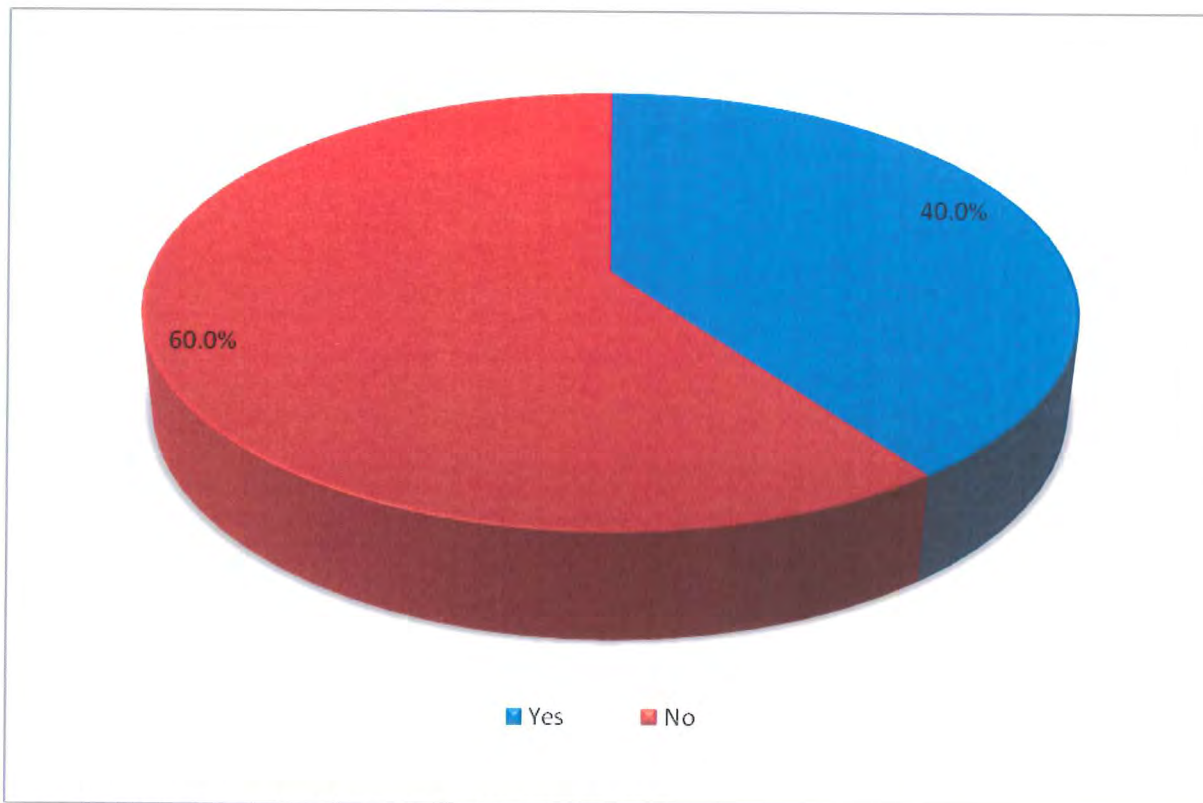
Organised sport

80 Over two thirds (66.7%) of respondents stated Tredegar as the place they play an organised sport and most undertook this type of activity once a week (48.1%).

3.6 Walking in the countryside

81 Respondents were then asked whether they regularly partake in walking in the countryside and in which area(s) they do this. The following tables (Figure 3.6.1) show the main findings:

Figure 3.6.1 – Do you or members of your household regularly walk in the countryside? (% of all respondents)



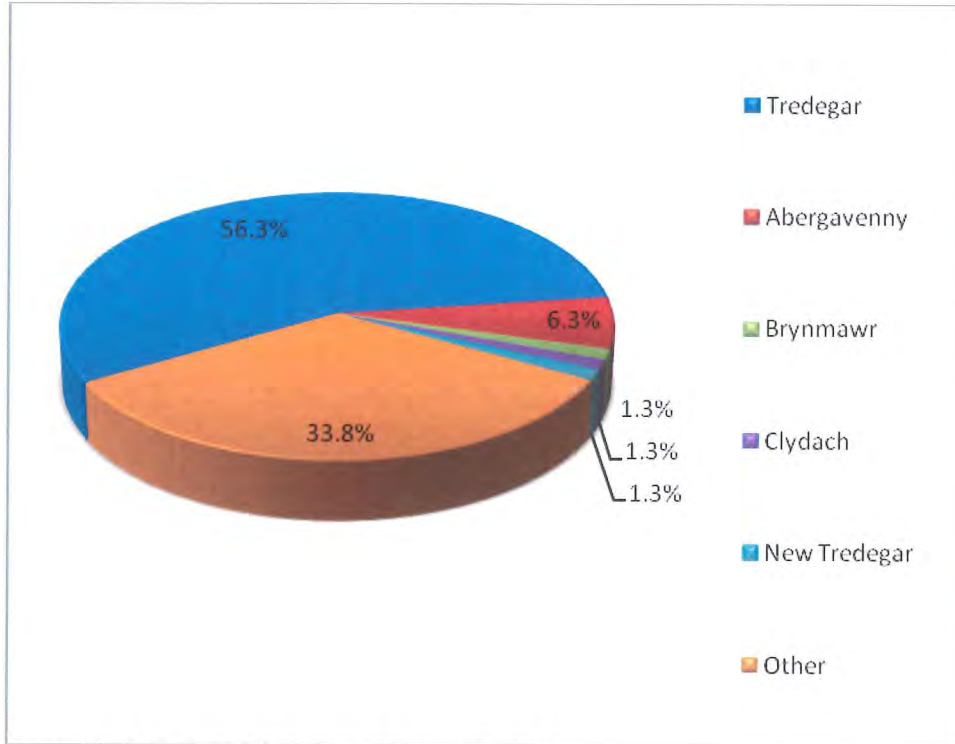
Base: 200 (Those undertaking some leisure activity)

82 Figure 3.6.1 has shown the majority of respondents (60.0%) in the Tredegar catchment area do not walk in the countryside compared with 80 respondents who had stated they do.

83

Respondents were then asked the area they go walking in the countryside. The following chart demonstrates the locations where respondents go walking:

Figure 3.6.2 – In which area do you go walking in the countryside? (% of all respondents)



Base: 80 (Those walking in the countryside)

84

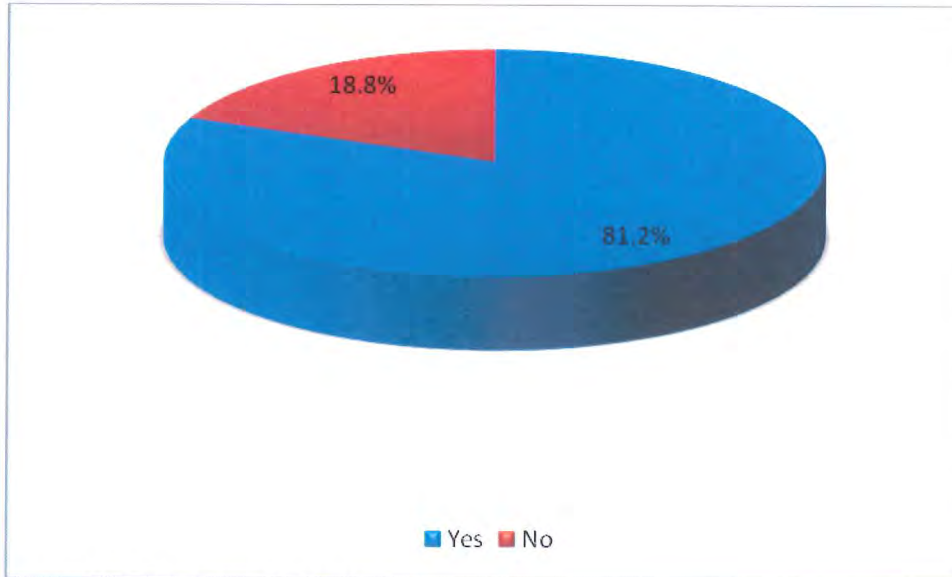
Those respondents, who go walking in the countryside, did so in Tredegar where under three fifths (56.3%) stated this. The next highest proportion with under a fifth (15.0%) of respondents that stating that they visit Brynbach Park. The table below indicates the ‘Other’ responses given:

Brynbach Park	15.0%
Brecon Beacons	5.0%
Tredegar Park	2.5%
Trefil	2.5%
Barry	1.3%
Hay-on-Wye	1.3%
Local Farmer’s Land	1.3%
Swansea	1.3%
Tenby	1.3%
Usk	1.3%
Weston super Mare	1.3%

3.7 Mode of transport

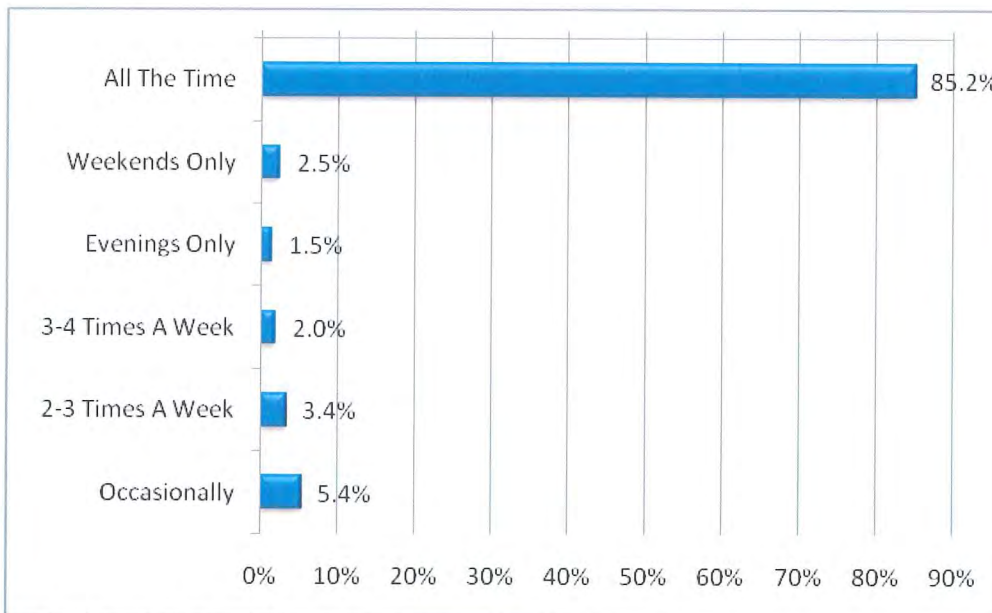
85 Respondents were then asked questions about their journey for shopping in general. These included whether they have access to a car/van and how often they have access to the car/van. The following data was found:

Figure 3.7.1 – Do you have access to a car/van for shopping? (% of all respondents)



Base: 250 (All respondents)

Figure 3.7.2 – How often do you have access to the car/van for shopping? (% of all respondents)



Base: 203 (Those with access to a car/van)

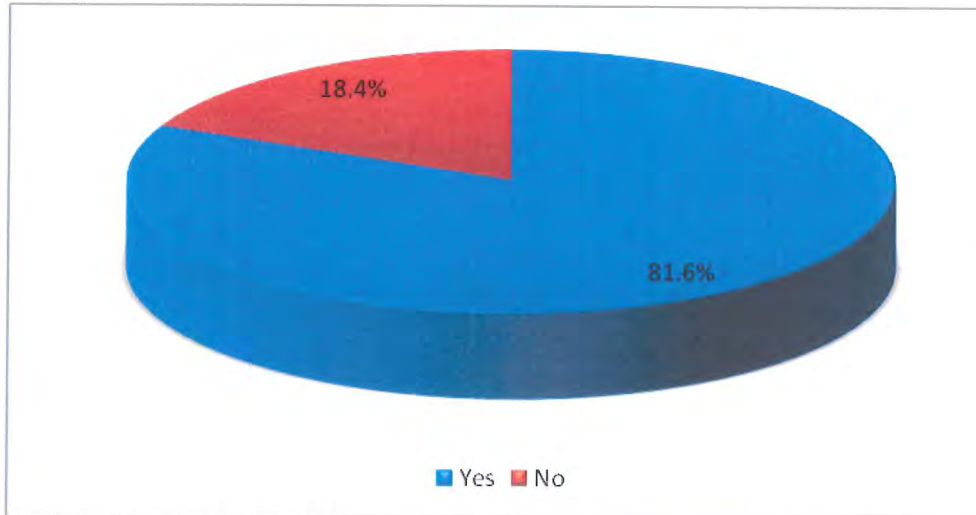
86 Those who travelled by car/van for shopping; some 203 respondents (81.2%), were asked how often they have access to the vehicle. The majority (85.2%) stated that they have access to a car/van all the time.

3.8 Shopping in Tredegar

87

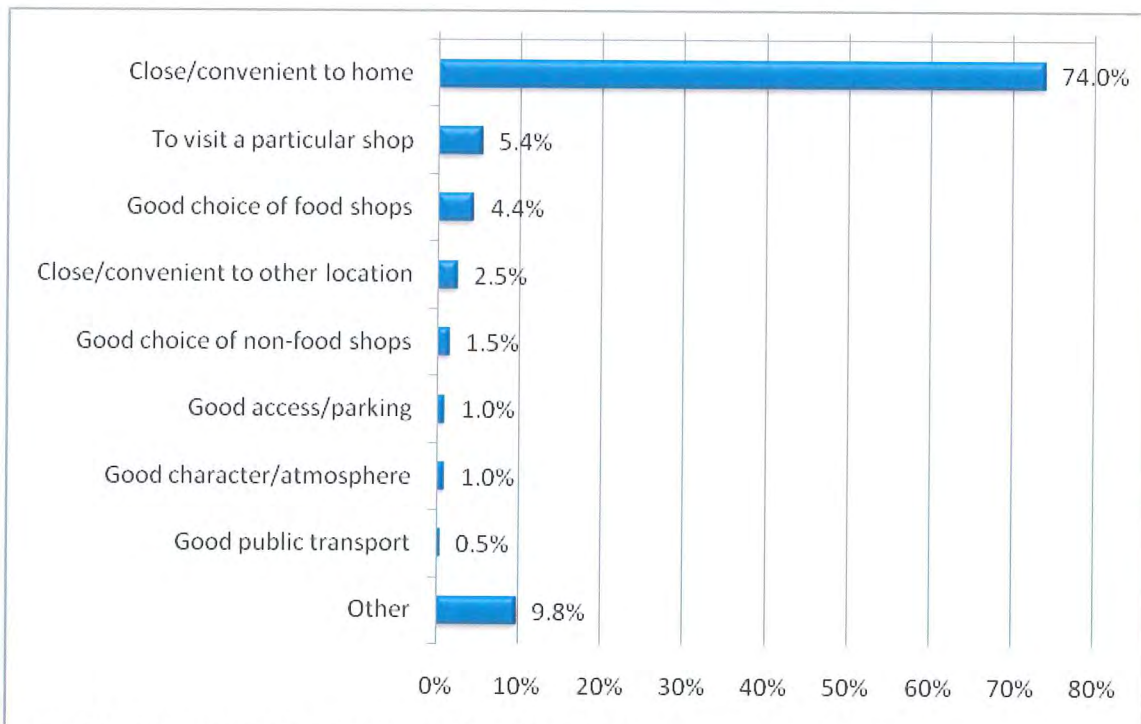
Respondents were asked a series of questions about shopping in Tredegar. These included whether they visit Tredegar for shopping, if so why and if not, why not? They were also asked when they visit Tredegar if they visit the town for any other purpose and which potential improvements would make them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

Figure 3.8.1 – Do you ever visit TREDEGAR for shopping? (% of all respondents)



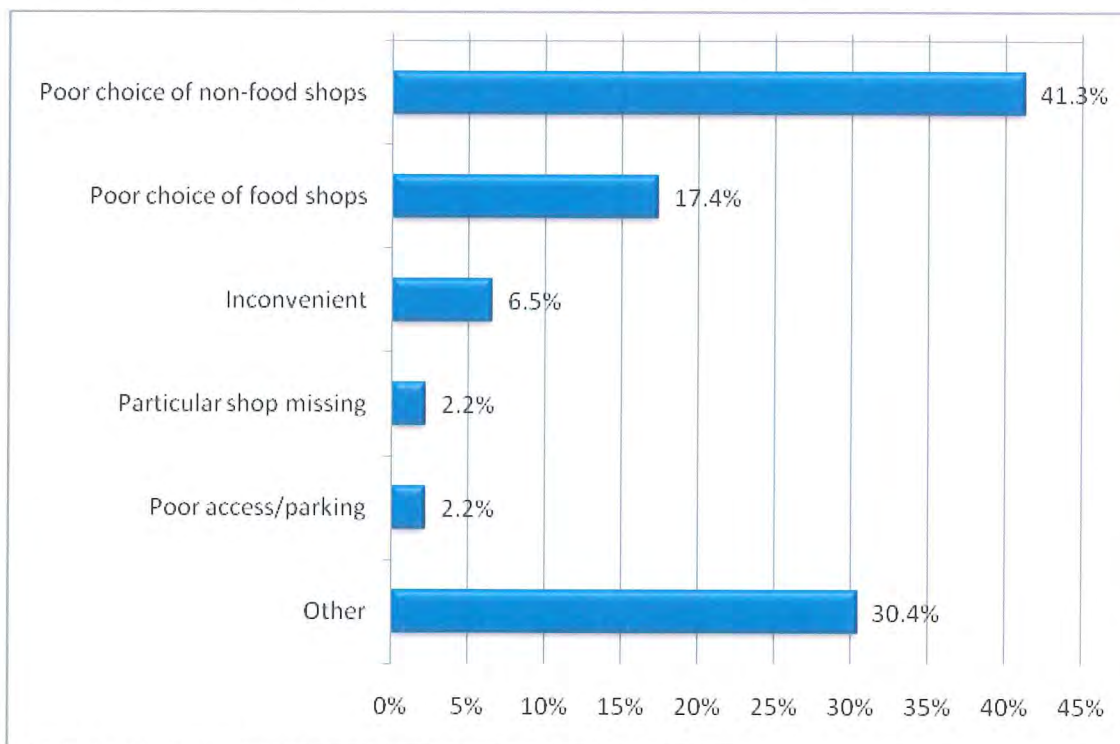
Base: 250 (All respondents)

Figure 3.8.2 – If yes, why is this? (% of all respondents)



Base: 204 (Those visiting Tredegar for shopping)

Figure 3.8.3 – If no, why is this? (% of all respondents)



Base: 46 (Those not visiting Tredegar for shopping)

88 The survey has found that 81.6% of all respondents surveyed do visit Tredegar for shopping.

89 Those respondents who indicated they visited Tredegar, some 204 respondents (Figure 3.8.2) stated a number of reasons for visiting their local area for shopping. Nearly three quarters of the respondents (74.0%) stated it was because it was close and/or convenient to home.

Those who visited Tredegar - Other verbatim comments

From the results shown in figure 3.8.2 and the 'Other' responses given (9.8%), the following aspects proved to be positive for a selection of respondents (6.4% - excluding 'No particular reason'):

90 Support local stores	2.9%
Nothing	2.0%
Free parking	0.5%
Habit/familiarity	0.5%
Hairdresser	0.5%

Similarly those respondents, who indicated they did not visit Tredegar (Figure 3.8.3), also stated a number of reasons for not visiting their local area for shopping. Over half of respondents stated Tredegar had a poor choice of non-food and food shops (58.7% - combined responses).

Those who did not visit Tredegar - Other verbatim comments

From the results shown in figure 3.8.3 and the 'Other' responses given (30.4%), the following aspects proved to be negative for a selection of respondents:

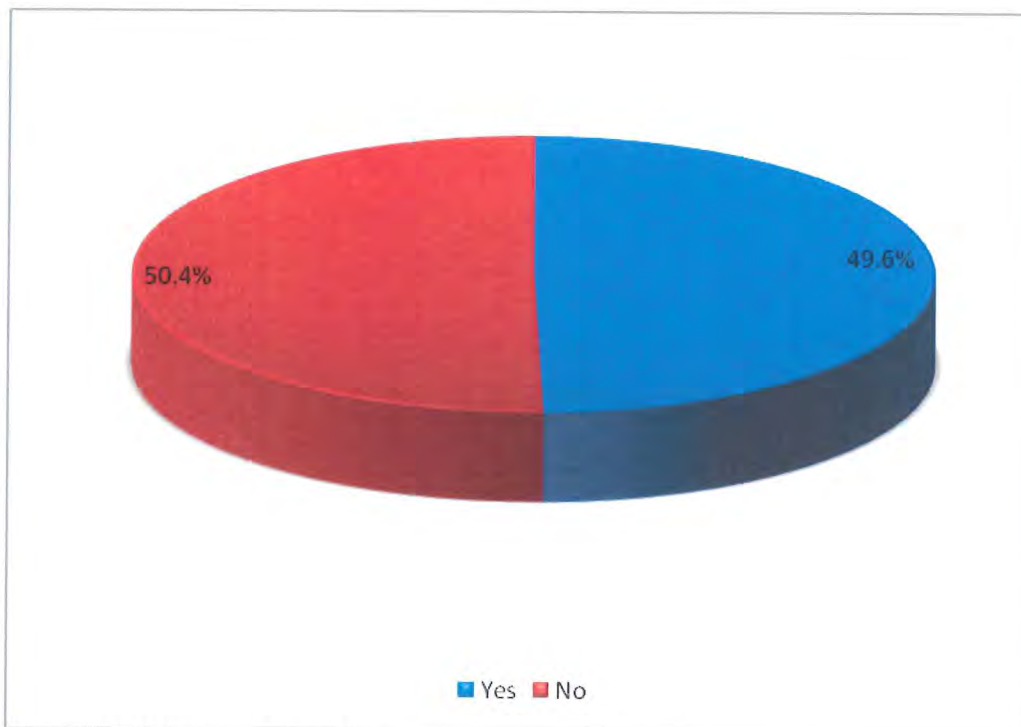
91

Nothing there	8.7%
Poor choice of non-food and food shops	8.7%
No reason	4.3%
Disabled	2.2%
Expensive	2.2%
Its full of estate agents & foreign restaurants	2.2%
Speeding	2.2%

92

The following charts illustrate the responses given when respondents were asked when they visit Tredegar, whether they usually visit the town for any other purpose and to indicate what it would normally be for. The results are as follows:

Figure 3.8.4 – When visiting TREDEGAR, do you usually visit the town for any other purpose? (% of all respondents)

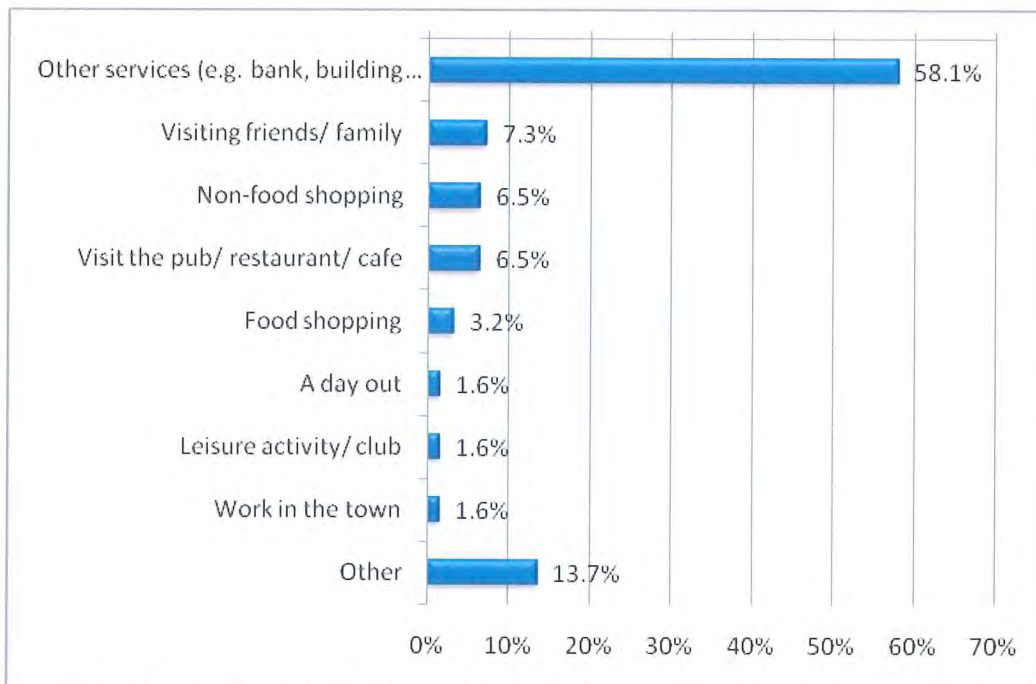


Base: 250 (All respondents)

93

Just under half (49.6%) of respondents visit Tredegar for any other purpose, apart from what is planned prior to their trip. However, the remaining proportion (50.4%) do visit the area for other usages, these can be seen in figure 3.8.5.

Figure 3.8.5 – What would this normally be for? (% of respondents visiting for another purpose)



Base: 124 (Those visiting Tredegar for any other purpose)

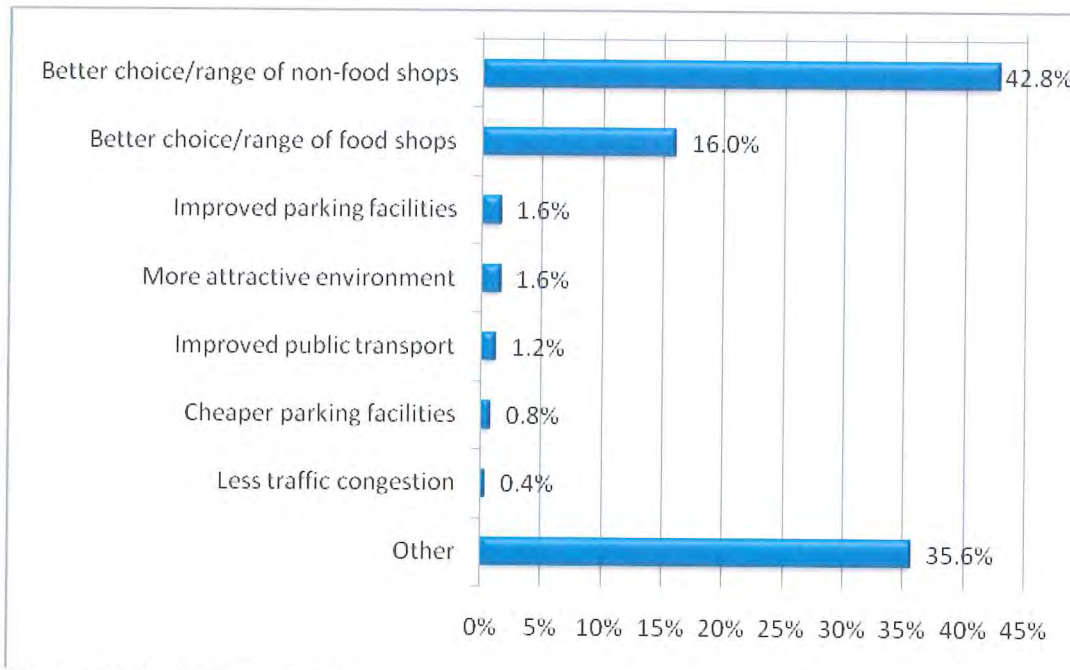
94 Figure 3.8.5 clearly shows that the majority (58.1%) of respondents stated they also visit other services as well as visiting Tredegar.

From the results shown in figure 3.8.5 the following ‘Other’ responses were given (13.7%):

Doctors/dentist	2.4%
Bank	1.6%
Hairdresser	1.6%
Library	1.6%
Visit the Park	1.6%
Bars or Clubs	0.8%
Chemist	0.8%
Harrisons JS Ltd, Commercial Street, Tredegar	0.8%
Live there	0.8%
No particular reason	0.8%
Window shopping	0.8%

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

Figure 3.8.10 – What would make you use TREDEGAR more frequently? (% of all respondents)



Base: 250 (All respondents)

96 The most popular response stated by over two fifths (42.8%) was that respondents would prefer to have better choice/range of non-food shops. Under a fifth (16.0%) said that a better choice/range of food shops would make them use Tredegar for shopping more frequently.

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

98 From the results shown in figure 3.8.10 and the following 'Other' responses were given (20.4% - excluding 'Nothing'):

Better range of food and non-food shops	10.0%
A decent supermarket	1.6%
Needs modernisation	1.6%
A safer and more secure environment	1.2%
Leisure facilities	1.2%
Better clothes shops	0.8%
Disabled access	0.8%
More leisure facilities	0.8%
Designer clothes shop	0.4%
Don't visit	0.4%
More facilities for youngsters	0.4%
More places to eat	0.4%

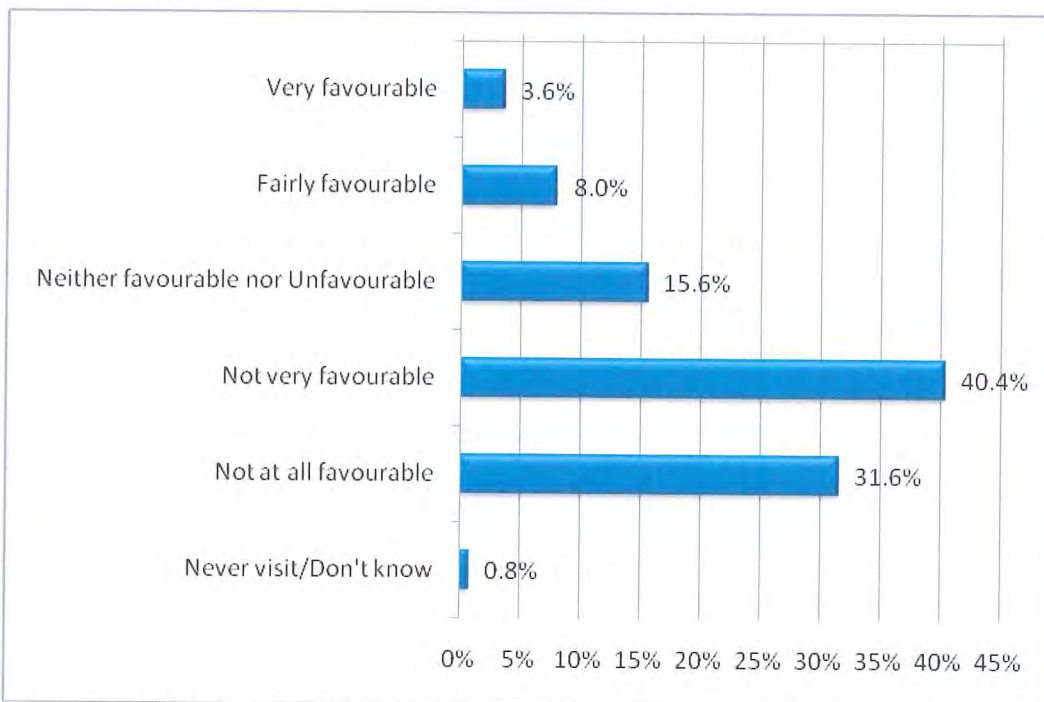
Pavements in need of serious repair	0.4%
Take out traffic humps	0.4%

3.9 Approval rating

99 Finally on the telephone survey, respondents were asked how they would rate Tredegar as a place for shopping on a scale from 'very favourable' to 'not at all favourable'.

100 The chart below demonstrates the responses given for the Tredegar catchment area:

Figure 3.9.2 - How would you rate TREDEGAR as a place for shopping? (% of all respondents)



Base: 250 (All respondents)

101 Nearly three quarters (72.0%) of respondents stated that they rate the town as either 'not very favourable' or 'not at all favourable', of which only 11.6% of all respondents felt the town was either 'very favourable' or 'fairly favourable'.

3.10 Demographics

102 The breakdown of SEG, age and gender of those who took part can be seen in figure 3.10.1 below:

Figure 3.10.1 – Breakdown of SEG, age and gender

By SEG

	Base: All respondents	
	Num	%
Base: All respondents	250	100.0%
A/B	30	12.0%
C1	67	26.8%
C2	77	30.8%
D/E	65	26.0%
Refused	11	4.4%

Base: 250 respondents in Tredegar

By age group

	Base: All respondents	
	Num	%
Base: All respondents	250	100.0%
18 - 24 years	3	1.2%
25 - 34 years	3	1.2%
35 - 44 years	24	9.6%
45 - 54 years	44	17.6%
55 - 64 years	58	23.2%
65 years or above	112	44.8%
Refused	6	2.4%

Base: 250 respondents in Tredegar

By gender

	Base: All respondents	
	Num	%
Base: All respondents	250	100.0%
Male	73	29.2%
Female	177	70.8%

Base: 250 respondents in Tredegar

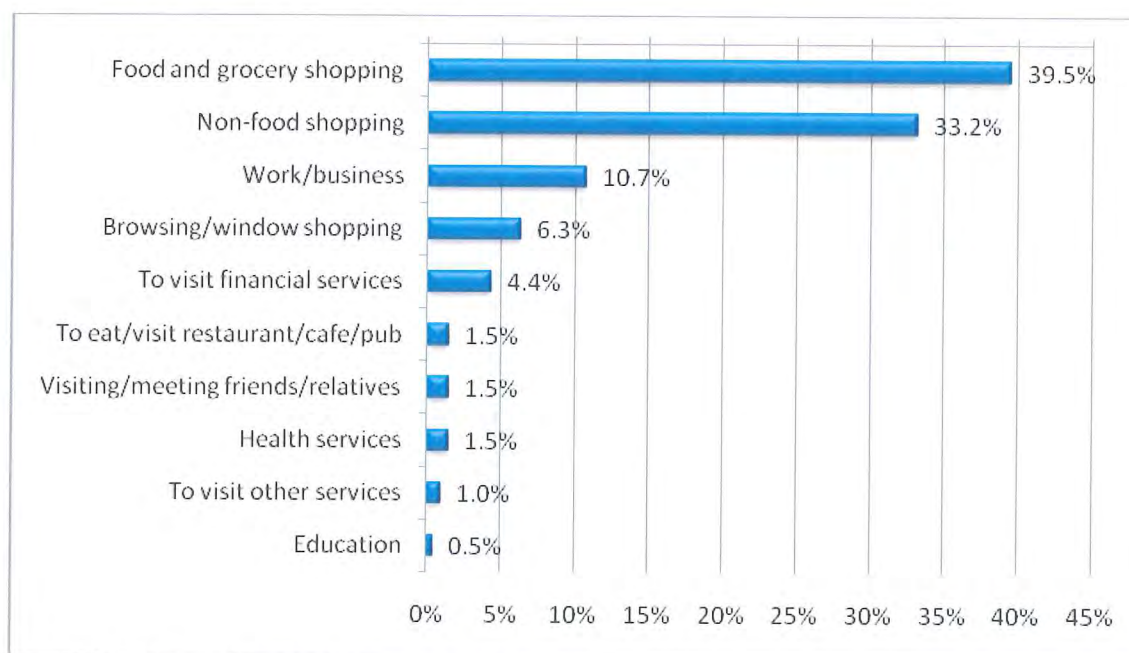
4.0 On-Street Survey

103 A total of 205 face-to-face interviews were conducted in Tredegar Town Centre between 10th November and 9th December 2008. Interviews were conducted in Commercial Street.

4.1 Reasons for visiting Tredegar Town Centre

104 To begin with in the on-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: 205 (All respondents)

105 Over a third (39.5%) of respondents stated they mainly visited Tredegar for Food and grocery shopping. The second most quoted response was Non-food shopping (33.2%) and in third place was Work/business (10.7%).

106 Collectively, those visiting Tredegar for shopping equates for nearly three quarters of all respondents (72.7%).

107 When asked what other reasons they were visiting Tredegar for, respondents were most likely to be Browsing/window shopping (37.1%). Over a tenth (11.7%) were not doing anything else, whilst on their trip.

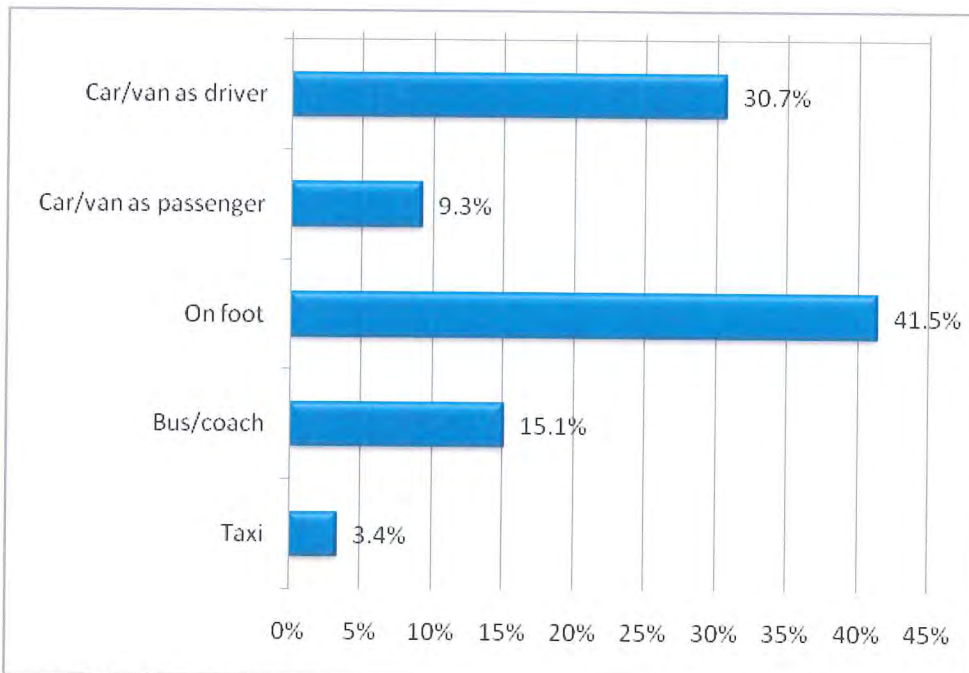
4.2 Travelling to Tredegar

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

109 The vast majority of respondents (95.1%) had gone straight from home to Tredegar, with the remainder doing so from Work (4.9%). Specifically, the majority (90.7%) of respondents had come from Tredegar.

110 Shoppers were then asked about the mode of transport that they used to travel to Tredegar Town Centre:

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



Base: 205 (All respondents)

111 The most popular method of transport was on foot, as over two fifths (41.5%) of all respondents stated this. Whereas, those travelling by car/van as the driver equated to under a third (30.7%) of respondents.

112 Those who travelled by car, some 82 respondents, were asked the exact location where they parked. The results can be seen in the following table:

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

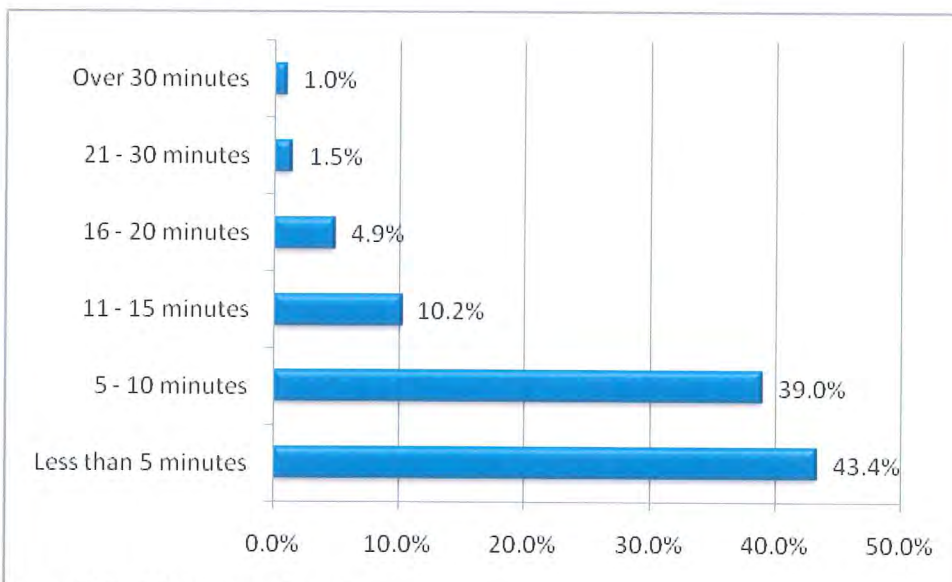
Car park location	All respondents at point of interview	Passenger type	
	Commercial Street	Driver	Passenger
Free Public Parking	78.0	82.5	63.2
On Street Parking	6.1	6.3	5.3
Lidl	12.2	11.1	15.8
Dropped off	3.7	-	15.8

Base: 82 (Those travelling by car/van)

113 The results have shown that those respondents travelling by car were most likely to use the free public parking (78.0%).

Time taken to travel to Tredegar

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



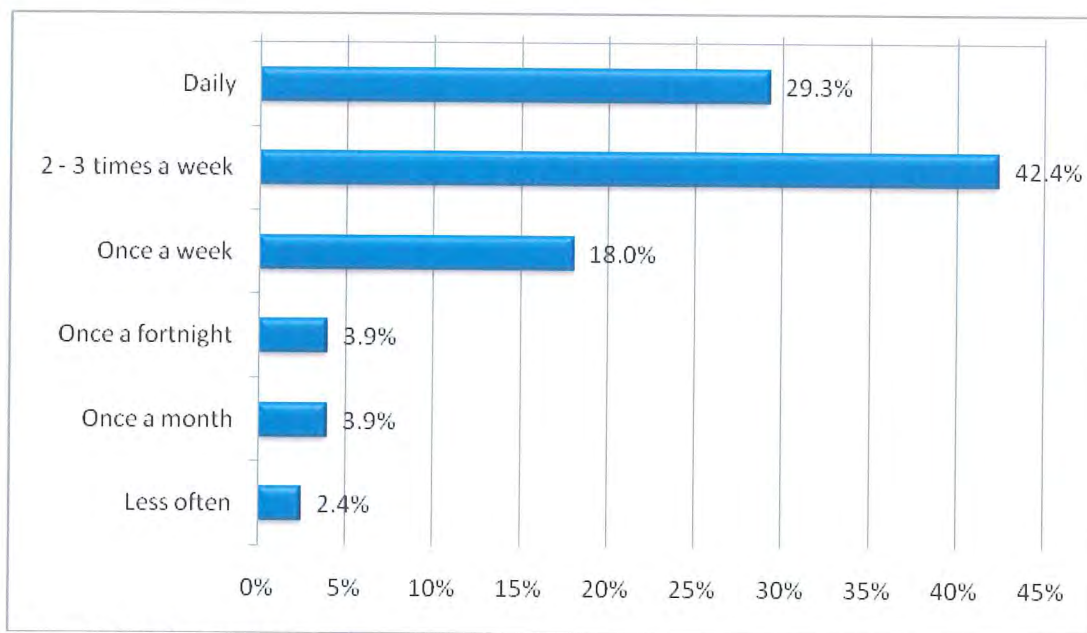
Base: 205 (All respondents)

114 Figure 4.2.3 clearly indicates that the majority of shoppers (82.4%) travel for less than 10 minutes, indicating that there is a local catchment area for shoppers.

Frequency of visits to Tredegar

115 Respondents were then asked to indicate their frequency of visits to the catchment area, the results of the survey is shown below:

Figure 4.2.4 - How often do you visit this Town Centre? (% of all respondents)



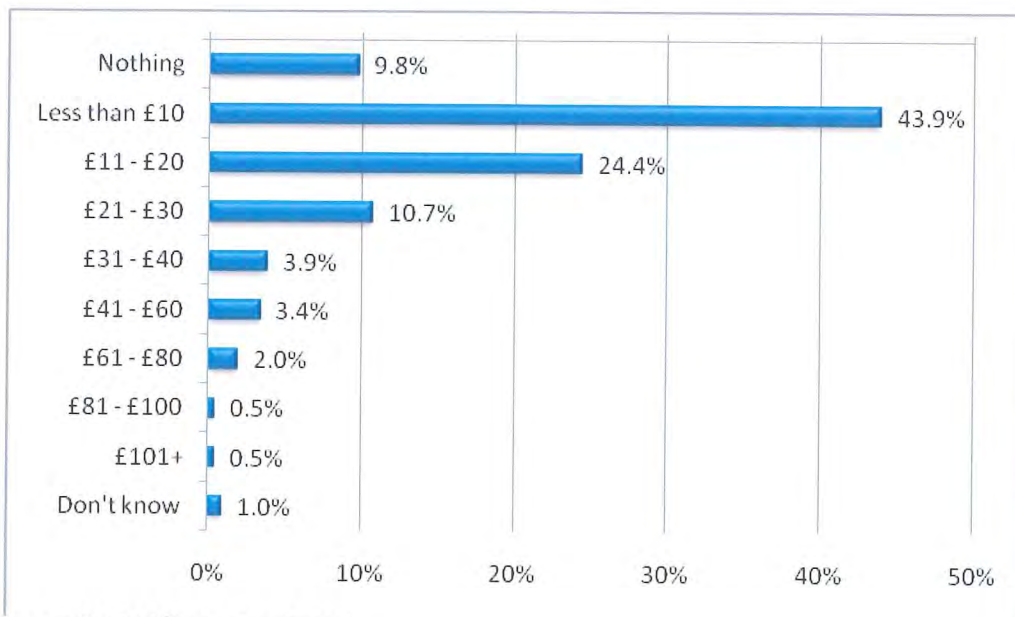
Base: 205 (All respondents)

116 Figure 4.2.4 clearly shows that over a quarter (29.3%) of all respondents visited the Town Centre daily, with over two fifths (42.4%) stated they visited Tredegar 2-3 times a week.

4.3 Spending behaviour

117 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 survey 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: 205 (All respondents)

118 The majority of respondents (68.3%) stated that they had or were likely to spend between £0-£20 during their visit, this comprised of 43.9% indicated they would be spending/have spent less than ten pounds and 24.4% stating somewhere in between £11 - £20. Under a tenth (9.8%) didn't expect to be spending any money whilst on their visit.

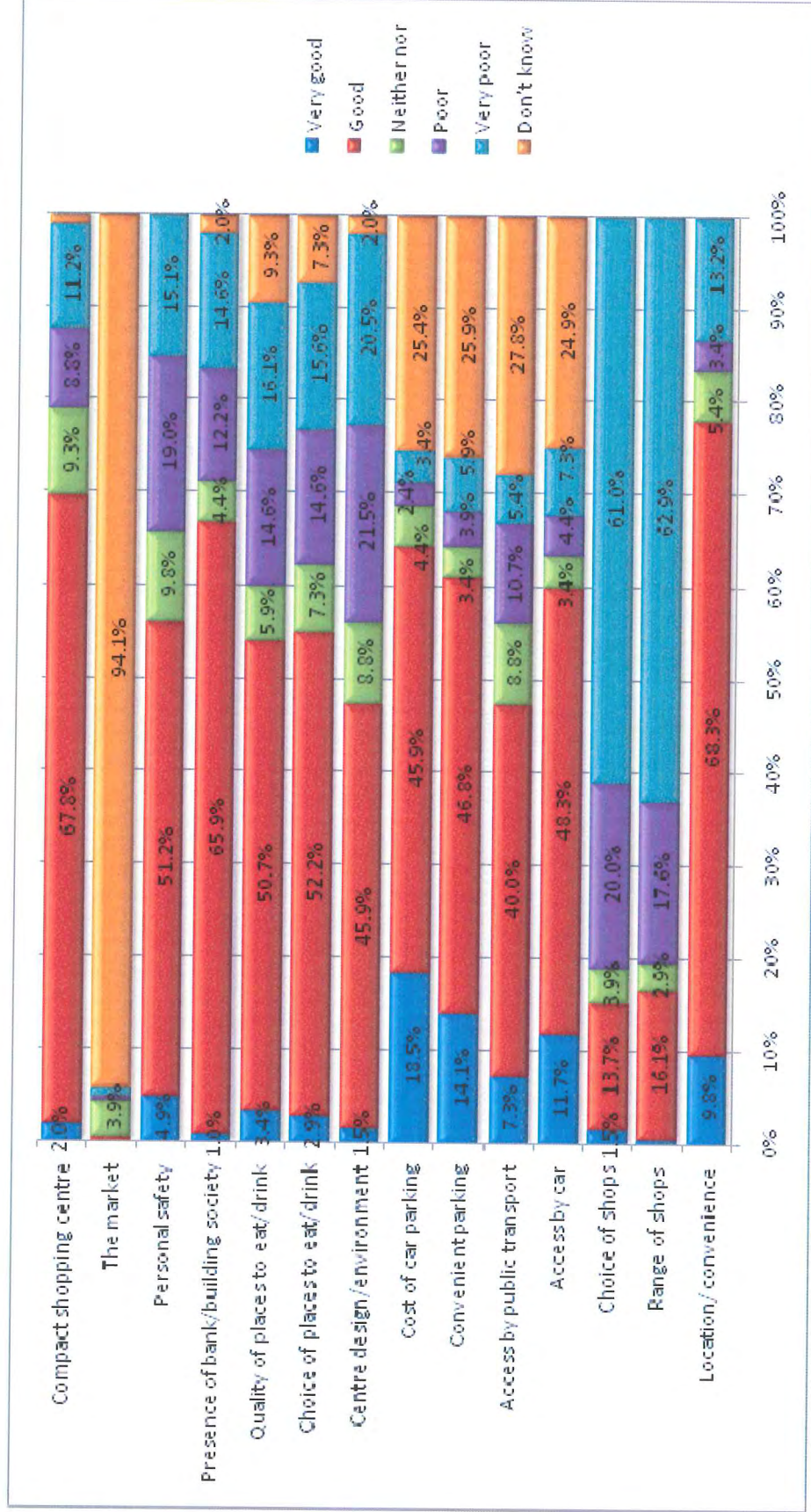
- 119 In order to collect data on other Town Centre functions, the Heads of the Valleys Town Centre Group requested additional questions to be introduced to the on-street survey. These questions were as follows:
- All respondents were given a list of aspects of the centre and asked to rate their level of satisfaction
 - Current patterns of the catchment areas for any other purpose other than retailing
 - List types of leisure activities respondents or members of their household regularly participate in:
 - Bingo
 - Tenpin Bowling
 - Visiting cafes/restaurants
 - 120 ○ Visiting the cinema
 - Visiting a nightclub
 - Going to pubs/bars
 - Visiting a sports, leisure centre/gym
 - Visiting the theatre/other cultural activities
 - Organised sport
 - Walking in the countryside
 - 'Other' leisure activities
 - Respondents likes of the centre for shopping, leisure/evening activities or services
 - Types of improvements respondents would make that could encourage them to visit the centre more often and improve their day out experience

4.4 Approval rating

Respondents were given a list of aspects of the Town Centre and asked to rate their level of satisfaction on a scale from 'very good' to 'don't know'.

121

Figure 4.4.1 – How would you rate the following aspects of the Town Centre? (% of all respondents)



Base: 205 (All respondents: multiple choice)

122

From the results shown in figure 4.4.1, the majority of respondents rated the location/convenience of Tredegar Town Centre as either 'very good' or 'good' (combined responses – 78.0%), the next highest proportion was stated by over two thirds (69.8%) of respondents that indicated the compact shopping centre was 'very good' or 'good'.

123

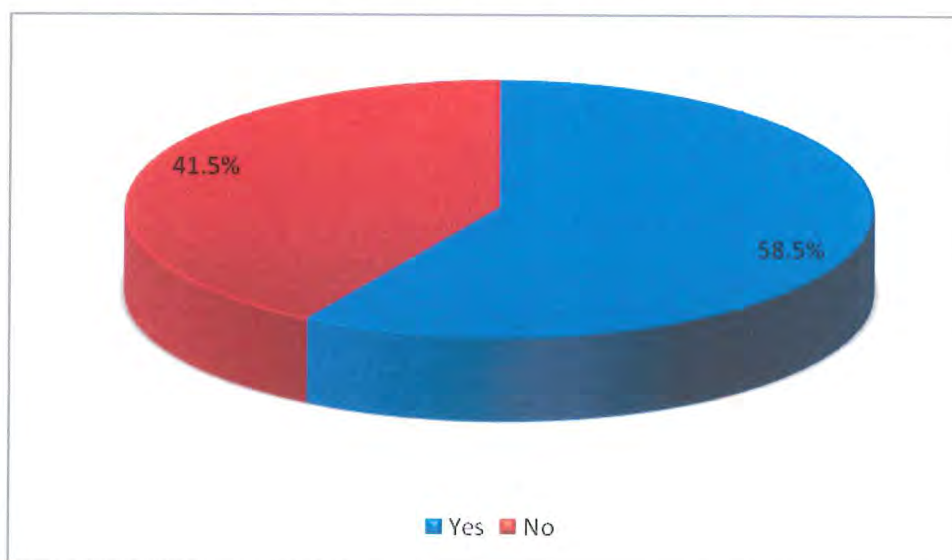
There have also been some negative responses, where a large proportion of respondents stated the choice of shops (81.0%) and/or range of shops (80.5%) were either 'poor' or 'very poor'.

4.5 Other activities

124

The following chart illustrate the responses given when respondents were asked when they visit Tredegar, whether they usually visit the town for any other purpose and to indicate what it would normally be for. The results are as follows:

Figure 4.5.1 – When visiting TREDEGAR, do you usually visit the town for any other purpose? (% of all respondents)



Base: 205 (All respondents)

125

From the results shown in figure 4.5.1 above the following indicates the responses given from 120 respondents when asked what they normally undertake when visiting the town for any other purpose:

Using financial services	60.8%
Using other services	37.5%
Using public or civic services	35.8%
Non-food shopping	23.3%
Food shopping	14.2%
Visiting restaurant, cafe, or public house	10.0%
Meeting friends or family	6.7%
Tourism or sight seeing	2.5%
Visiting the Library	2.5%
Other social or leisure reasons	2.5%
Work in or near the town centre	1.7%
Business	1.7%

126 The survey has revealed a number of reasons for visiting Tredegar, and has found the majority stated they also visit this area to use the financial services (60.8%).

4.6 Leisure activities

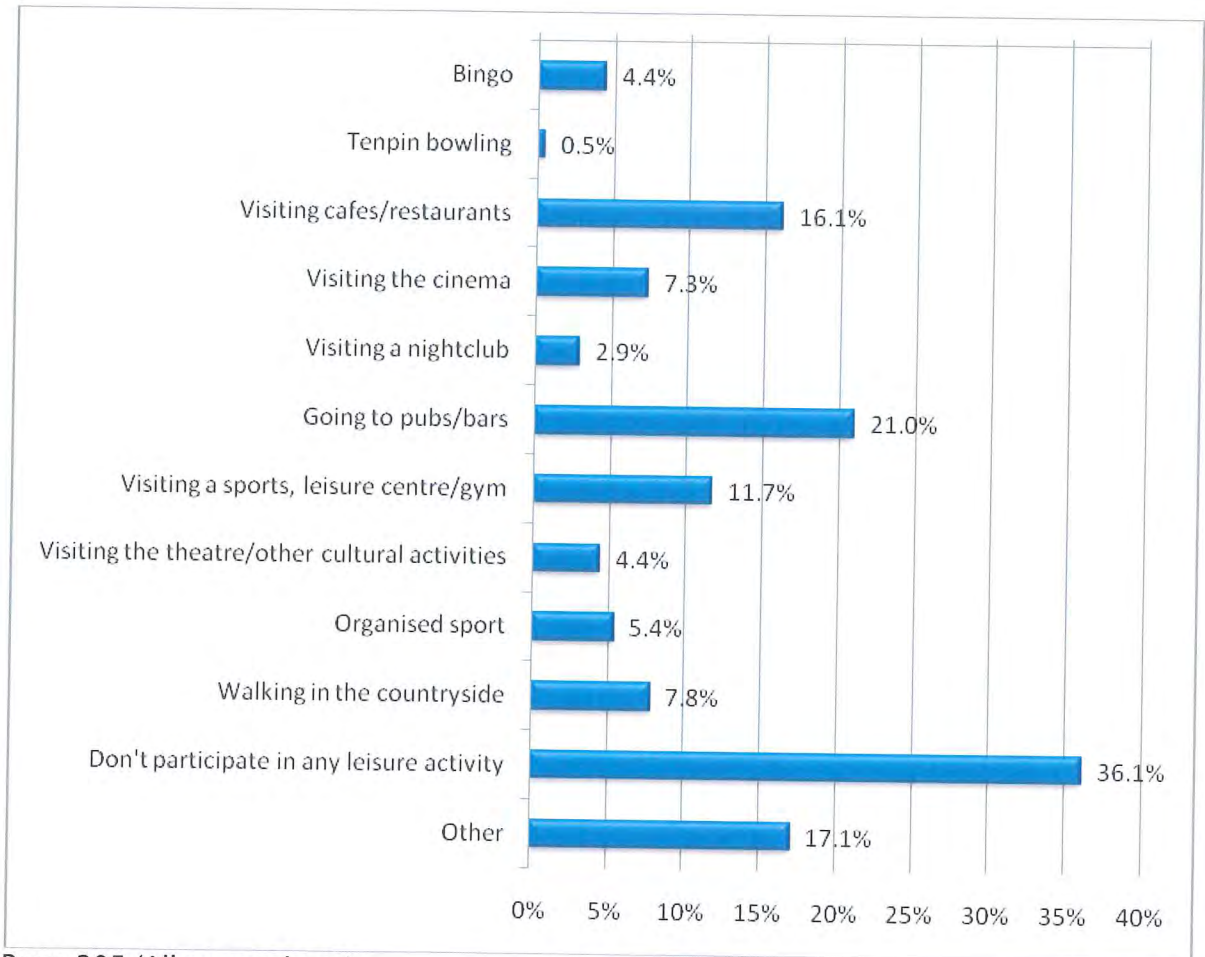
127 A series of questions relating to leisure activities were asked, which included discovering which leisure activities respondents partake in.

128 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:

- 129 ○ Bingo (Excluding online)
- 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
- Don't participate in any leisure activity
- 'Other' leisure activities

130 Respondents were able to state as many activities that applied and the following chart (Figure 4.6.1) demonstrates the findings that were discovered:

Figure 4.6.1 – Which of the following leisure activities do you or members of your household regularly participate in? (% of all respondents)



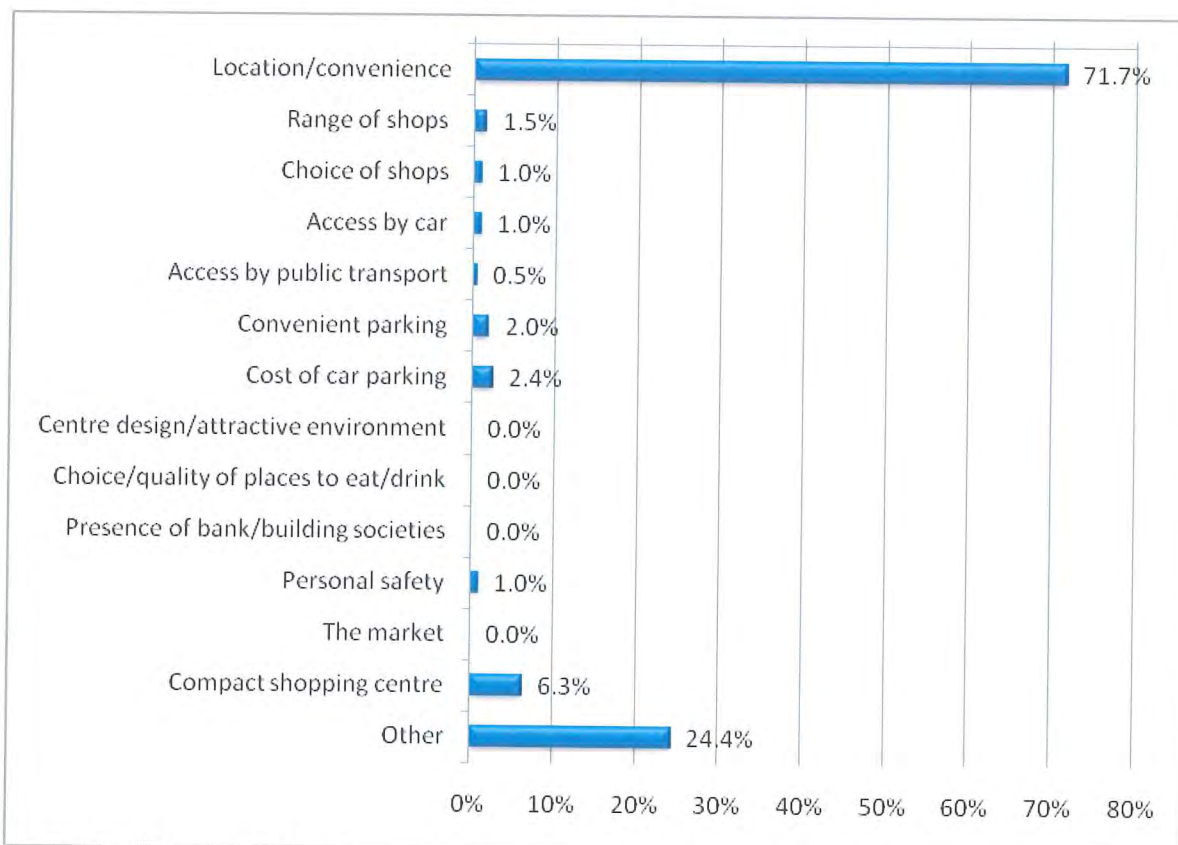
Base: 205 (All respondents)

131 When surveying respondents on-street as well as over the telephone, respondents remain interested in going to pubs/bars stated by over a fifth (21.0%). The next most popular response was visiting cafes/restaurants (16.1%). 74 respondents indicated that they do not participate in any leisure activity.

4.7 Shopping in Tredegar and improvements

132 Respondents were asked to state what they like about Tredegar for shopping, leisure/evening activities or services. The results are shown below:

Figure 4.7.1 - What do you like about Tredegar for shopping, leisure/evening activities or services? (% of all respondents)



Base: 205 (All respondents)

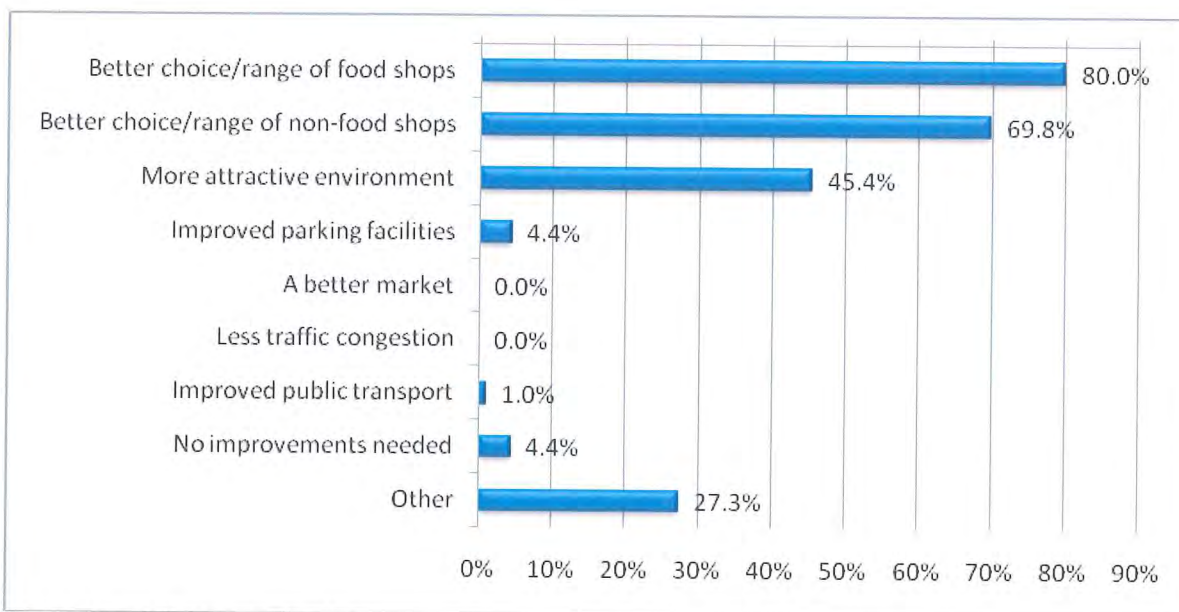
133 Tredegar's location and convenience was the aspect that respondents most liked about the area (71.7%) for shopping, leisure/evening activities or services.

134 Of the 'Other' responses given, the following aspects proved to be favourable for a selection of respondents:

Friendly people/community spirit	1.5%
Quiet	0.5%
All under cover	0.5%
It's clean	0.5%

135 Finally on the on-street survey, respondents were asked what improvements they would make to Tredegar to encourage them to visit the area more often and improve their day out experience. The results can be seen below:

Figure 4.7.2 - What improvements, if any, would make you visit Tredegar more often and improve your day out experience? (% of all respondents)



Base: 205 (All respondents)

136 A better range of food and non-food shops (80.0% and 69.8% respectively) were the most popular responses given by on-street interviewees when asked what improvements they would particularly prefer in Tredegar to encourage them to visit Tredegar more often and improve their day out experience.

Of the 'Other' responses given, the following categories were mentioned by respondents:

137

Shoe shop	10.2%
Large supermarket	6.8%
Cinema	1.5%
Complete refurbishment	1.0%
Market needed	1.0%
Cleaner streets	1.0%
More clothes/fashion shops	1.0%
Increased security/make it safer	1.0%
Laundrette	1.0%
Leisure centre facilities	0.5%
Indoor children's play area	0.5%
Less expensive shops	0.5%
A police presence	0.5%
Improved paving/road maintenance	0.5%
Big name stores	0.5%

Although the wording in the options/questions used in previous surveys is slightly different to the current study, it is apparent that dissatisfaction with the choice and range of shops is evident.

4.8 Demographics

139 The breakdown of SEG, age and gender of those who took part can be seen in figure 4.8.1.

Figure 4.8.1 – Breakdown of SEG, age and gender

By SEG

	Base: All respondents		Commercial Street	
	Num	%	Num	%
Base: All respondents	205	100.0%	205	100.0%
A/B	4	2.0%	4	2.0%
C1	32	15.6%	32	15.6%
C2	30	14.6%	30	14.6%
D/E	139	67.8%	139	67.8%

Base: 205 respondents in Tredegar

By age group

	Base: All respondents		Commercial Street	
	Num	%	Num	%
Base: All respondents	205	100.0%	205	100.0%
18 - 25 years	32	15.6%	32	15.6%
26 - 34 years	19	9.3%	19	9.3%
35 - 44 years	24	11.7%	24	11.7%
45 - 54 years	33	16.1%	33	16.1%
55 - 64 years	43	21.0%	43	21.0%
65 years or more	54	26.3%	54	26.3%

Base: 205 respondents in Tredegar

By gender

	Base: All respondents		Commercial Street	
	Num	%	Num	%
Base: All respondents	205	100.0%	205	100.0%
Male	73	35.6%	73	35.6%
Female	132	64.4%	132	64.4%

Base: 205 respondents in Tredegar

5.0 STATEMENT OF RELIABILITY

Assessment of the standard error:

1. This survey has been undertaken by a series of individual sample surveys for different routes.
2. The results are subject to the following sampling error, for which there follow an analysis.
3. The following analysis indicates the methodology used to calculate the standard error, with the standard 95% probability of being correct. The formulae for these calculations are as follows:

$$SE\% = \sqrt{\frac{p\% \times q\%}{n}}$$

where p% = % sample value recorded

q% = 100% - p%

n = sample size

and where:

±1.28 (SE%) = 95% probability that the correct answer lies in the range calculated.

4. When the sampling frame for individual routes is boosted to ensure reliability, with the results subsequently weighted proportional to population, the following analysis is used to calculate the effective sample size. The formulae for these calculations are as follows:

$$\frac{n}{\sum_{i=1}^k P_i W_i^2}$$

where k = number of zones the population and sample are divided into

n = total sample size

P = sample proportions

W = weights

5. On our sample of 5,880 interviews for both surveys we have a confidence interval of 1.28 at a 95% confidence level.

The **confidence interval** is the plus-or-minus figure usually reported in newspaper or television opinion poll results. For example, if you use a confidence interval of 1.28 and 50% percent of your sample picks an answer you can be "sure" that if you had asked the question of the entire relevant population between 48.72% (50 - 1.28) and 51.28% (50 + 1.28) would have picked that answer.

The **confidence level** tells you how sure you can be. It is expressed as a percentage and represents how often the true percentage of the population who would pick an answer lies within the confidence interval. The 95% confidence level means you can be 95% certain; the 99% confidence level means you can be 99% certain. Most researchers use the 95% confidence level.

When you put the confidence level and the confidence interval together, you can say that you are 95% sure that the true percentage of the population is between 48.72% and 51.28%.

Appendix One
Heads of the Valleys Household Telephone Survey
- MAIN Questionnaire

Appendix Two
Heads of the Valleys Household Telephone Survey
- TREDEGAR Unweighted Results Tabulations

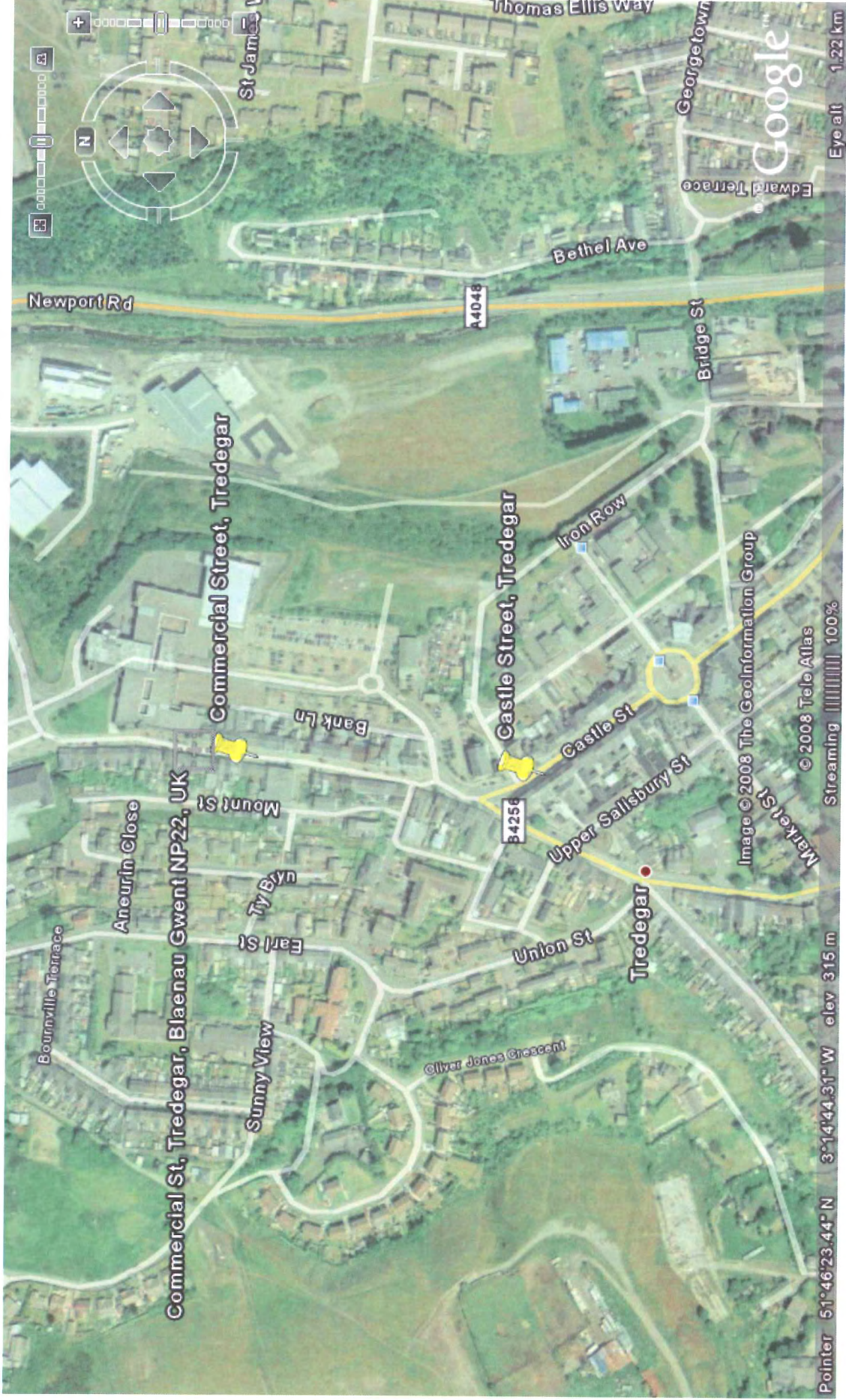
Appendix Three
Heads of the Valleys Household Telephone Survey
- TREDEGAR Weighted Results Tabulations

Appendix Four
Heads of the Valleys Household Telephone Survey
- Catchment Area

Appendix Five
Heads of the Valleys On-Street Survey
- TREDEGAR Questionnaire

Appendix Six
Heads of the Valleys On-Street Survey
- TREDEGAR Results Tabulations

Appendix Seven
Heads of the Valleys On-Street Survey
- TREDEGAR Map of interviewing areas



Job Name: Heads of the Valleys Shopper Attitude Surveys 2008 – TREDEGAR

Version	Preparations	Approvals	Date
Preliminary Draft	Prepared by:  Saadiah Rifin, Research Executive	Approved by:  John Poole, Research Director	30 /01 / 2009
Revised Draft	Prepared by: Saadiah Rifin, Research Executive	Approved by: John Poole, Research Director	/ / 2009
Final	Prepared by: Saadiah Rifin, Research Executive	Approved by: John Poole, Research Director	/ / 2009

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