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Research and Marketing plus

Shopper Attitude Surveys 2008 – Ebbw Vale Report

Heads of the Valleys

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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.

2 The following centres were surveyed:

- 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.

5 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

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 Ebbw Vale.

8 Interviews were conducted by the Research and Marketing Plus 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

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- 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, Tonypandy
    - 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 Ebbw Vale 207 interviews were completed in Bethcar Street and Market 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:

- 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
- 13 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 457 local residents were interviewed who resided across the area. Interviewing was conducted within the catchment area of Ebbw Vale over a period, from 7th November - 9th December 2008.

2.2 Main Findings

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

- 15 Over two fifths of respondents (41.6%) listed Tesco, North West Approach in Ebbw Vale, (this response fell under the 'other' responses given) as the store where they buy the majority of their household food and grocery items. The second most popular store/location was Morrisons, Beaufort Road in Ebbw Vale and named by over a quarter (28.8%) of respondents.

- 16 Not one respondent within the catchment area stated that they used the Internet for their household's food and grocery shopping.

- 17 Ebbw Vale Town Centre was the most popular location to purchase non food items, with over a quarter (26%) visiting this area for this purpose. Cardiff (22%) was the second most popular town to purchase the majority of their non-food items.

- 18 In 2008, a series of questions were included for the first time, namely:

  - 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

- 19 The 58 respondents who stated they use the internet to shop were asked to indicate the categories of goods they have purchased. The largest proportion indicated that they purchased clothes and/or music & video (both 43.1%).

- 20 Respondents were prompted with a list of stores/locations and asked to state whether they had used or visited these stores for any other purpose. When prompted, the majority of respondents had visited Asda in Nantyglo/Brynmawr (70.8%) and Cyfarthfa Retail Park in Merthyr Tydfil (62.4%); whereas a nearly a fifth (17.2%) indicated they had not used/visited the stores/locations for any other purpose.

- 21 The results revealed that the most popular leisure activity that respondents in the Ebbw Vale catchment area participated in was visiting cafes/restaurants (53.6%) of which they visited either once a month or less often (both 26.1%).

- 22 Over two fifths (44.4%) stated that they would rather 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%) indicated that they do not participate in any leisure activity.

- 23 Those respondents, who go walking in the countryside, did so in Ebbw Vale where over a quarter (28.2%) stated this. The next highest proportion was a fifth (20.5%) of respondents who stated that they visit the Brecon Beacons. This response fell under the 'other' category.

- 24 Those who travelled by car/van for shopping; some 201 respondents (80.4%), were asked how often they have access to the vehicle. The majority (83.6%) stated that they have access to a car/van all the time.

- 25 The survey has found that 88.8% of all respondents surveyed do visit Ebbw Vale for shopping.

- 26 The 222 respondents who indicated they visited Ebbw Vale (Figure 3.8.2) stated a number of reasons for visiting their local area for shopping. Nearly three fifths of the respondents (57.7%) stated it was because it was close and/or convenient to home.

- 27 In 2008, another question was introduced for the first time; whether respondents usually visit the town for any other purpose and what for. 129 respondents (51.6%) indicated they visit this area for other usages, these can be seen in figure 3.8.5

- 28 All respondents within the catchment area of Ebbw Vale were then asked what would make them use Ebbw Vale more frequently. The most popular response stated by two fifths (40%) was that respondents would prefer to have better choice/range of non-food shops. Nearly a tenth (9.2%) said that a better choice/range of food shops would make them use Ebbw Vale for shopping more frequently.

- 29 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 and food shopping.

- 30 Nearly half (48.4%) of respondents stated that they rate the town as either 'not very favourable' or 'not at all favourable', of which a quarter (25.6%) of all respondents felt the town was either 'very favourable' or 'fairly favourable'.

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

- 31 The most popular response given in this survey has shown over a third (39.6%) of respondents stated they mainly visited Ebbw Vale for non-food shopping. The second highest response was food and grocery shopping (16.4%) and in third place were browsing/window shopping (10.13%).

- 32 Collectively, those visiting Ebbw Vale for shopping equates for nearly three fifths of all respondents (56%).

- The most popular method of transport was by car/van as the driver, as a almost a
33 third (32.9%) of all respondents stated this. Whereas, over a quarter (29%) of
respondents were travelling on foot..

- Over three fifths (61.4%) of all respondents visited the town centre at least twice a
week or more frequently. This breaks down to a quarter of respondents (25.6%)
34 visiting daily and over a third who visited Ebbw Vale 2-3 times a week (35.7%).

- The majority of respondents (53.6%) stated that they had spent or were likely to
spend between £0-£20 during their visit, this comprised of 30.9% indicating they
35 would be spending/have spent less than ten pounds and 22.7% stating somewhere
between £11 - £20. Under a tenth (7.2%) didn't expect to be spending any money
whilst on their visit.

- The majority of respondents rated the Location/ convenience in Ebbw Vale as
36 either 'very good' or 'good' (combined responses - 90.3%), another high
proportion (88.9%) of respondents indicated the Presence of bank/building society
was 'very good' or 'good'.

- 37 Negative responses include the range of shops where over two thirds (44.9%) rated
either 'poor' or 'very poor' and the choice of shops with nearly half of respondents
rating either 'poor' or 'very poor' (47.3%).

- The survey has revealed a number of reasons for visiting Ebbw Vale, with the
38 majority of respondents (58.2%) stating they also visit this area to undertake use
the financial services.

- It is evident that even when surveying respondents' both on-street and over the
telephone they have remained interested in going to pubs/bars and visiting
39 cafes/restaurants, stated by 27.1% and 15.0% respectively. 38.6% indicated they do
not participate in any leisure activity.

- Ebbw Vales' location and convenience was the aspect that respondents most liked
about the area (68.6%) for shopping, leisure/evening activities or services.
40 However, only 12.6% were impressed with the choice and range of shops within the
catchment area.

- A better choice/range of non-food and food shops (36.2% and 52.2% respectively)
41 were the most popular responses given by on-street interviewees when asked what
improvements they would particularly prefer in Ebbw Vale to encourage them to
visit this area more often and improve their day out experience.

3.0 Household Telephone Survey

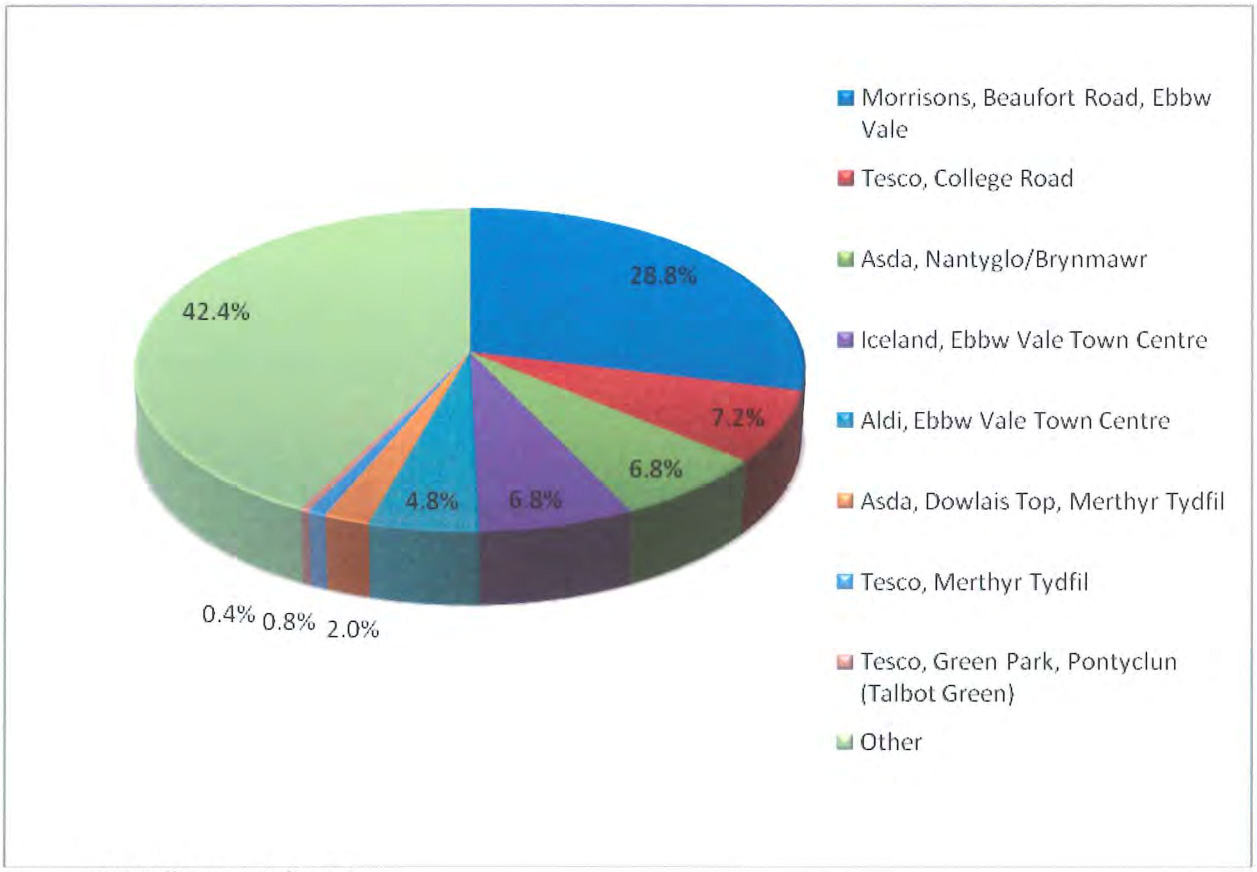
42 A total of 250 interviews were conducted in the catchment area of Ebbw Vale over a period, from 7th November - 29th November 2008. Random selections of local resident's within the Ebbw Vale area were asked for their opinions on a variety of subjects relating to their shopping behaviour. This included 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 Ebbw Vale as a place for shopping.

3.1 Food and grocery shopping

Main Food

43 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 Ebbw Vale 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)

Over two fifths of respondents (41.6%) listed Tesco, North West Approach in Ebbw Vale, (this response fell under the 'other' responses given) as the store where they

44

buy the majority of their household food and grocery items. The second most popular store/location was Morrisons, Beaufort Road in Ebbw Vale and named by over a quarter (28.8%) of respondents.

45 Not one respondent within the catchment area stated that they used the Internet for their household's food and grocery shopping.

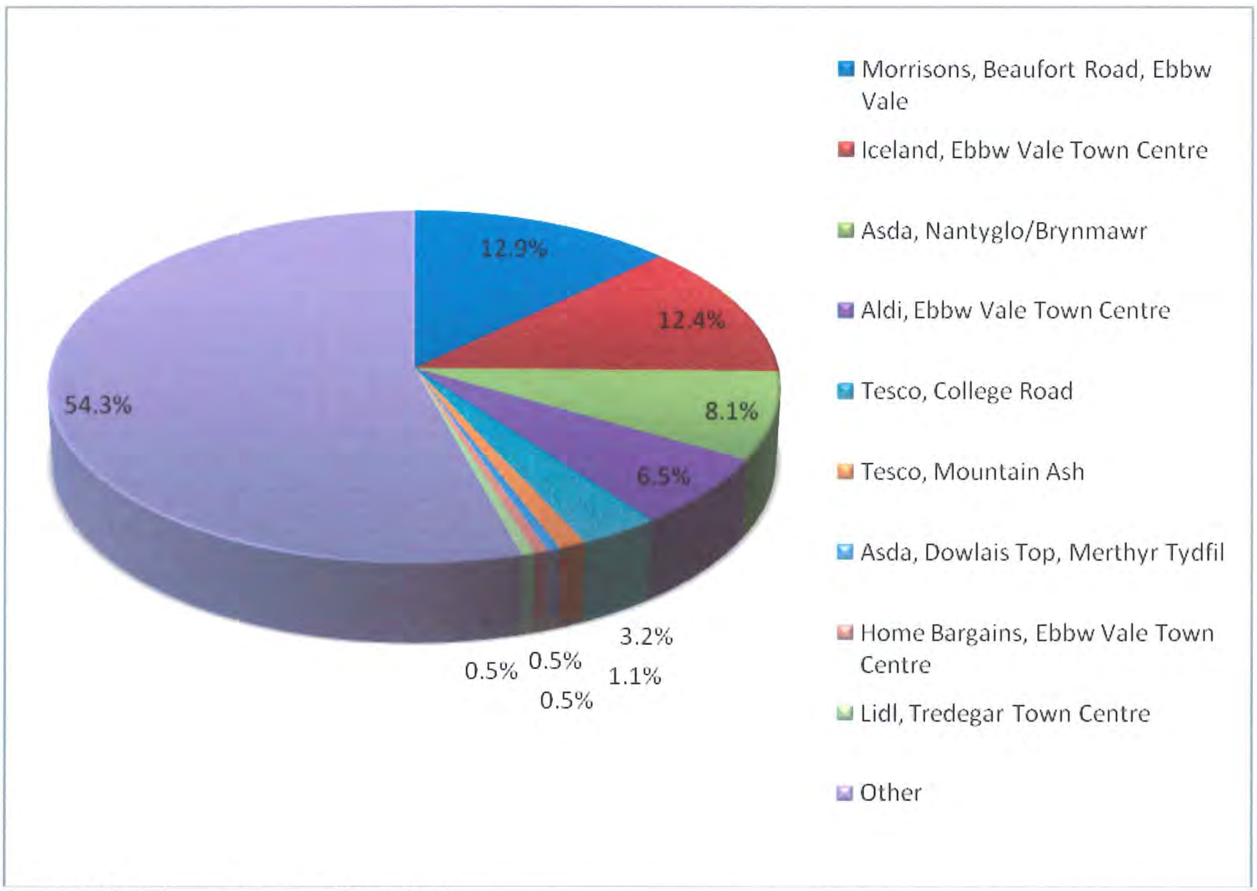
46 With regards to the respondents frequency of visits, travelling habits and expenditure, over half (55.2%) of all respondents stated they normally shop at their main food store once a week. The majority of respondents (92%) are travelling from their home in Ebbw Vale to their main food store and over half (53.1%) travelling by car/van as the driver. Nearly a quarter (24%) of all respondents spends in the region of £51 - £75 on their main food and grocery shopping.

47 Three fifths (60.8%) 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 (74.4%) 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 specified by respondents in the Ebbw Vale 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: 186 (Those top-up shopping)

49 Figure 3.1.3 has shown the majority of respondents stated 'Other' responses (54.3%) and of these 'Other' responses the most popular store/location indicated they visited their local stores in the Ebbw Vale area to purchase top-up shopping (25.8%).

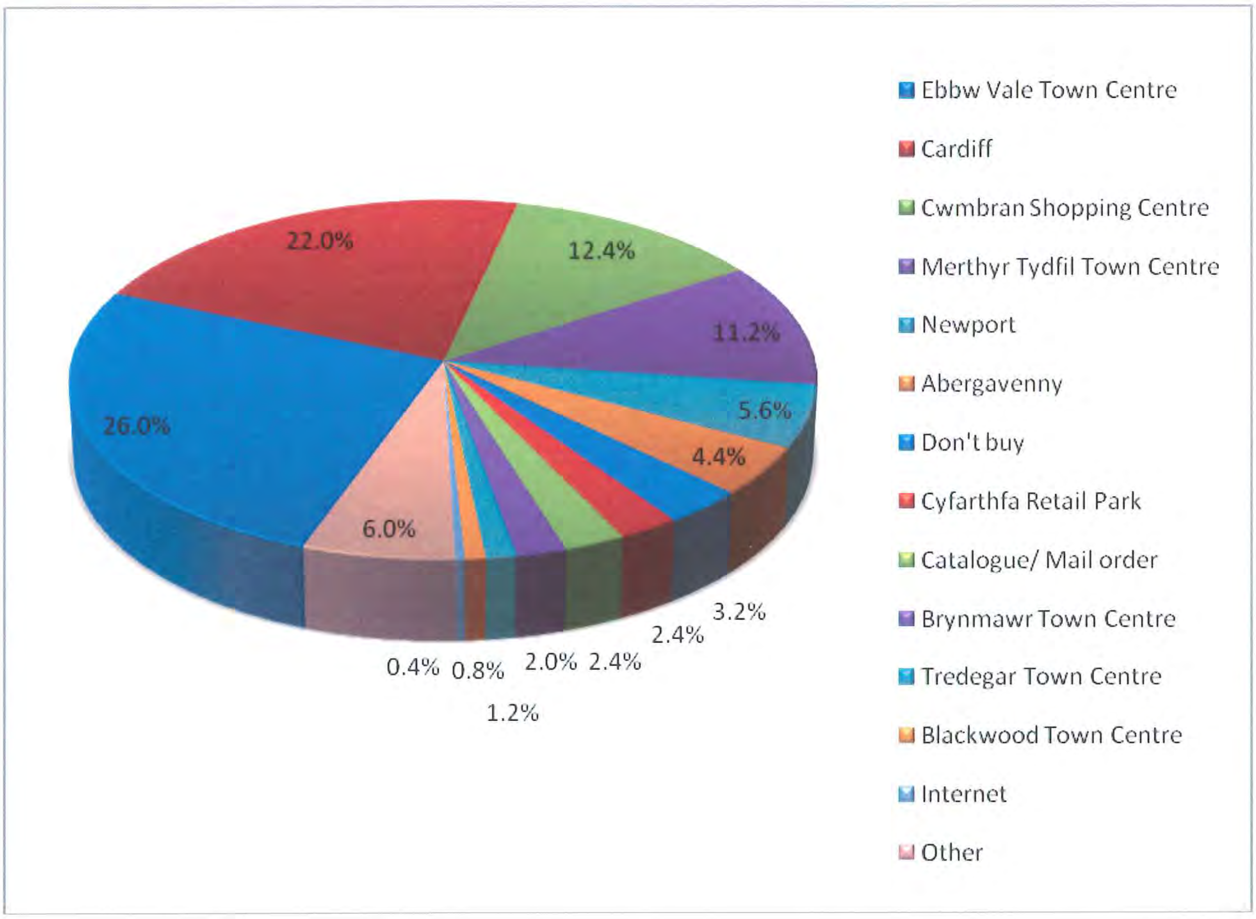
Table 3.1.4 - Top-up shopping - Other verbatim stores/locations:

Local stores, Ebbw Vale	*25.8%*
Tesco, North West Approach, Ebbw Vale	*21.0%*
Local stores, Waunlwyd	*2.2%*
Local stores, Beaufort	*1.1%*
Country Choice, Ebbw Vale	*0.5%*
Local stores, Brynmawr	*0.5%*
Local stores, Garnlydan	*0.5%*
Local stores, Hilltop	*0.5%*
Marks & Spencer, South Walk, Cwmbran	*0.5%*
Milkman - goods delivered	*0.5%*
Spar, Rassau	*0.5%*
Wilkinsons, Abergavenny	*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 concentrates on the results of respondents in the Ebbw Vale 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)

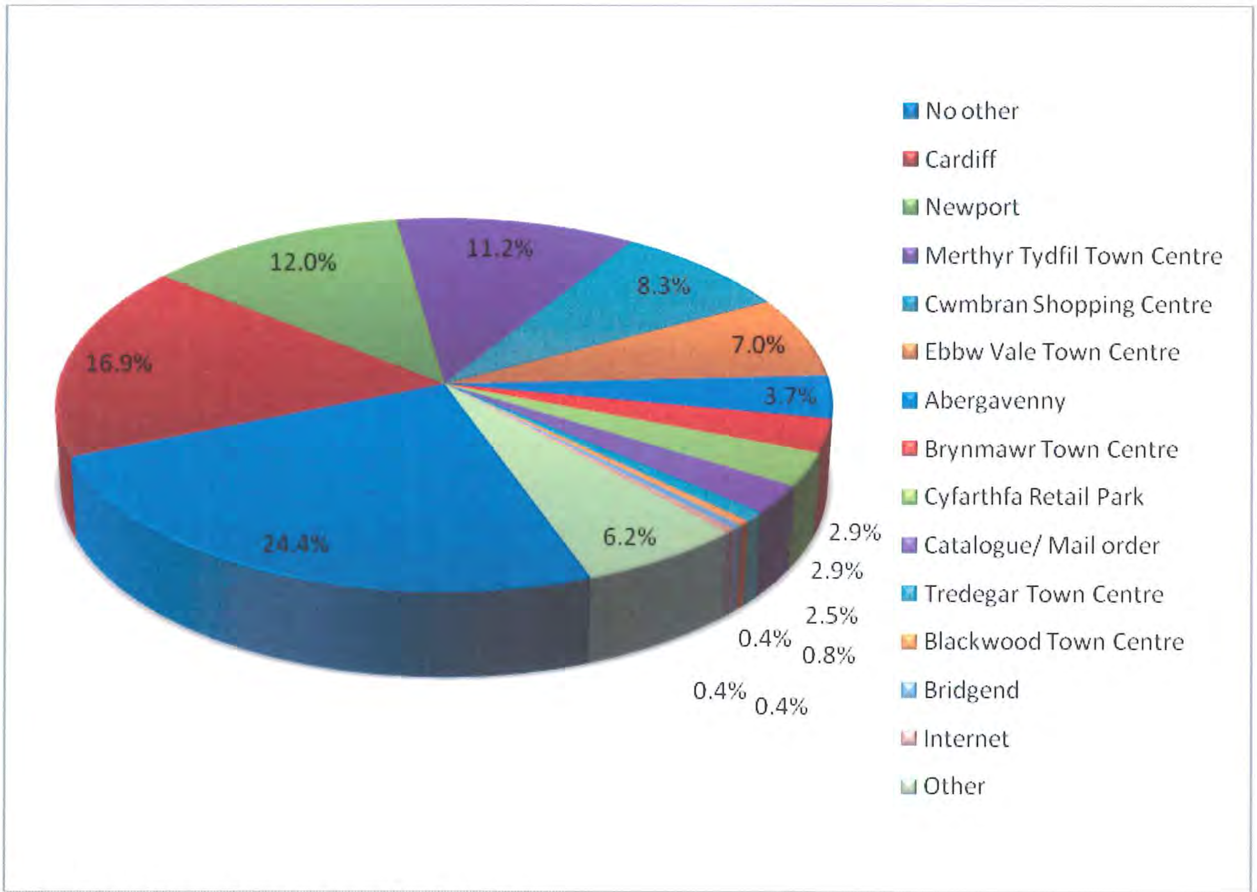


Base: 250 (All respondents)

51 In terms of locations to purchase non-food items, Ebbw Vale Town Centre was the most popular location with over a quarter (26%) visiting this area. Cardiff (22%) was the second most popular town 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: 242 (Those buying non-food items)

53 A quarter of respondents (24.4%) stated they do not visit any other centre for non-food shopping. Whereas those that stated another location mainly visited Cardiff or Cardiff with a sixth of respondents (16.9%) 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:

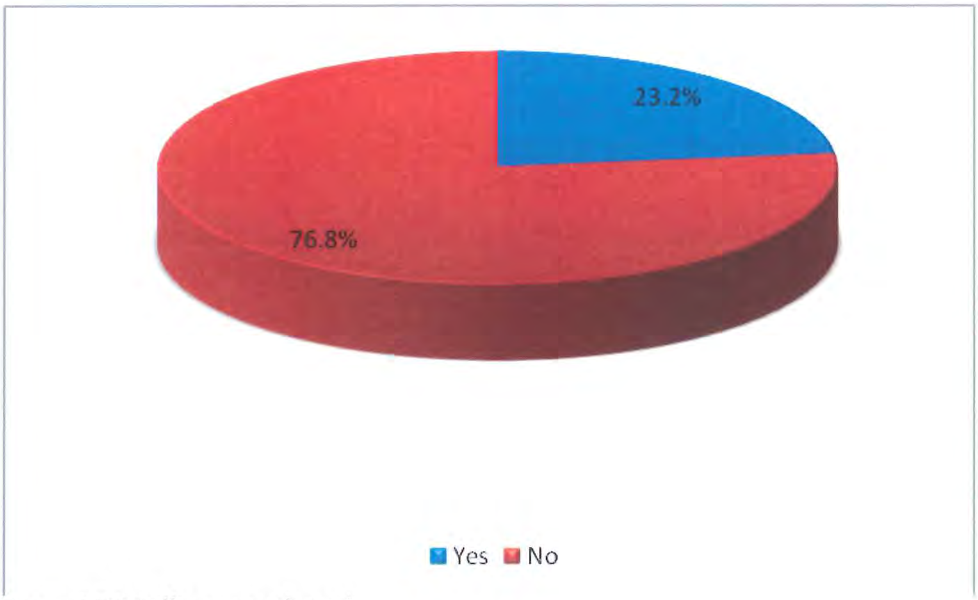
54
- Internet shopping and types of goods
- Current usages of recently opened food stores/shopping centres (inc. shopping patterns prior to these new establishments)
- Current patterns of the catchment areas for any other purpose other than retailing

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 Ebbw Vale catchment area within the Heads of the Valleys Programme Area.

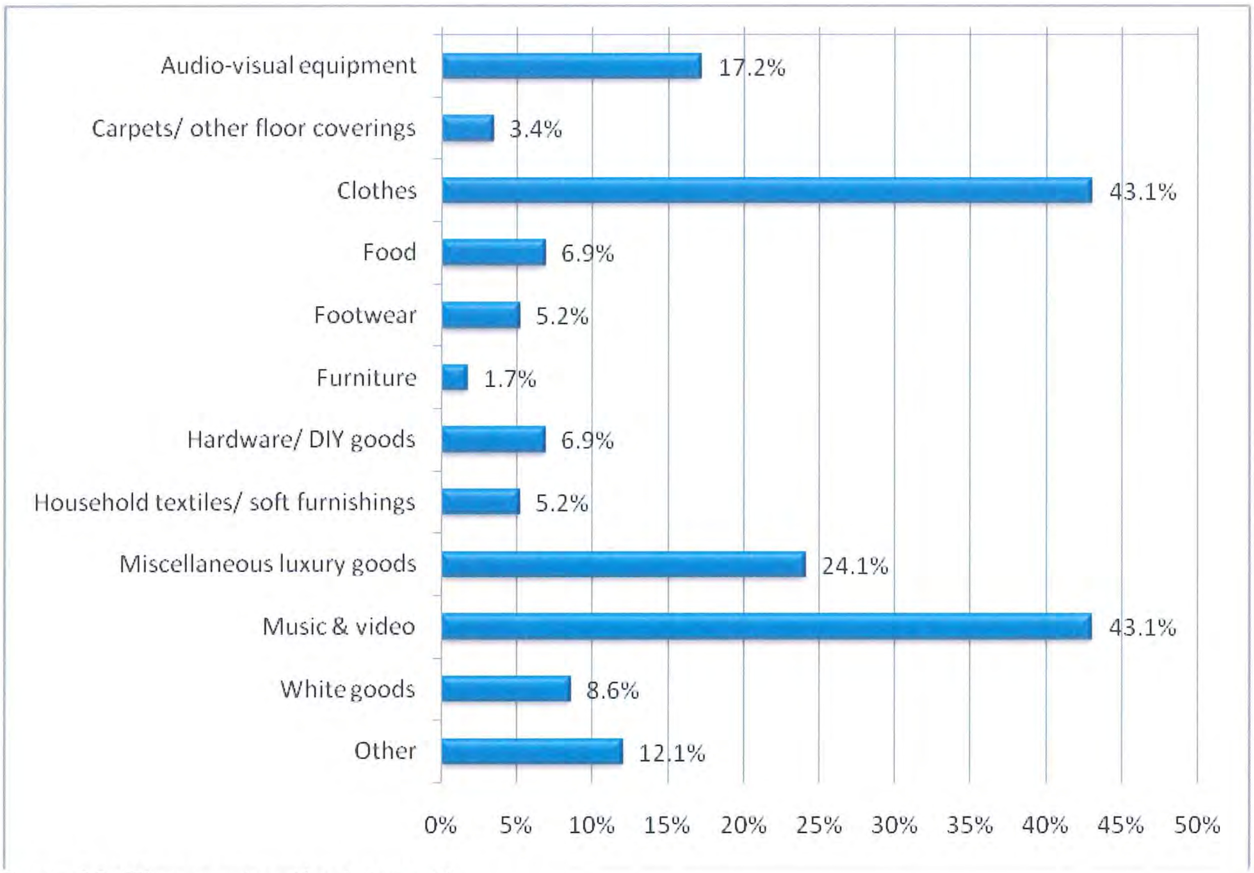
Figure 3.3.1 – Do you shop using the Internet? (% of all respondents)



Base: 250 (All respondents)

57 The majority (76.8%) of respondents within this Ebbw Vale catchment area do not use the internet to purchase goods and would rather view the items in person than on a computer, as under a quarter (23.2%) of respondents stated 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: 58 (Those using the internet)

58 The 58 respondents who stated they use the internet to shop were asked to indicate the categories of goods they have purchased. The chart above clearly indicates that an equal proportion of respondents purchased clothes and/or music & video (both 43.1%).

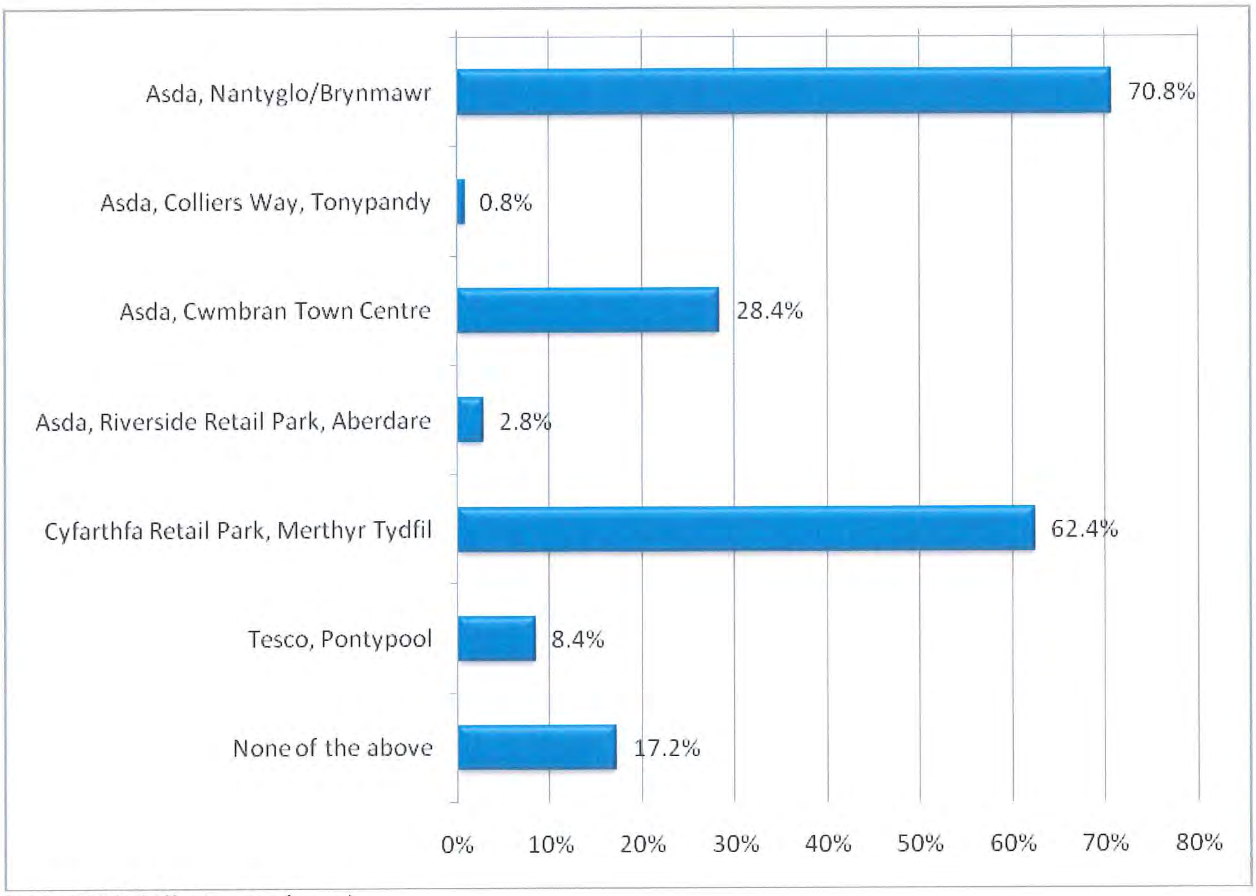
59 The next popular responses given were miscellaneous luxury goods and/or Audio-visual equipment, stated by 24.1% and 17.2% respectively.

60 However, as internet food shopping with the current population has increased over the years, only 6.9% within the Ebbw Vale 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 for any purpose. The following data was found:

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 Asda in Nantyglo/Brynmawr (70.8%) and Cyfarthfa Retail Park in Merthyr Tydfil (62.4%); whereas a nearly a fifth (17.2%) indicated they had not used/visited the 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)

Tesco, North West Approach, Ebbw Vale	22.7%
Asda, Dowlais Top, Merthyr Tydfil	13.0%
Morrisons, Beaufort Road, Ebbw Vale	12.6%
Tesco, Town Centre, Ebbw Vale	7.2%
Tesco, College Road, Ebbw Vale	5.3%
Cardiff City Centre	4.8%
Kwik Save, James Street, Ebbw Vale	3.9%
Ebbw Vale Town Centre	3.4%
No other store used previously	3.4%
Co-op, Ebbw Vale	2.4%
Iceland, Ebbw Vale	1.9%
Local stores, Ebbw Vale	1.9%
Merthyr Tydfil Town centre	1.4%
Aldi, The Walk, Ebbw Vale	1.0%
Co-op, High Street, Blaina, Gwent.	1.0%
Local stores, Cardiff	1.0%
Newport Town Centre	1.0%
Not sure	1.0%
Tesco, Merthyr Tydfil	1.0%
Abergavenny	0.5%
Asda - Merthyr Tydfil, Pioneer, Ebbw Vale	0.5%
Asda Pontygwyndy Road, Caerphilly	0.5%
Asda, Brynmawr	0.5%
Cardiff, Tesco Ebbw Vale	0.5%
Carrefour, Caerphilly	0.5%
Co-op & Tesco in Ebbw Vale	0.5%
Cwmbran or Newport	0.5%
Cwmbran Town Centre	0.5%
Don't know	0.5%
Ebbw Vale Market	0.5%
Festival Park Shopping Village, Ebbw Vale	0.5%
Hereford	0.5%
Kwiksave, Beaufort Street, Brynmawr (now closed)	0.5%
Leos, Beaufort Road, Ebbw Vale (now closed)	0.5%
Mcarthur Glen, Bridgend	0.5%
Merthyr Tydfil, local stores	0.5%
N/A - didn't live in the area before these shops opened	0.5%
Rarely uses the retail park	0.5%
Safeway, Merthyr Road, Llanfoist, Abergavenny	0.5%
Somerfield, Ebbw Vale	0.5%

Base: 207 (Those using other stores/locations)

Figure 3.4.2 has shown that respondents have stated they used to shop at Tesco,
64 North West Approach in Ebbw Vale (22.7%) and Asda, Dowlais Top in Merthyr Tydfil
(13%). Over three fifths (62.3%) of respondents surveyed indicated shops in the
Ebbw Vale catchment area (combined responses).

3.5 Leisure activities

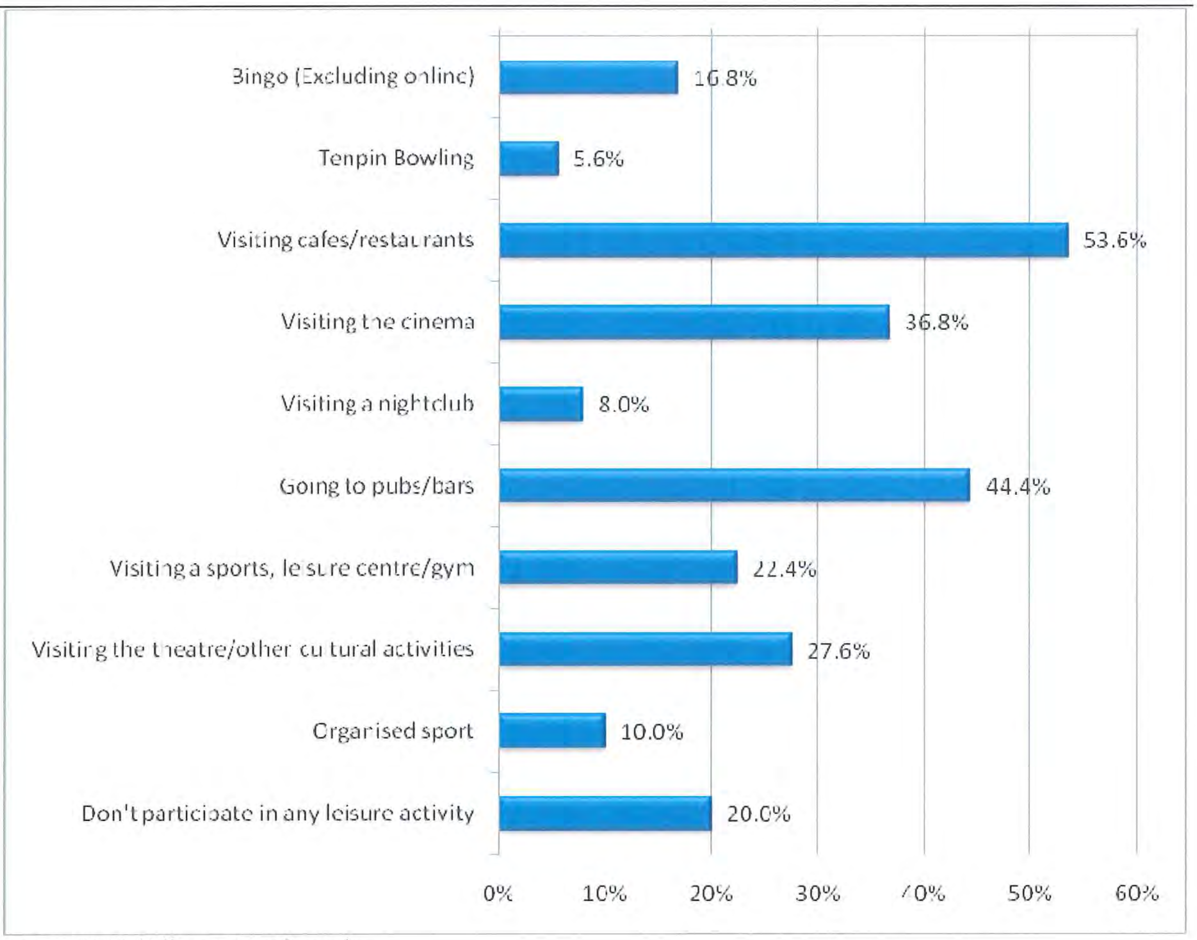
A series of questions relating to leisure activities were asked, these included
65 discovering which leisure activities respondents partake in, in which area and how
frequent they participate in these activities.

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:

- Bingo (Excluding online)
- 67 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 Ebbw Vale catchment area participated in was visiting cafes/restaurants (53.6%) of which they visited either once a month or less often (both 26.1%).

Other respondents stated that they'd rather partake in going to pubs/bars where over two fifths (44.4%) stated this. The majority of respondents who partake in this type of activity do so once a week. Only 50 respondents (20%) indicated that they do not participate in any leisure activity.

<u>Bingo</u>

70 Ebbw Vale was the most popular area for this activity with nearly two fifths (73.8%) stating this. Merthyr Tydfil (19%) was the second most popular area to play Bingo.

71 The most popular frequency of playing Bingo was once a week with nearly half (47.6%) of all respondents.

<u>Tenpin Bowling</u>

72 Nantgarw and Treforest were the main areas respondents visited to play Tenpin Bowling (both 21.4%) and mainly undertake this less often than once a month (71.4%).

<u>Cafés/Restaurants</u>

73 The majority (47.8%) of respondents visited Ebbw Vale to go to a café or a restaurant either once a month or less often (both 26.1%).

<u>Cinema</u>

74 Many respondents tended to visit Brynmawr (34.8%) to go to the Cinema. The majority of those who visited the Cinema did so less often than once a month

(55.4%).

Nightclubs

75 The place that respondents of the Ebbw Vale catchment area preferred to frequent visits to nightclubs was in Cardiff, where four fifths (80%) stated this location. The highest proportion of respondents visit nightclubs less often than once a month (45%).

Pubs/Bars

76 Ebbw Vale was the most popular area to visit a pub or a bar with over three quarters (78.4%) indicated they go there. The respondents who visited a pub or a bar stated that they go once a week with 36% of respondents stated so.

Sports, Leisure Centre/Gym

77 Those who visited a sport, leisure centre or a gym preferred to go to Ebbw Vale with over four thirds (85.7%) stating this.

78 Over a third (35.7%) of respondents visited a sport, leisure centre or a gym 2-3 times a week.

Theatre/other cultural activities

79 The majority (52.2%) 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 (91.3%).

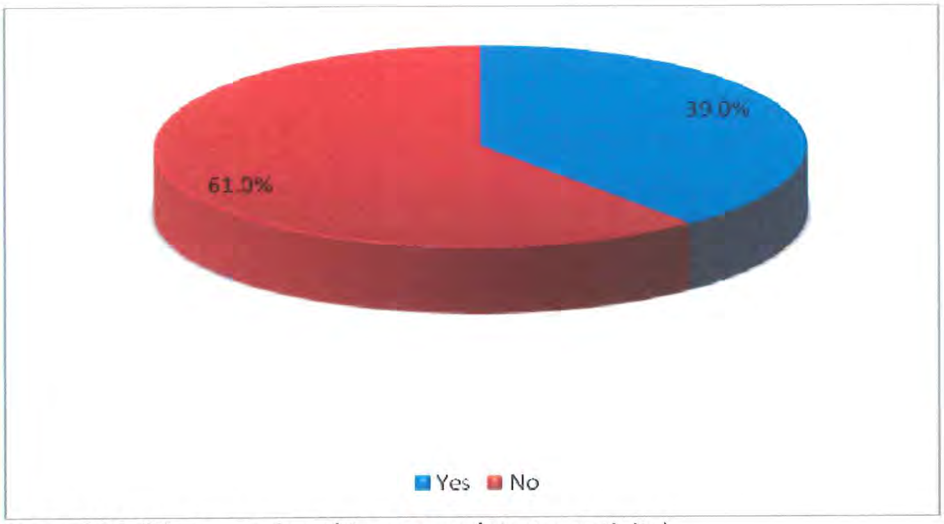
Organised sport

80 Three fifths (60%) of respondents stated Ebbw Vale as the place they play an organised sport and most respondents undertook this type of activity once a week (72%).

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)

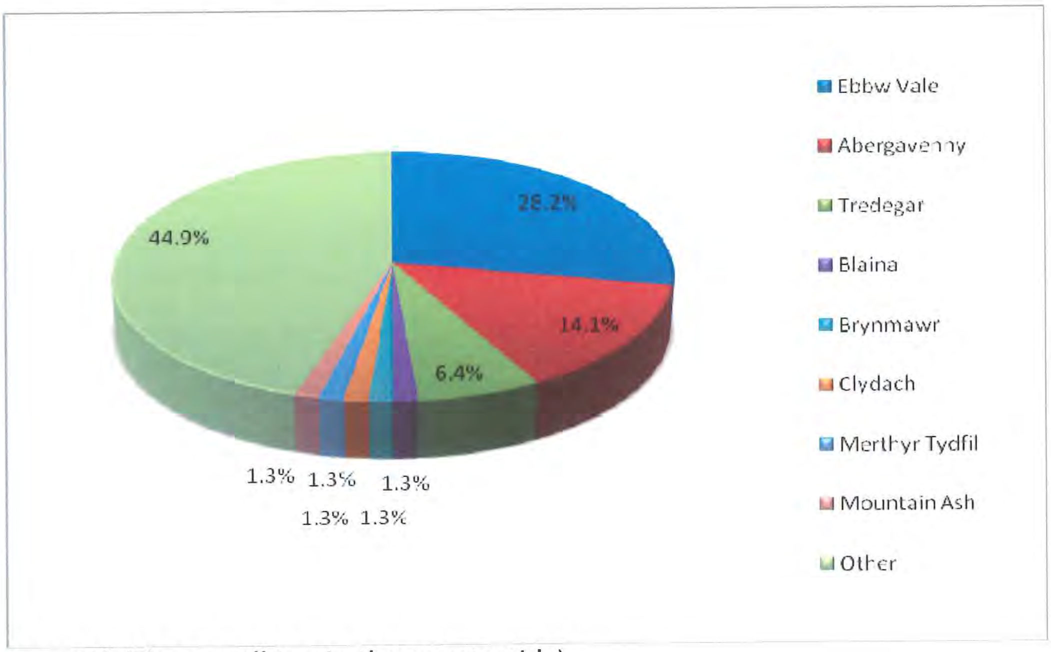


Base: 200 (Those undertaking some leisure activity)

82 Figure 3.6.1 has shown the majority of respondents (61%) in the Ebbw Vale catchment area do not walk in the countryside compared with 78 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: 78 (Those walking in the countryside)

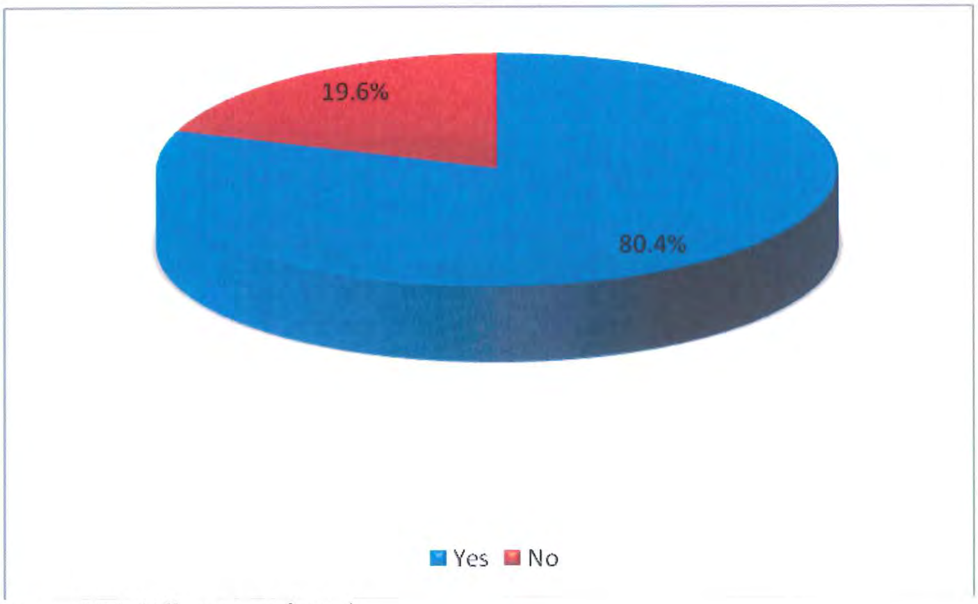
84 Those respondents, who go walking in the countryside, did so in Ebbw Vale where over a quarter (28.2%) stated this. The next highest proportion was a fifth (20.5%) of respondents stated they visit the Brecon Beacons, this response fell under the 'other' category. Below indicates the 'other' responses given:

Brecon Beacons	*20.5%*
Crickhowell	*6.4%*
Gilwern	*3.8%*
Cwm	*2.6%*
Caerleon	*1.3%*
Hereford	*1.3%*
Llandovery	*1.3%*
Llangynidr Moors	*1.3%*
North Wales	*1.3%*
Parc Bryn Bach, Tredegar	*1.3%*
Talybont Canal	*1.3%*
Varies due to hobby	*1.3%*
Waunlwyd	*1.3%*

3.7 Mode of transport

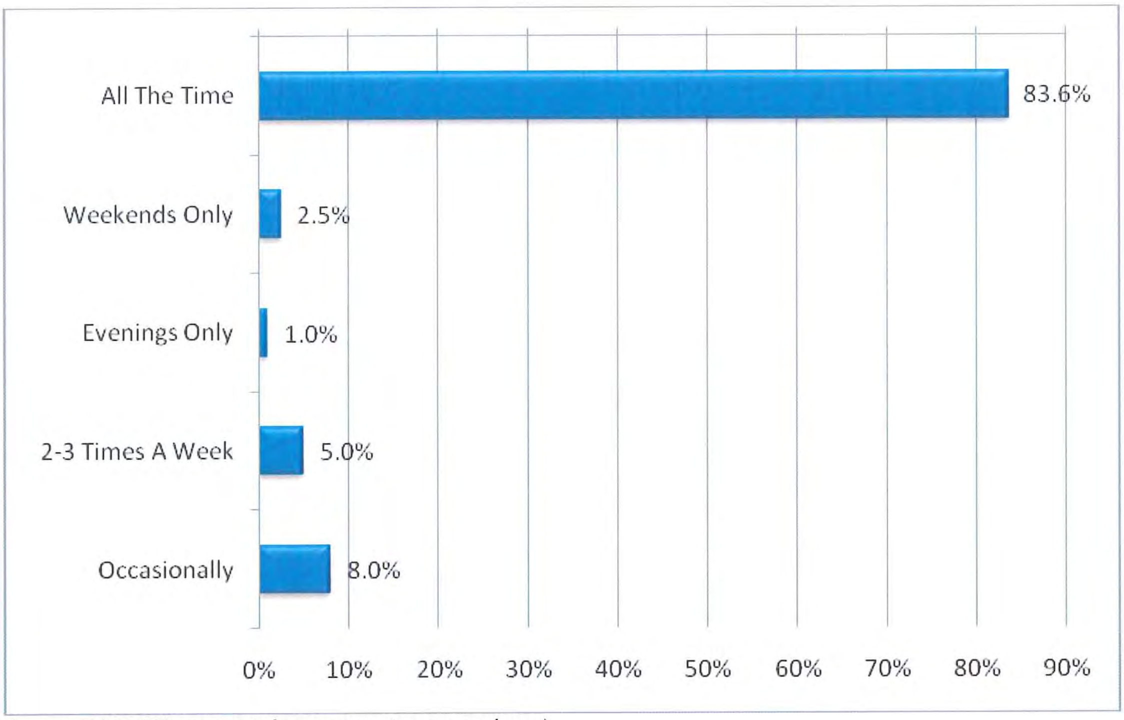
85 Respondents were next asked a couple of questions about their journey for shopping in general. These included whether they have access to a car/van and how often they have access to the car/van. The following data was found:

Figure 3.7.1 - 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)



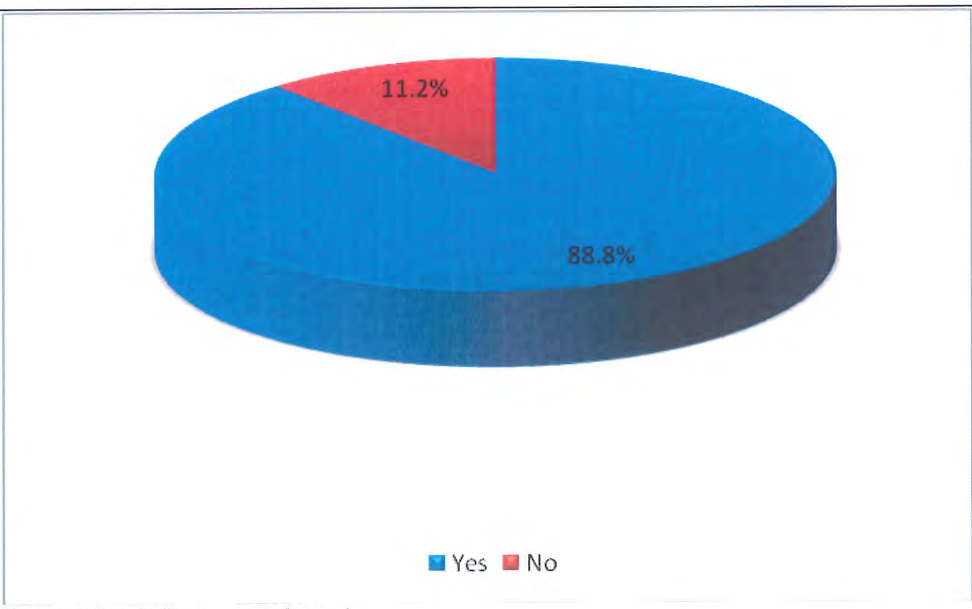
Base: 201 (Those with access to a car/van)

86 Those who travelled by car/van for shopping; some 201 respondents (80.4%), were asked how often they have access to the vehicle. The majority (83.6%) stated that they have access to a car/van all the time.

3.8 Shopping in Ebbw Vale

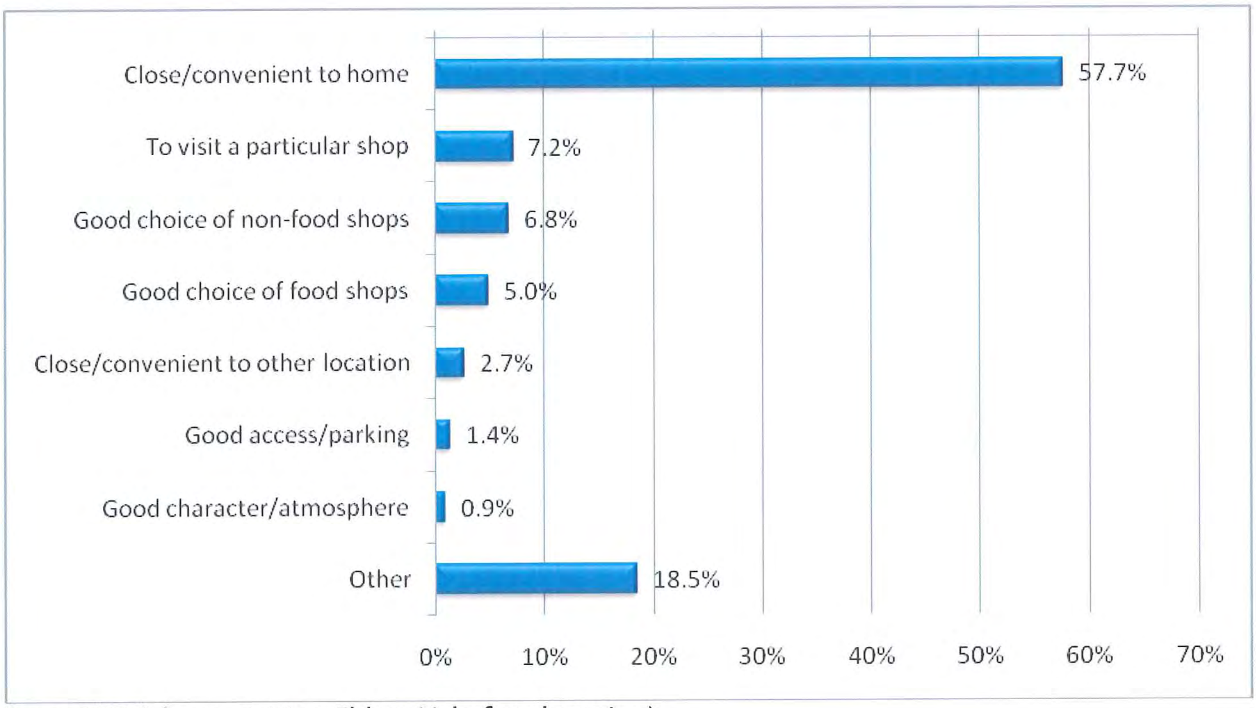
87 Respondents were asked a series of questions about shopping in Ebbw Vale. These included whether they visit Ebbw Vale for shopping, if so why and if not, why not? They were also asked when they visit Ebbw Vale do they visit the town for any other purpose and which potential improvements would make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

Figure 3.8.1 - Do you ever visit EBBW VALE for shopping? (% of all respondents)



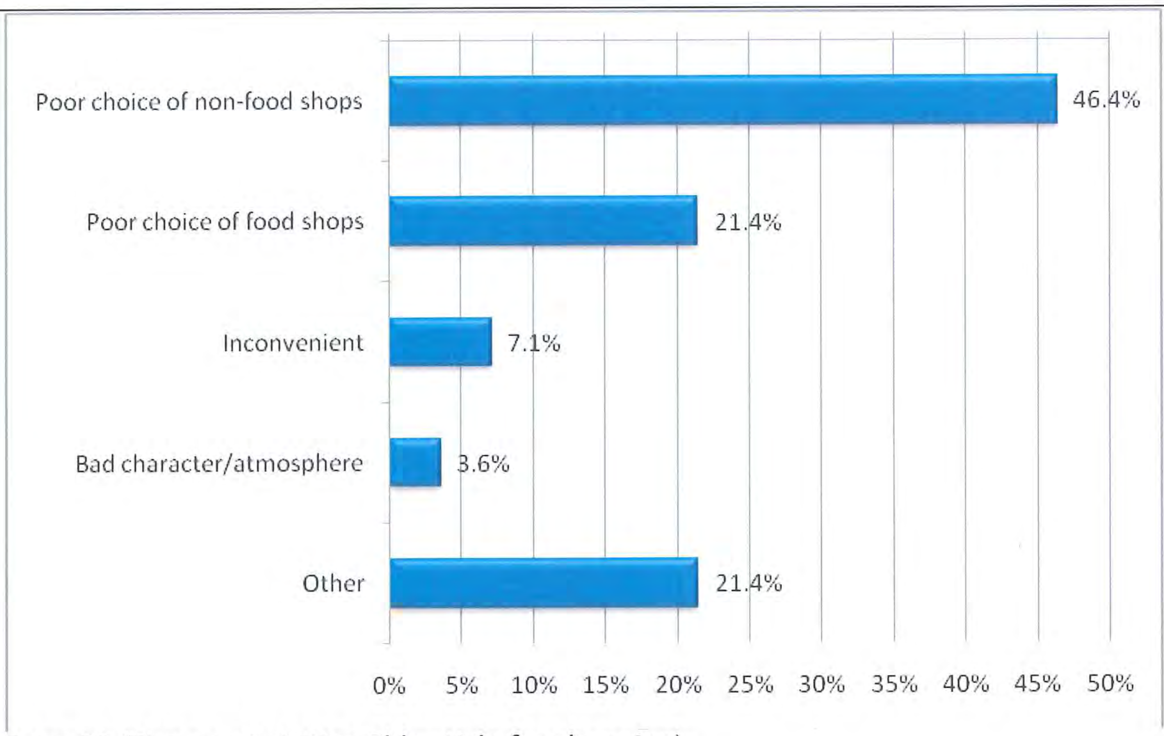
Base: 250 (All respondents)

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



Base: 222 (Those visiting Ebbw Vale for shopping)

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



Base: 28 (Those not visiting Ebbw Vale for shopping)

88 The survey has found that 88.8% of all respondents surveyed do visit Ebbw Vale for shopping.

89 Those respondents who indicated they visited Ebbw Vale, some 222 respondents (Figure 3.8.2) stated a number of reasons for visiting their local area for shopping. Nearly three fifths of the respondents (57.7%) stated it was because it was close and/or convenient to home.

Those who visited Ebbw Vale - Other verbatim comments

90 From the results shown in figure 3.8.2 and the other responses given (18.5%), the following aspects proved to be positive for a selection of respondents (13.1% - exc. 'No particular reason'):

- *Bank* *2.7%*
- *Market day/ good market* *2.3%*
- *Support local stores* *2.3%*
- *Habit/familiarity* *1.8%*
- *Day trip* *1.4%*
- *Everything in one place/ good layout* *1.4%*
- *Work* *1.4%*

91 Similarly those respondents, who indicated they did not visit Ebbw Vale (Figure 3.8.3), also stated a number of reasons for not visiting their local area for shopping. Nearly half (46.4%) of respondents stated Ebbw Vale has a poor choice of non-food shops and a fifth (21.4%) felt there was also a poor choice of food shops.

Those who did not visit Ebbw Vale - Other verbatim comments

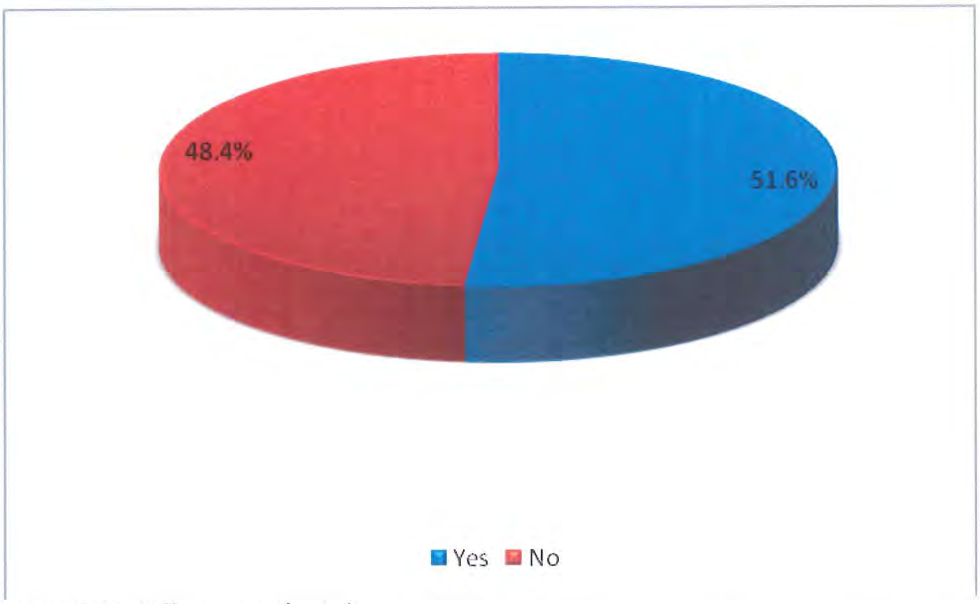
From the results shown in figure 3.8.3 and the other responses given (21.4%), the following aspects proved to be negative for a selection of respondents:

92

- *Nothing there* *10.7%*
- *Housebound* *7.1%*
- *Road works* *3.6%*

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

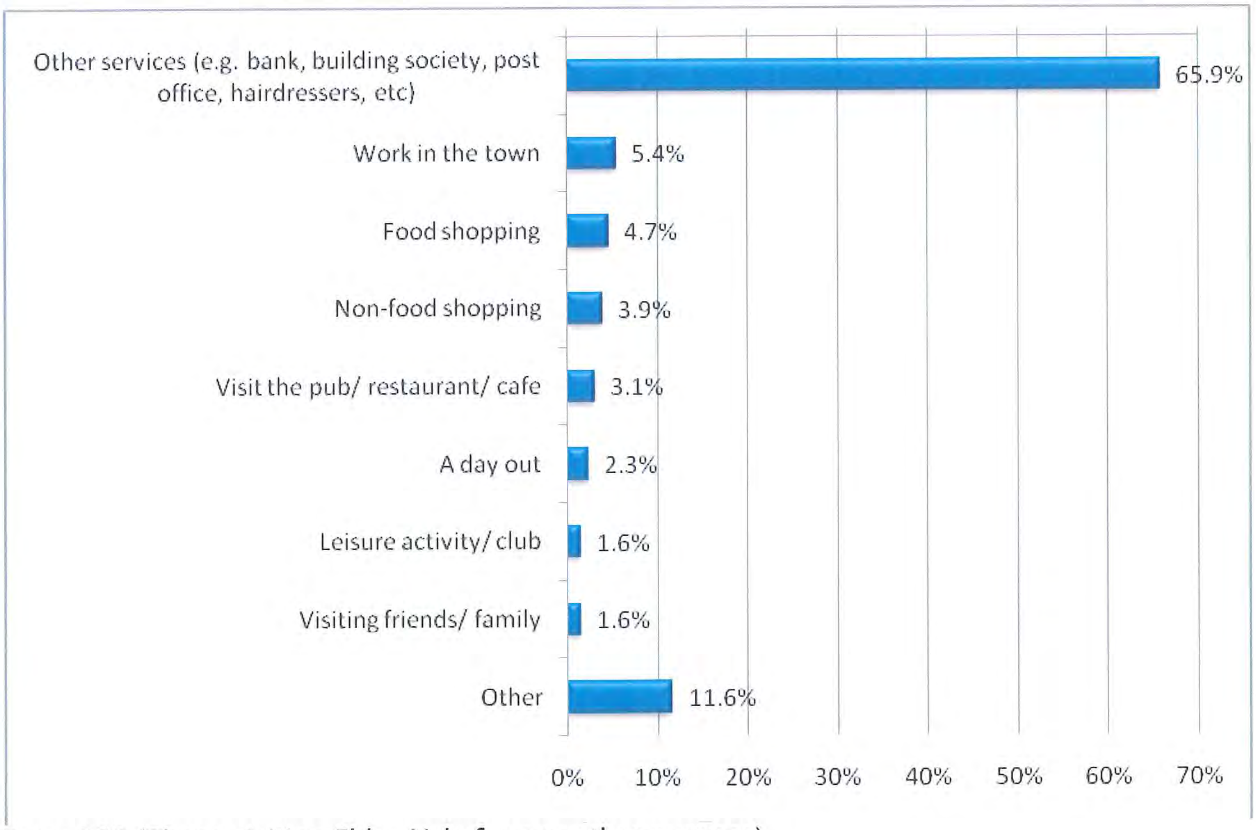
Figure 3.8.4 - When visiting EBBW VALE, do you usually visit the town for any other purpose? (% of all respondents)



Base: 250 (All respondents)

94 It is evident that there is almost an even split of respondent visiting Ebbw Vale for any other purpose, apart from what is planned prior to their trip. However, the 129 respondents (51.6%) that indicated they visit this 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: 129 (Those visiting Ebbw Vale for any other purpose)

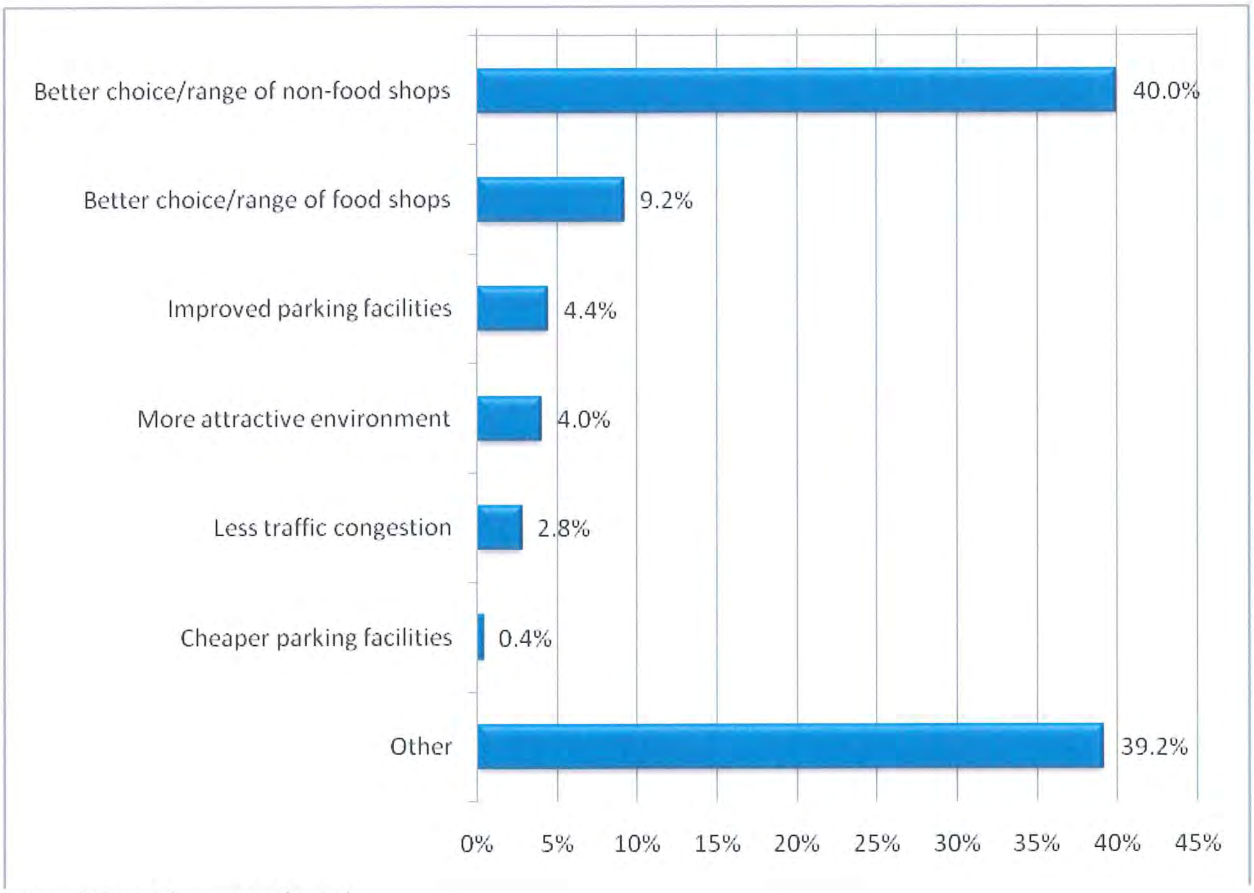
95 Figure 3.8.5 clearly shows that the majority (65.9%) of respondents stated they also visit other services as well as visiting Ebbw Vale.

96 From the results shown in figure 3.8.5 the following other responses were given (11.6%):

Doctors/dentist	*3.9%*
Library	*2.3%*
Chemist	*0.8%*
Learning Centre	*0.8%*
Market	*0.8%*
Paying Bills	*0.8%*
Travel agents	*0.8%*
Walk	*0.8%*
Window shopping	*0.8%*

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

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



Base: 250 (All respondents)

98 The most popular response stated by two fifths (40%) was that respondents would prefer to have better choice/range of non-food shops. Nearly a tenth (9.2%) said that a better choice/range of food shops would make them use Ebbw Vale for shopping more frequently.

99 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 and food shopping.

100 From the results shown in figure 3.8.10 and the following other responses were given (13.6% - exc. 'Nothing'):

o *More food and non-food shops*	*3.2%*
o *If the council finished the improvements to the town centre*	*2.0%*
o *Improve the roads within town centre*	*1.2%*
o *More leisure activities*	*1.2%*
o *Cinema*	*0.8%*
o *More chain stores e.g. Marks & Spencer*	*0.8%*
o *More facilities for youngsters*	*0.8%*
o *Own mobility issues stop householder shopping more regularly*	*0.8%*
o *Bank etc*	*0.4%*

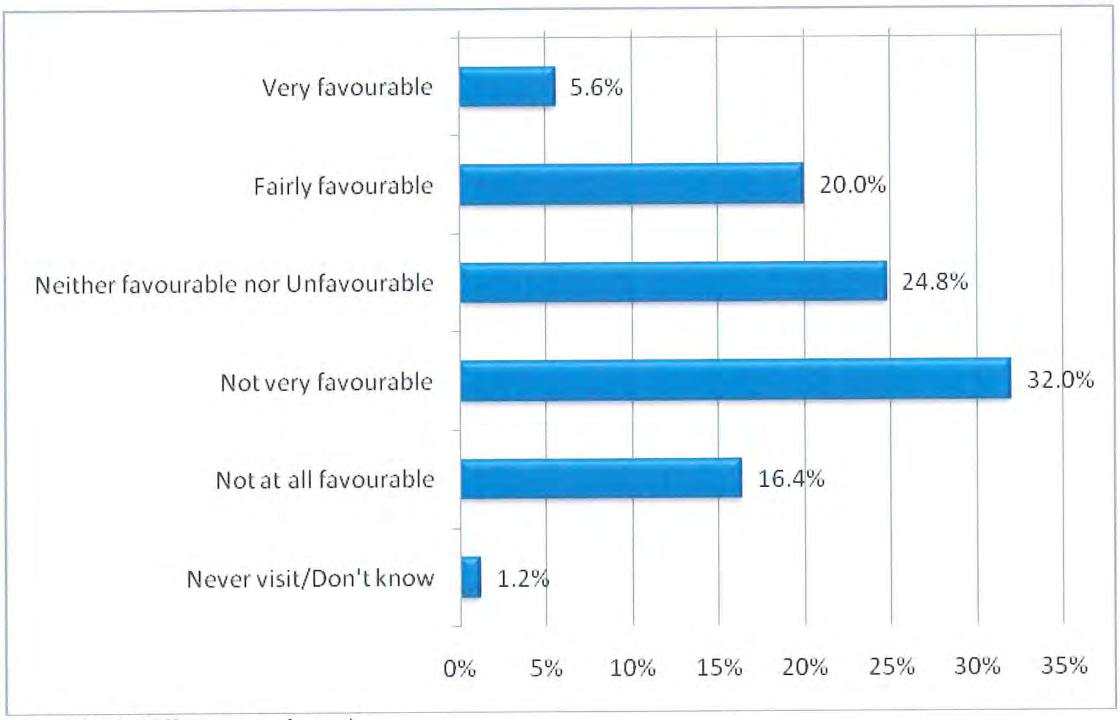
- *Better pushchair access to shops* *0.4%*
- *Covered shopping centre* *0.4%*
- *Get rid of multi-storey car park* *0.4%*
- *Larger department stores* *0.4%*
- *Public toilets* *0.4%*
- *Tesco* *0.4%*

3.9 Approval rating

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

102 The chart below demonstrates the responses given for the Ebbw Vale catchment area:

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



Base: 250 (All respondents)

103 Nearly half (48.4%) of respondents stated that they rate the town as either 'not very favourable' or 'not at all favourable', of which a quarter (25.6%) of all respondents felt the town was either 'very favourable' or 'fairly favourable'.

3.10 Demographics

104 The breakdown of SEG, age and gender of those who took part can be seen in figure 3.6.1 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	18	7.2%
C1	67	26.8%
C2	72	28.8%
D/E	83	33.2%
Refused	10	4.0%

Base: 250 respondents in Ebbw Vale

By age group

	Base: All respondents	
	Num	%
Base: All respondents	**250**	**100.0%**
18 - 24 years	3	1.2%
25 - 34 years	11	4.4%
35 - 44 years	28	11.2%
45 - 54 years	32	12.8%
55 - 64 years	62	24.8%
65 years or above	107	42.8%
Refused	7	2.8%

Base: 250 respondents in Ebbw Vale

By gender

	Base: All respondents	
	Num	%
Base: All respondents	**250**	**100.0%**
Male	66	26.4%
Female	184	73.6%

Base: 250 respondents in Ebbw Vale

4.0 On-Street Survey

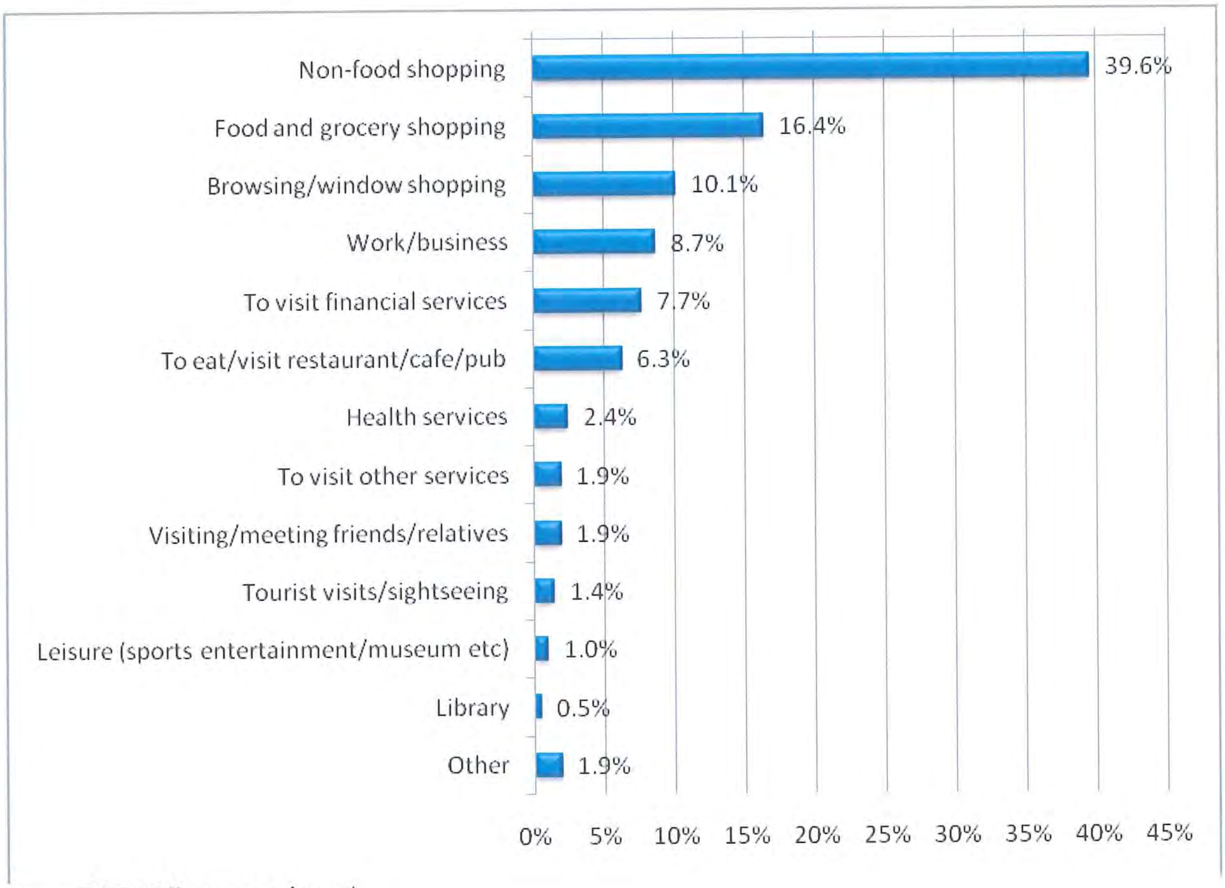
105 A total of 205 face-to-face interviews were conducted in Ebbw Vale town centre between 10th November and 9th December 2008. Interviews were conducted in two locations, namely:

- Bethcar Street
- Market Street

4.1 Reasons for visiting Ebbw Vale town centre

106 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: 207 (All respondents)

107 The most popular response given in this survey has shown nearly a third (39.6%) of respondents stated they mainly visited Ebbw Vale for non-food shopping. The second quoted response was food and grocery shopping (16.4%) and in third place were browsing/window shopping (10.13%).

108 Collectively, those visiting Ebbw Vale for shopping equates for nearly three fifths of all respondents (56%).

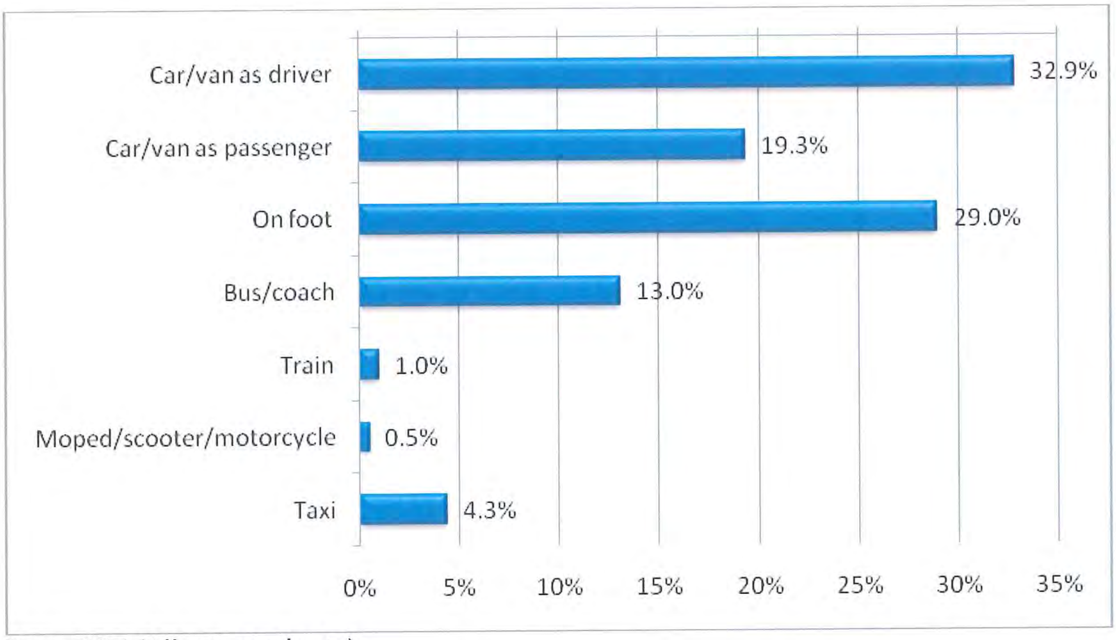
4.2 Travelling to Ebbw Vale

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

110 The majority of respondents (89.9%) had gone straight from home to Ebbw Vale, with the remainder doing so from Work (9.2%) or Friends/family home (1%). Specifically, the majority (52.2%) of respondents had come from Ebbw Vale.

111 Shoppers were then asked about the mode of transport that they used to travel to Ebbw Vale town centre.

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



Base: 207 (All respondents)

112 The most popular method of transport was by car/van as the driver, as a third (32.9%) of all respondents stated this. Whereas, those travelling on foot equated to over a quarter (29%) of respondents.

113

Those who travelled by car, some 108 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)

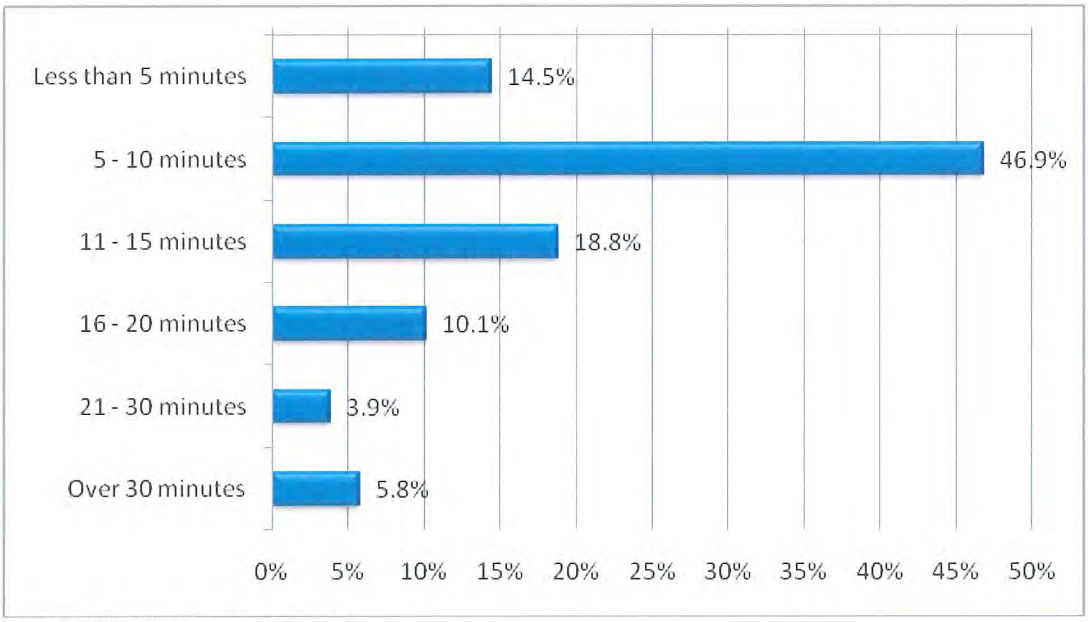
Car park location	All respondents	Point of interview		Passenger type	
		Bethcar Street	Market Street	Driver	Passenger
Free public parking	34.3	34.7	33.3	33.8	35
On-street parking	11.1	5.6	22.2	10.3	12.5
Others	54.6	59,7	44.4	55.9	52.5

Base: 108 (Those travelling by car/van)

114 The results have shown that those respondents travelling by car were most likely to use the free public parking (34.3%) before parking on-street.

Time taken to travel to Ebbw Vale

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



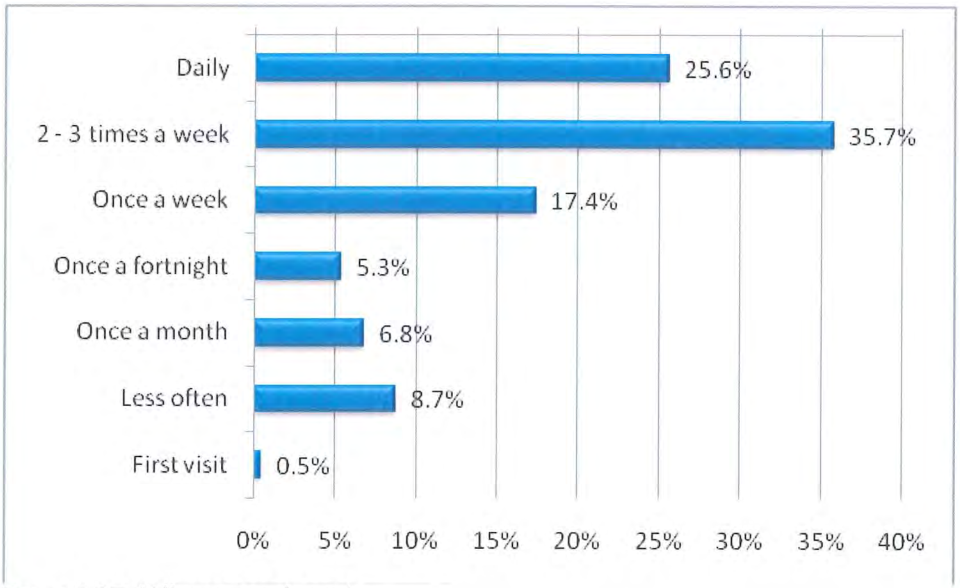
Base: 207 (All respondents)

115 Figure 4.2.3 clearly indicates that the majority of shoppers (61.4%) travel for less than 10 minutes, indicating that there is a local catchment area for shoppers.

Frequency of visits to Ebbw Vale

116 Respondents were then asked to indicate their level of frequency 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)



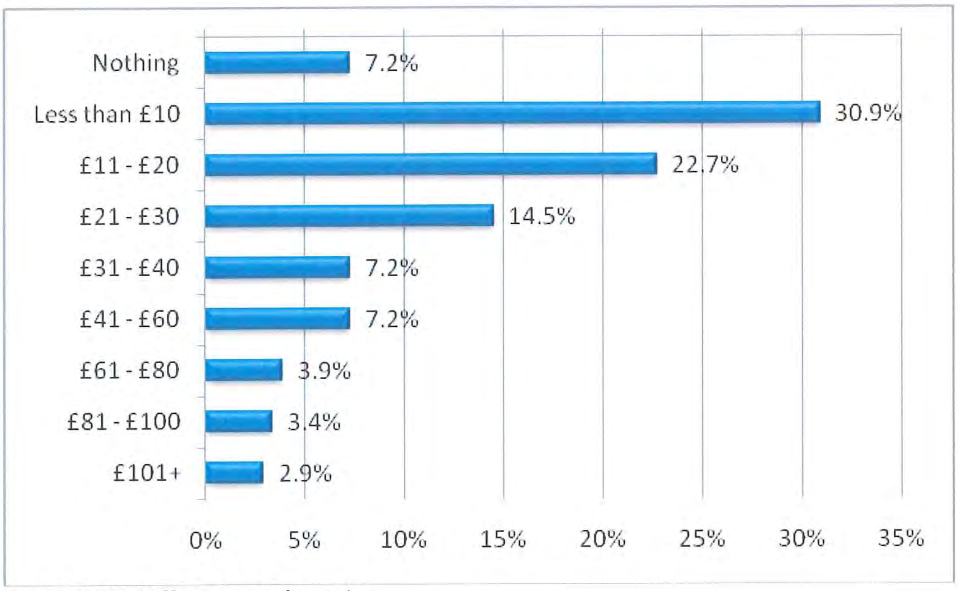
Base: 207 (All respondents)

117 Over three fifths (61.4%) of all respondents visited the town centre at least twice a week or more frequently. This breaks down to a quarter of respondents (25.6%) visited daily and over a third who visited Ebbw Vale 2-3 times a week (35.7%).

4.3 Spending behaviour

118 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: 207 (All respondents)

119 The majority of respondents (53.6%) stated that they had or were likely to spend between £0-£20 during their visit, this comprised of 30.9% indicated they would be spending/have spent less than ten pounds and 22.7% stating somewhere in between £11 - £20. Under a tenth (7.2%) didn't expect to be spending any money whilst on their visit.

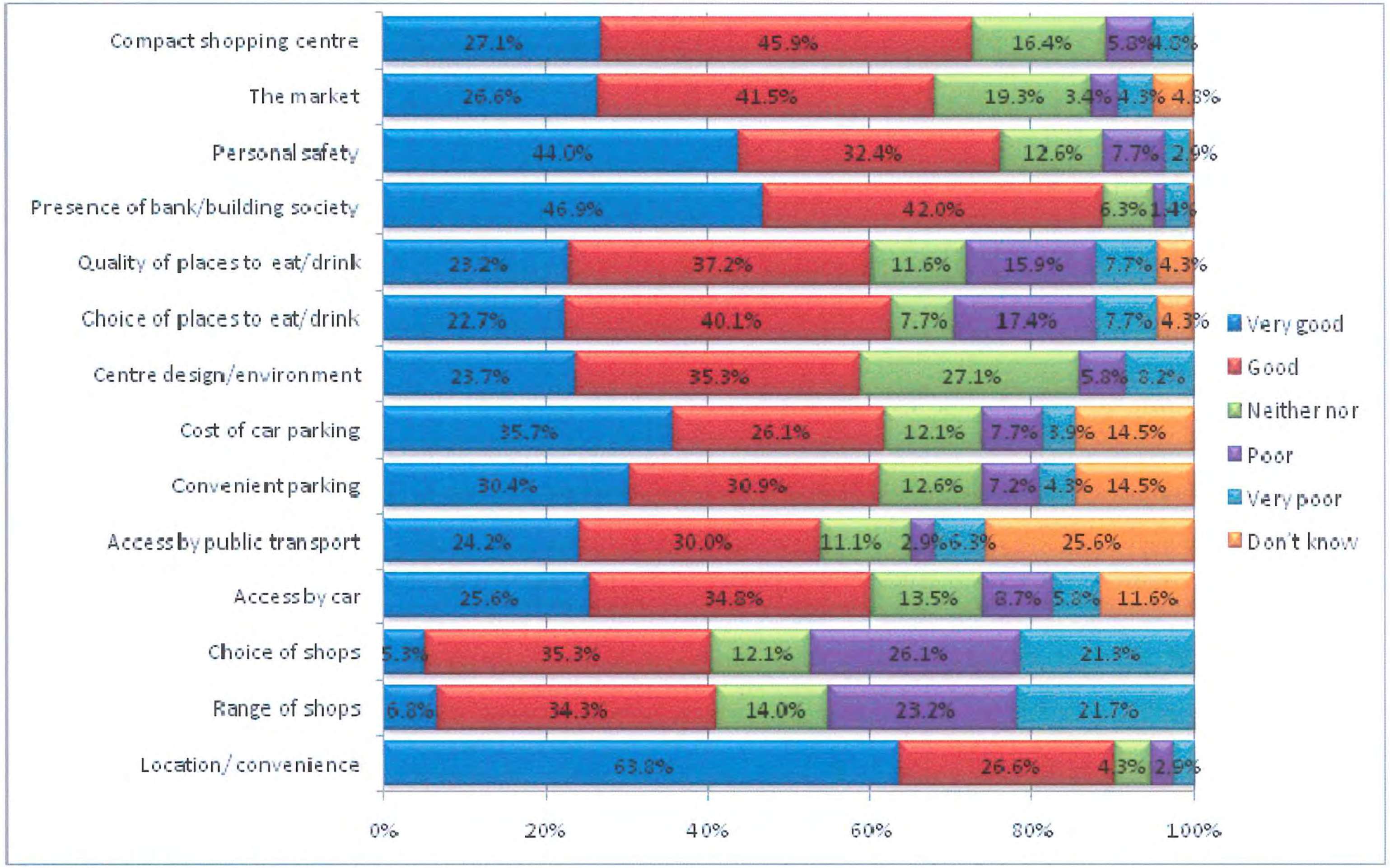
120 In order to collect data on other town centre functions, the Heads of the Valleys Town Centre Group requested additional questions to be introduced to the on-street survey. These questions were as follows:

- 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
    - 121 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

122 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’.

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



Base: 207 (All respondents: multiple choice)

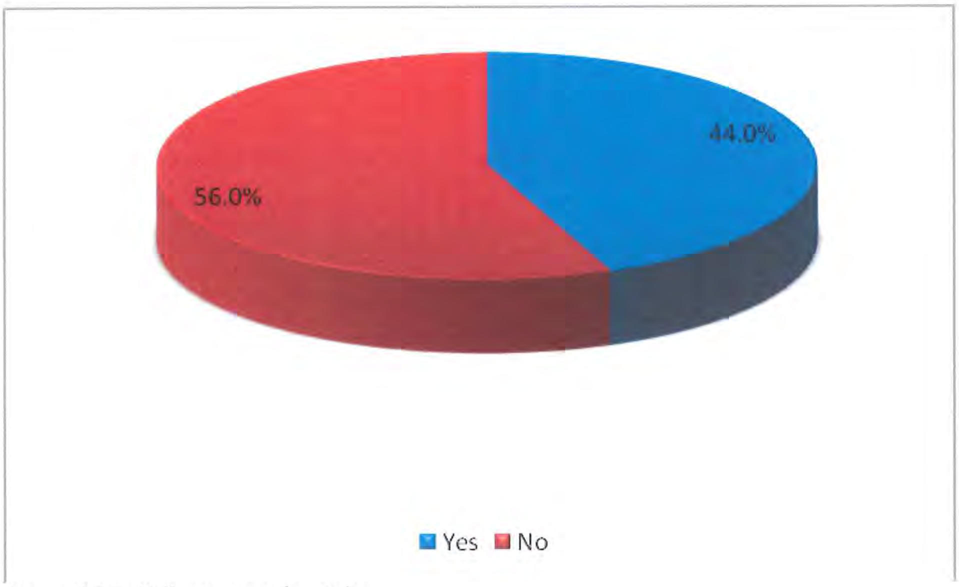
123 From the results shown in figure 4.4.1, the majority of respondents rated the Location/ convenience in Ebbw Vale as either 'very good' or 'good' (combined responses - 90.3%), another high proportion (88.9%) of respondents indicated the Presence of bank/building society was 'very good' or 'good'.

124 The results have also shown the negative responses where over two fifths of respondents stated the range of shops (44.9%) was either 'poor' or 'very poor'; similarly the choice of shops (47.3%) response also fell under this rating.

4.5 Other activities

125 The following chart illustrates the responses given when respondents were asked when they visit Ebbw Vale, 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 Ebbw Vale, do you usually visit the town for any other purpose? (% of all respondents)



Base: 207 (All respondents)

126 From the results shown in figure 4.5.1 above the following indicates the responses given from 91 respondents when asked what they normally undertake when visiting the town for any other purpose:

Food shopping	*20.9%*
Non-food shopping	*19.8%*
Using financial services	*58.2%*
Using public or civic services	*16.5%*
Using other services	*17.6%*
Visiting restaurant, cafe, or public house	*20.9%*
Work in or near the town centre	*4.4%*
Tourism or sight seeing	*0.0%*
Visiting the Library	*6.6%*
Meeting friends or family	*9.9%*
Other social or leisure reasons	*8.8%*
Business	*1.1%*
Education	*0.0%*
Access to transport services	*0.0%*

127 The survey has revealed a number of reasons for visiting Ebbw Vale, and has found the majority (58.2%) stated they also visit this area to undertake use the financial services.

4.6 Leisure activities

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

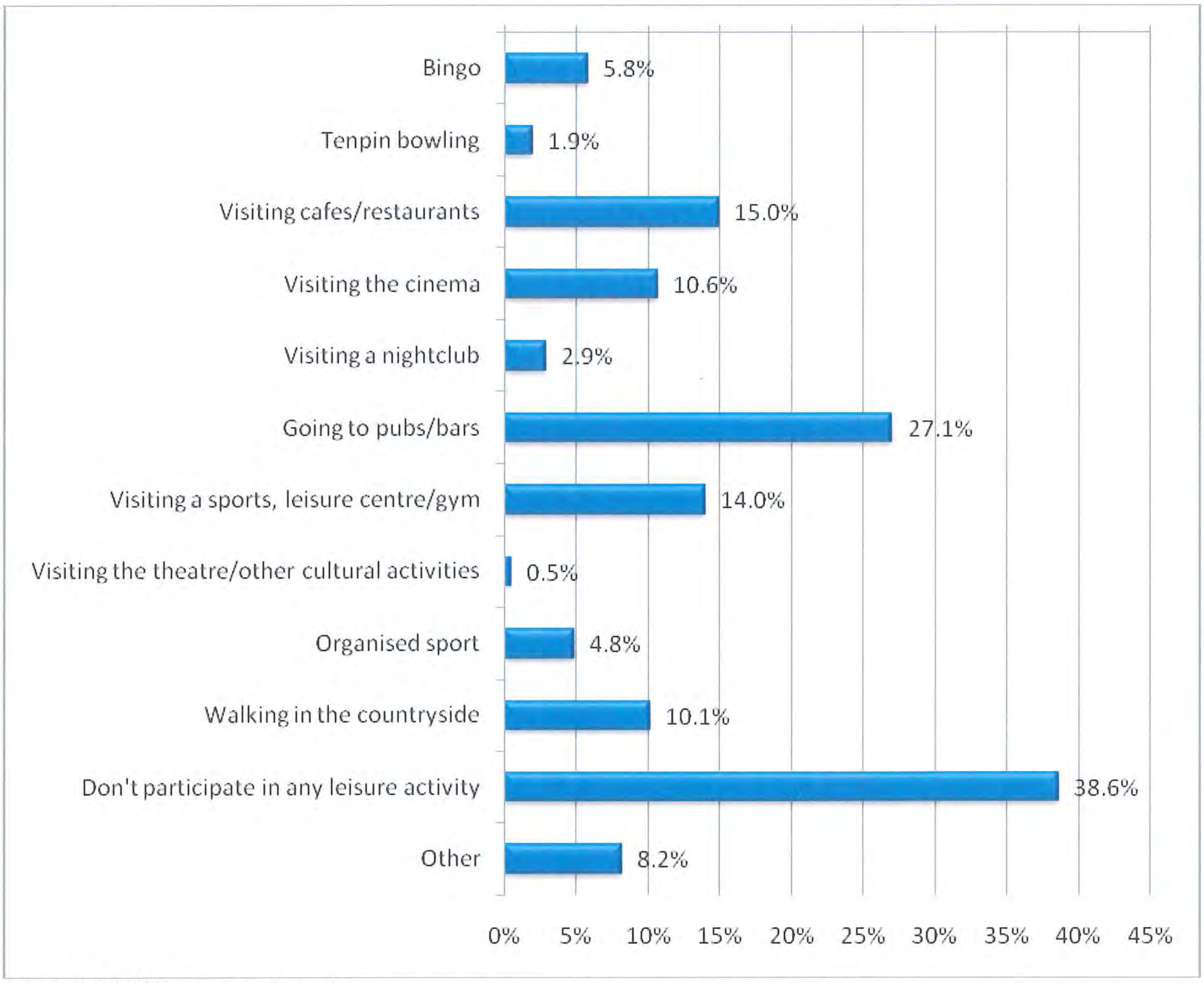
129 A list of activities was read out to the respondents (including an option for those who do not participate in any leisure activity), which were as follows:

130

- 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

131 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)



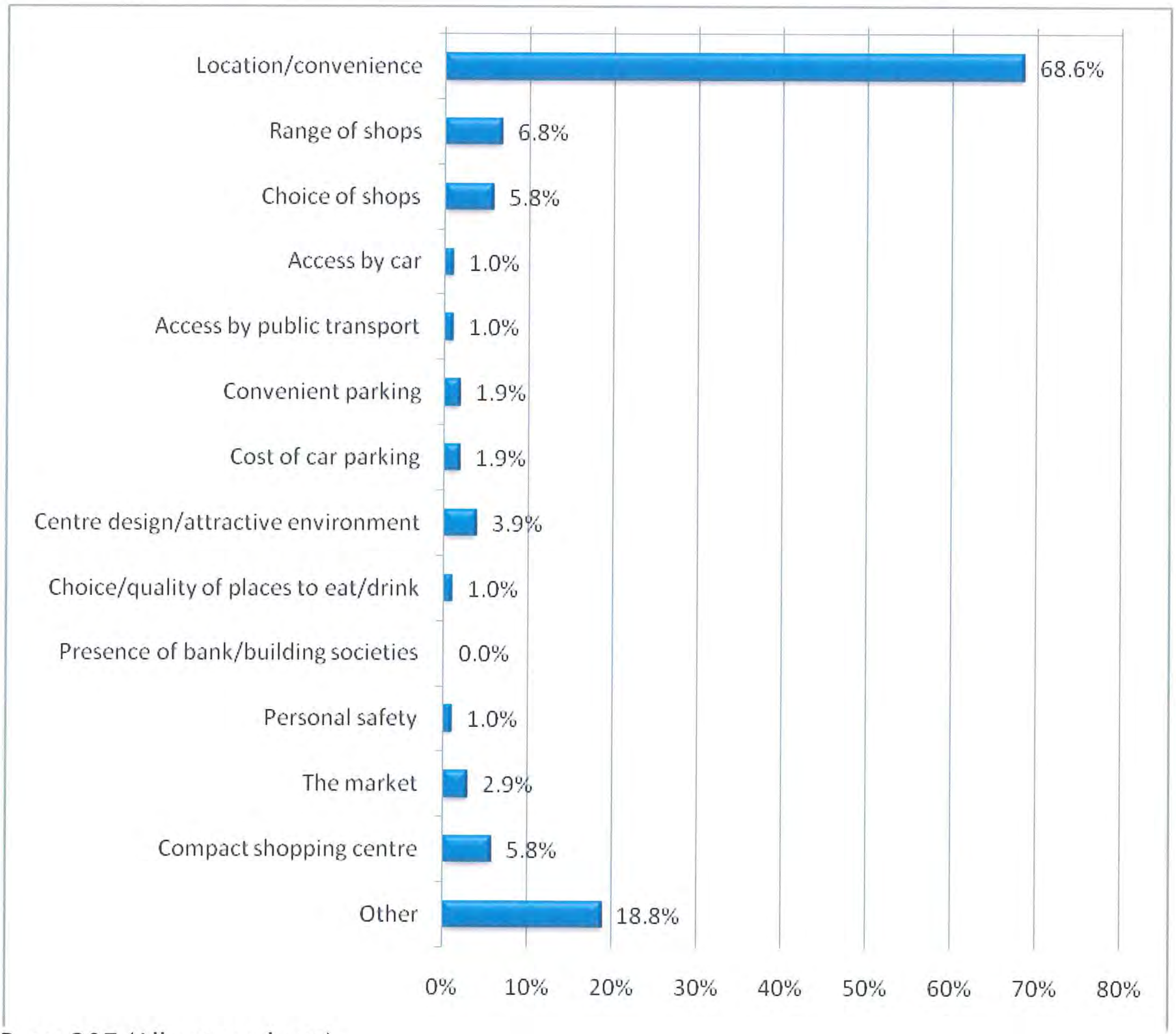
Base: 207 (All respondents)

132 It is evident that even when surveying respondents' on-street as well as over the telephone they have remained interested in going to pubs/bars and visiting cafes/restaurants stated by 27.1% and 15% respectively. 38.6% indicated they do not participate in any leisure activity.

4.7 Shopping in Ebbw Vale and improvements

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

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



Base: 207 (All respondents)

134 Ebbw Vales' location and convenience was the aspect that respondents most liked about the area (68.6%) for shopping, leisure/evening activities or services. However, only 12.6% were impressed with the choice and range of shops within the catchment area.

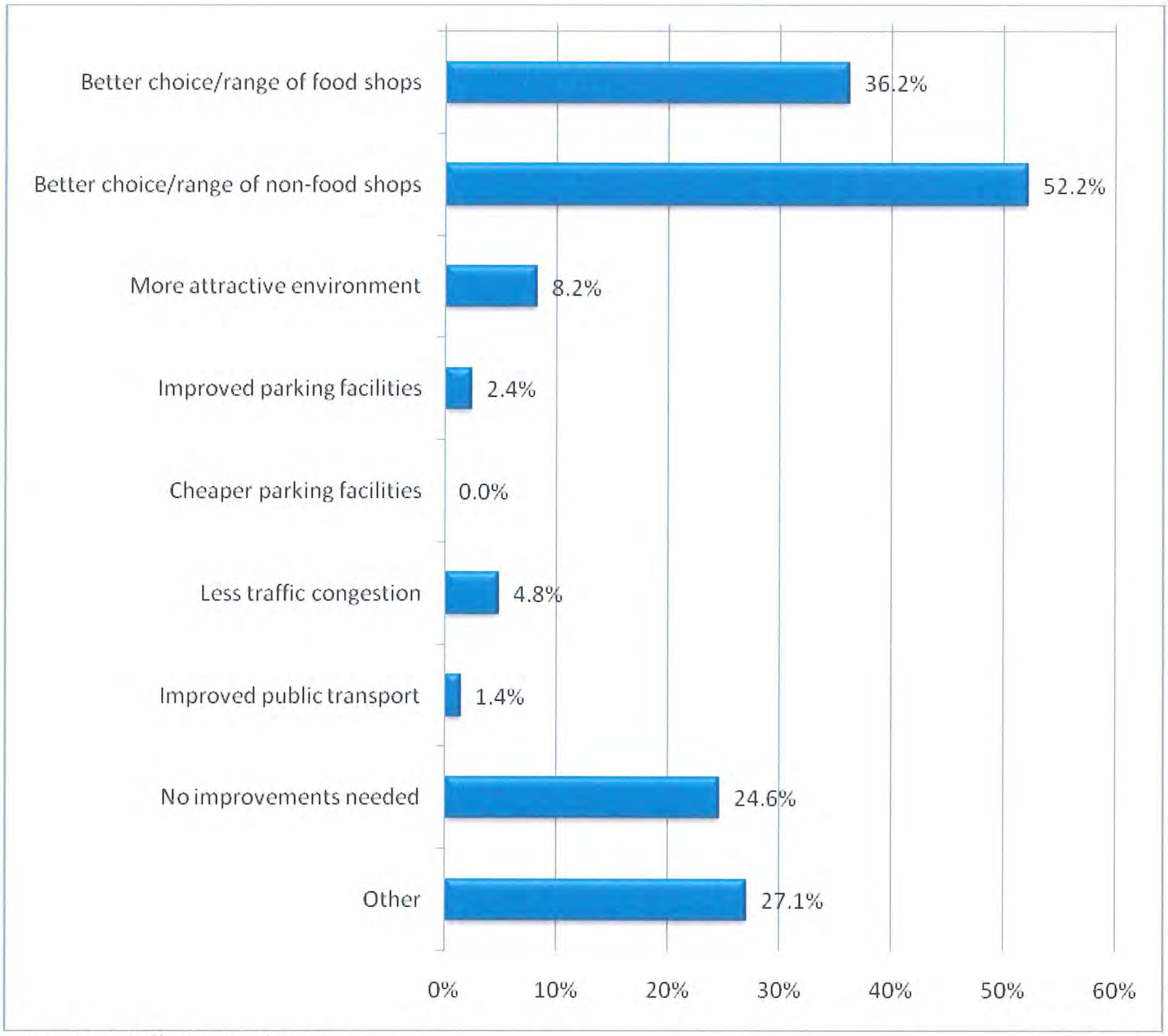
135 Of the other responses given, the following aspects proved to be favourable for a selection of respondents:

- *Friendly people/community spirit* 4.3%
- *Quiet* 1.9%
- *The festival park* 1.9%
- *It's flat* 1.0%
- *Traffic free* 1.0%

- *Familiarity/live here* 0.5%

136 Finally on the on-street survey, respondents were asked what improvements they would make to Ebbw Vale 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 Ebbw Vale more often and improve your day out experience? (% of all respondents)



Base: 207 (All respondents)

137 A better choice/range of non-food and food shops (36.2% and 52.2% respectively) were the most popular responses given by on-street interviewees when asked what improvements they would particularly prefer in Ebbw Vale to encourage them to visit this area more often and improve their day out experience.

138 Of the other responses given, the following aspects proved to be essential for a selection of respondents:

More pedestrianisation	*5.3%*
Improved paving/road maintainance	*3.4%*
Complete re-furbishment	*1.9%*
Cinema	*1.9%*
Marks & Spencer	*1.9%*
More disabled parking	*1.4%*
Cleaner streets	*1.0%*
More clothes/fashion shops	*1.0%*
Increased security/make it safer	*1.0%*
Primark	*1.0%*
Department stores	*1.0%*
Wider choice of restaurants	*1.0%*
Better disabled access	*1.0%*
Shoe shop	*0.5%*
Indoor childrens play area	*0.5%*
More seating	*0.5%*
Marketing to attract visitors from nearby attractions	*0.5%*
Main street to be kept clear of cars	*0.5%*
More entertainment	*0.5%*
Childrens clothes/shoes	*0.5%*
More undercover shopping	*0.5%*
More toy shops	*0.5%*

139 Although the wording in the options/questions used in previous surveys is slightly different to the current study, however when looking at the themes, it is apparent that there is slight disappointment with the choice and range of shops within the catchment area.

4.8 Demographics

140 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		Bethcar Street		Market Street	
	Num	%	Num	%	Num	%
Base: All respondents	**207**	**100.0%**	**137**	**100.0%**	**70**	**100.0%**
A/B	10	4.8%	7	5.1%	3	4.3%
C1	38	18.4%	27	19.7%	11	15.7%
C2	49	23.7%	31	22.6%	18	25.7%
D/E	109	52.7%	72	52.6%	37	52.9%
Refused	1	0.5%	0	0.0%	1	1.4%

Base: 207 respondents in Ebbw Vale

By age group

	Base: All respondents		Bethcar Street		Market Street	
	Num	%	Num	%	Num	%
Base: All respondents	**207**	**100.0%**	**137**	**100.0%**	**70**	**100.0%**
18 - 25 years	25	12.1%	14	10.2%	11	15.7%
26 - 34 years	23	11.1%	15	10.9%	8	11.4%
35 - 44 years	32	15.5%	22	16.1%	10	14.3%
45 - 54 years	37	17.9%	28	20.4%	9	12.9%
55 - 64 years	35	16.9%	25	18.2%	10	14.3%
65 years or more	55	26.6%	33	24.1%	22	31.4%

Base: 207 respondents in Ebbw Vale

By gender

	Base: All respondents		Bethcar Street		Market Street	
	Num	%	Num	%	Num	%
Base: All respondents	**207**	**100.0%**	**137**	**100.0%**	**70**	**100.0%**
Male	75	36.2%	54	39.4%	21	30.0%
Female	132	63.8%	83	60.6%	49	70.0%

Base: 207 respondents in Ebbw Vale

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:

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

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.