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Research and Marketing plus

Shopper Attitude Surveys 2008 – Brynmawr Report

Heads of the Valleys

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1.0 Introduction

1.1 Project Overview

Caerphilly County Borough Council (C.C.B.C.) regularly conducts market research
1 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:

- Abertillery
- Aberdare
- Bargoed
- 2 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

The settlement pattern in the South Wales Valleys is such that each of these
3 centres has a much wider catchment than just their resident populations.

1.2 The Research Objectives

The main requirements of this project are to establish where and how often
4 residents and visitors are shopping for their food and non-food purchases, as well as investigating the other reasons for visiting the shopping centres, their attitude towards the centres and the means of transport used.

The specific objectives are as follows:

- Where residents and visitors are shopping for food
- Where residents and visitors are shopping for non-food
- 5 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 Brynmawr.

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
- Whether respondents, who conduct a main food shop, combine it with any non-food shopping
- 9 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 Brynmawr 201 interviews were completed in Beaufort Street and Bailey 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 451 local residents were interviewed who resided across the area. Interviewing was conducted within the catchment area of Brynmawr over a period, from 7th November - 9th December 2008.

2.2 Main Findings

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

- 15 Over half of respondents (53.2%) listed Asda in Nantyglo/Brynmawr 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 tenth (11.6%) of respondents.

- Only two respondents (0.8%) within the catchment area stated that they used the Internet for their household's food and grocery shopping.

- 16 In terms of towns, Cardiff (20%) was the most popular location for non-food items. Abergavenny (17.6%) was the second and Brynmawr Town Centre (9.6%) being the third most popular town.

- 17 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 visiting the catchment areas for any other purpose other than retailing

- 18 All respondents who stated they use the internet to shop (25.2%) were asked to indicate the categories of goods they have purchased. The main goods purchased over the internet was Miscellaneous luxury goods (43.0%).

- 19 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 majority of respondents had visited Asda in Nantyglo/Brynmawr (90.0%)
    - A small proportion (7.2%) indicated they had not used/visited these stores/locations for any other purpose

- 20 The results revealed that the most popular leisure activity that respondents in the Brynmawr catchment area participated in was visiting cafes/restaurants (57.6%) of which they mainly visited less often than once a month (31.3%).

- 21 Other started that they visit the cinema (44.8%) and mainly did so less often than once a month. Only 37 respondents indicated that they do not participate in any leisure activity.

- 22 The survey also found that the highest proportion of respondents who go walking in the countryside did so in Brynmawr (23.4%).

- 23 Most respondents who travelled by car/van some 221 (88.4%) stated that they have access to a car/van all the time.

- 24 The survey has found that 71.2% of all respondents surveyed do visit Brynmawr for their shopping and some 178 respondents stated a number of reasons for visiting their local area for shopping:

  - Mainly due to the closeness and/or convenience to their home (58.4%)

- 25 In 2008, a new question was introduced; whether respondents usually visit the town for any other purpose (and if so what for). Over half (51.6%) of respondents visit Brynmawr for any other purpose, apart from what is planned prior to their trip.

- 26 All respondents within the catchment area of Brynmawr were then asked what would make them visit the area more frequently:

  - Over a quarter (27.6%) would prefer to have better choice/range of non-food shops

- 27 The results of the telephone 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 non-food shopping.

- 28 Surprisingly, half (50.0%) stated that they rate the town as either 'not very favourable' or 'not at all favourable'.

- 29 Over a quarter (28.8%) of all respondents felt the town was either 'very favourable' or 'fairly favourable'.

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

- 30 Nearly a third (31.3%) of respondents stated they mainly visited Brynmawr for food and grocery shopping.

  - The second most quoted response was non-food shopping (14.4%) and in third place was work/business (11.4%).

- 31 Collectively, those visiting Brynmawr for shopping equates to just under half of all respondents (45.8%).

- 32 The most popular method of transport was on foot (44.3%) with under a third (27.9%) having travelled by car/van as the driver or passenger.

- 33 Nearly four fifths (79.1%) visited the Town Centre at least twice a week or more frequently. This is broken down as follows:

  - Over half who visit daily (52.7%)

- Over a quarter visited Brynmawr 2-3 times a week (26.4%)

- The majority of respondents (74.1%) stated that they had or were likely to spend between £0-£20 during their visit

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  - 60.2% indicated they would be spending/have spent less than ten pounds
  - 13.9% stating somewhere in between £11 - £20
  - Over a tenth (15.4%) didn't expect to be spending any money whilst on their visit

- 35 The majority of respondents rated the Location/ convenience of Brynmawr was either 'very good' or 'good' (combined responses – 91.0%). Another high proportion of respondents (88.6%) indicated the Personal safety was 'very good' or 'good'.

- 36 However, the majority of respondents (80.1%) stated the market was either 'poor' or 'very poor', and rated the choice of shops (68.7%) as either 'poor' or 'very poor' as well.

- 37 The survey has revealed a number of reasons for visiting Brynmawr, and the majority (34.9%) stated they also visit this area to use the financial services.

- 38 With regards to leisure activities, respondents are interested in going to pubs/bars and visiting cafes/restaurants (34.3% and 22.9% respectively). Although, over a third 35.3% indicated they do not participate in any leisure activity.

- 39 Brynmawr's location and convenience was the aspect that respondents most liked about the area (71.1%) for shopping, leisure/evening activities or services. However, only 13.4% liked the choice and range of shops within the catchment area.

- 40 When asked what improvements would encourage them to visit this area more often and improve their day out experience a better choice/range of food and non-food shops (77.6% and 60.7% respectively) were the most popular responses given.

3.0 Household Telephone Survey

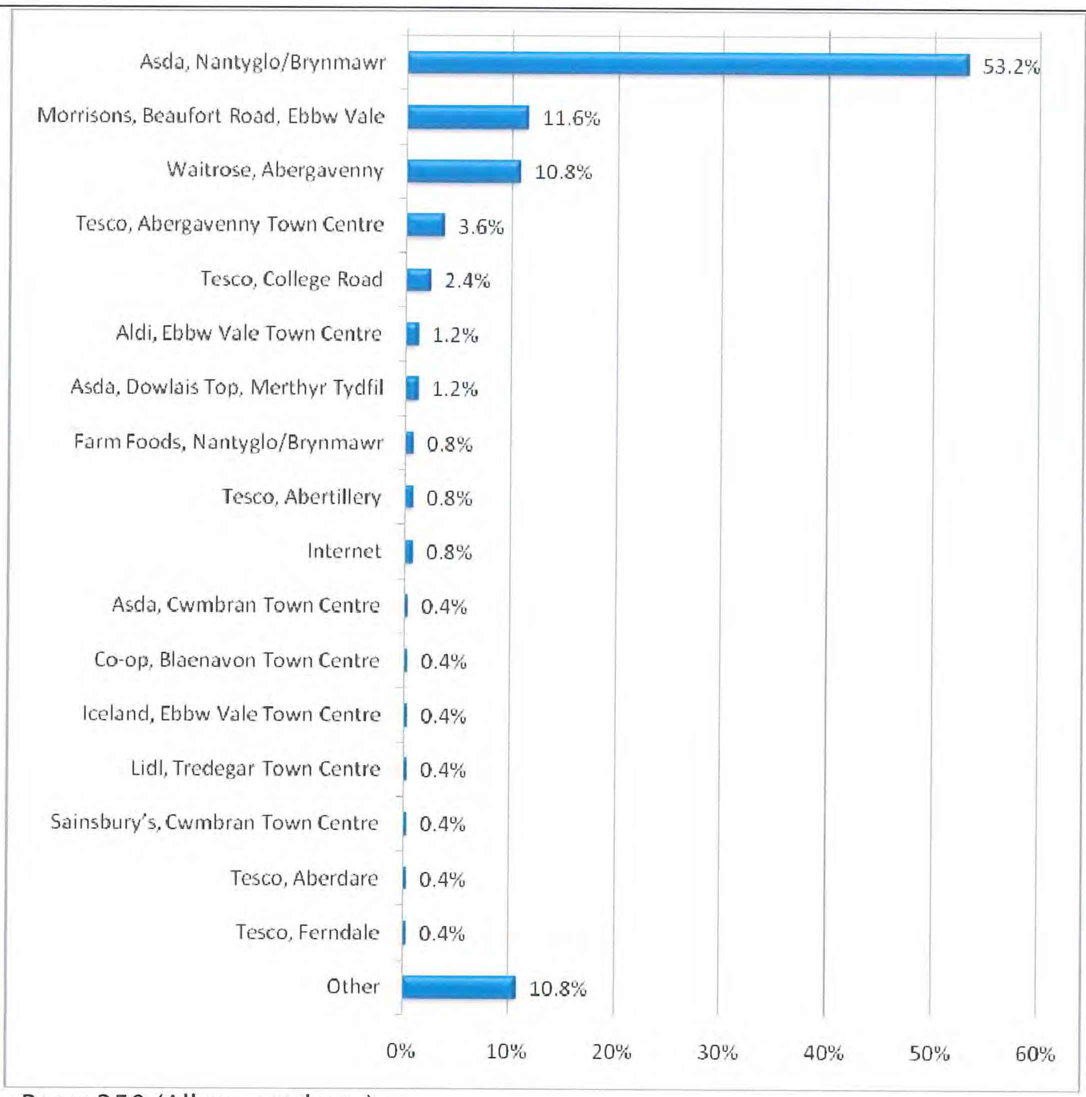
41 A total of 250 interviews were conducted in the catchment area of Brynmawr over a period, from 7th November - 29th November 2008. A random selection of local resident's within the Brynmawr area were asked for their opinions on a variety of subjects relating to their shopping behaviour. This included 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 Brynmawr 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 Brynmawr 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 Over half of respondents (53.2%) listed Asda in Nantyglo/Brynmawr 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 tenth (11.6%) of respondents.

Only two respondents (0.8%) within the catchment area stated that they used the Internet for their household's food and grocery shopping.

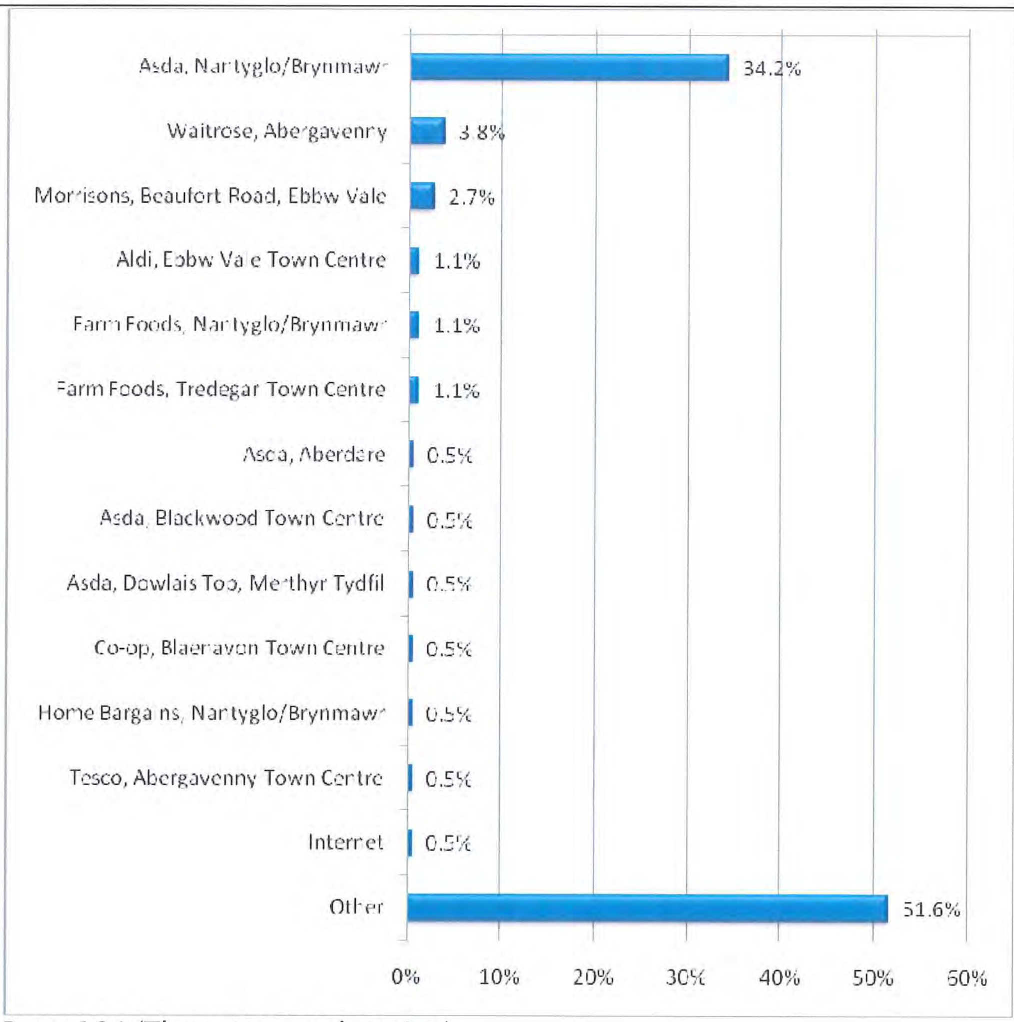
44 With regards to the respondents frequency of visits, travelling habits and expenditure, nearly two thirds (65.2%) of all respondents normally shop at their main food store once a week, with the majority of respondents (87.9%) travelling from their home in Brynmawr to their main food store and over three fifths (62.5%) travelling by car/van. Under a fifth (18.1%) of all respondents spend in the region of £51 - £75 on their main food and grocery shopping.

45 Over half (53.2%) 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

46 Those who carried out top-up food shopping were asked where they were most likely to do so. 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)

The most popular store/location visited for top-up shopping as well as for main
47 food was Asda in Nantyglo/Brynmawr (34.2%).

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

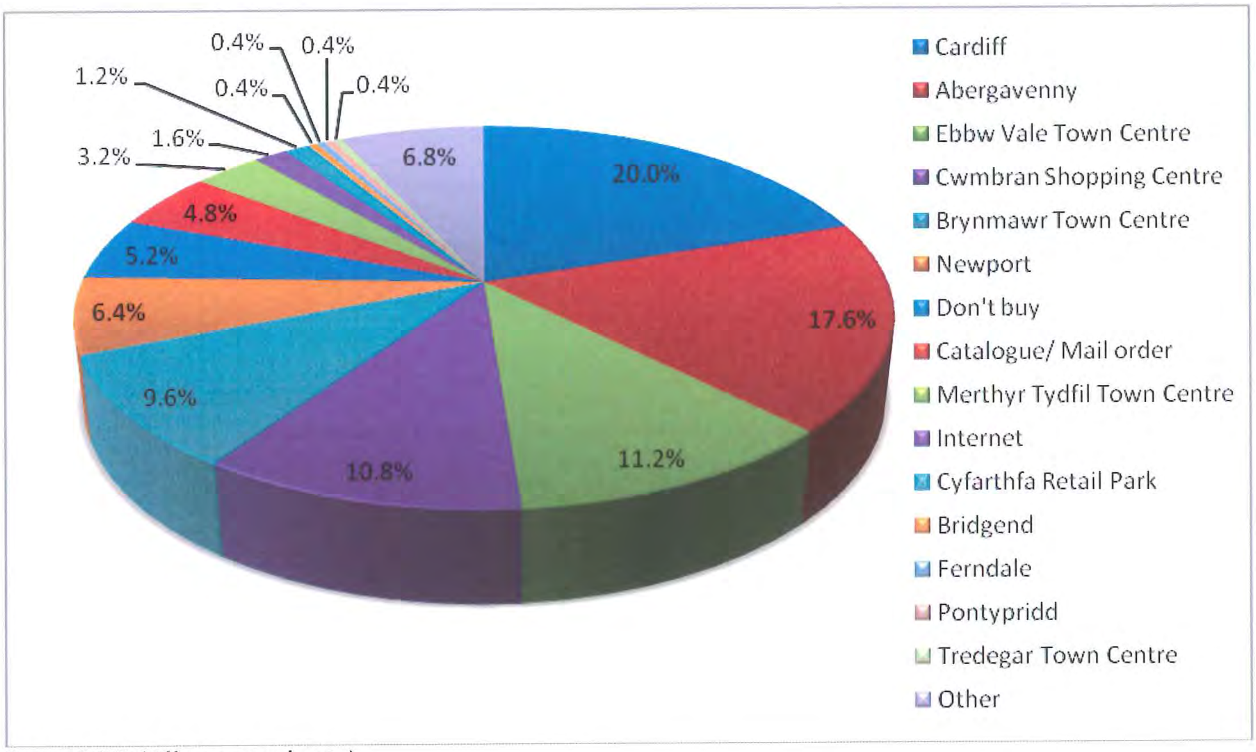
Local stores, Brynmawr	14.7%
Local stores, Gilwern	10.9%
Costcutter, Bailey Street, Brynmawr	6.0%
Local stores, Abergavenny	3.8%
Local stores, Nantyglo	3.8%

Spar, Gilwern	2.2%
Tesco, North West Approach, Ebbw Vale	1.6%
Co-op, High Street, Blaina	1.1%
Local stores, Crickhowell	1.1%
Costcutter, Nantyglo	0.5%
Iceland, Cibi Walk, Frogmore Street, Abergavenny	0.5%
Local stores, Beaufort	0.5%
Local stores, Cwm	0.5%
Local stores, Cwmbran	0.5%
Local stores, Ebbw Vale	0.5%
Marks & Spencer, Culverhouse Cross, Cardiff	0.5%
Marks & Spencer, South Walk, Cwmbran	0.5%
Milkman - goods delivered	0.5%
Spar, Church Avenue, Trevethin	0.5%
The Happy Shopper, Canning Street, Cwm	0.5%
Vegetable box - goods delivered	0.5%

3.2 Non-food shopping

48 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 Brynmawr 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)

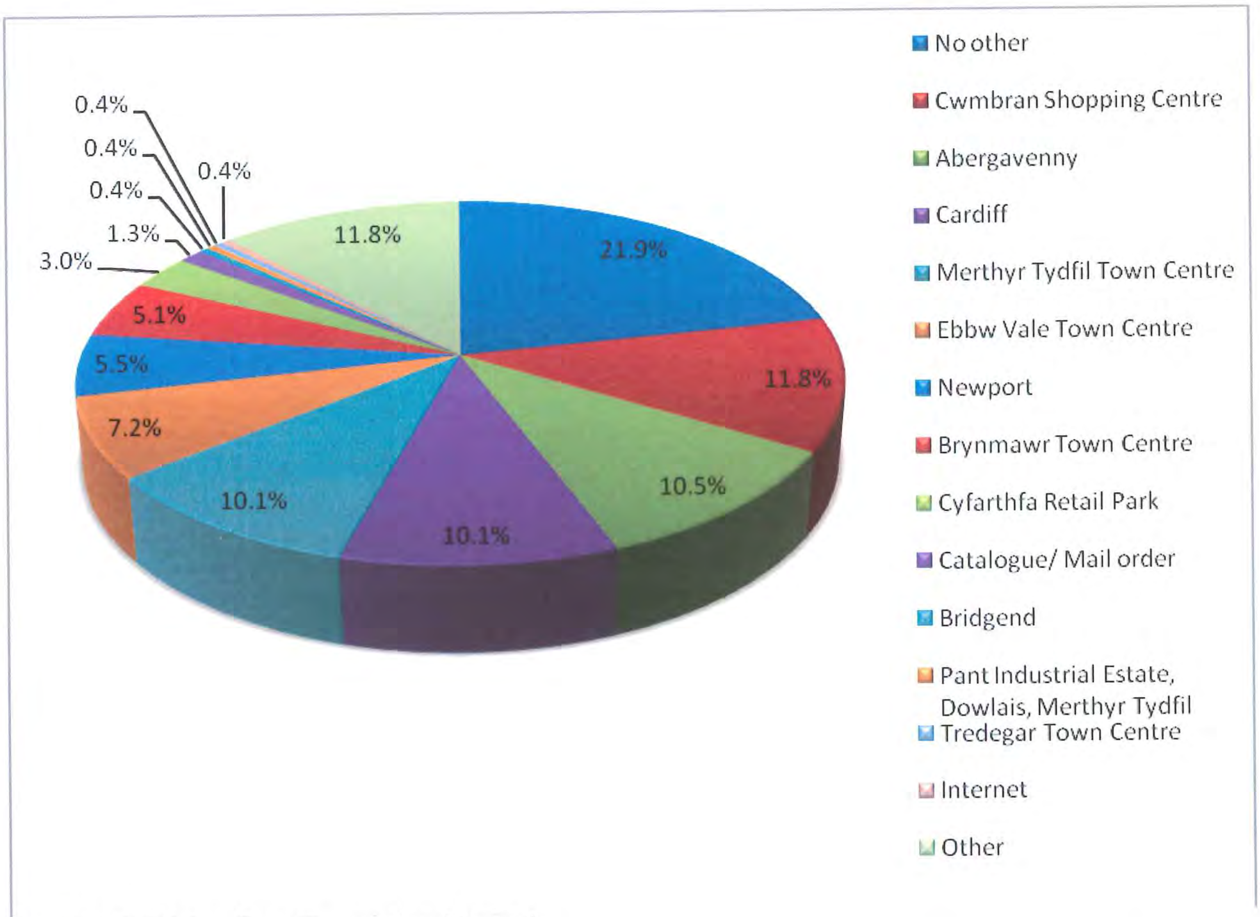


Base: 250 (All respondents)

49 In terms of locations to purchase non-food items, Cardiff was the most popular location with a fifth (20.0%) visiting this area. Abergavenny (17.6%) was the second most popular area. Brynmawr Town Centre was stated by under a tenth (9.6%) to purchase the majority of their non-food items.

50 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: 237 (Those buying non-food items)

51 Over a fifth (21.9%) of respondents do not visit any other centre for non-food shopping. The most popular location stated was Cwmbran Shopping Centre (11.8%), with Brynmawr indicated by only 5.1% of those surveyed 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:

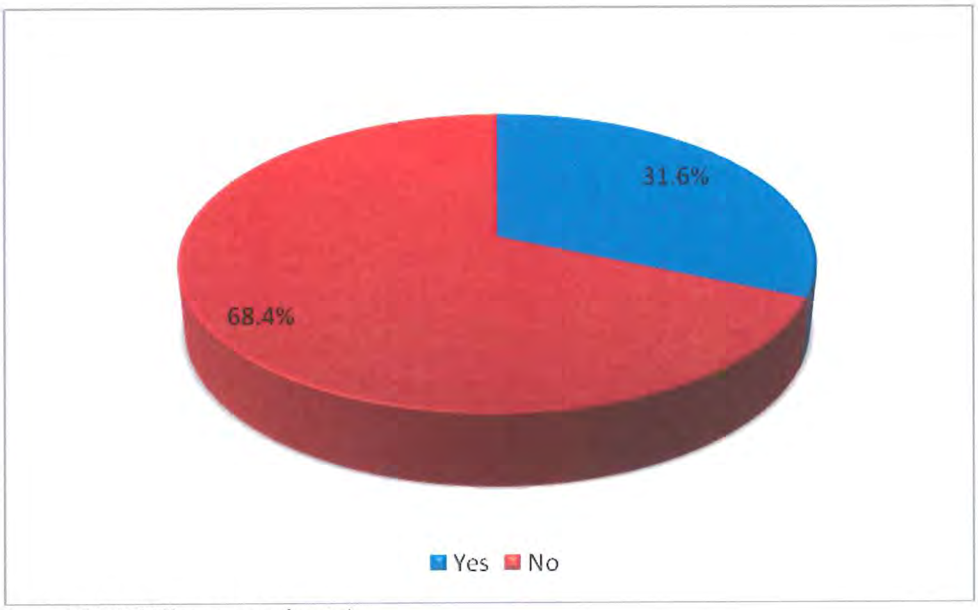
52 - Internet shopping and types of goods
- Current usages of recently opened food stores/shopping centres (inc. shopping patterns prior to these new establishments)
- Current patterns of visiting the catchment areas for any other purpose (other than retail visits)

3.3 Internet shopping

53 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.

54 The following charts concentrates on the results of respondents in the Brynmawr catchment area within the Heads of the Valleys Programme Area.

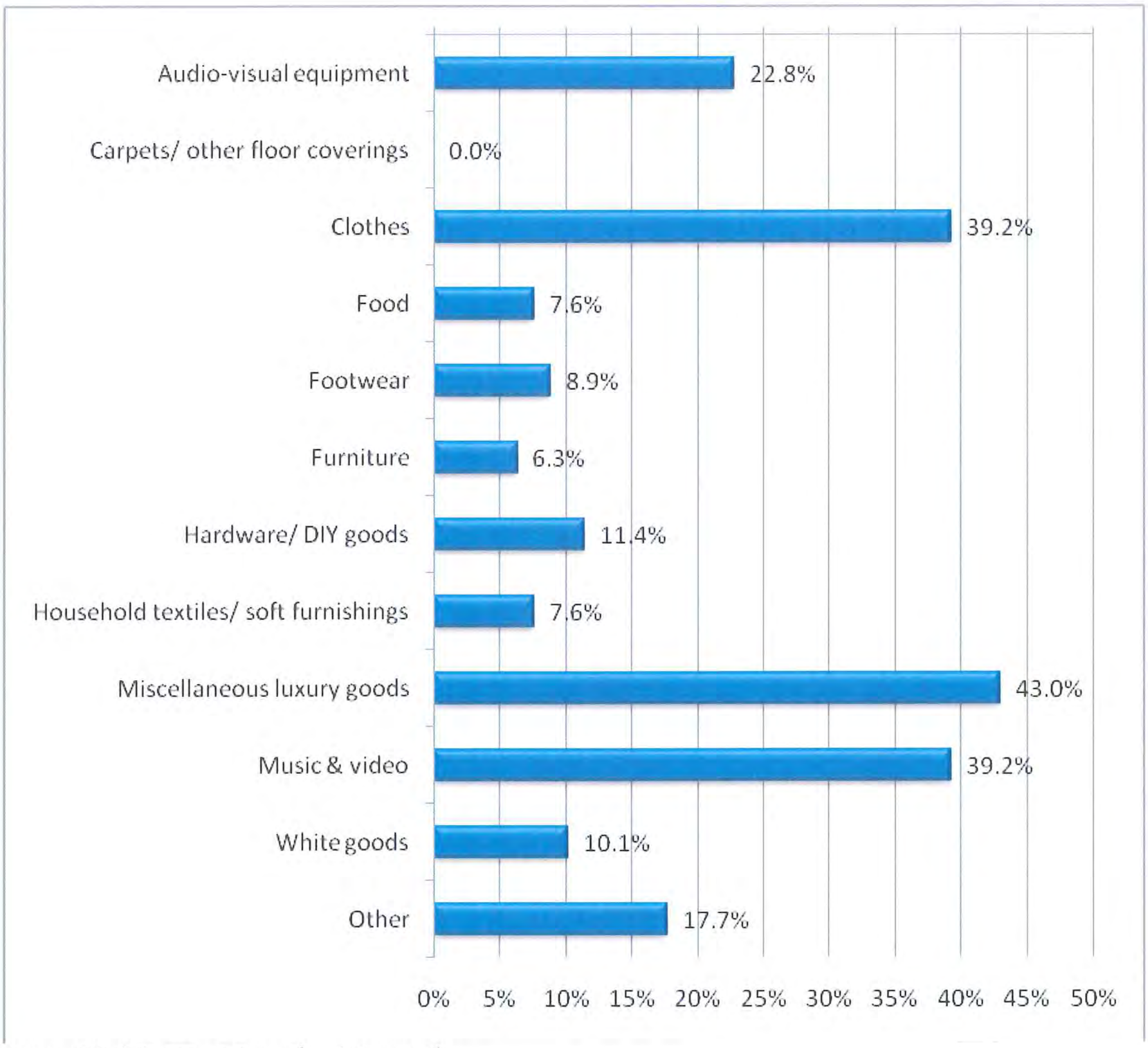
Figure 3.3.1 – Do you shop using the Internet? (% of all respondents)



Base: 250 (All respondents)

55 It is evident that the majority (68.4%) of respondents within this Brynmawr 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 third (31.6%) 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: 79 (Those using the internet)

56 The 79 respondents who stated they use the internet to shop were asked to indicate the categories of goods they have purchased. Over two fifths of respondents purchase Miscellaneous luxury goods (43.0%) on the internet.

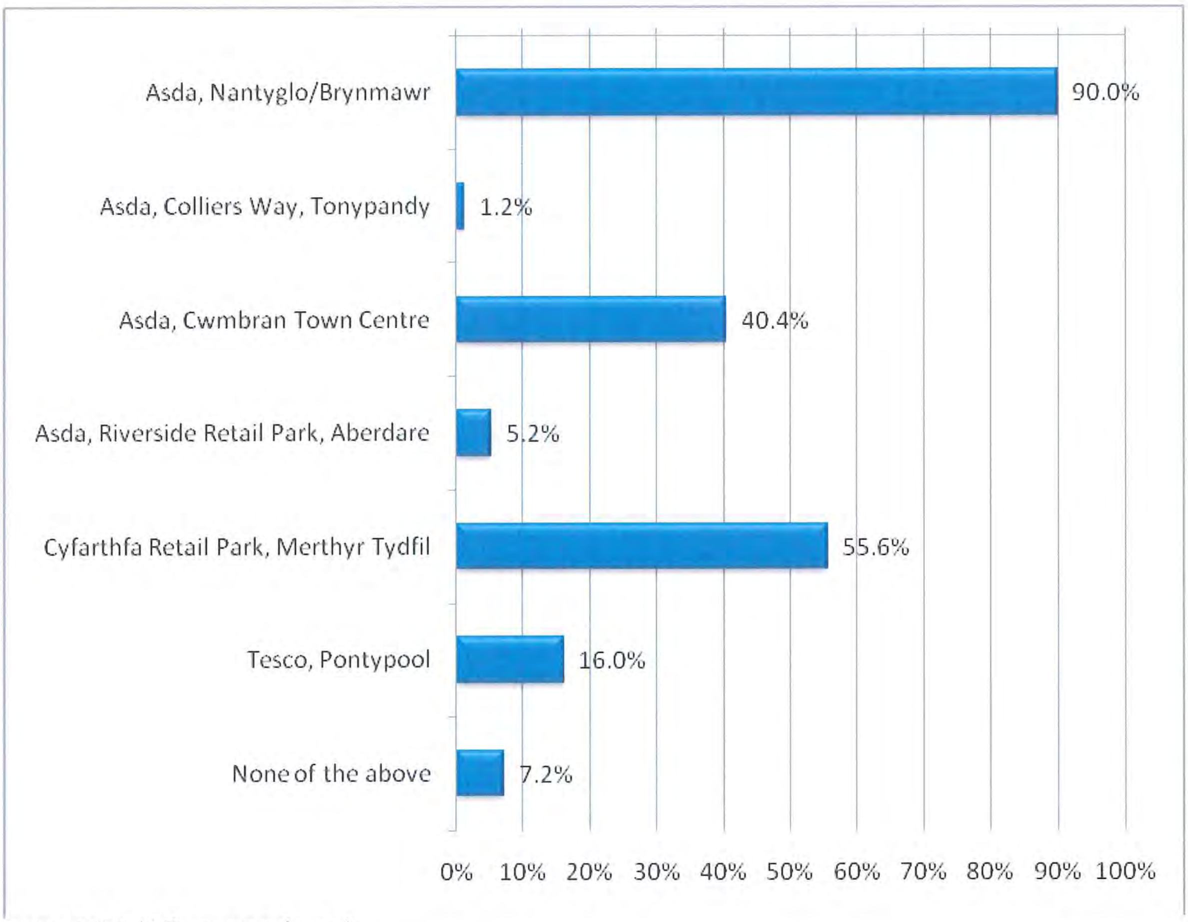
57 The next most popular responses given were Clothes, Music & video and Audio-visual equipment stated by 39.2%, 39.2% and 22.8% respectively.

58 Only 7.6% of respondents within the Brynmawr catchment area purchased their food and groceries via the internet.

3.4 Other activities

59 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)

60 When prompted, the majority of respondents had visited Asda in Nantyglo/Brynmawr (90.0%), whereas a small proportion (7.2%) indicated they had not used/visited these stores/locations for any other purpose.

61 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	22.4%
Morrisons, Beaufort Road, Ebbw Vale	12.9%
Somerfield, Beaufort Street, Brynmawr	11.2%
Kwik Save, Brynmawr	6.5%
Safeway, Merthyr Road, Abergavenny	6.5%
Tesco, Frogmore Street, Abergavenny	3.4%
Asda, Dowlais Top, Merthyr Tydfil	2.6%
Kwik Save, James Street, Ebbw Vale	2.6%
Local stores, Brynmawr	2.6%
No other store previously used	2.2%
Aldi, The Walk, Ebbw Vale	1.7%
Merthyr Tydfil Town Centre	1.7%
Tesco, College Road, Ebbw Vale	1.7%
Waitrose, Merthyr Road., Abergavenny	1.7%
Asda, Brynmawr	1.3%
Asda, Newport	0.9%
Brynmawr Town Centre	0.9%
Costcutters, Bailey Street, Brynmawr	0.9%
Various stores, Cwmbran	0.9%
Ebbw Vale Town Centre	0.9%
Leo's, Ebbw Vale	0.9%
Sainsbury's, Cwmbran	0.9%
Tesco, Abertillery	0.9%
Asda, Abervale	0.4%
Can't remember	0.4%
Co-op, Brynmawr	0.4%
Co-op, Blaina	0.4%
Co-op, Gilwern	0.4%
Co-op, High Street, Shirehampton, Bristol	0.4%
Dowlais	0.4%
Iceland, Ebbw Vale	0.4%
Lidl, Merthyr Tydfil	0.4%
Lidl, Tredegar Town Centre	0.4%
Marks & Spencer, Culverhouse Cross	0.4%
Morrisons, Beafort Road, Ebbw Vale	0.4%
Nowhere in particular	0.4%
Nowhere. Have only been to Cyfarthfa once.	0.4%
Retail park goods - Previously From catalogues	0.4%
Safeway, Abergavenny	0.4%
Somerfield, Lower High Street, Merthyr Tydfil	0.4%
Somerfield, Somerset Street, Abertillery.	0.4%
Spar Church Avenue, Trevethin	0.4%
Spar, Crickhowell Road, Gilwern	0.4%
Tesco Aberdale	0.4%
Tesco, Terra Nova Way, Penarth	0.4%
Tesco, Aberdare	0.4%
Tesco, Abergavenny	0.4%
Tesco, Ebbw Vale town centre (now closed)	0.4%

Tesco, Ledbury Road, Hereford	0.4%
Tesco, North West Approach, Ebbw Vale	0.4%
Tredegar town centre	0.4%

Base: 232 (Those using other stores/locations)

62 The results have shown that over a fifth (22.4%) of respondents used to use Tesco, North West Approach in Ebbw Vale.

3.5 Leisure activities

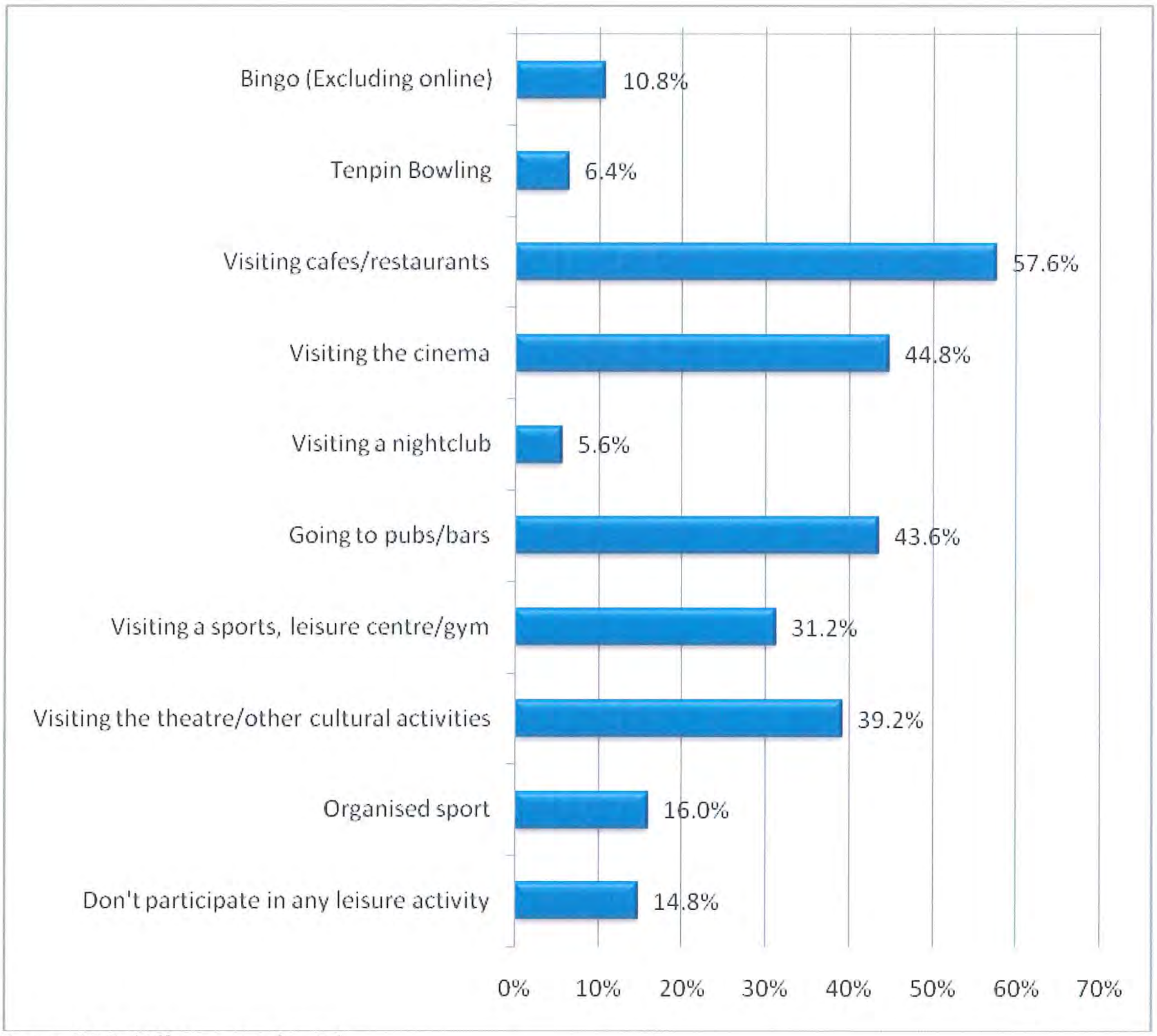
63 A series of questions relating to leisure activities were asked, these included discovering which leisure activities respondents partake in, in which area and how frequent they participate in these activities.

64 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)
- 65 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

66 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)

67 The most popular leisure activity that respondents in the Brynmawr catchment area participated in was visiting cafes/restaurants (57.6%) of which they visited less often than once a month (31.3%).

68 The next most popular leisure activity was visiting the cinema (44.8%). The majority of respondents who partake in this type of activity do so less often than once a month. Only 37 respondents (14.8%) indicated that they do not participate in any leisure activity.

<u>Bingo</u>

Brynmawr (29.6%) was the most popular area for this activity with nearly a third
69 stating this location to play Bingo.

70 The most popular frequency of playing Bingo was once a week where a similar proportion indicated this (29.6%).

Tenpin Bowling

71 A quarter of respondents stated they visited Nantgarw (25.0%) to go Tenpin
Bowling and mainly undertake this less often than once a month (68.8%).

Cafés/Restaurants

A range of areas were mentioned for this activity, with 41.0% stating they visit
72 Abergavenny to go to a café or a restaurant and do so once a week (31.3%).

Cinema

Many respondents tended to visit Brynmawr (48.2%) to go to the Cinema. The
73 majority of those who visited the Cinema did so less often than once a month
(60.7%).

Nightclubs

The place that respondents of the Brynmawr catchment area preferred to visit
74 nightclubs is Cardiff (50.0%) with 28.6% visiting nightclubs once a week and an
equal proportion going less often than once a month (28.6%).

Pubs/Bars

Brynmawr was the most popular area to visit a pub or a bar with under half (48.6%)
75 indicating they go there. 27.5% of respondents stated they visit a pub or a bar once
a week.

Sports, Leisure Centre/Gym

Those who visited a sport, leisure centre or a gym preferred to go to Nantyglo with
76 over a third (35.9%) stating this. Over a third (38.5%) of respondents visited a
sport, leisure centre or a gym 2-3 times a week.

Theatre/other cultural activities

Over two fifths (44.9%) of all respondents within the catchment area preferred to
77 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 (81.6%).

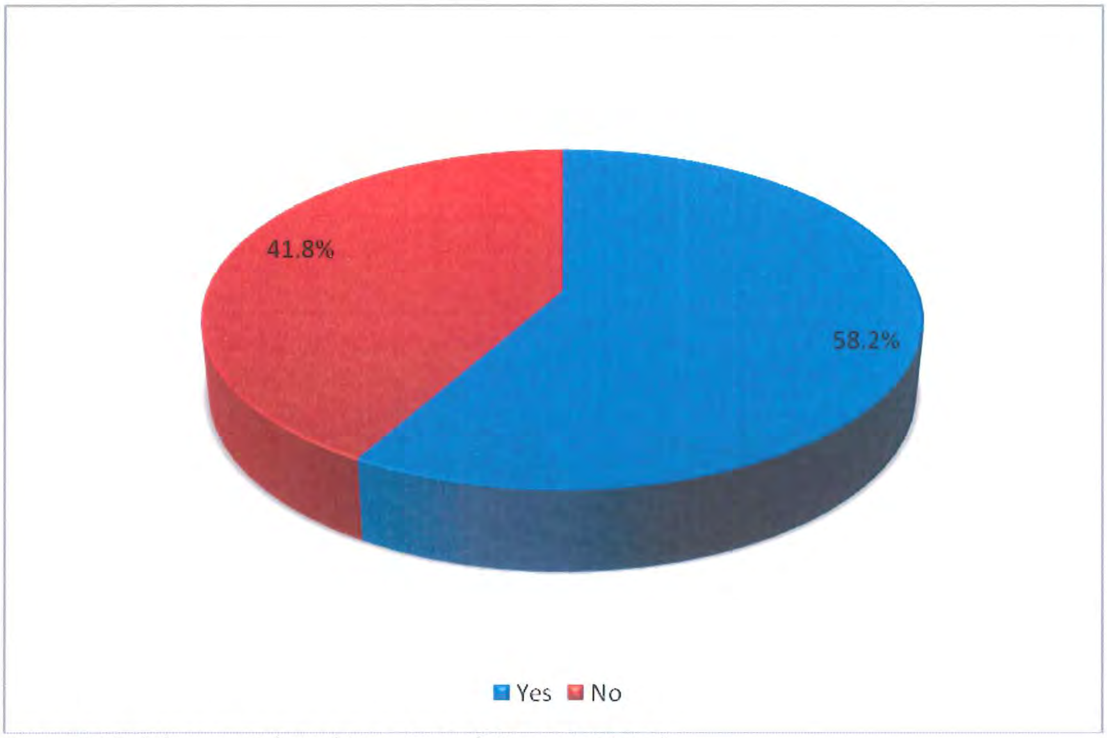
Organised sport

A quarter (25.0%) of respondents stated Abergavenny as the place they play an
78 organised sport and under a third (30.0%) stated they participated in this activity
less often than once a month.

3.6 Walking in the countryside

79 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)

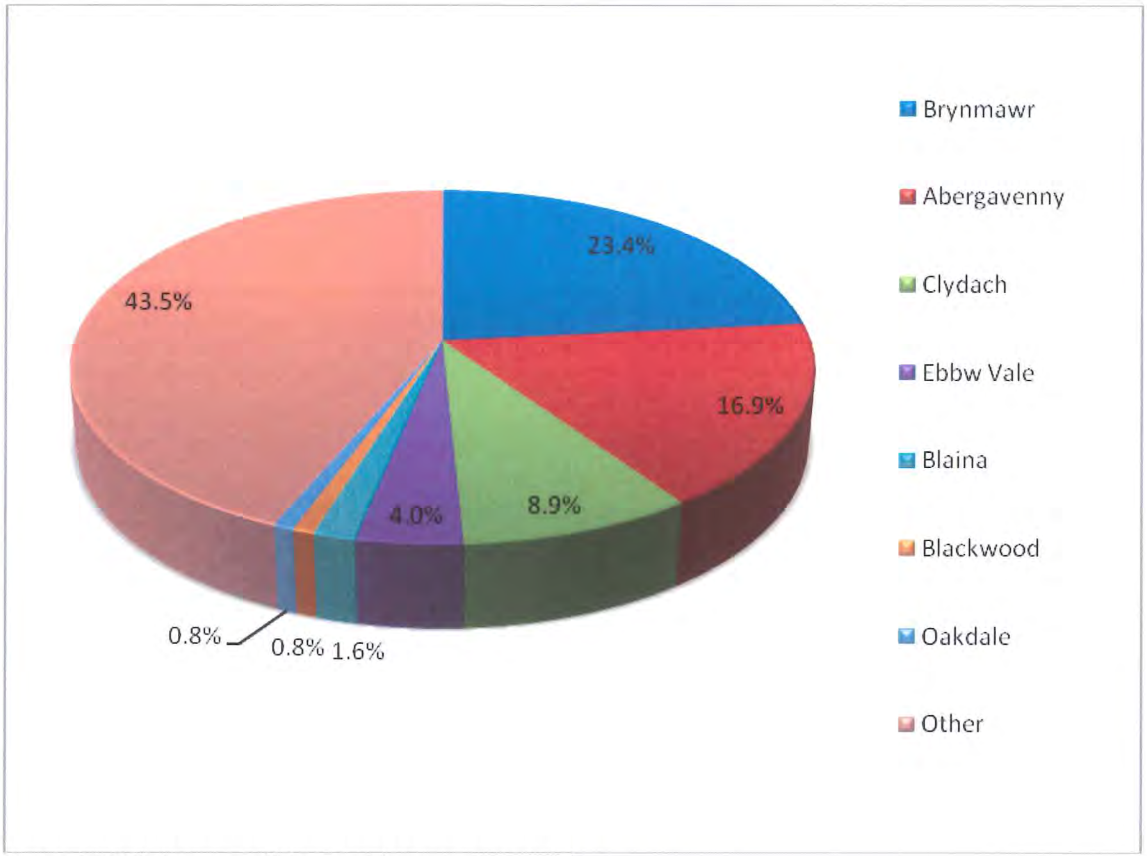


Base: 213 (Those undertaking some leisure activity)

80 Figure 3.6.1 has shown that just under three fifths of respondents walk in the countryside.

81 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: 124 (Those walking in the countryside)

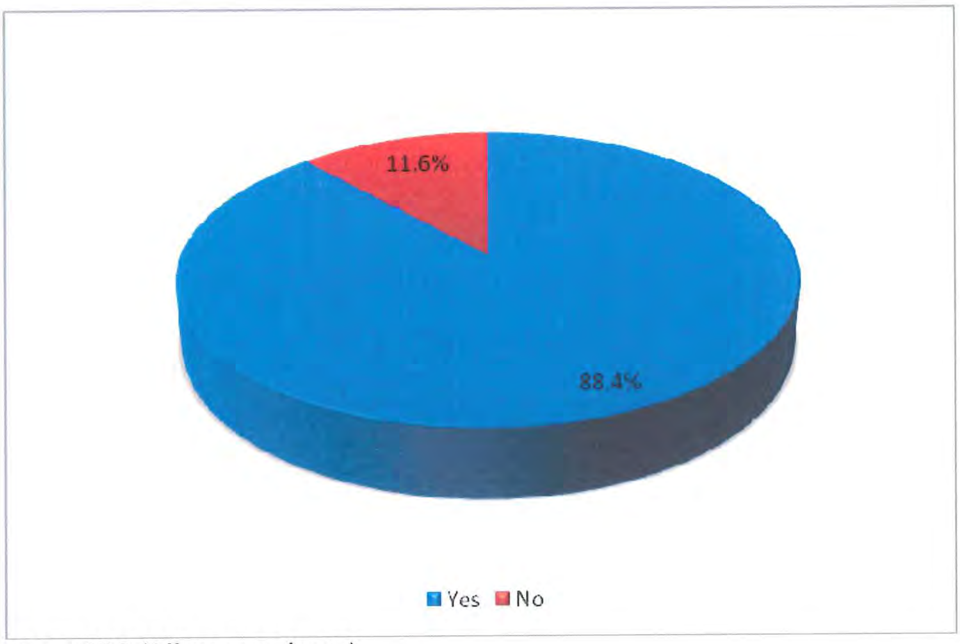
82 Those respondents, who go walking in the countryside and fell within the catchment area, did so in Brynmawr where nearly a quarter (23.4%) stated this. The table below indicates the 'other' responses given (43.5%):

Gilwern	16.9%
Brecon Beacons	13.7%
Tenby	1.6%
Varies	1.6%
Brynbach Park	0.8%
Burnham on Sea, Somerset	0.8%
Clydach, Abergavenny	0.8%
Crickhowell	0.8%
Garnlydan	0.8%
Gwent	0.8%
Hereford	0.8%
Llandovery	0.8%
Llangenny	0.8%
Llangynidr	0.8%
Local Farmer's Land	0.8%
Monmouth	0.8%

3.7 Mode of transport

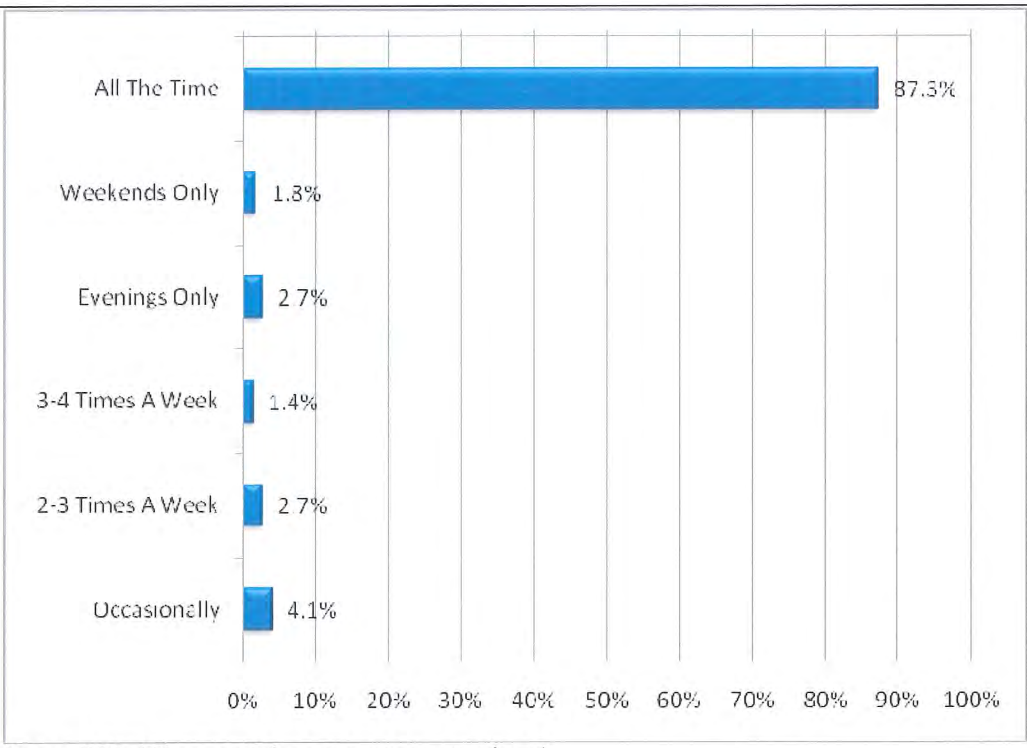
Respondents were next asked a couple of questions about their journey for
83 shopping in general. These included whether they have access to a car/van and
how often they have access to the car/van. The following data was found:

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)



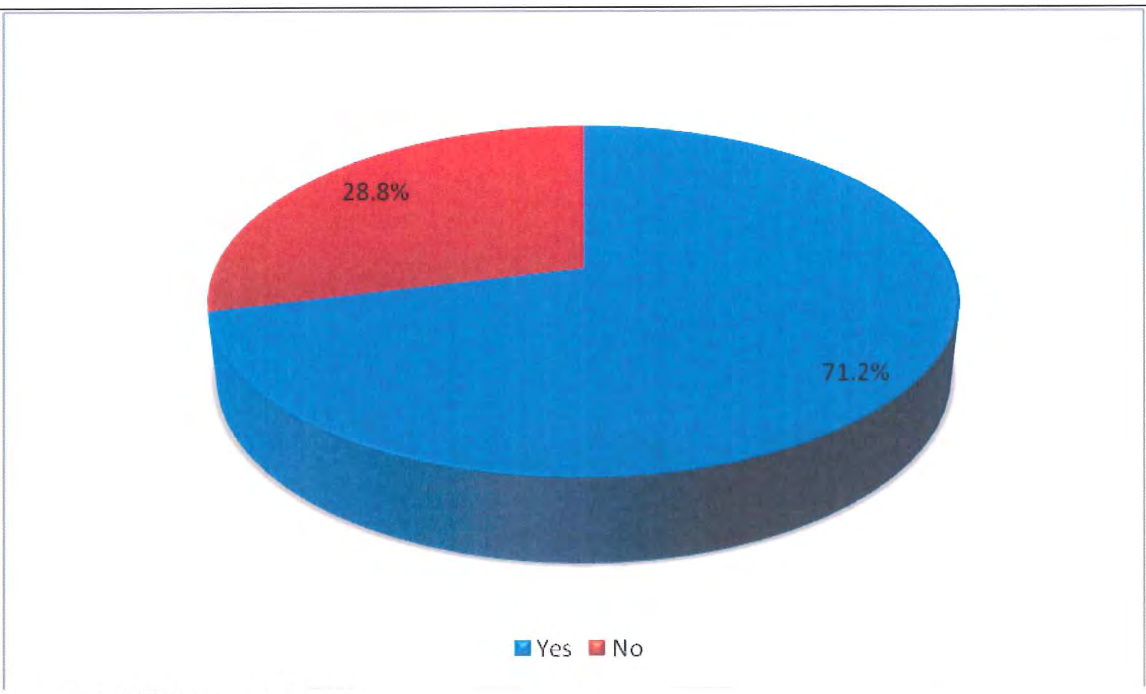
Base: 221 (Those with access to a car/van)

84 Those who travelled by car/van for shopping; some 221 respondents (88.4%), were asked how often they have access to the vehicle. The majority (87.3%) stated that they have access to a car/van all the time.

3.8 Shopping in Brynmawr

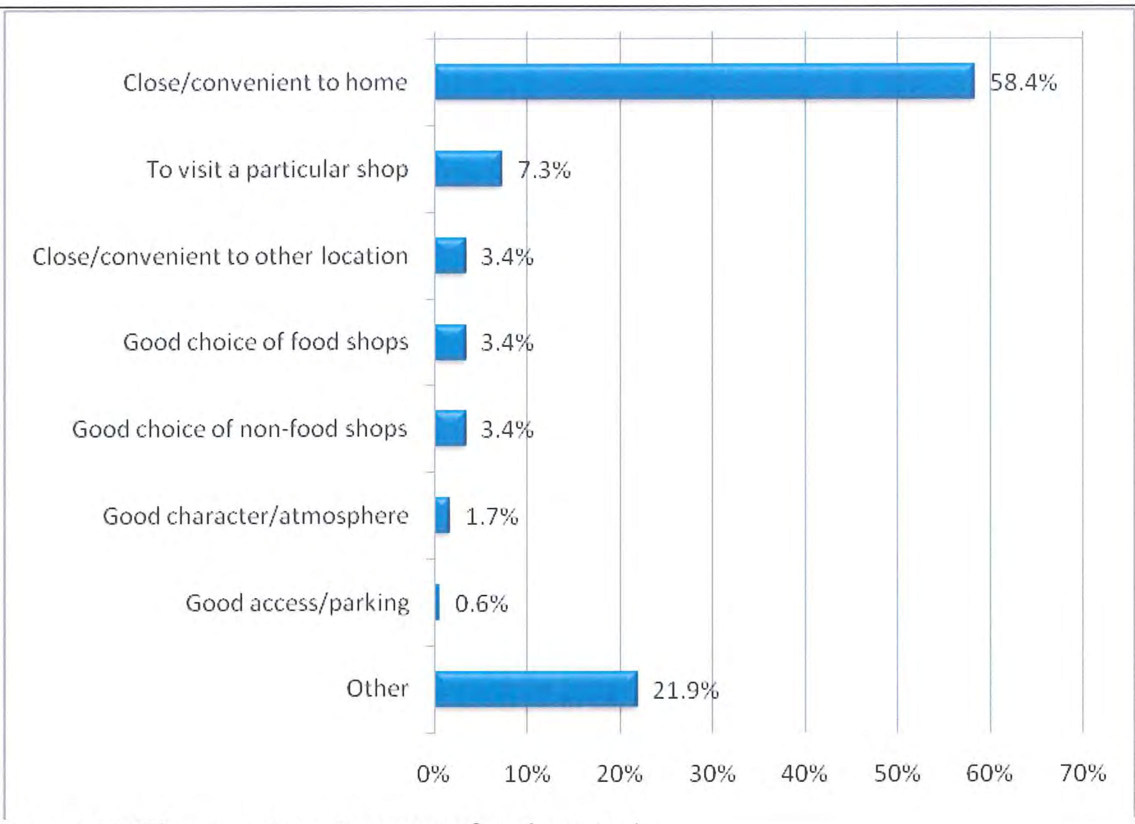
85 Respondents were asked a series of questions about shopping in Brynmawr. These included whether they visit Brynmawr for shopping, if so why and if not, why not? They were also asked when they visit Brynmawr do they visit the town for any other purpose and which potential improvements would make them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

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



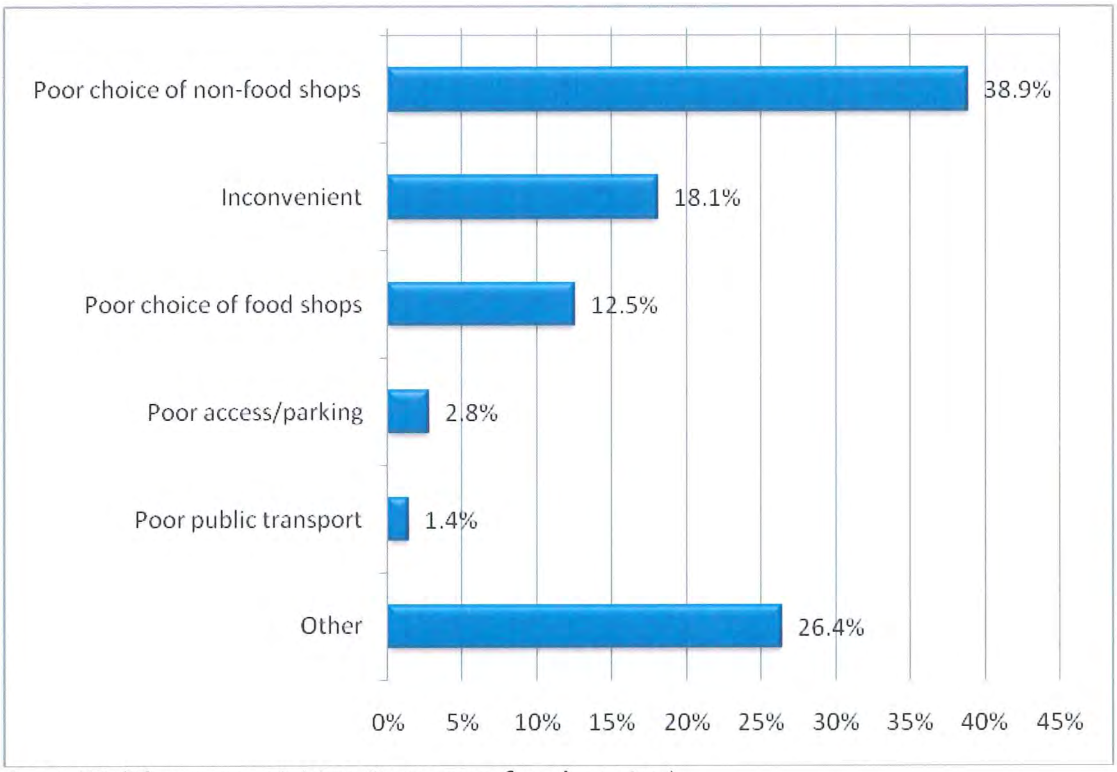
Base: 250 (All respondents)

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



Base: 178 (Those visiting Brynmawr for shopping)

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



Base: 72 (Those not visiting Brynmawr for shopping)

86 The survey has found that 71.2% of all respondents surveyed visit Brynmawr for shopping.

87 Those respondents who indicated they visited Brynmawr, some 178 respondents (Figure 3.8.2) stated a number of reasons for visiting their local area for shopping. Nearly three fifths of the respondents (58.4%) stated it was because it was close and/or convenient to home.

88 Those who visited Brynmawr - Other verbatim comments
From the results shown in figure 3.8.2 and the other responses given (21.9%), the following aspects proved to be positive for a selection of respondents (17.4% - excluding 'No particular reason'):

- *Support local stores* *3.9%*
- *Habit/familiarity* *2.8%*
- *Local shops* *2.2%*
- *Asda* *1.7%*
- *Dentist there* *1.7%*
- *Bank* *1.1%*
- *Post office* *1.1%*
- *Visit family whilst there* *1.1%*
- *Work Related* *1.1%*
- *Good choice of food and non-food shops* *0.6%*

89 Similarly those respondents, who indicated they did not visit Brynmawr (Figure 3.8.3), also stated a number of reasons for not visiting their local area for shopping. Over a third (38.9%) of respondents stated Brynmawr had poor choice of non-food shops.

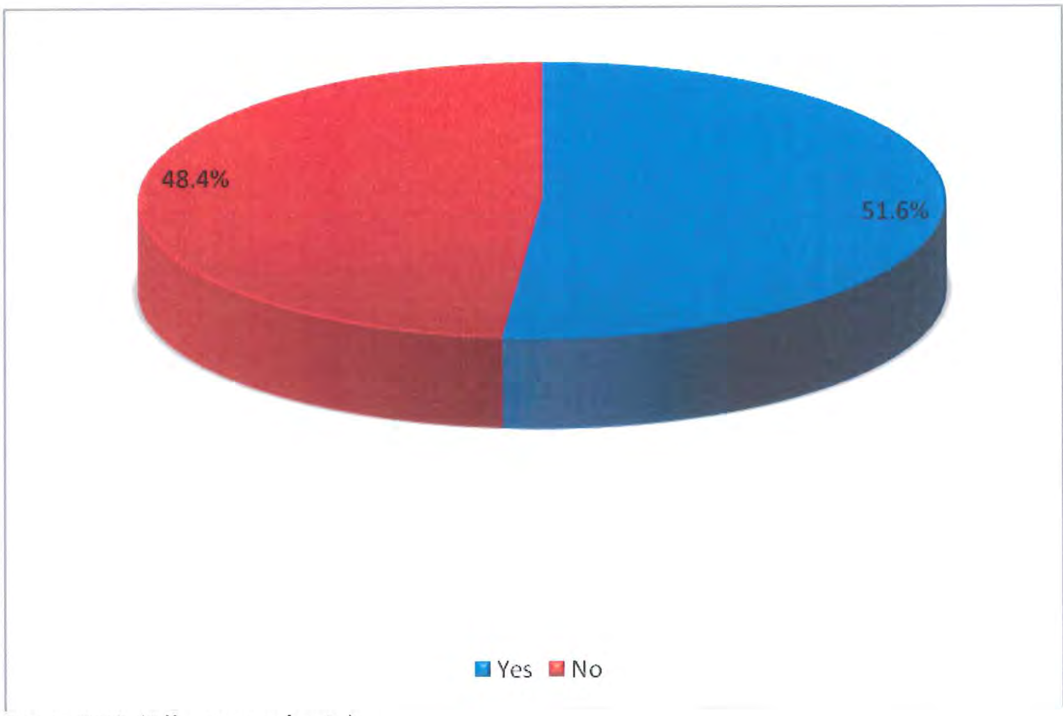
90 Those who did not visit Brynmawr - Other verbatim comments
From the results shown in figure 3.8.3 and the other responses given (26.4%), the following aspects proved to be negative for a small selection of respondents (16.7% - excluding. 'No particular reason'):

- *No reason to go there* *5.6%*
- *Disabled* *2.8%*
- *General dislike for shopping in Brynmawr* *2.8%*
- *Nothing there* *2.8%*
- *Doesn't like shopping* *1.4%*
- *Lack of coffee shops/general shops* *1.4%*

91 The following charts illustrate the responses given when respondents were asked

when they visit Brynmawr, whether they usually visit the town for any other purpose and to indicate what it would normally be for. The results are as follows:

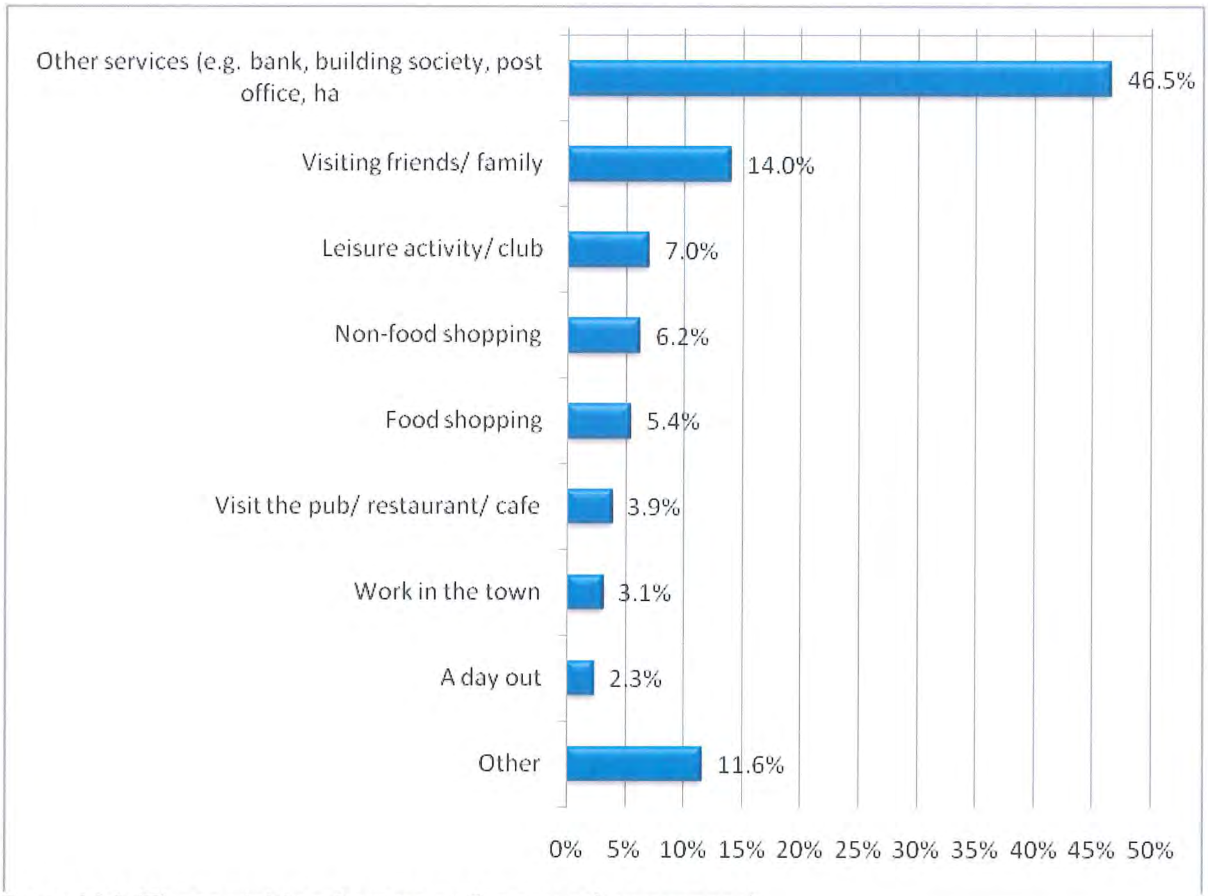
Figure 3.8.4 – When visiting BRYNMAWR, do you usually visit the town for any other purpose? (% of all respondents)



Base: 250 (All respondents)

Just over half (51.6%) of respondents visit Brynmawr for any other purpose, apart
92 from what is planned prior to their trip. However, the remaining proportion (48.4%)
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: 129 (Those visiting Brynmawr for any other purpose)

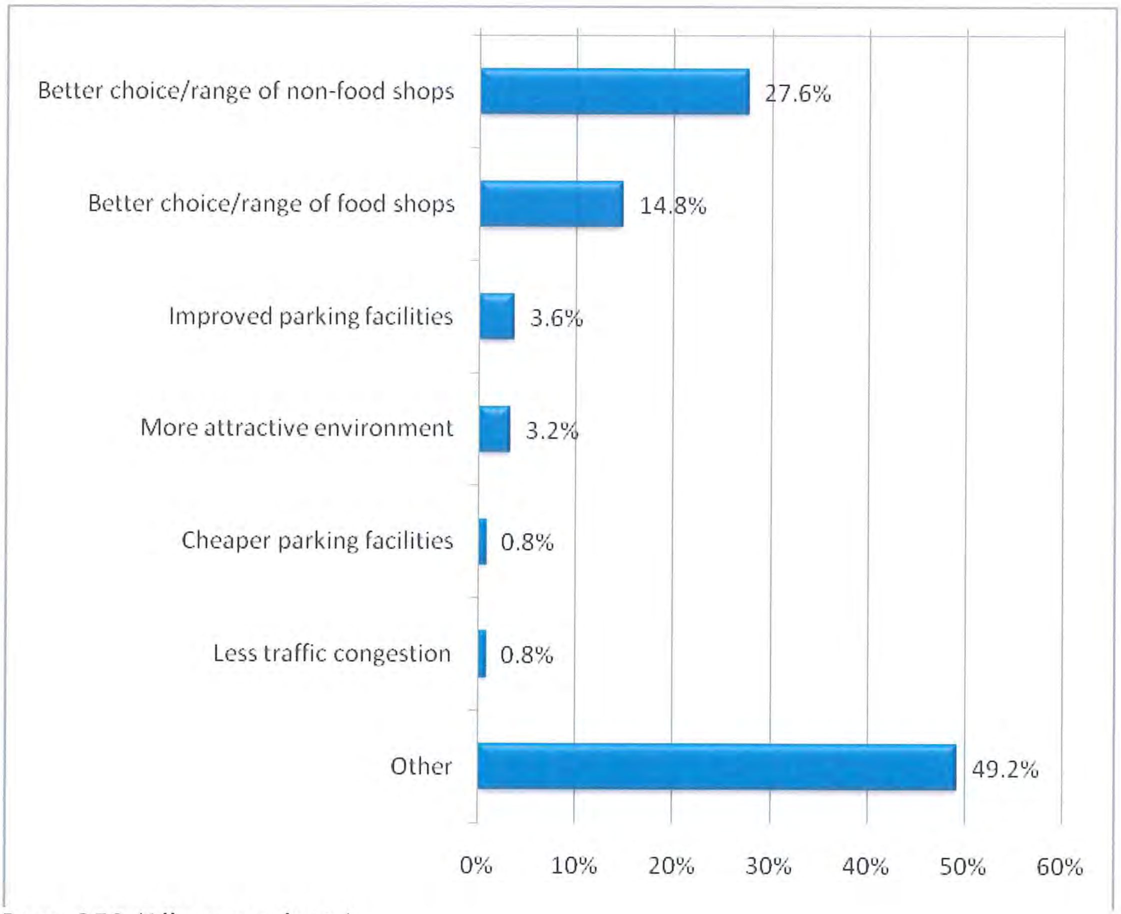
Figure 3.8.5 clearly shows that the majority (46.5%) of respondents stated they also
93 visit other services as well as visiting Brynmawr.

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

o *Doctors/dentist*	*4.7%*
o *Cinema*	*1.6%*
o *Library*	*1.6%*
o *Chemist*	*0.8%*
o *Chip shops and takeaways*	*0.8%*
o *Pass time*	*0.8%*
o *To visit historical monuments*	*0.8%*
o *Walk*	*0.8%*

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

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



Base: 250 (All respondents)

95 The most popular response stated by over a quarter (27.6%) was that respondents would prefer to have better choice/range of non-food shops which would make them use Brynmawr for shopping more frequently.

96 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 non-food shopping.

97 From the results shown in figure 3.8.10 and the following other responses were given (14.8% - excluding. 'Nothing'):

- *More food and non-food shops* 1.6%
- *More independent shops* 1.2%
- *Re-open the local stores that closed as a result of the large supermarket* 1.2%
- *Bank etc* 0.8%
- *Better range of shops* 0.8%
- *Bring back smaller stores* 0.8%
- *Coffee shop* 0.8%
- *A Monsoon store* 0.4%
- *Better clothes shops* 0.4%

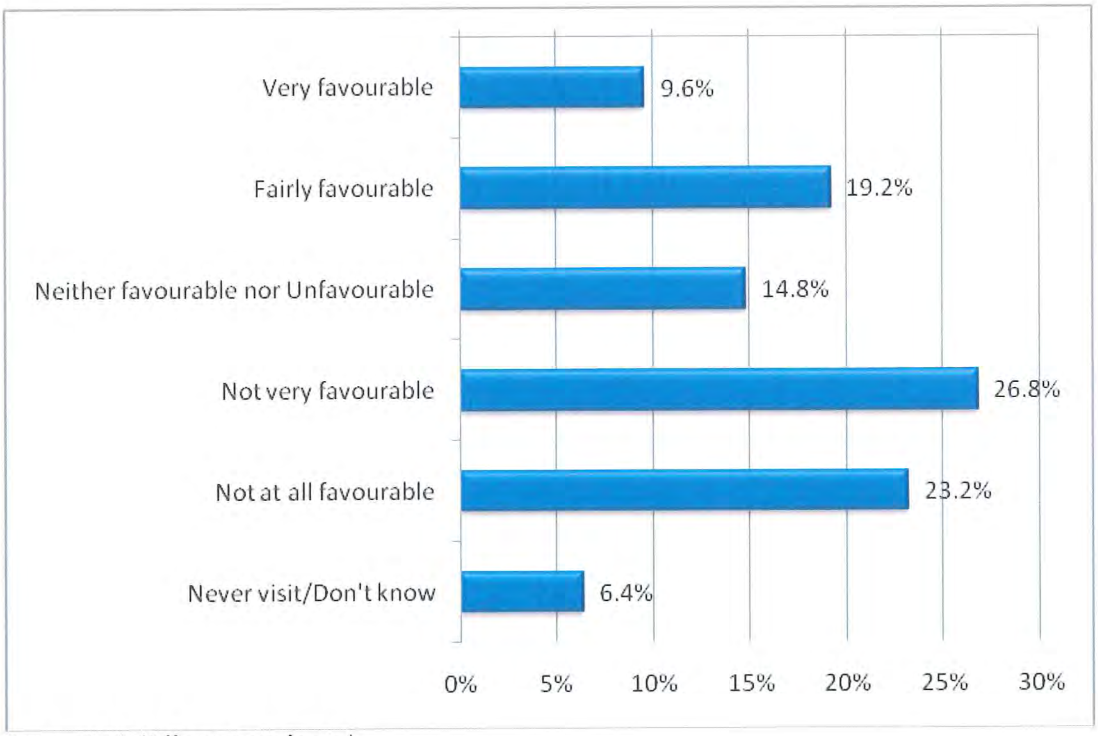
○ *Cinema*	*0.4%*
○ *Close Asda*	*0.4%*
○ *Council need to help out smaller stores*	*0.4%*
○ *Covered Shopping Centre*	*0.4%*
○ *Good grocery shop*	*0.4%*
○ *Leisure facilities*	*0.4%*
○ *Live near by*	*0.4%*
○ *More clothes shops*	*0.4%*
○ *More leisure activities*	*0.4%*
○ *Needs a superstore*	*0.4%*
○ *Own mobility issues stop householder shopping more regularly*	*0.4%*
○ *Re-open the Somerfield that was closed*	*0.4%*
○ *Safer*	*0.4%*
○ *Saturday opening hours*	*0.4%*
○ *Swimming pool facility*	*0.4%*
○ *Tesco*	*0.4%*
○ *Too out of the way*	*0.4%*

3.9 Approval rating

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

99 The chart below demonstrates the responses given for the Brynmawr catchment area:

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



Base: 250 (All respondents)

100 Half (50.0%) stated that they rate the town as either 'not very favourable' or 'not at all favourable', whereas over a quarter (28.8%) of all respondents felt the town was either 'very favourable' or 'fairly favourable'.

3.10 Demographics

101 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	43	17.2%
C1	70	28.0%
C2	65	26.0%
D/E	61	24.4%
Refused	11	4.4%

Base: 250 respondents in Brynmawr

By age group

	Base: All respondents	
	Num	%
Base: All respondents	**250**	**100.0%**
18 - 24 years	3	1.2%
25 - 34 years	12	4.8%
35 - 44 years	37	14.8%
45 - 54 years	33	13.2%
55 - 64 years	65	26.0%
65 years or above	98	39.2%
Refused	2	0.8%

Base: 250 respondents in Brynmawr

By gender

	Base: All respondents	
	Num	%
Base: All respondents	**250**	**100.0%**
Male	69	27.6%
Female	181	72.4%

Base: 250 respondents in Brynmawr

4.0 On-Street Survey

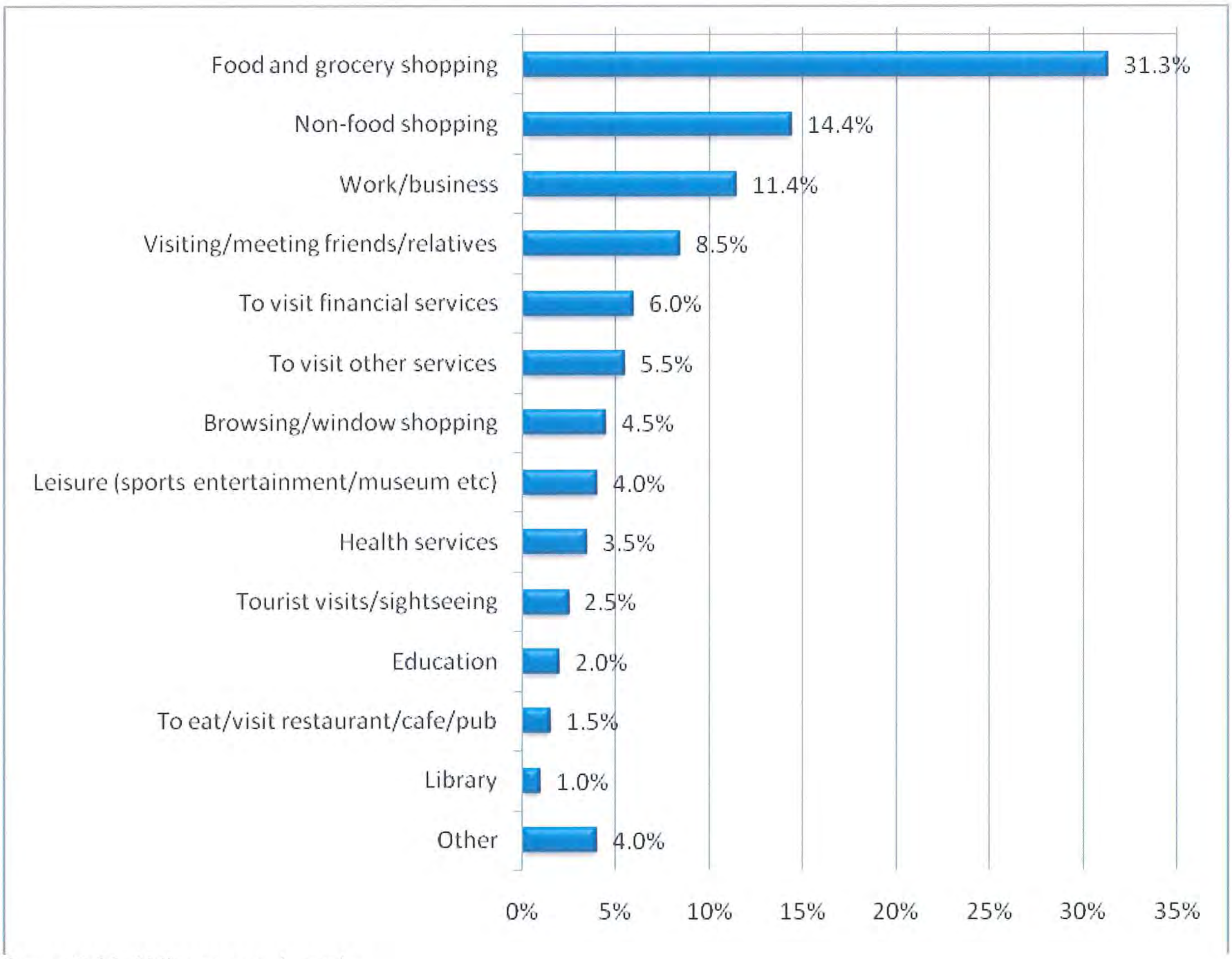
102 A total of 201 face-to-face interviews were conducted in Brynmawr town centre between 10th November and 9th December 2008. Interviews were conducted in two locations, namely:

- Beaufort Street
- Bailey Street

4.1 Reasons for visiting Brynmawr town centre

103 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: 201 (All respondents)

104 Nearly a third (31.3%) of respondents stated they mainly visited Brynmawr for food and grocery shopping. The second most quoted response was non-food shopping (14.4%) and in third place was work/business (11.4%).

105 Collectively, those visiting Brynmawr for shopping equates for under half of all respondents (45.8%).

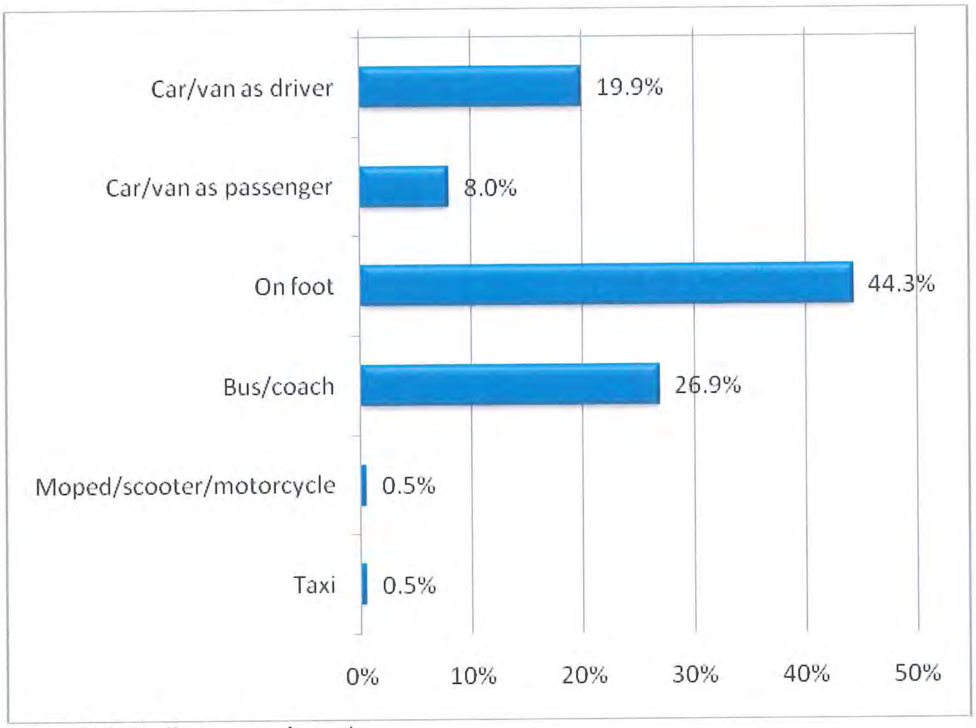
4.2 Travelling to Brynmawr

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

107 The majority of respondents (95.0%) had gone straight from home to Brynmawr, with the remainder doing so from Work (3.5%), Friends/family home (1%) or College (0.5%). Specifically, the majority (50.7%) of respondents had come from Brynmawr.

108 Shoppers were then asked about the mode of transport that they used to travel to Brynmawr town centre.

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



Base: 201 (All respondents)

109 The most popular method of transport was on foot, as over two fifths (44.3%) of all respondents stated this. Under a third (27.9%) had travelled by car/van as the driver or passenger.

110 Those who travelled by car, some 56 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)

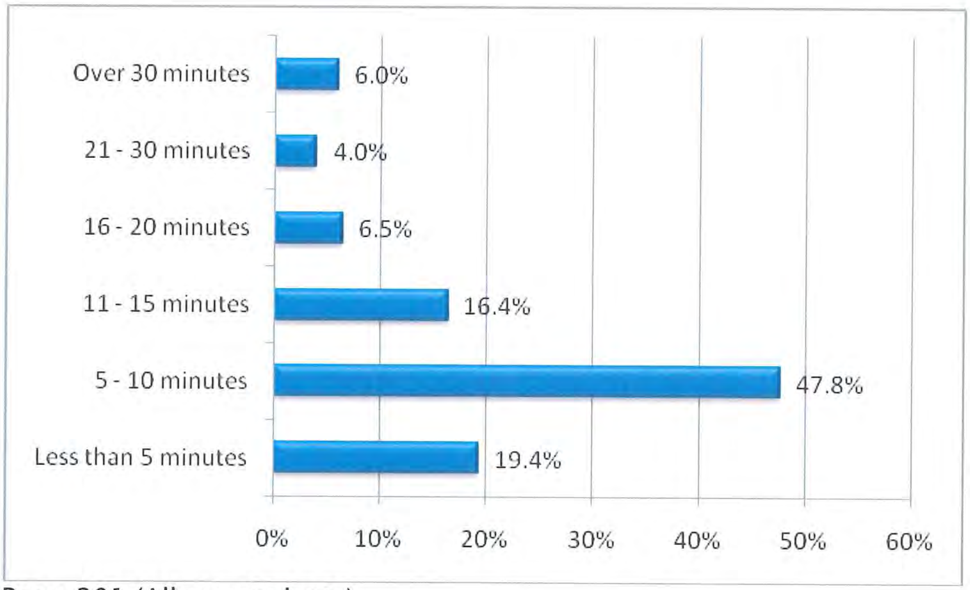
Car park location	All respondents	Point of interview		Passenger type	
		Beaufort Street	Bailey Street	Driver	Passenger
On Street Parking	71.4	64.1	88.2	77.5	56.3
Free Public Parking	21.4	25.6	11.8	22.5	18.8
Dropped off	7.1	10.3	-	-	25

Base: 56 (Those travelling by car/van)

111 The results have shown those respondents travelling by car were most likely to park on-street (71.4%).

Time taken to travel to Brynmawr

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



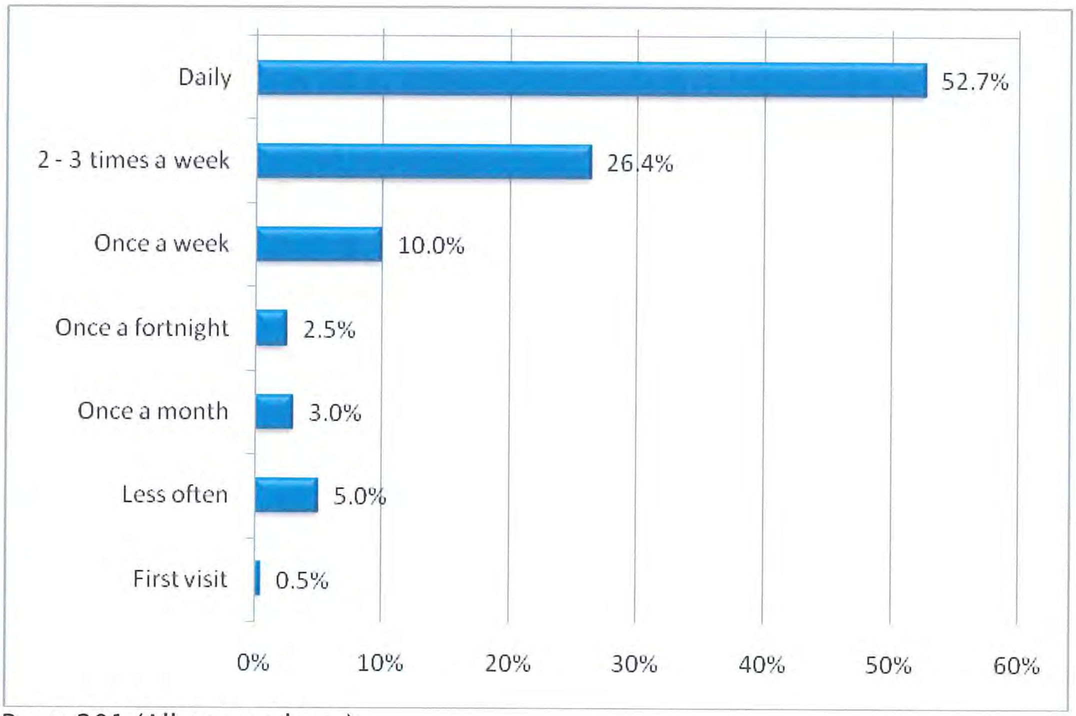
Base: 201 (All respondents)

112 Figure 4.2.3 clearly indicates that the majority of shoppers (67.2%) travel for less than 10 minutes, indicating there is a local catchment area for shoppers.

Frequency of visits to Brynmawr

113 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)



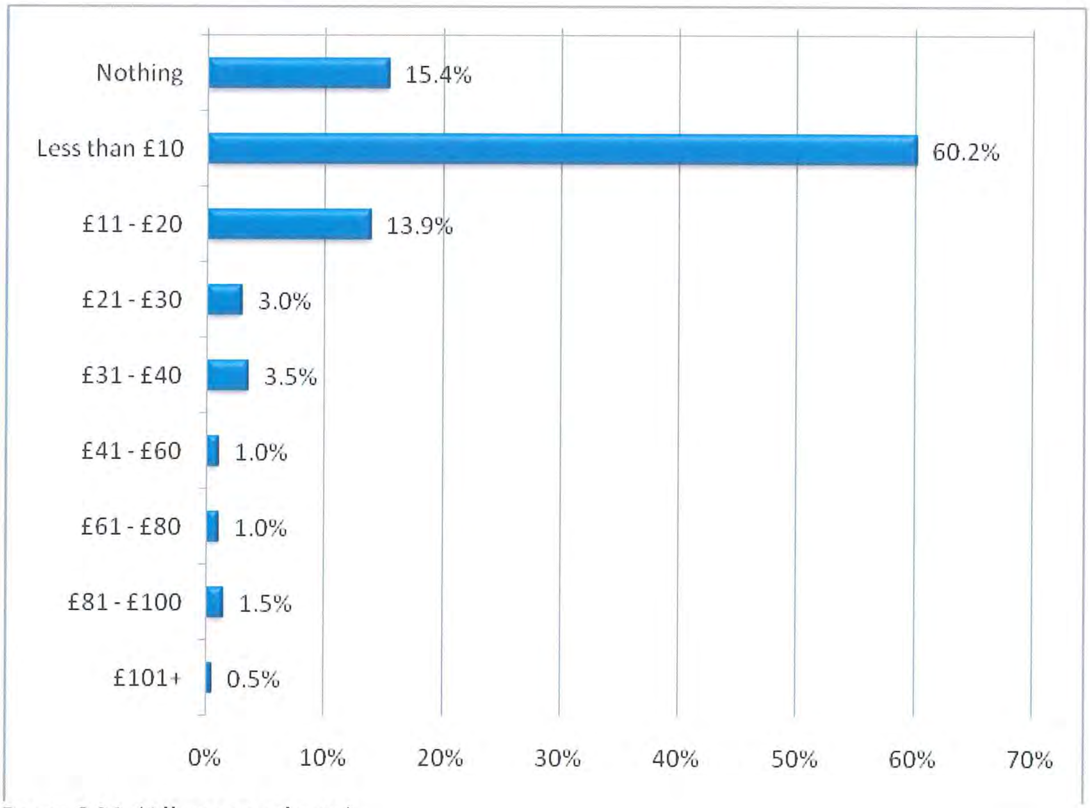
Base: 201 (All respondents)

114 Under four fifths (79.1%) visited the Town Centre at least twice a week or more frequently. This breaks down to over half (52.7%) who visit daily and a quarter who visit Brynmawr 2-3 times a week (26.4%).

4.3 Spending behaviour

115 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: 201 (All respondents)

116 The majority of respondents (74.1%) stated that they had or were likely to spend between £0-£20 during their visit, this comprised of 60.2% indicated they would be spending/have spent less than ten pounds and 13.9% stating somewhere in between £11 - £20. Over a tenth (15.4%) didn't expect to be spending any money whilst on their visit.

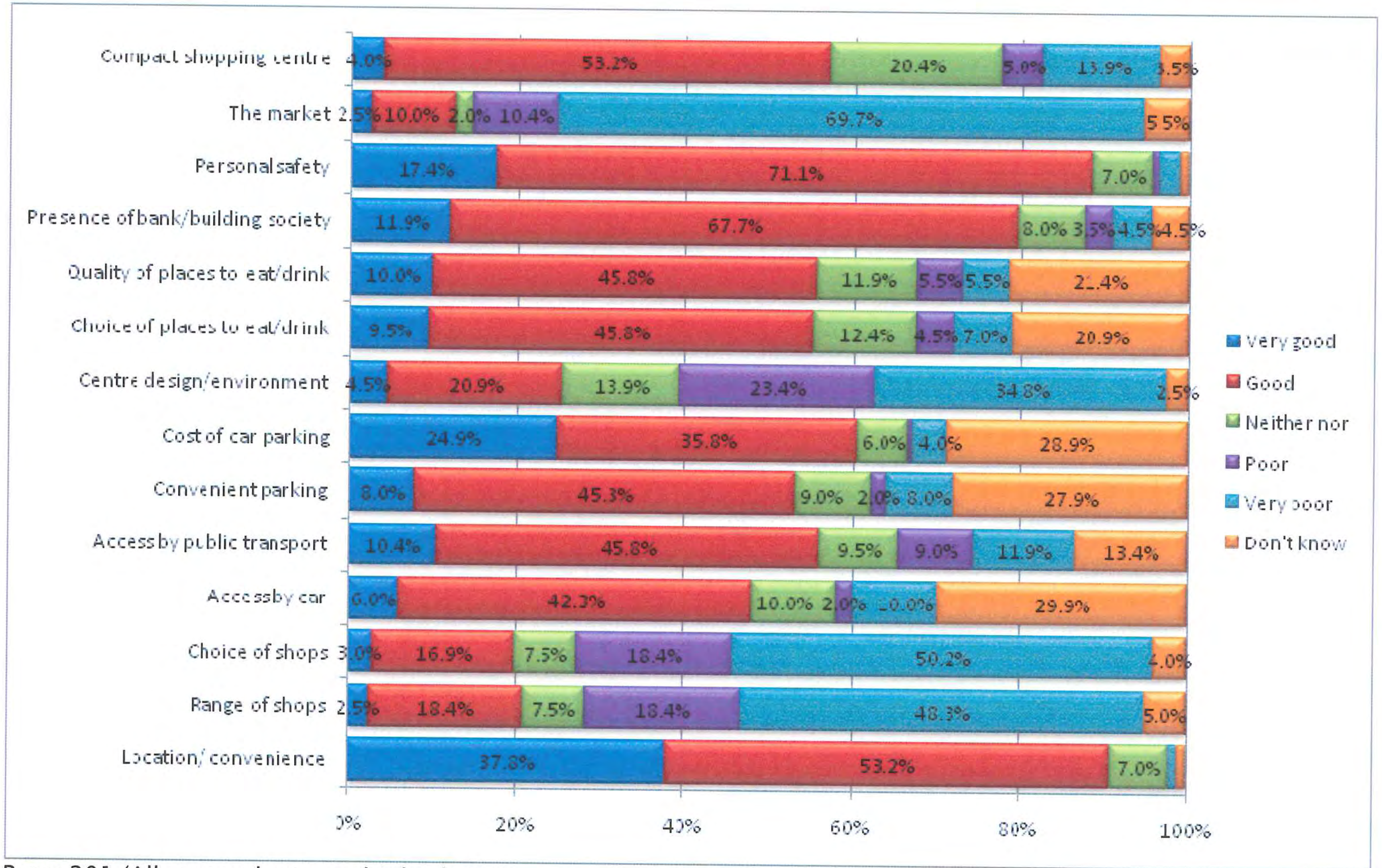
117 In order to collect data on other town centre functions, the Heads of the Valleys Town Centre Group requested additional questions to be introduced to the on-street survey. These questions were as follows:

- 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
118
    - 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

119 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: 201 (All respondents: multiple choice)

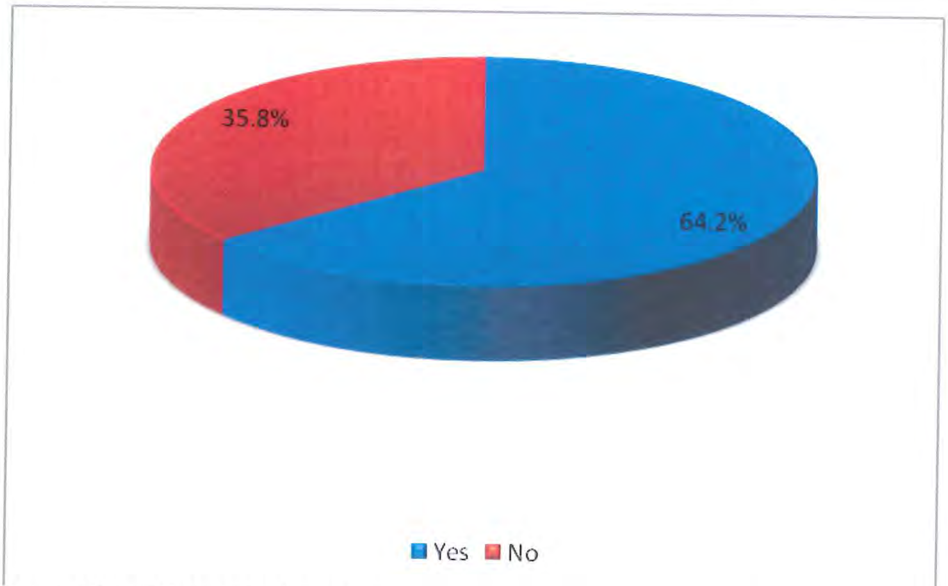
120 From the results shown in figure 4.4.1, the majority of respondents rated the Location/ convenience of Brynmawr was either 'very good' or 'good' (combined responses - 91.0%). The majority of respondents (88.6%) indicated the Personal safety was 'very good' or 'good'.

121 The results also show the negative responses. Over four fifths of respondents (80.1%) stated the market was either 'poor' or 'very poor', and rating the choice of shops (68.7%) as either 'poor' or 'very poor'.

4.5 Other activities

122 The following chart illustrate the responses given when respondents were asked when they visit Brynmawr, 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 BRYNMAWR, do you usually visit the town for any other purpose? (% of all respondents)



Base: 201 (All respondents)

123 From the results shown in figure 4.5.1 above the following indicates the responses given from 129 respondents when asked what they normally undertake when visiting the town for any other purpose:

o *Food shopping*	*31.8%*
o *Non-food shopping*	*34.1%*
o *Using financial services*	*34.9%*
o *Using public or civic services*	*26.4%*
o *Using other services*	*31.0%*
o *Visiting restaurant, cafe, or public house*	*6.2%*
o *Work in or near the town centre*	*0.8%*
o *Tourism or sight seeing*	*0.0%*
o *Visiting the Library*	*3.9%*
o *Meeting friends or family*	*7.8%*
o *Other social or leisure reasons*	*10.9%*
o *Business*	*4.7%*

- *Education* *1.6%*
- *Access to transport services* *1.6%*

124 The survey has revealed a number of reasons for visiting Brynmawr, and has found the majority (34.9%) stated they also visit this area to use the financial services.

4.6 Leisure activities

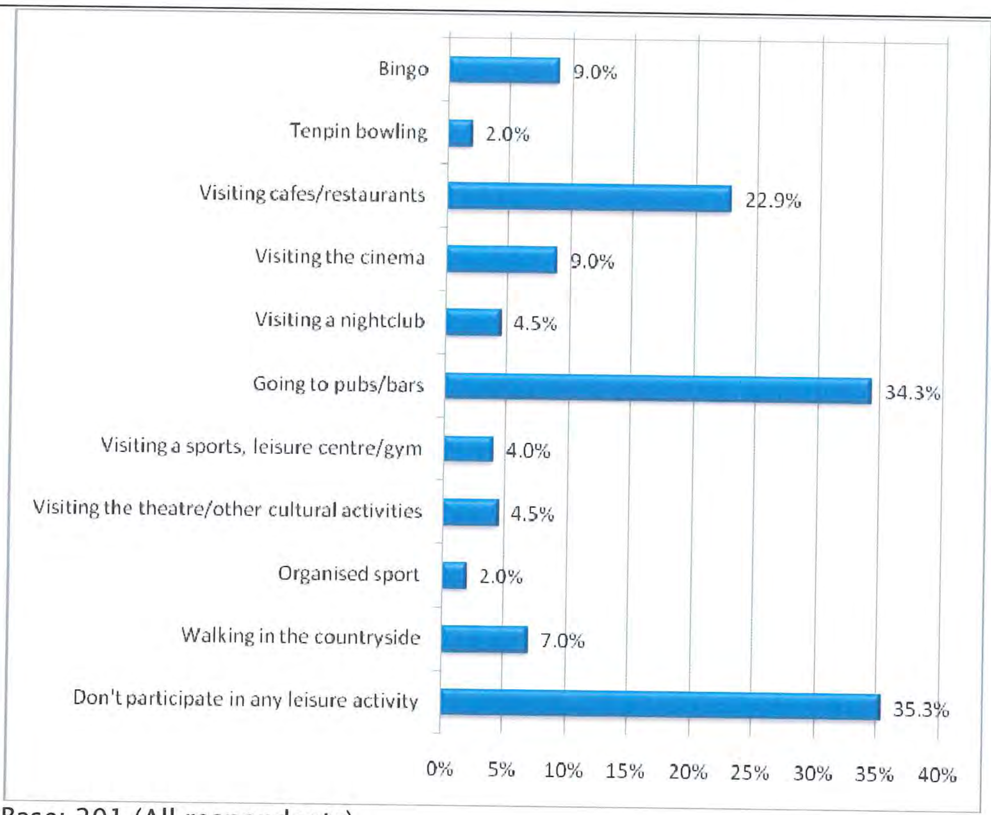
125 A series of questions relating to leisure activities were asked, which included discovering which leisure activities respondents partake in.

126 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:

127
- 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

128 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)



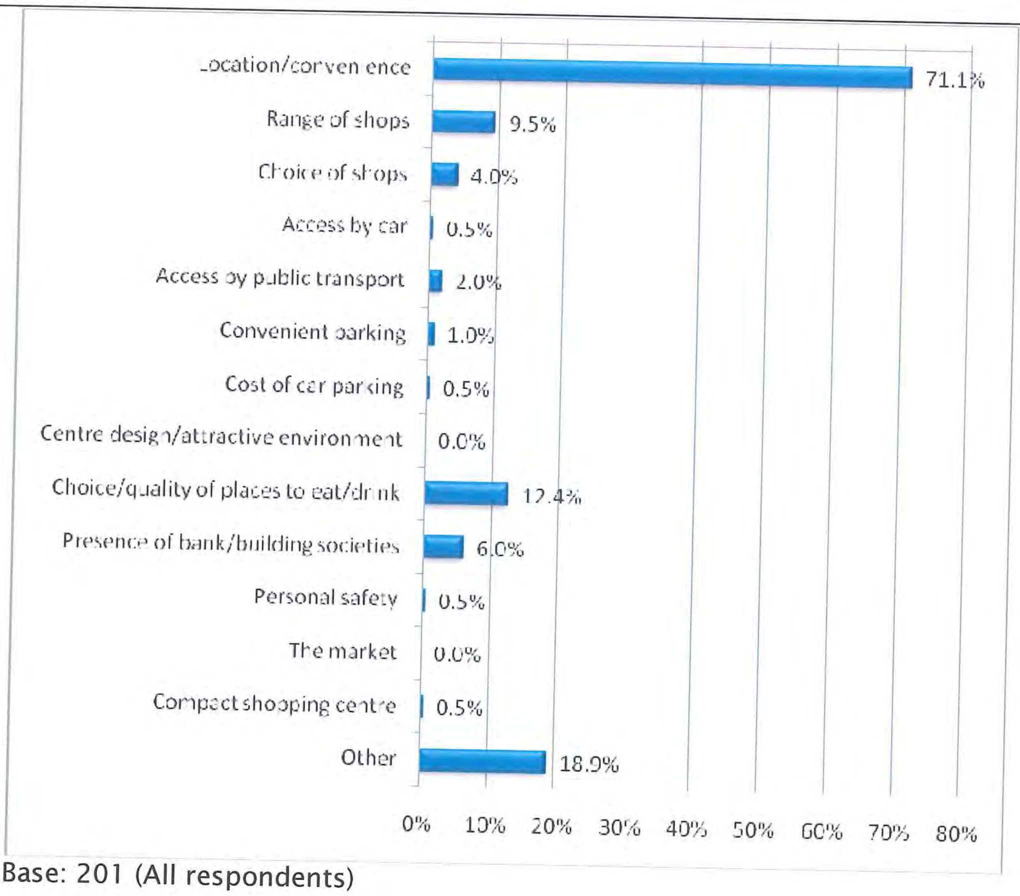
Base: 201 (All respondents)

129 Both on-street and telephone surveys demonstrated that respondents are interested in going to pubs/bars and visiting cafes/restaurants, stated by 34.3% and 22.9% respectively. 35.3% indicated they do not participate in any leisure activity.

4.7 Shopping in Brynmawr and improvements

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

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



Base: 201 (All respondents)

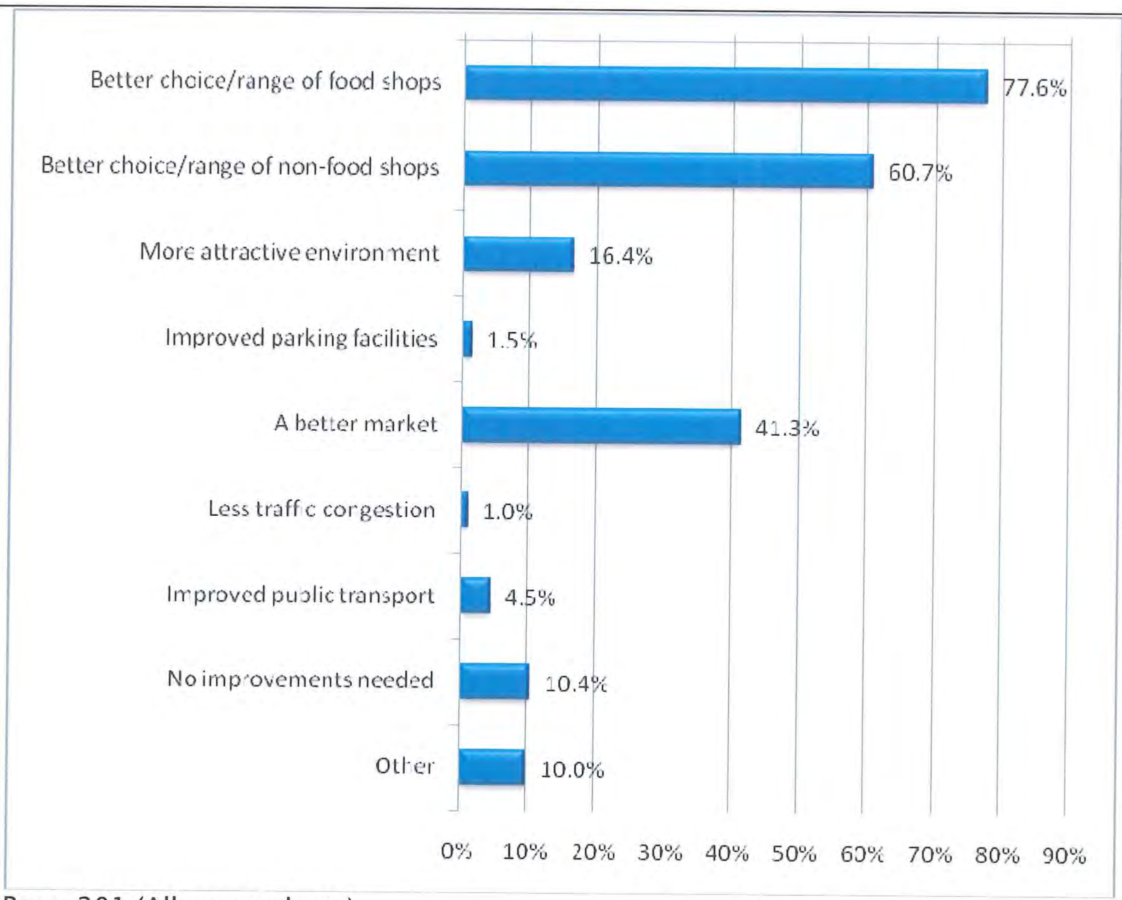
131 Brynmawr's location and convenience was the aspect that respondents most liked about the area (71.1%) for shopping, leisure/evening activities or services. However, only 13.4% liked the choice and range of shops within the catchment area.

132 Of the other responses given, the following aspects proved to be favourable for a selection of respondents (6% - excluding. 'Nothing'):

- *Friendly people/community spirit* *4.5%*
- *Familiarity/live here* *0.5%*
- *The mountains* *0.5%*
- *Good hairdresser* *0.5%*

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



Base: 201 (All respondents)

134 A better choice/range of food and non-food shops (77.6% and 60.7% respectively) were the most popular responses given by on-street interviewees when asked what improvements would encourage them to visit this area more often and improve their day out experience.

135 Of the other responses given, the following categories were mentioned by respondents (10.0%):

- *Don't know* — *4.0%*
- *Big name stores* — *1.0%*
- *Reduce business rates to encourage new businesses* — *1.0%*
- *Regular bus to Asda* — *1.0%*
- *Large supermarket* — *0.5%*
- *More clothes/fashion shops* — *0.5%*
- *Community centre* — *0.5%*
- *A police presence* — *0.5%*
- *Fewer takeaways* — *0.5%*
- *More for young people* — *0.5%*

136 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

137 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		Beaufort Street		Bailey Street	
	Num	%	Num	%	Num	%
Base: All respondents	**201**	**100.0%**	**153**	**100.0%**	**48**	**100.0%**
A/B	11	5.5%	5	3.3%	6	12.5%
C1	23	11.4%	20	13.1%	3	6.3%
C2	50	24.9%	33	21.6%	17	35.4%
D/E	116	57.7%	94	61.4%	22	45.8%
Refused	1	0.5%	1	0.7%	0	0.0%

Base: 201 respondents in Brynmawr

By age group

	Base: All respondents		Beaufort Street		Bailey Street	
	Num	%	Num	%	Num	%
Base: All respondents	**201**	**100.0%**	**153**	**100.0%**	**48**	**100.0%**
18 - 25 years	12	6.0%	9	5.9%	3	6.3%
26 - 34 years	7	3.5%	1	0.7%	6	12.5%
35 - 44 years	29	14.4%	22	14.4%	7	14.6%
45 - 54 years	29	14.4%	21	13.7%	8	16.7%
55 - 64 years	38	18.9%	29	19.0%	9	18.8%
65 years or more	86	42.8%	71	46.4%	15	31.3%

Base: 201 respondents in Brynmawr

By gender

	Base: All respondents		Beaufort Street		Bailey Street	
	Num	%	Num	%	Num	%
Base: All respondents	**201**	**100.0%**	**153**	**100.0%**	**48**	**100.0%**
Male	97	48.3%	73	47.7%	24	50.0%
Female	104	51.7%	80	52.3%	24	50.0%

Base: 201 respondents in Brynmawr

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.

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%.**

6.0 KEY CONCLUSIONS

Key conclusions are as follows:

Major positive attributes:

When reviewing the surveys positive attributes, the following was found:

- Residents do shop for both main food and top-up food items in Brynmawr as an alternative to other major nearby towns.
- Respondents also like to use other services (such as the banks, building societies, post offices) within Brynmawr, and have rated these services to be very good, especially because they are located within the vicinity.
- The results have also demonstrated many respondents within the catchment area prefer to purchase items whether it is non-food or food over the counter, rather than on the internet.
- This may suggest many residents either do not have access to a computer on a regular basis, prefer to handle/examine goods or find passing personal details over the internet unsafe. There could be many reasons for not using the internet; however, this does suggest that most will visit Brynmawr for any purpose and indicates there is a local catchment area for shoppers.
- Those who took part in the surveys the majority indicated they live within walking distance and travel less than 10 minutes to Brynmawr.
- It is evident that most respondents are very happy with the location and convenience of Brynmawr.

Major negative attributes:

The following highlight the negative attributes:

- Even though respondents stated they visit the town for their shopping, with the majority stating food. It is apparent many do not wish to visit Brynmawr for their non-food shopping and have stated there is a lack of choice/range of shops in the area.
- Many respondents do not rate the town very favourably, and have stated it is due to the range and choice of shops in the area.
- A large proportion of respondents have indicated they do not spend a great deal in Brynmawr.