Causeway Coast & Glens Borough Council

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Ballycastle

August 2021

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Client Analysis & Relationship Development

Introduction

In March 2021, Causeway Coast and Glens Borough Council appointed CARD Group Ltd to carry out Perception and Opinion surveys, among people and businesses, within 12 designated town centres within the Borough. The aim of the survey is to assess how people and businesses perceive the town centres within Causeway Coast and Glens, in order to assist the Town & Village Management Team and Planning Department operations.

The following report is a sub-report seeking to provide a summarised snapshot of our results, emanating from the Causeway Coast & Glens visitor & traders sampling, at a **local** level. This particular sub-report provides the snapshot for sampling that took place in **Ballycastle**;

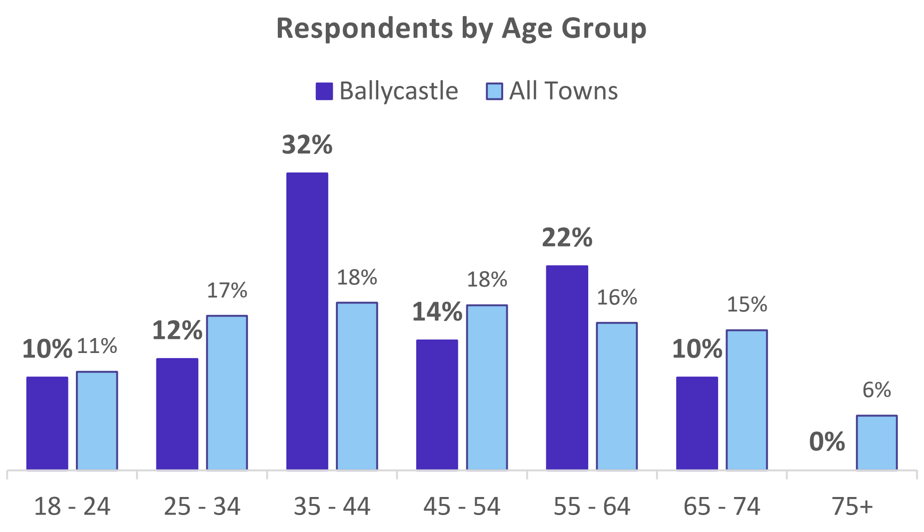
- The visitor results are based on an overall sample of **50** respondents;
- The trader's results are based on a sample of **19** traders within the town centre.

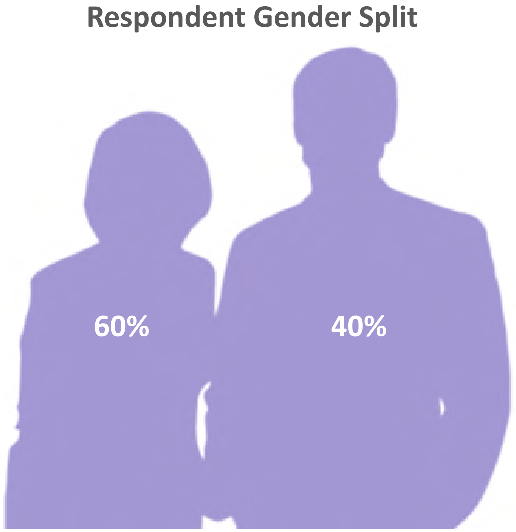
Sampling for visitors and traders in Ballycastle took place between 24th March and 24th April 2021. It is important to note that during this period, there were a range of continuing restrictions in place owing to the ongoing Coronavirus pandemic. The specific restrictions at the time are outlined in Appendix 1, however it is important to be cognisant of the impact these restrictions will have had on both visitors (restrictions on area movement, what shops / activities they have come to use etc.) and traders (loss of revenue, periods of closure etc.) in the area.

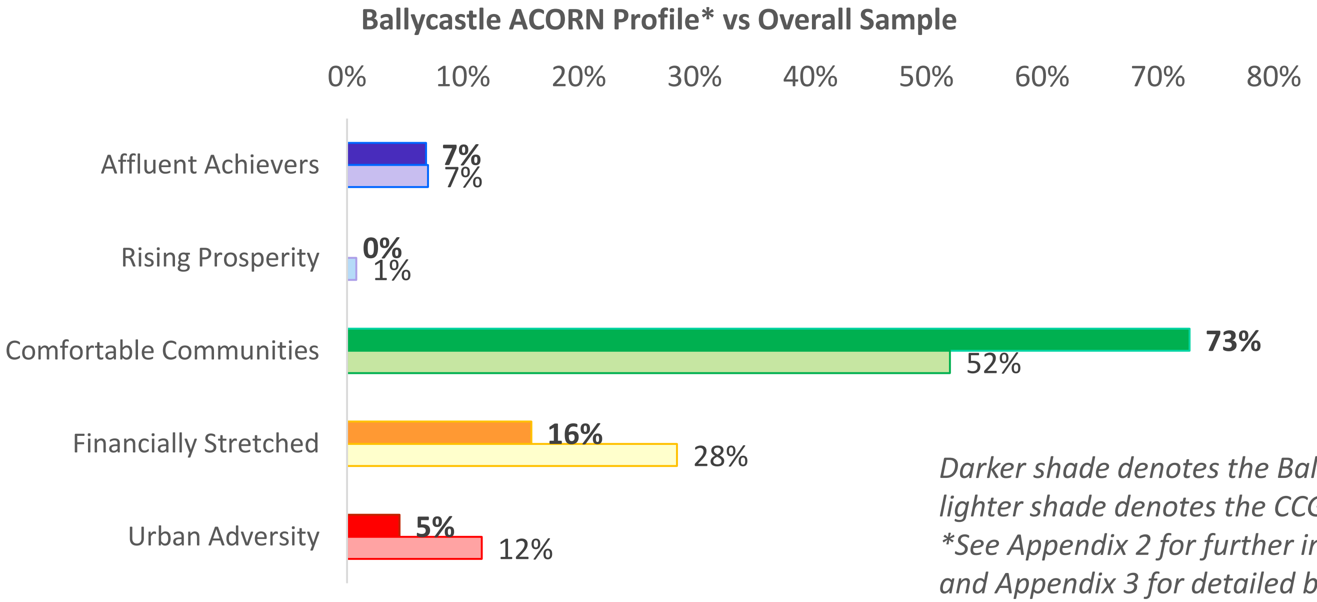
Visitors

Respondent Profile

Causeway Coast & Glens Borough Council



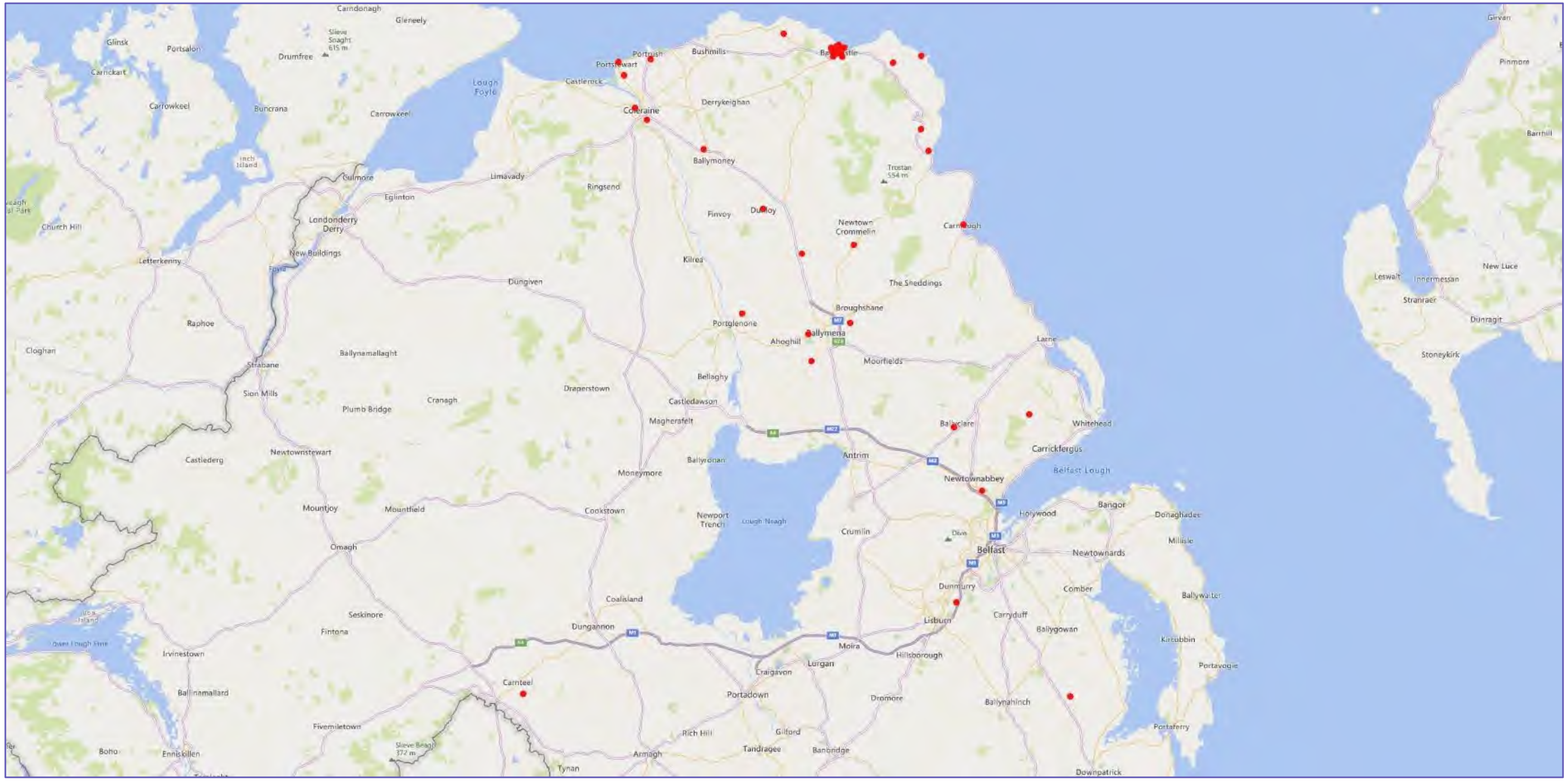




Darker shade denotes the Ballycastle respondent profile while lighter shade denotes the CCGBC baseline.
**See Appendix 2 for further information on ACORN classifications and Appendix 3 for detailed breakdown*

The visitor age profile is heavily weighted towards the 35-44 age category. Only 10% of respondents are 65 or over compared to the average of 21%. This is the second lowest across the borough.

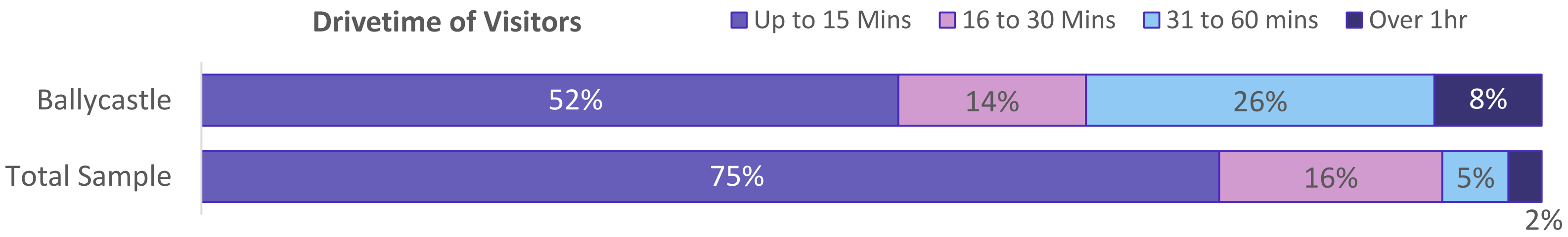
Similar to some of the other towns, Ballycastle visitors are mainly from the ‘Comfortable Communities’ ACORN sub-category. Only Cushendall has a larger proportion of visitors from this category.



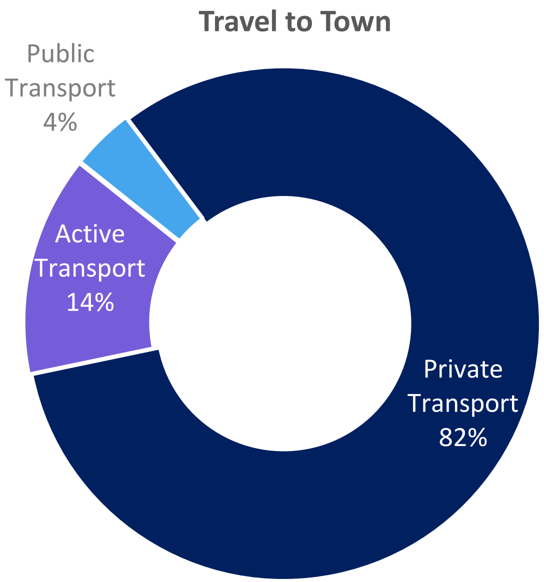
Ballycastle has visitors from across NI and only 52% are within a 15 minute drive from Ballycastle. This is the lowest of any town and has lead to the highest average drive time.

Unlike other towns, people are still travelling to Ballycastle for recreation.

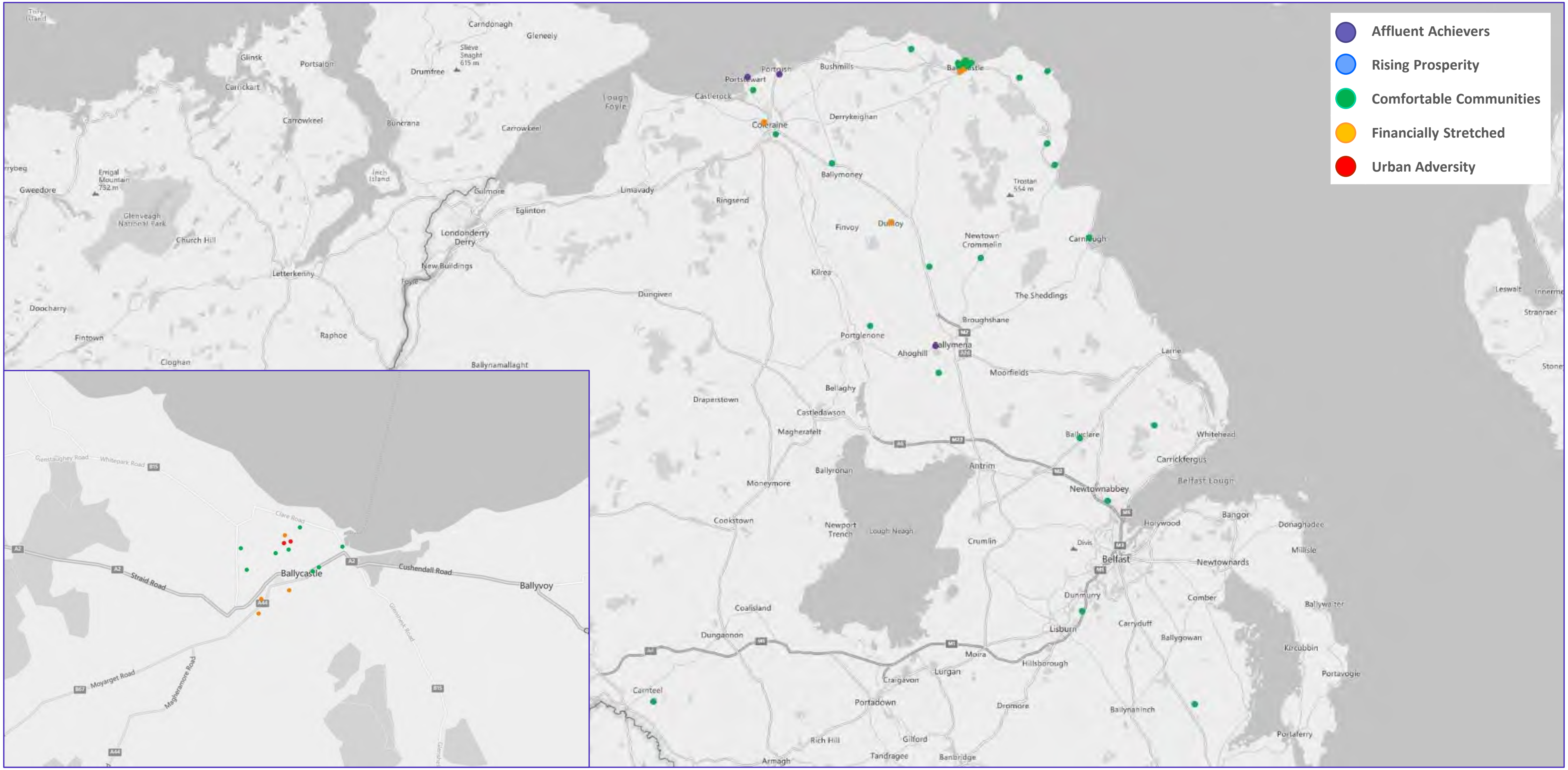
This is represented in the travel breakdown: more people are using private transport to get to Ballycastle.



Average
23 mins
10 mins



ACORN Mapping



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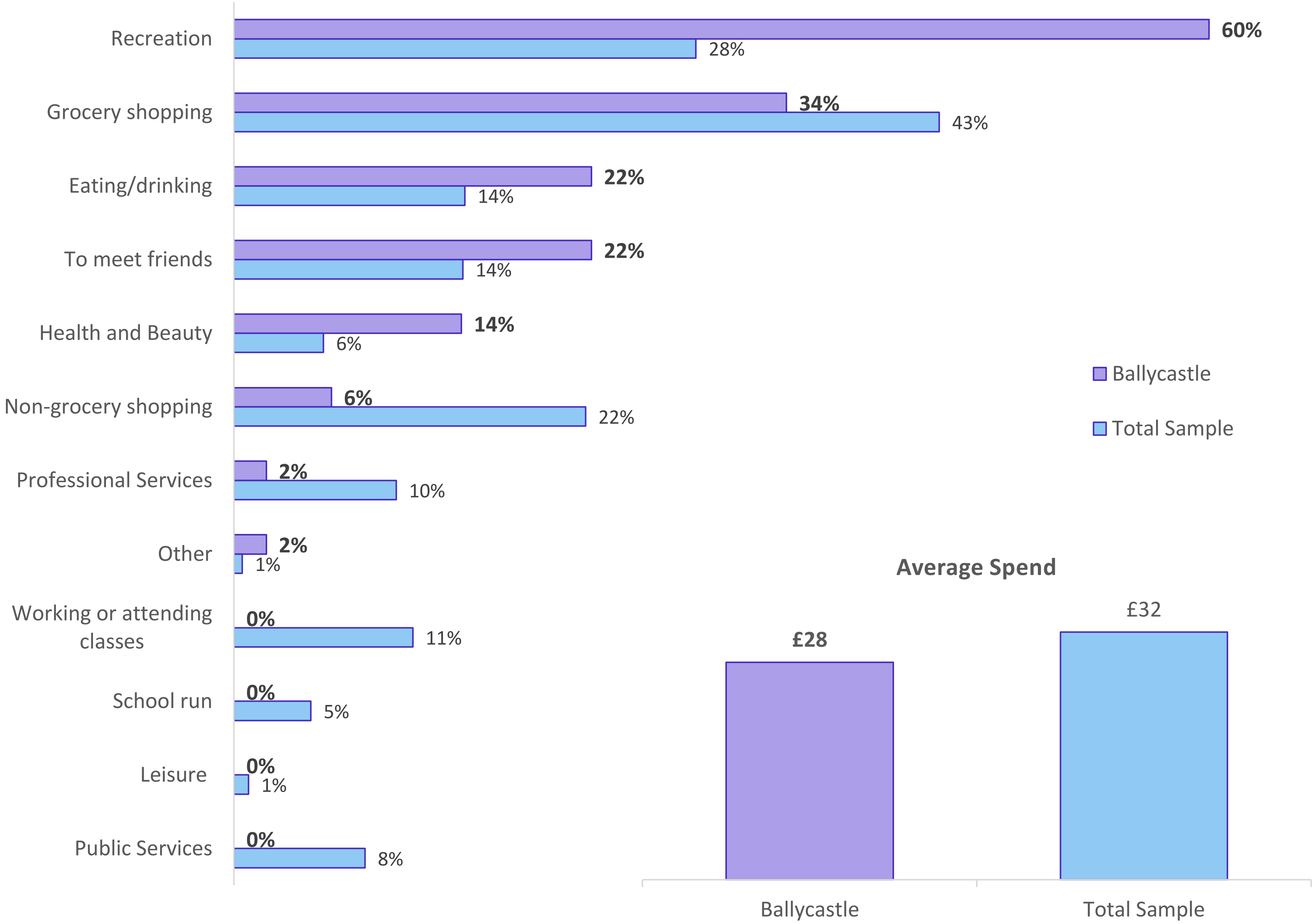
Why are people going to the town centres?



Location	Average Dwell Time	Average Spend per Minute
Ballycastle	83 mins	£0.33
Total Sample	109 mins	£0.29

Ballycastle is second to Portrush in terms of recreation as primary purpose of visit, once again reflective of the status of both towns as hotspots for tourists / visitors.

Those who are within 15 minutes of Ballycastle are less likely to be there for recreation (42%) while those who are 16 minutes and over away are much more likely (79%).

What is your opinion of the town centre?

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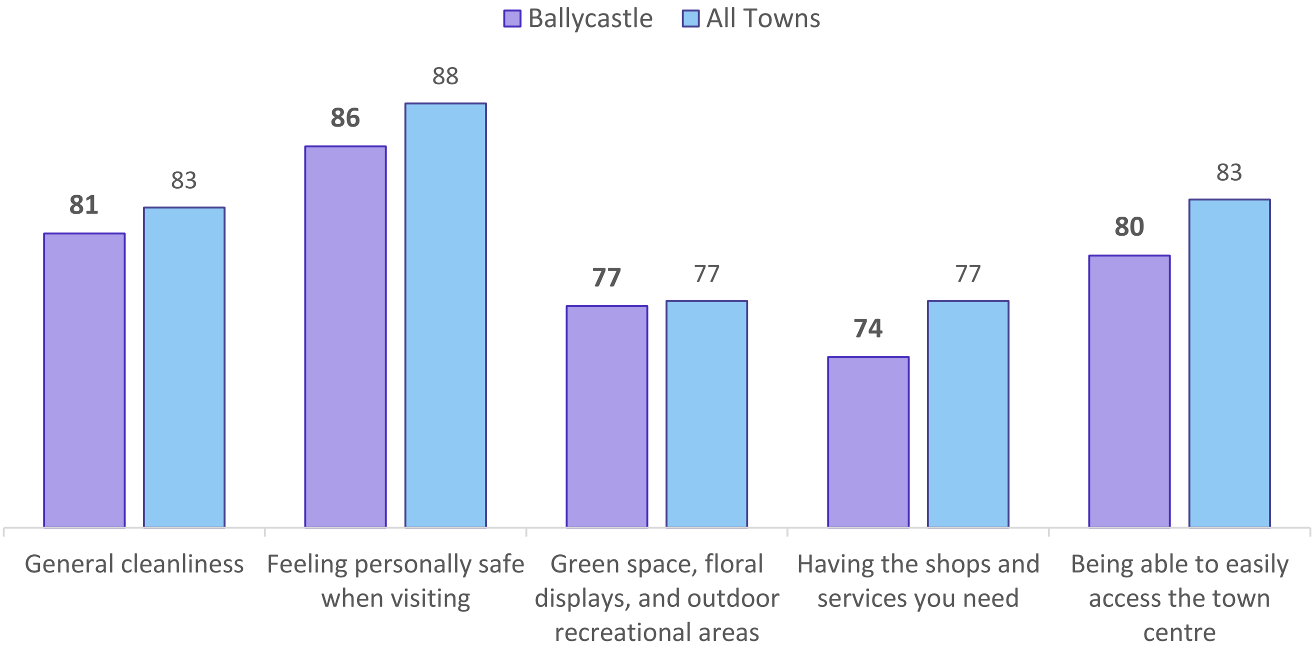
	Ballycastle Visitors									Score: +88
	Dislike				Passive		Like			
Description	Hate	Dislike	Avoid	Not ok	Not for me	Ok	Like	Enjoy	One of my favourites	My favourite town
Score	1	2	3	4	5	6	7	8	9	10
Sample	0%	0%	0%	0%	2%	10%	12%	48%	24%	4%
Calculation	Total of 'Like' (**88**) – Total of Dislike (**0**) = **+88**									

Average Rating Ballycastle Town Centre *(out of 100)*



- Above is the combined Sentiment Score for Ballycastle (+88). The rationale for Sentiment Scoring is outlined in Appendix 2.
- We can see that visitors to the town retain a largely positive view of it with no visitors disliking the town.
- The sentiment score is much higher than the average score of +71 which contrasts with the average ratings for the town. All scores are below average or average.

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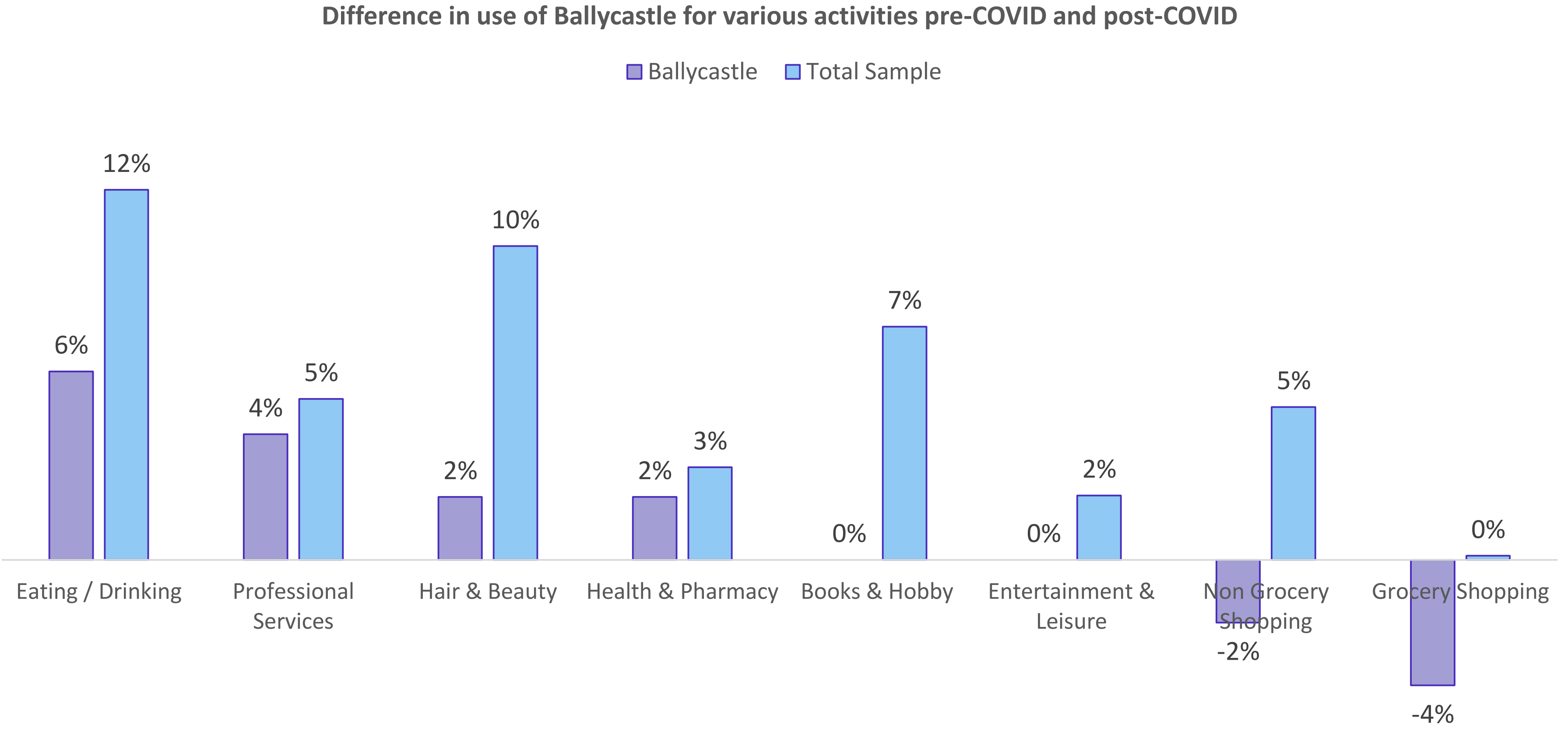
Pre & Post-COVID Use



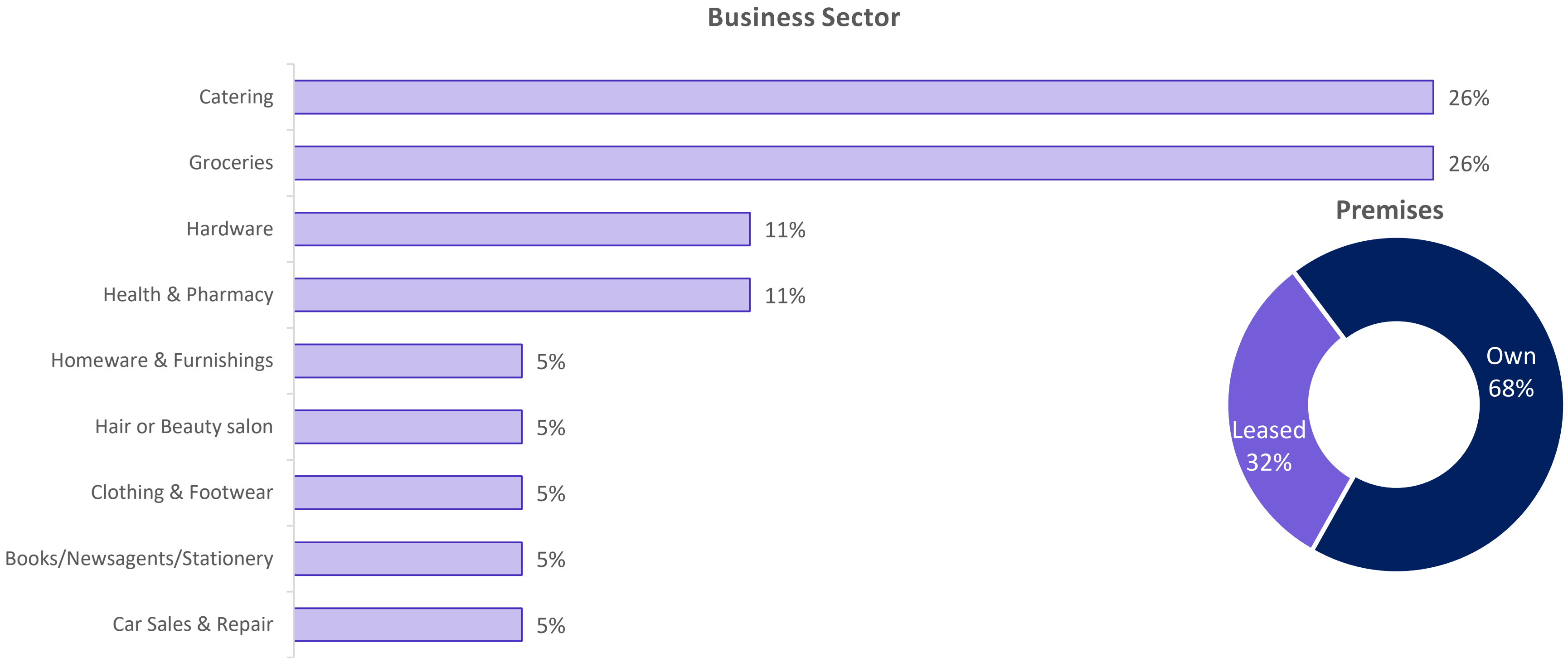
Ballycastle TC Use	Eating / Drinking	Professional Services	Hair & Beauty	Health & Pharmacy	Books & Hobby	Entertainment & Leisure	Non Grocery Shopping	Grocery Shopping
Before COVID	80.0%	14.0%	44.0%	42.0%	30.0%	48.0%	38.0%	60.0%
After COVID	86.0%	18.0%	46.0%	44.0%	30.0%	48.0%	36.0%	56.0%
Difference	**6.0%**	**4.0%**	**2.0%**	**2.0%**	**0.0%**	**0.0%**	**-2.0%**	**-4.0%**

We anticipate a small decrease in the use of grocery stores which accounts for 34% of visits and a small increase for 'Eating & Drinking' which accounts for 22% of visits.

In terms of barriers to visit, 24% provided 'other' barriers. In the main these related to uncontrollable factors like distance and weather. Though some did mention poor reliability in public transport service to the town.

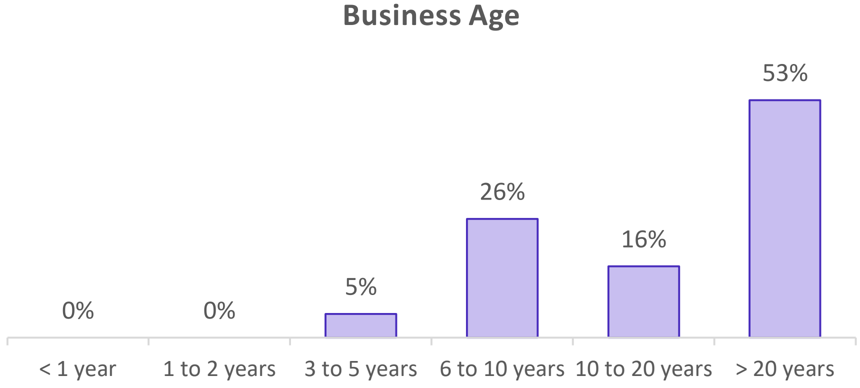
What prevents you from visiting the town centre more?	Ballycastle	Total Sample
Congestion & Traffic	4%	19%
Parking	8%	15%
Habit	0%	8%
Unappealing Retailers	4%	13%
Evening Economy Options	2%	7%
Visually Unappealing Area	2%	7%
Cafes & Restaurant Offer	0%	7%
Safety	0%	3%
None of these	**56%**	**52%**

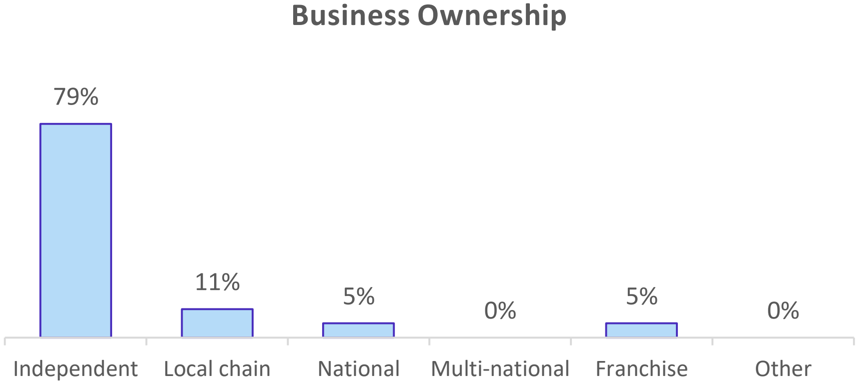
Traders

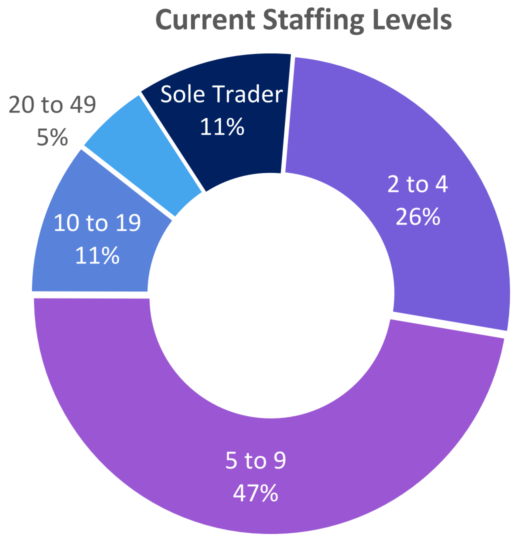


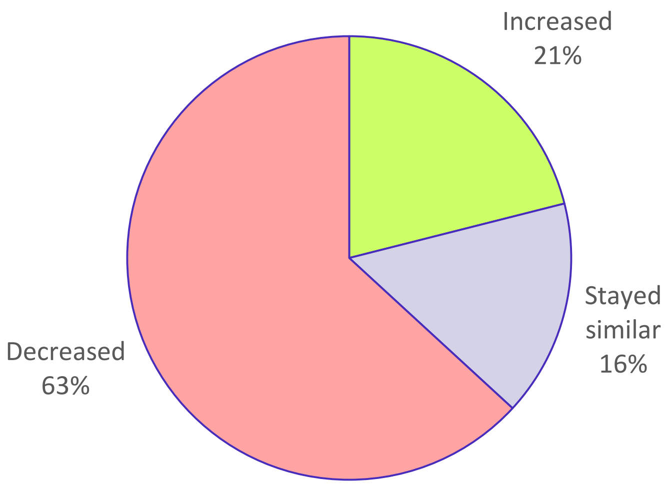
The trader profile for Ballycastle is mostly mature, independent firms. 68% of businesses are 10 years or older.

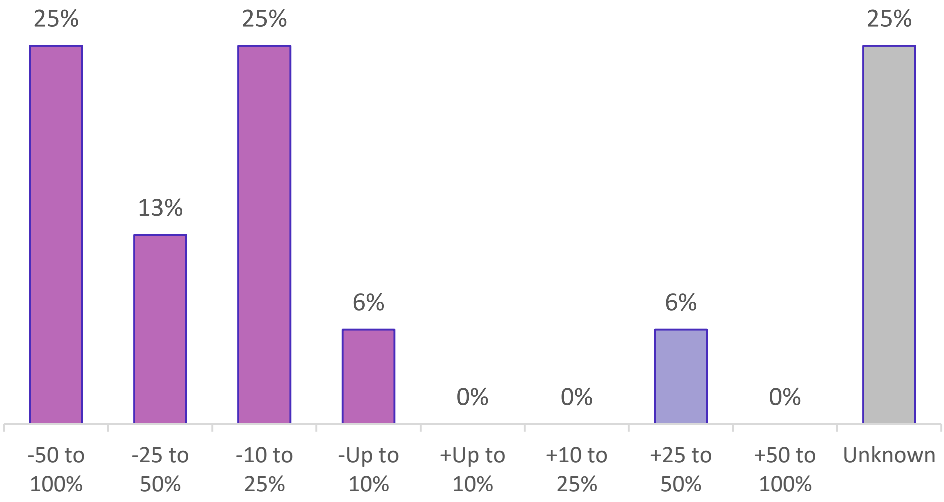
84% of traders have less than 10 employees which is the highest among all 12 towns.

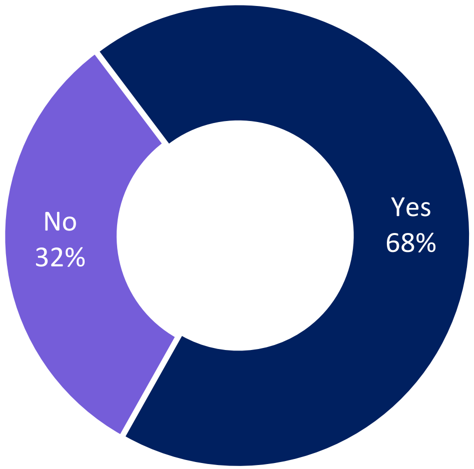












Did the business pivot to provide alternative services during the COVID lockdown …	%
No	**42%**
Yes	**58%**
Of those who said yes …	
Online selling & delivery	27%
Click & collect	27%
New services tailored to new circumstances	55%
New products tailored to new circumstances	0%

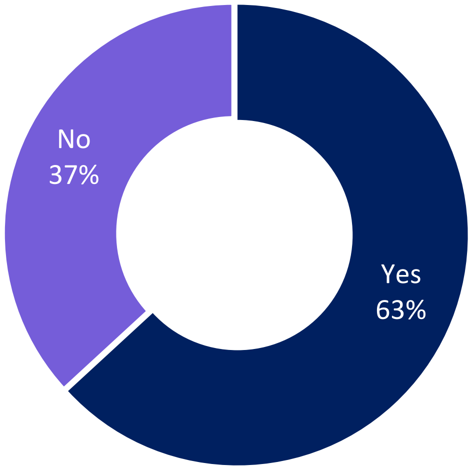
A large proportion of Ballycastle traders saw a decrease in turnover during the pandemic with 68% forced to close at some stage. The grocery sector and pharmacies/chemists are the only groups that see an increase.

Common reasons for closing include: being classed as non-essential and reduced opening hours.

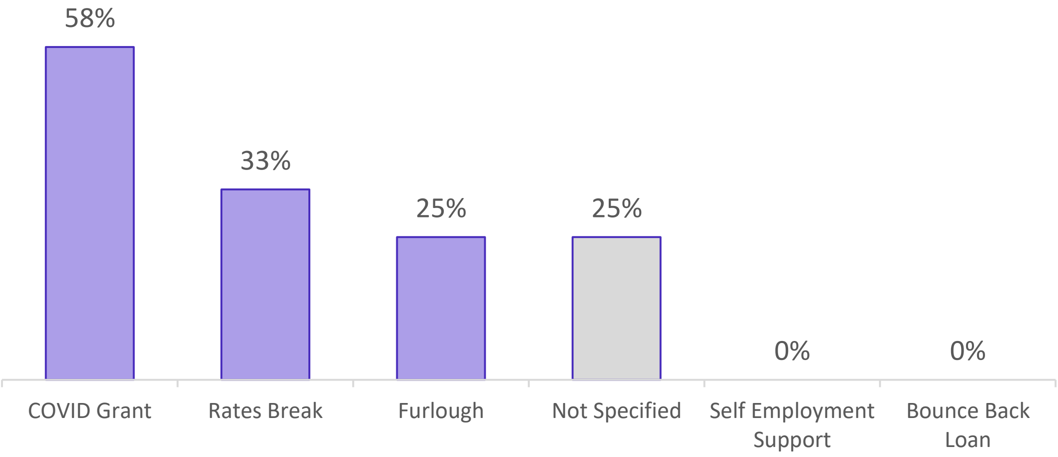
Many traders attempted to pivot using online selling and click & collect. This has not outweighed the losses due to COVID.

COVID Impact continued

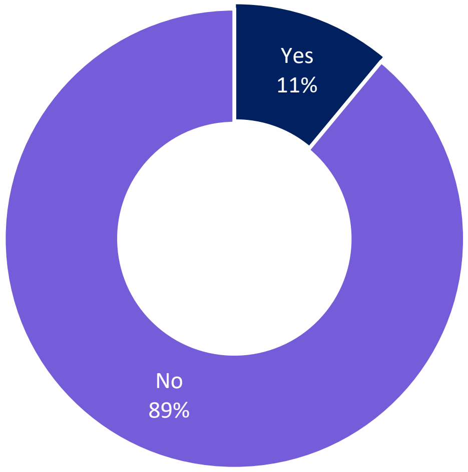
Did you avail of any Government support?



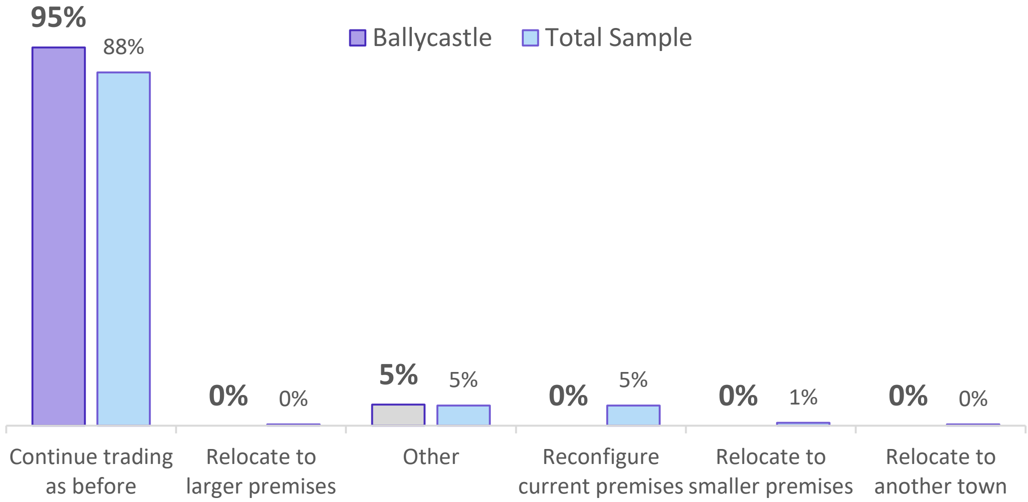
What kind of Government Support …



Did you avail of any CC&G Business Support …



Trading intentions going forward …

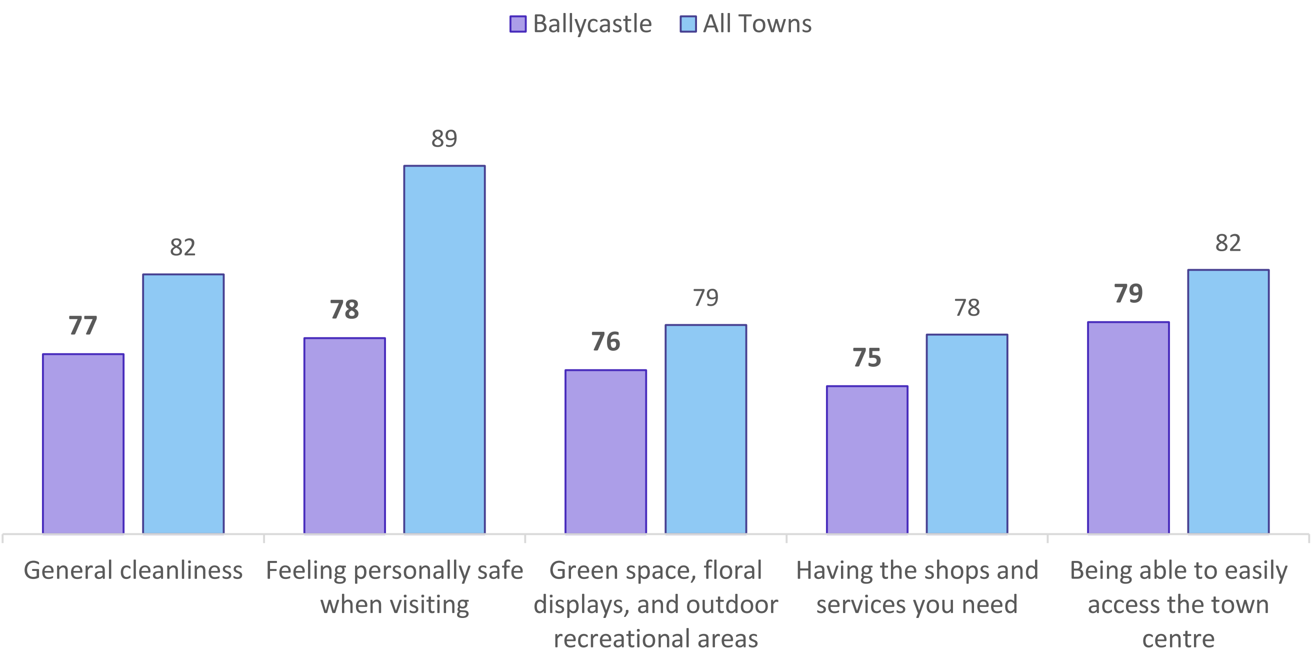


COVID grants were used in Ballycastle more than in the other 12 towns and Ballycastle had the highest uptake of council support.

More traders were given COVID grants in Ballycastle than the other 12 towns and the majority of businesses intend to continue trading as before.

	Ballycastle Traders									Score: +68
	Dislike				Passive		Like			
Description	Hate	Dislike	Avoid	Not ok	Not for me	Ok	Like	Enjoy	One of my favourites	My favourite town
Score	1	2	3	4	5	6	7	8	9	10
Sample	0%	11%	0%	5%	0%	0%	16%	47%	21%	0%
Calculation	Total of 'Like' (**84**) – Total of Dislike (**16**) = **Ballycastle Traders Score = +68**									

Average Rating Ballycastle Town Centre *(out of 100)*



- Ballycastle received a slightly above average sentiment score (+68) and below average on the town centre ratings.
- When looking at the individual sentiment scores, there are a number who think negatively of the town:

"needs attention and further support from local council"

"no police help, anti social behaviour prevalent, drug problems, issues with who is in charge of CCTV"

"too many empty shops"

- The score for "Feeling personally safe" is significantly lower than the average which is possibly explained by the comment above from a trader.

Appendix 1 – Terminology & Clarifications

Margin of Error

Our overall sample of 781 samples was sufficient to achieve a margin of error of +/- 3.5% @95% confidence when looking at the borough as a whole. For each individual town, greater caution should be placed on the results as the sample gets more segmented the margin of error increases. For Ballycastle a sample size of 50 was achieved which provides us with a margin of error of +/- 13.9% @ 95% confidence. In simple terms, our margin of error of means that were the study to be replicated 20 times, we would expect the results to vary by no more than + or – 13.9% in 19 (95%) of the subsequent studies.

Coronavirus Restrictions

At the end of March, beginning of April 2020 – Northern Ireland was still under some of the most restrictive COVID regulations since the beginning of the pandemic. This included restrictions on which traders were allowed to open / operate, as well as restrictions on the movement of the general public. The removal of these restrictions only really began in late April.

https://www.executiveoffice-ni.gov.uk/news/executive-agrees-relaxations-covid-restrictions

This is likely to have had significant ramifications on both our visitor and trader sampling as the profile of each will have been dramatically altered from what would be considered 'the norm'.

Weather & Climate

According to the Met Office, the UK experienced one of the coldest Aprils since 1922, and the highest level of air frost in 60 year.

https://www.metoffice.gov.uk/about-us/press-office/news/weather-and-climate/2021/lowest-average-minimum-temperatures-since-1922-as-part-of-dry-april

The inclement weather, in combination with the aforementioned Coronavirus restrictions, are likely to have had a significant impact on visitor footfall and composition in comparison to what would normally be expected for the time of year.

Appendix 2 – ACORN & Sentiment Explained

Causeway Coast & Glens Borough Council

About ACORN

ACORN is a geodemographic segmentation of the UK's population. It segments households, postcodes & neighbourhoods into 6 categories and 18 associated sub-groups. Through analysis of demographic data, social factors & individual consumer behaviour, it provides precise information and an in-depth understanding of different types of people at a postcode level.

Categorisation

	ACORN Groups		Sub-Categories	
1	Affluent Achievers	These are some of the most financially successful people in the UK. They live in affluent, high status areas of the country. They are healthy, wealthy and confident consumers.	Lavish Lifestyles	The most affluent people in the UK who live comfortable lifestyles with few financial concerns.
			Executive Wealth	High income people, successfully combining jobs and families.
			Mature Money	Older, affluent people with the money and time to enjoy life.
2	Rising Prosperity	These are generally younger, well educated, professionals moving up the career ladder, living in our major towns and cities. Singles or couples, some are yet to start a family, others will have younger children.	City Sophisticates	Younger individuals enjoying the city lifestyle with lots of opportunities to socialise and spend.
			Career Climbers	Younger singles and couples, some with young children, living in more urban locations.
3	Comfortable Communities	This category contains much of middle-of-the-road UK, whether in the suburbs, smaller towns or the countryside. They are stable families and empty nesters in suburban or semirural areas.	Countryside Communities	Older people with leisure interests reflecting rural locations.
			Successful Suburbs	Home-owning families living comfortably in stable areas in suburban and semi-rural locations
			Steady Neighbourhoods	These working families form the bedrock of many towns across the UK.
			Comfortable Seniors	Older people with sufficient investments and pensions for a secure future.
			Starting Out	Young couples and early career climbers in their first homes.

	ACORN Groups		Sub-Categories	
4	Financially Stretched	This category contains a mix of traditional areas of the UK, including social housing developments specifically for the elderly. It also includes student term-time areas.	Student Life	Students and young people with little income living in halls of residence or shared houses
			Modest Means	Younger families in smaller homes with below average incomes.
			Striving Families	Struggling families on limited incomes in urban areas.
			Poorer Pensioners	Older people and pensioners, the majority of whom live in social housing.
5	Urban Adversity	This category contains the most deprived areas of towns and cities across the UK. Household incomes are low, nearly always below the national average.	Young Hardship	People with a modest lifestyle who may be struggling in the economic climate.
			Struggling Estates	Large, low income families surviving with benefits.
			Difficult Circumstances	Young adults, many of whom are single parents, enduring hardship.

Sentiment Scoring

The Sentiment Score tracks how people feel about a brand or place and ranges from -100 to +100. The score is calculated by taking the percentage who do not like the town away from the percentage who do like the town. The average score for all towns in +71.The table below provides a contextual overview for how sentiment scores should be viewed.

Score Range	Result	Rationale
-100 to -1	**Very Poor**	The town is actively disliked by its residents/traders. This should be the first targets for change
0 to 24	**Poor**	Overall the residents/traders have a low opinion of the town.
25 to 49	**Neutral**	a score between 25 and 50 indicates 25-50% more people like rather than dislike the town
50 to 74	**Good**	The town is receiving very high scores meaning very few people dislike the town
75 to 89	**Very Good**	The town has few people who dislike or feel neutral about the town
90 to 100	**Excellent**	Almost the entire population likes/enjoys the town

Appendix 3 – Results Expanded

Detailed ACORN Results for Ballycastle Visitors

No.	ACORN Group	Ballycastle	Total Sample	Sub-Category		Ballycastle	Total Sample
1	Affluent Achievers	**7%**	7%	A	Lavish Lifestyles	**0%**	0%
				B	Executive Wealth	**0.0%**	4.1%
				C	Mature Money	**6.8%**	2.9%
2	Rising Prosperity	**0%**	1%	D	City Sophisticates	**0%**	0%
				E	Career Climbers	**0.0%**	0.8%
3	Comfortable Communities	**73%**	52%	F	Countryside Communities	**56.8%**	45.6%
				G	Successful Suburbs	**11.4%**	2.3%
				H	Steady Neighbourhoods	**4.5%**	1.6%
				I	Comfortable Seniors	**0.0%**	1.4%
				J	Starting Out	**0.0%**	1.1%
4	Financially Stretched	**16%**	28%	K	Student Life	**0.0%**	0.4%
				L	Modest Means	**2.3%**	8.4%
				M	Striving Families	**13.6%**	12.1%
				N	Poorer Pensioners	**0.0%**	7.7%
5	Urban Adversity	**5%**	12%	O	Young Hardship	**0.0%**	7.1%
				P	Struggling Estates	**4.5%**	3.0%
				Q	Difficult Circumstances	**0.0%**	1.5%

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