

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Bushmills

August 2021



"OLD BUSHMILLS" DISTILLERY Co. LTD.

The image shows the Old Bushmills Distillery building, a long, two-story brick structure with a dark roof. The name "OLD BUSHMILLS" DISTILLERY Co. LTD." is painted in large white letters across the roof. The building is situated next to a body of water, and a large tree is visible on the right side. The sky is blue with some clouds.

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.

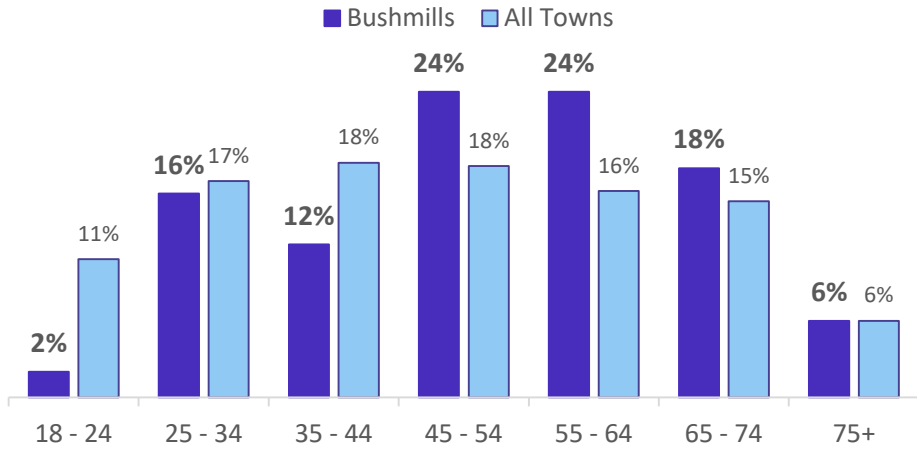
The following report is a sub-report seeking to provide a summarised snapshot of our results, emanating from the Causeway Coast & Glens visitor & traders sampling, at a **local** level. This particular sub-report provides the snapshot for sampling that took place in **Bushmills**;

- The visitor results are based on an overall sample of **51** respondents;
- The trader's results are based on a sample of **16** traders within the town centre.

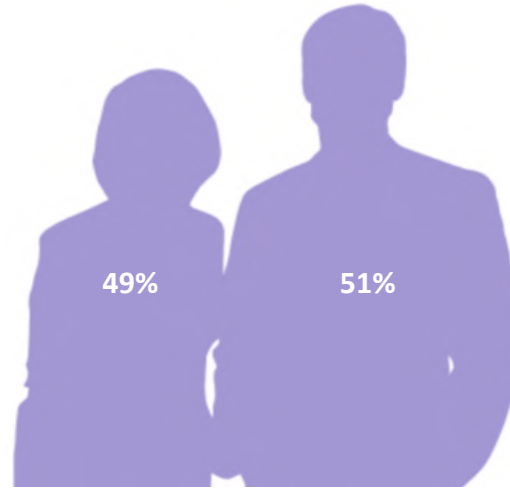
Sampling for visitors and traders in Bushmills took place between 30th March and 23rd April 2021. It is important to note that during this period, there were a range of continuing restrictions in place owing to the ongoing Coronavirus pandemic. The specific restrictions at the time are outlined in Appendix 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

Respondents by Age Group



Respondent Gender Split

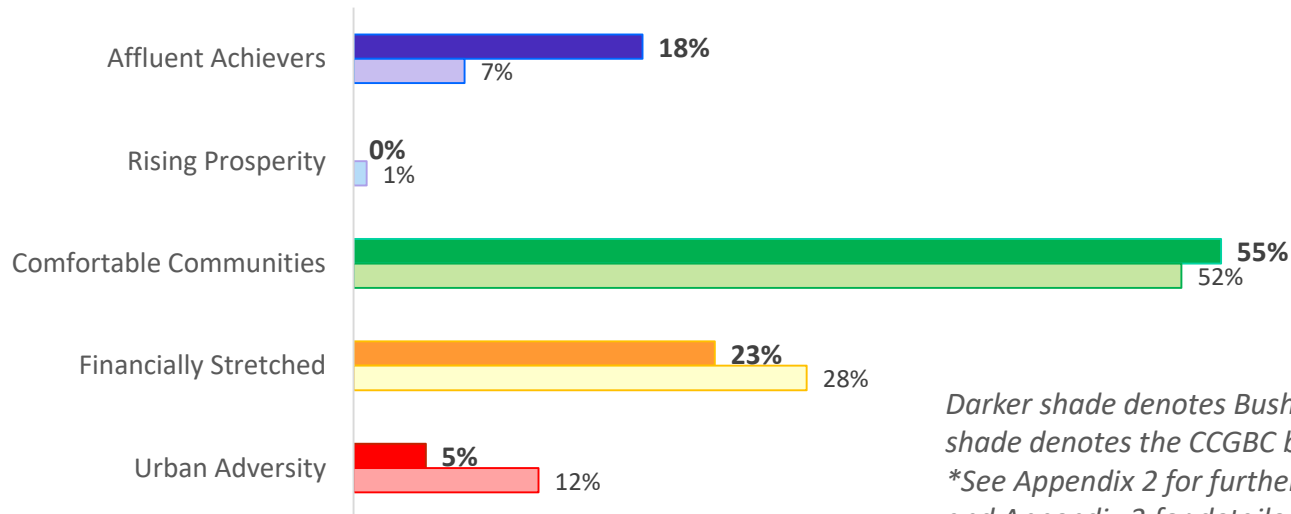


The visitor age profile is heavily weighted for visitors aged 45 to 64 accounting for 48% of the visitors compared to the average 34%.

Only 2% were people under 24 which is the lowest of the 12 towns.

This has given the town the second highest average age (52) out of the towns.

Bushmills ACORN Profile* vs Overall Sample

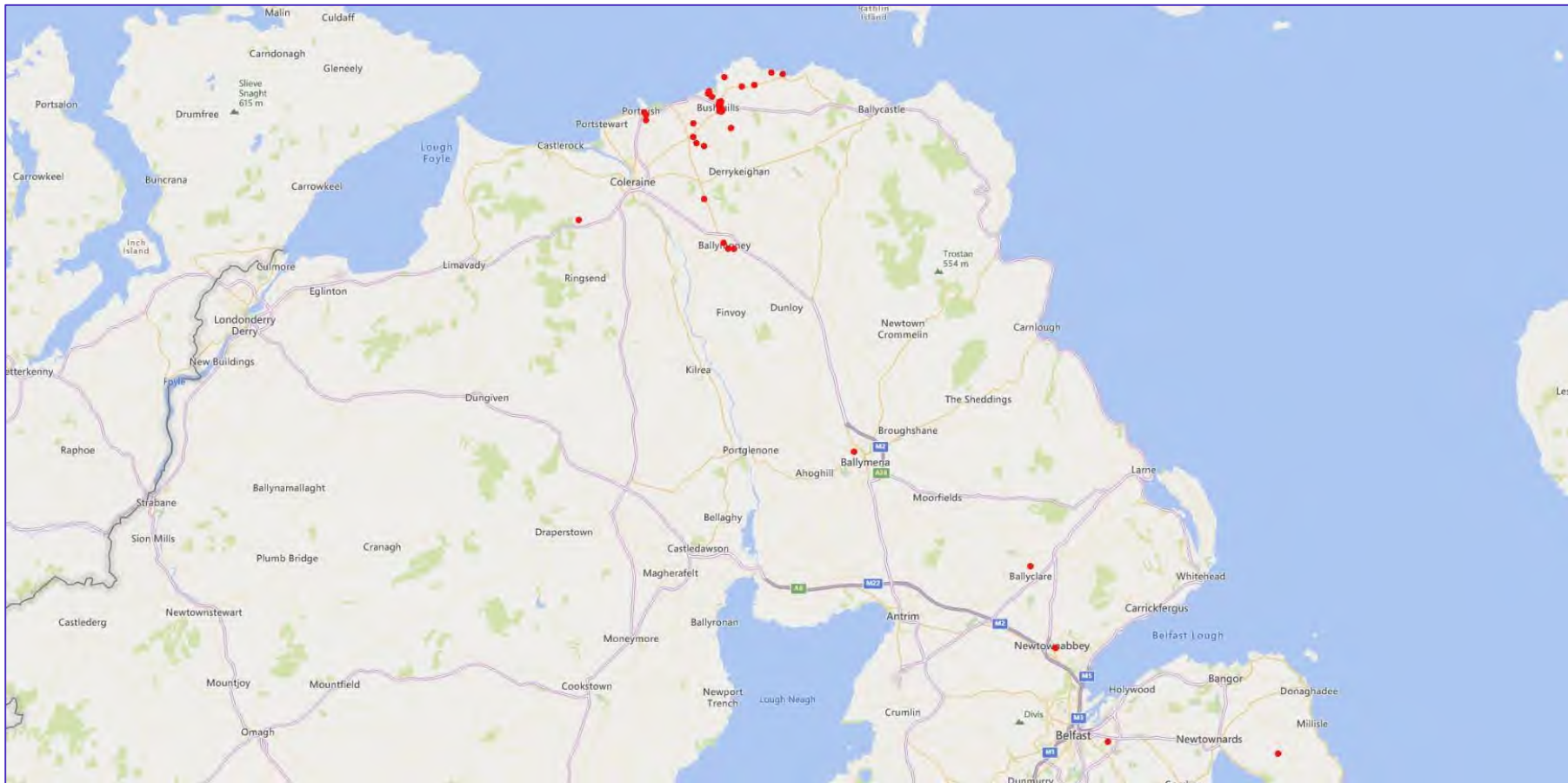


Darker shade denotes Bushmills respondent profile while lighter shade denotes the CCGBC baseline.

**See Appendix 2 for further information on ACORN classifications and Appendix 3 for detailed breakdown*

The majority of visitors are in the 'Comfortable Communities' sub-category which is standard across the borough.

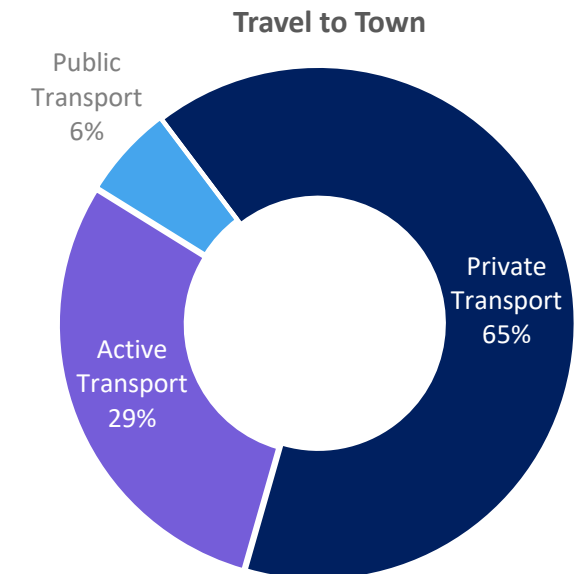
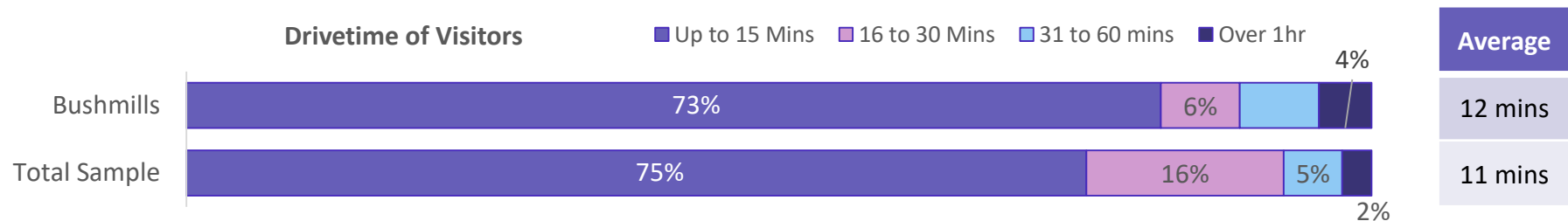
Bushmills also appears to have the highest proportion of people who are 'Affluent Achievers'.

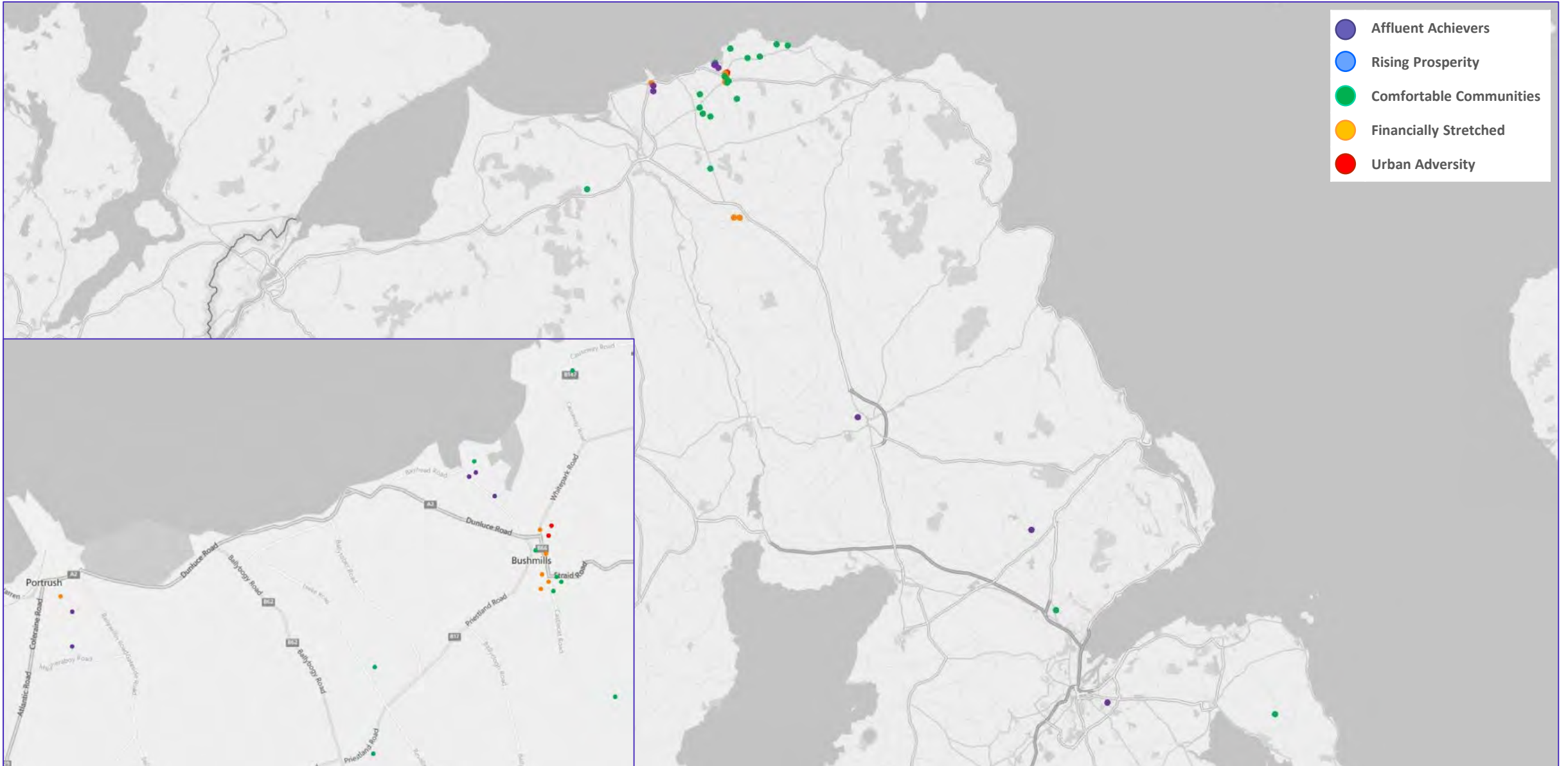


The majority of visitors (73%) were from Bushmills or within a 15 minute drive. However, there were visitors from Belfast, Newtownabbey, Ballyclare, and Ballymena indicating there are some people travelling.

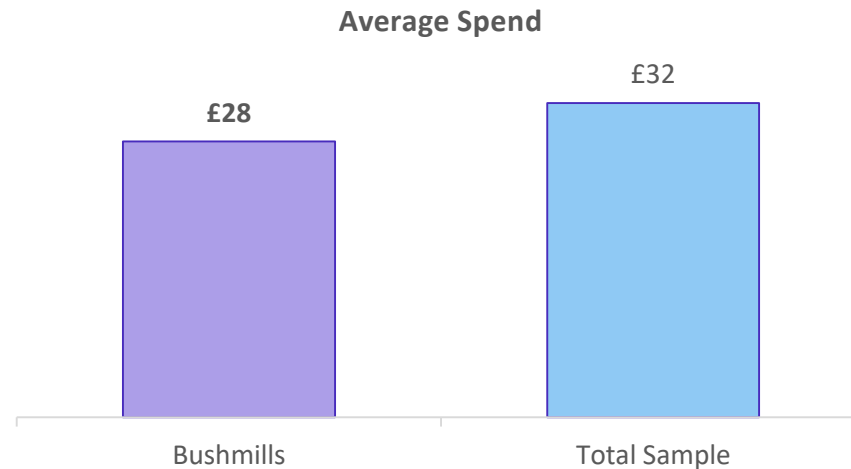
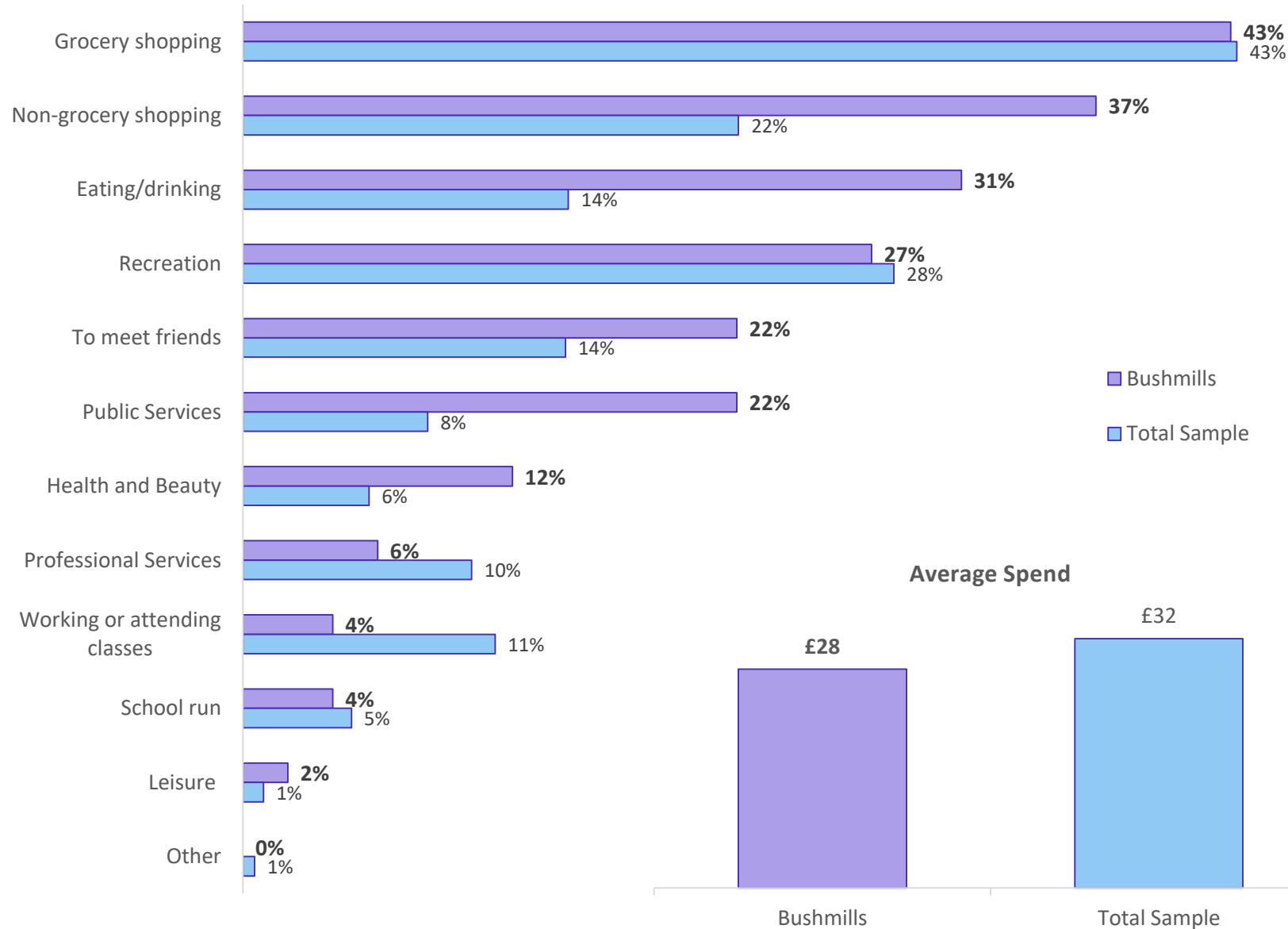
Primarily these people noted recreational purposes for their visit such as fishing and staying in their caravan.

Given the slightly wider dispersion of visitors use of own / private transport was relatively high.





Why are people going to the town centres?



Location	Average Dwell Time	Average Spend per Minute
Bushmills	137 mins	£0.20
Total Sample	109 mins	£0.29

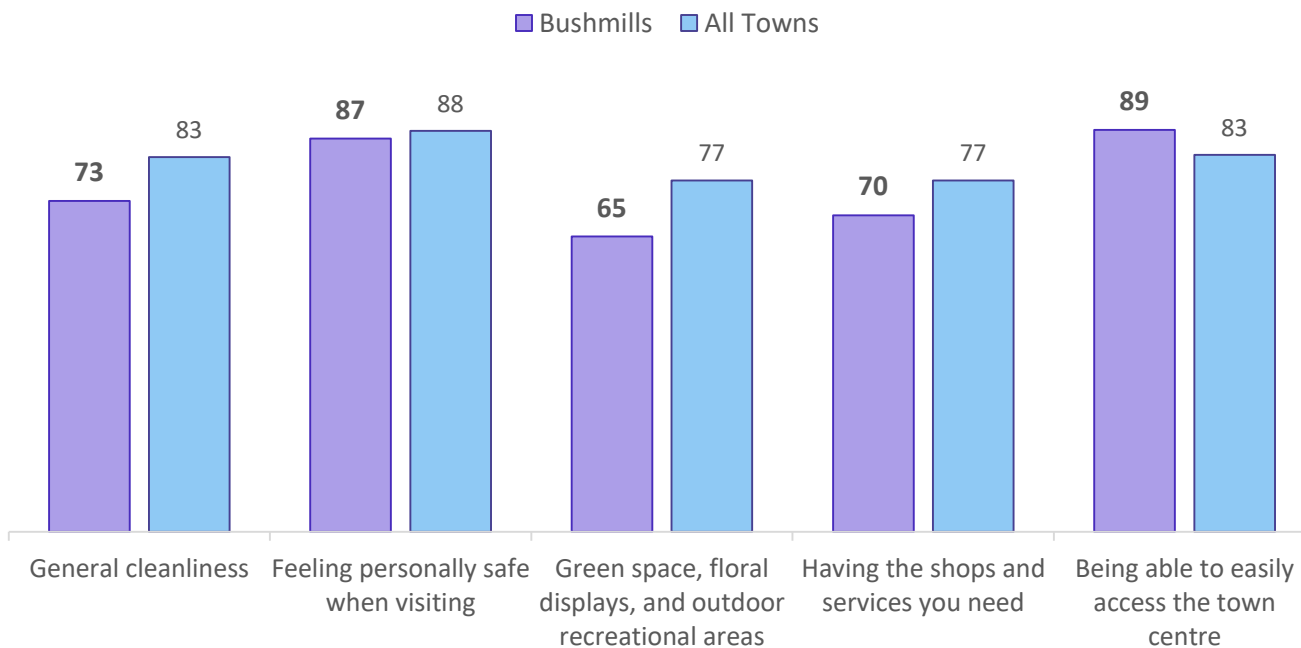
Bushmills has a larger proportion of visitors in town for non-grocery shopping and eating/drinking.

Bushmills has the highest dwell time of all 12 towns with only 6% of people staying in town for less than 45 minutes compared to the average of 26%.

This will have impacted on the average spend per minute in the town.

	Bushmills Visitors				Score: +78					
	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%	2%	0%	2%	0%	14%	14%	55%	10%	4%
Calculation	Total of 'Like' (82) – Total of Dislike (4) = +78									

Average Rating Bushmills Town Centre (out of 100)



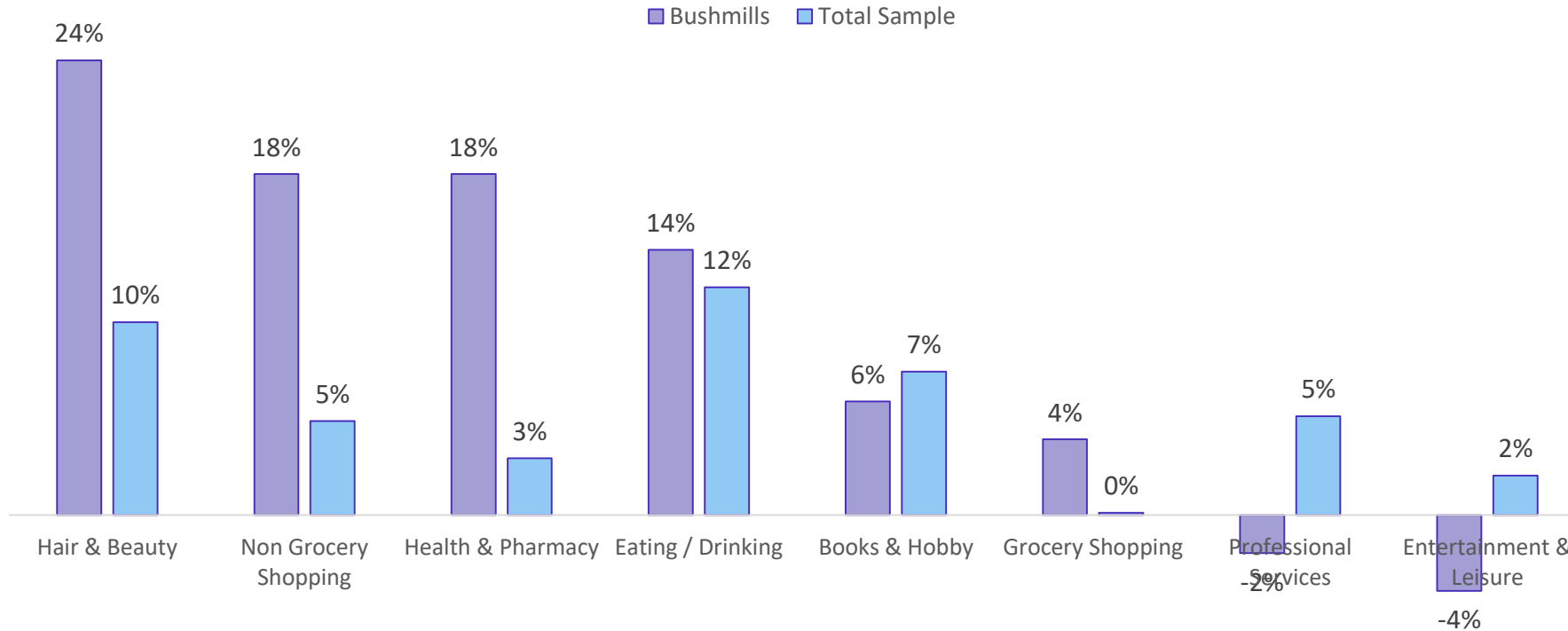
- Above is the Sentiment Score for Bushmills. The rationale for the Sentiment Scoring is outlined in Appendix 2.
- The visitors have a largely positive view of the town with only 4% saying it's 'Not ok' or they 'Dislike' Bushmills. The overall score is above the average town score of 71.
- The town centre ratings opposite show a slightly different picture with all ratings close to, or below, the average. Bushmills scores 10-12 points lower than average for 'General cleanliness' and 'green spaces'.

"it's okay to do a bit of small shopping for bits and pieces and handy for the post office"

"It's handy for coming in to get some groceries when I'm short at home"

"I'm very disappointed because of shortage of dog bins"

Difference in use of Bushmills for various activities pre-COVID and post-COVID



Hair and Beauty traders are likely to see a large boost after COVID restrictions compared to other towns while Non-grocery shopping and Health & Pharmacy see similar large jumps compared to the average.

Non-grocery shopping accounts for 37% of visits indicating its importance in Bushmills.

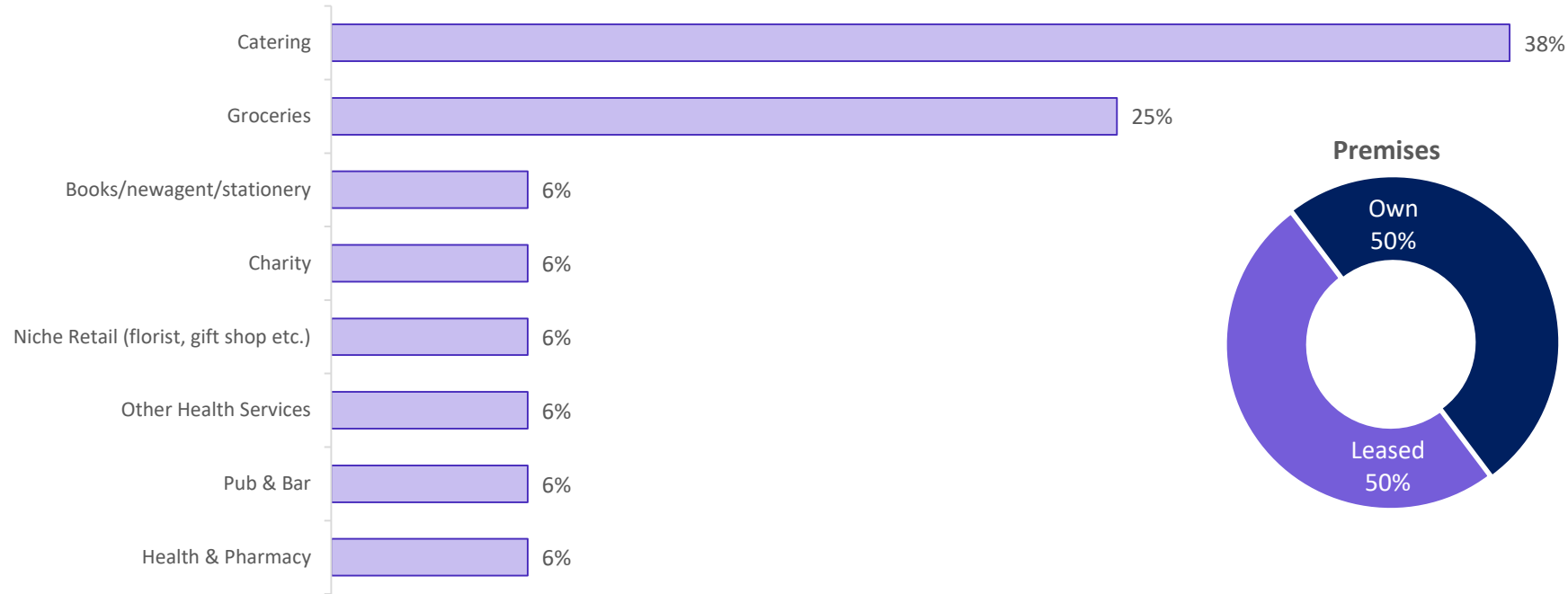
There do not appear to be any issues that stick out as a significant problem in terms of preventing visits to the town.

What prevents you from visiting the town centre more?	Bushmills	Total Sample
Congestion & Traffic	6%	19%
Parking	0%	15%
Habit	0%	8%
Unappealing Retailers	14%	13%
Evening Economy Options	4%	7%
Visually Unappealing Area	2%	7%
Cafes & Restaurant Offer	0%	7%
Safety	8%	3%
None of these	69%	52%

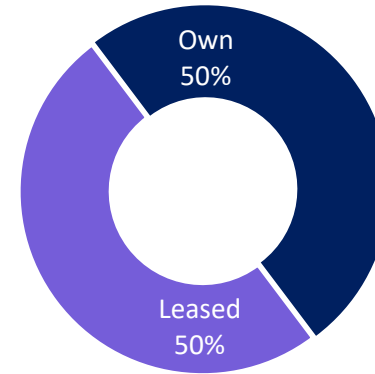
Bushmills TC Use	Hair & Beauty	Non Grocery Shopping	Health & Pharmacy	Eating / Drinking	Books & Hobby	Grocery Shopping	Professional Services	Entertainment & Leisure
Before COVID	31.4%	45.1%	54.9%	60.8%	72.5%	68.6%	3.9%	5.9%
After COVID	54.9%	62.7%	72.5%	74.5%	78.4%	72.5%	2.0%	2.0%
Difference	+23.5%	+17.6%	+17.6%	+13.7%	+5.9%	+3.9%	-2.0%	-3.9%

Traders

Business Sector



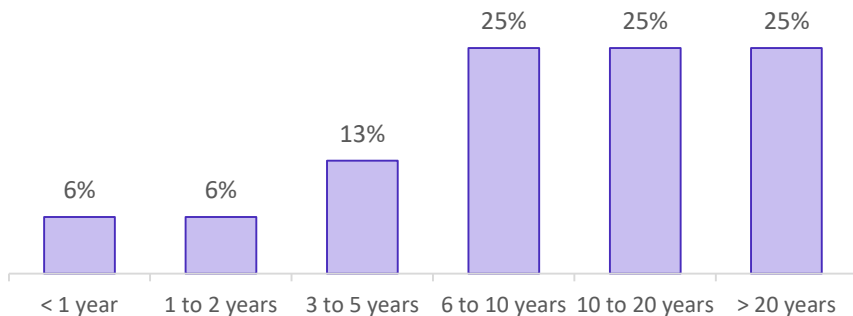
Premises



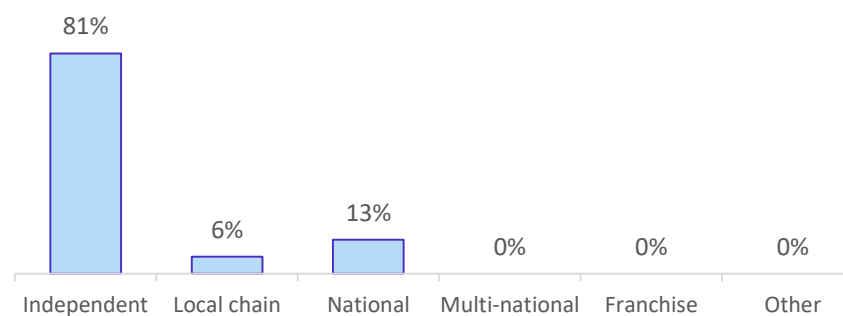
With 38% of traders offering catering services, the 14% increase in use after COVID from visitors (slide 8) should impact Bushmills in a positive way.

The trader profile for Bushmills is mainly maturing independent businesses – 50% are over 10 years old. This is slightly below a borough wide average of 59%.

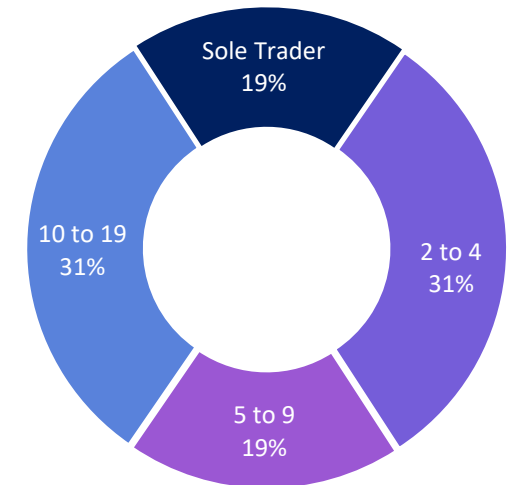
Business Age



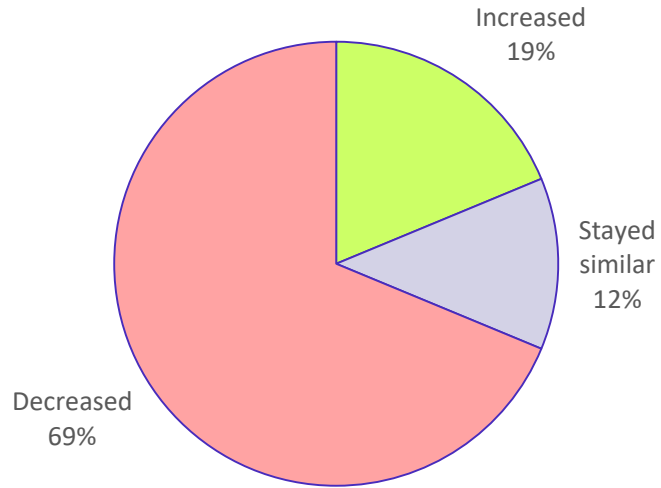
Business Ownership



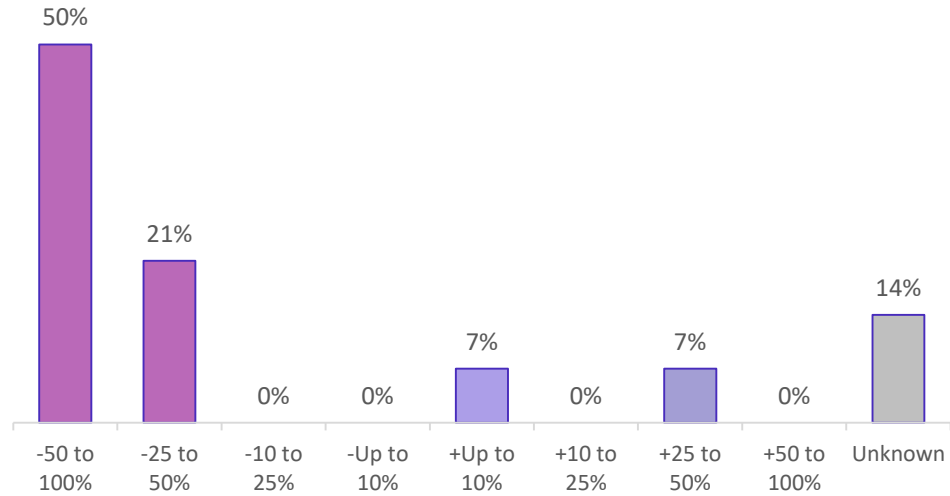
Current Staffing Levels



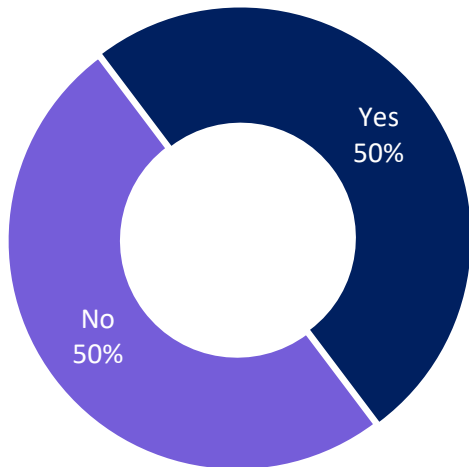
Impact on Turnover



Level of Impact



Were you forced to close operations at any point?

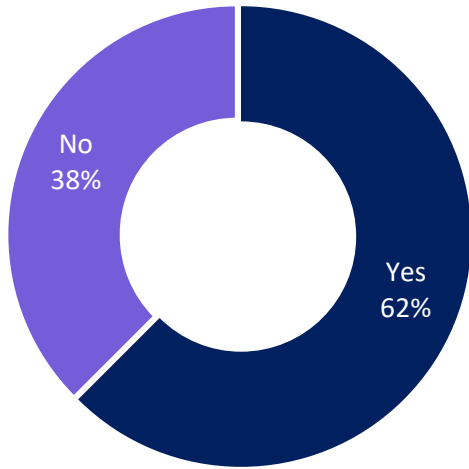


Did the business pivot to provide alternative services during the COVID lockdown ...	%
No	56%
Yes	44%
<i>Of those who said yes ...</i>	
Online selling & delivery	57%
Click & collect	71%
New services tailored to new circumstances	0%
New products tailored to new circumstances	0%

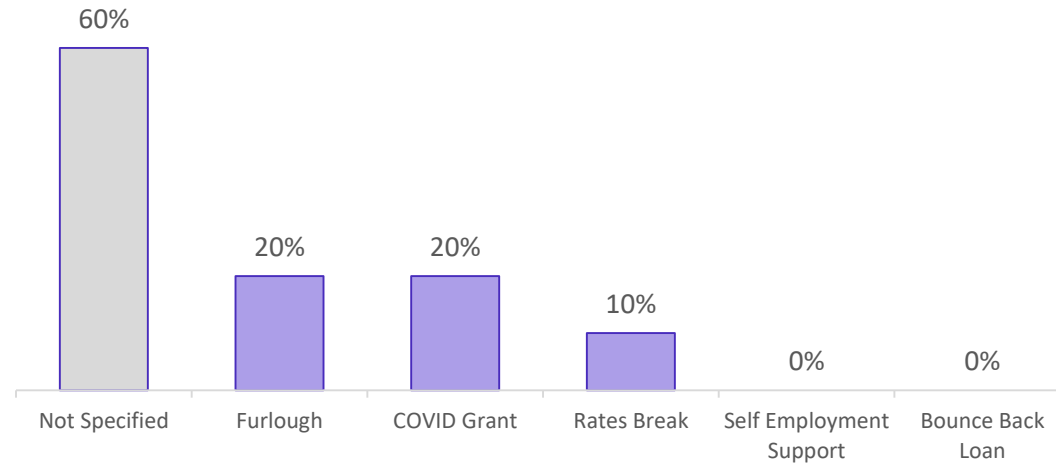
Bushmills has the second highest number of traders with decreased turnover with half of businesses having to close at some stage.

The majority of businesses having decreased turnover were in the catering category while the businesses with increased turnover were in the grocery, health services, and pharmacy categories.

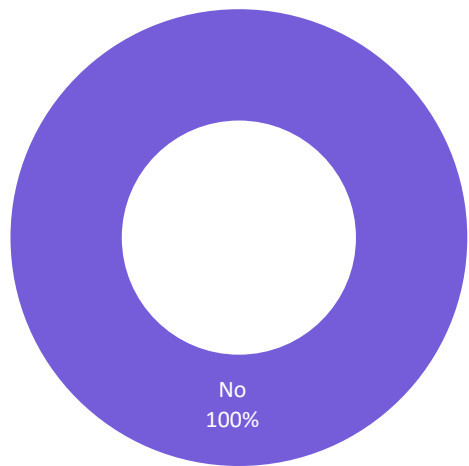
Did you avail of any Government support?



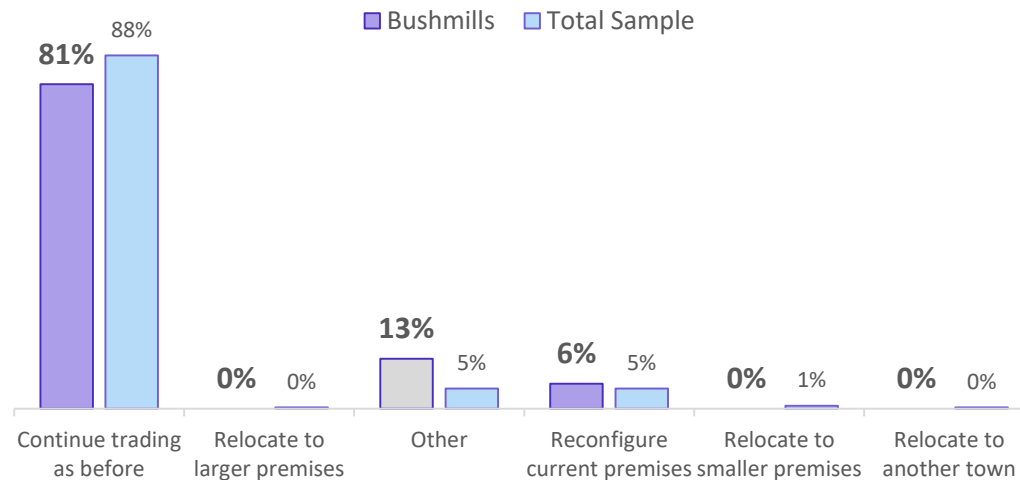
What kind of Government Support ...



Did you avail of any CC&G Business Support ...



Trading intentions going forward ...



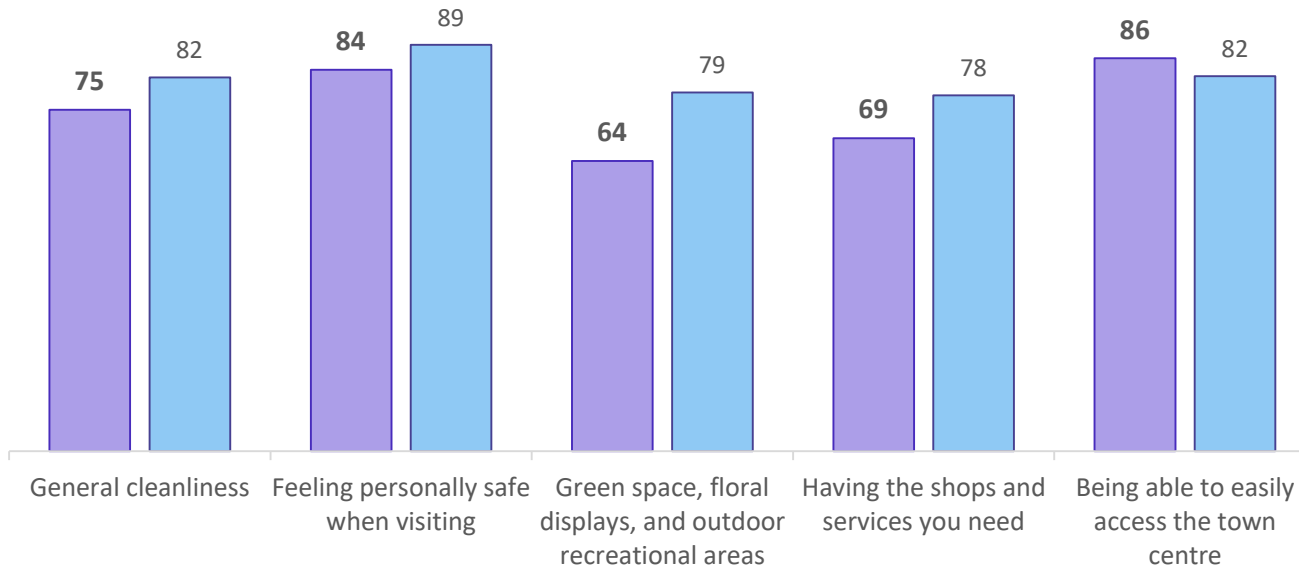
The majority of traders surveyed did use Government support but were not willing to specify what type of support.

As with other towns, no surveyed traders used council support. Going forward, most traders intend to continue as before, with one trader planning to reconfigure their current premises.

	Bushmills Traders				Score: +75					
	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%	13%	13%	6%	13%	44%	13%
Calculation	Total of 'Like' (75) – Total of Dislike (0) = Bushmills Traders Score = +75									

Average Rating Bushmills Town Centre (out of 100)

■ Bushmills ■ All Towns



- Bushmills has a Sentiment Score higher than the average of +64 which contrasts slightly with the town centre ratings where they are below average on 4 of the 5 categories.
- When looking at the individual sentiment scores, 25% are categorised as 'Passive' meaning they have no strong opinion about Bushmills. All other traders feel positively about the town.
- Some feedback that stands out:

"Would like more investment for Bushmills, we're the gateway for the Giants Causeway."

"The shops that are closed need to reopen to bring back life into the town"

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 Bushmills a sample size of 51 was achieved which provides us with a margin of error of +/- 13.7% @ 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 – 13.7% 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

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 is +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 Bushmills Visitors

No.	ACORN Group	Bushmills	Total Sample	Sub-Category		Bushmills	Total Sample
1	Affluent Achievers	18%	7%	A	Lavish Lifestyles	0%	0%
				B	Executive Wealth	9.1%	4.1%
				C	Mature Money	9.1%	2.9%
2	Rising Prosperity	0%	1%	D	City Sophisticates	0%	0%
				E	Career Climbers	0.0%	0.8%
3	Comfortable Communities	55%	52%	F	Countryside Communities	52.3%	45.6%
				G	Successful Suburbs	2.3%	2.3%
				H	Steady Neighbourhoods	0%	1.6%
				I	Comfortable Seniors	0%	1.4%
				J	Starting Out	0%	1.1%
4	Financially Stretched	23%	28%	K	Student Life	0%	0.4%
				L	Modest Means	6.8%	8.4%
				M	Striving Families	6.8%	12.1%
				N	Poorer Pensioners	9.1%	7.7%
5	Urban Adversity	5%	12%	O	Young Hardship	0%	7.1%
				P	Struggling Estates	2.3%	3.0%
				Q	Difficult Circumstances	2.3%	1.5%

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