

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Coleraine

June 2021



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.

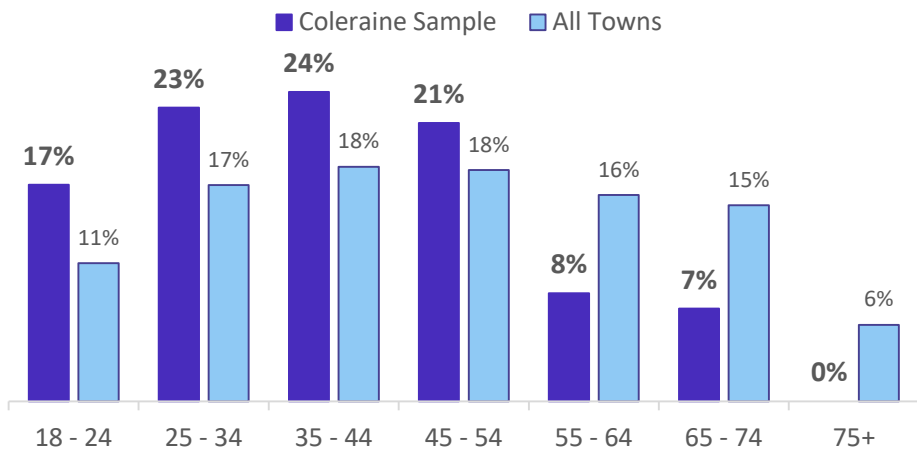
The following report is a sub-report seeking to provide a summarised snapshot of our results, emanating from the Causeway Coast & Glens visitor & traders sampling, at a **local** level. This particular sub-report provides the snapshot for sampling that took place in **Coleraine**;

- The visitor results are based on an overall sample of **84** respondents;
- The trader's results are based on a sample of **39** traders within the town centre.

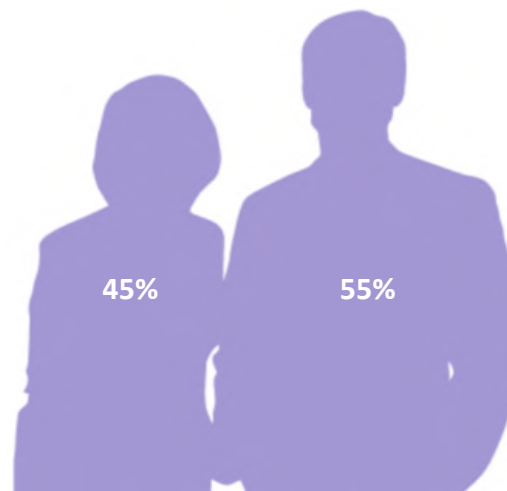
Sampling for visitors and traders in Coleraine took place between 24th March and 7th April 2021. It is important to note that during this period, there were a range of continuing restrictions in place owing to the ongoing Coronavirus pandemic. The specific restrictions at the time are outlined in Appendix 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

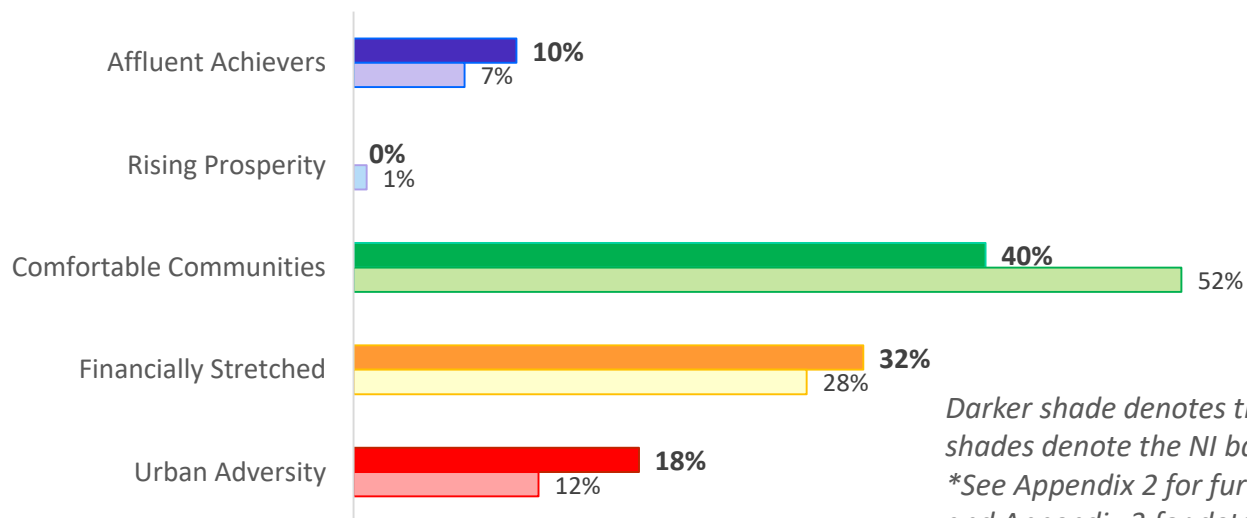


Respondent Gender Split



Our Coleraine sample appears overall to be younger than our overall sample, while also being slightly more weighted towards male visitors compared to 47% for the overall sample.

Coleraine ACORN Profile* vs Overall Sample



Darker shade denotes the CCG respondent profile while lighter shades denote the NI baseline.

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

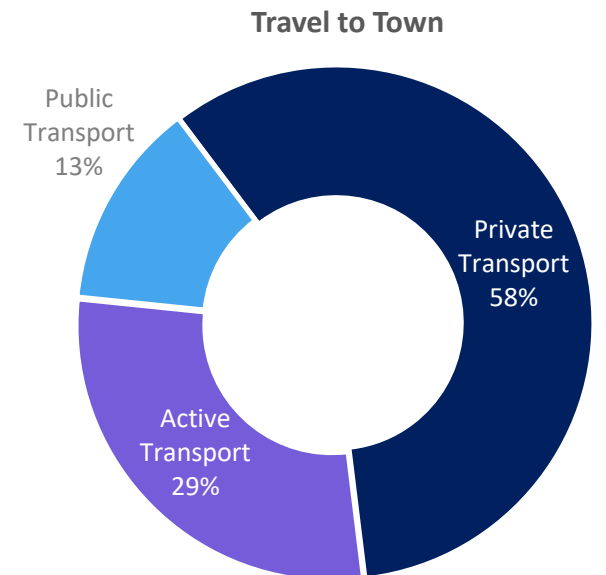
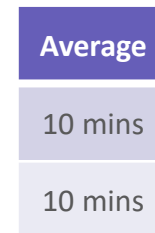
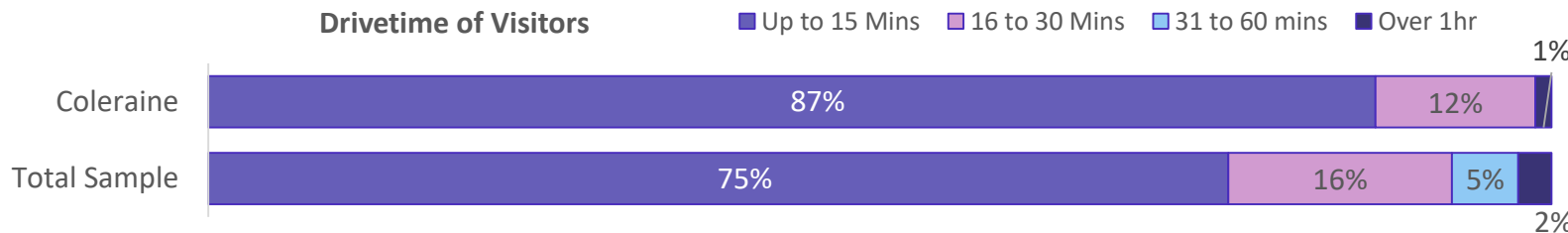
The visitor population also appeared to tend more towards the 2 least affluent ACORN categories, with a significantly reduced influence of the rural 'Countryside Communities' subtype.

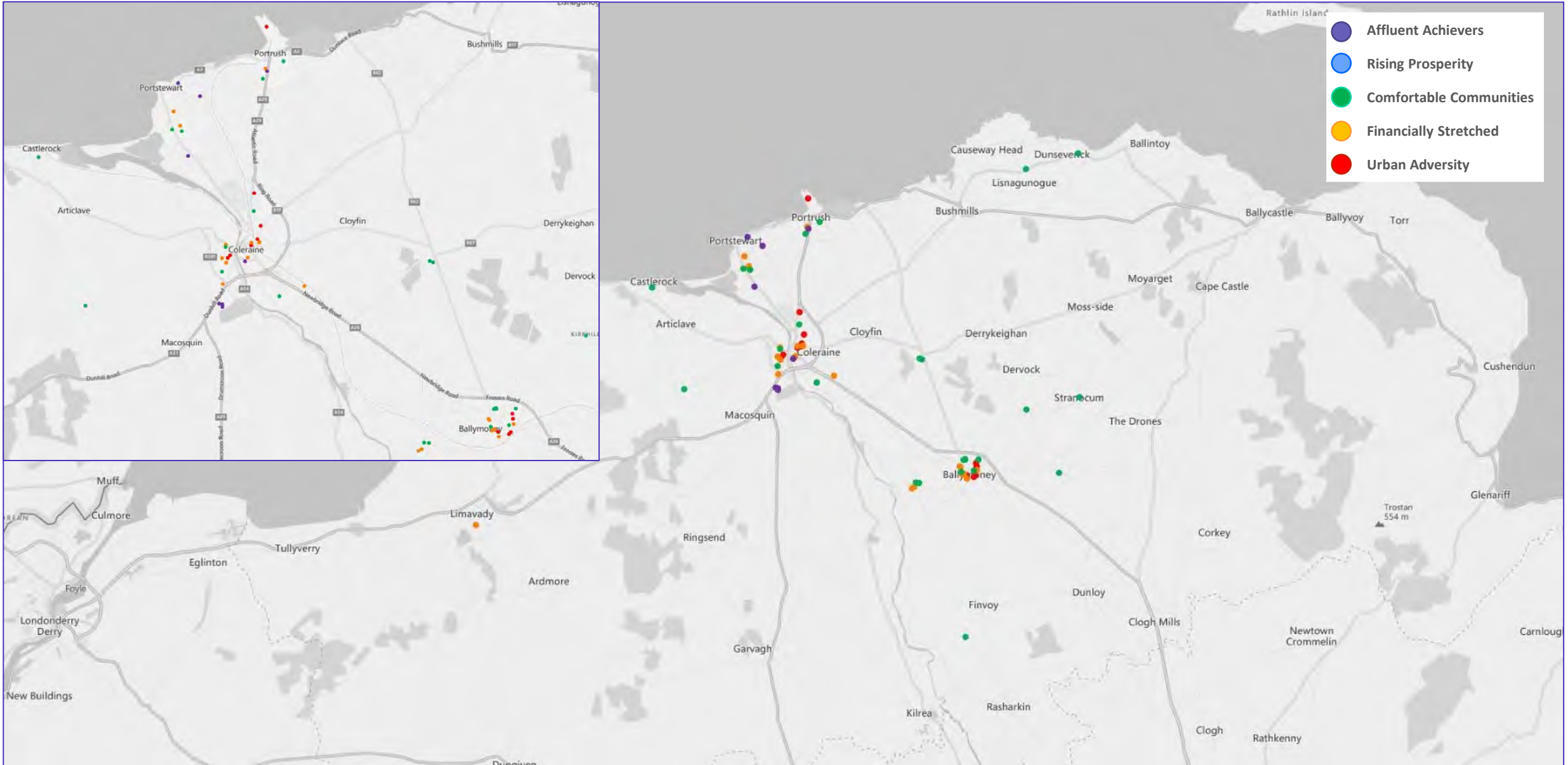


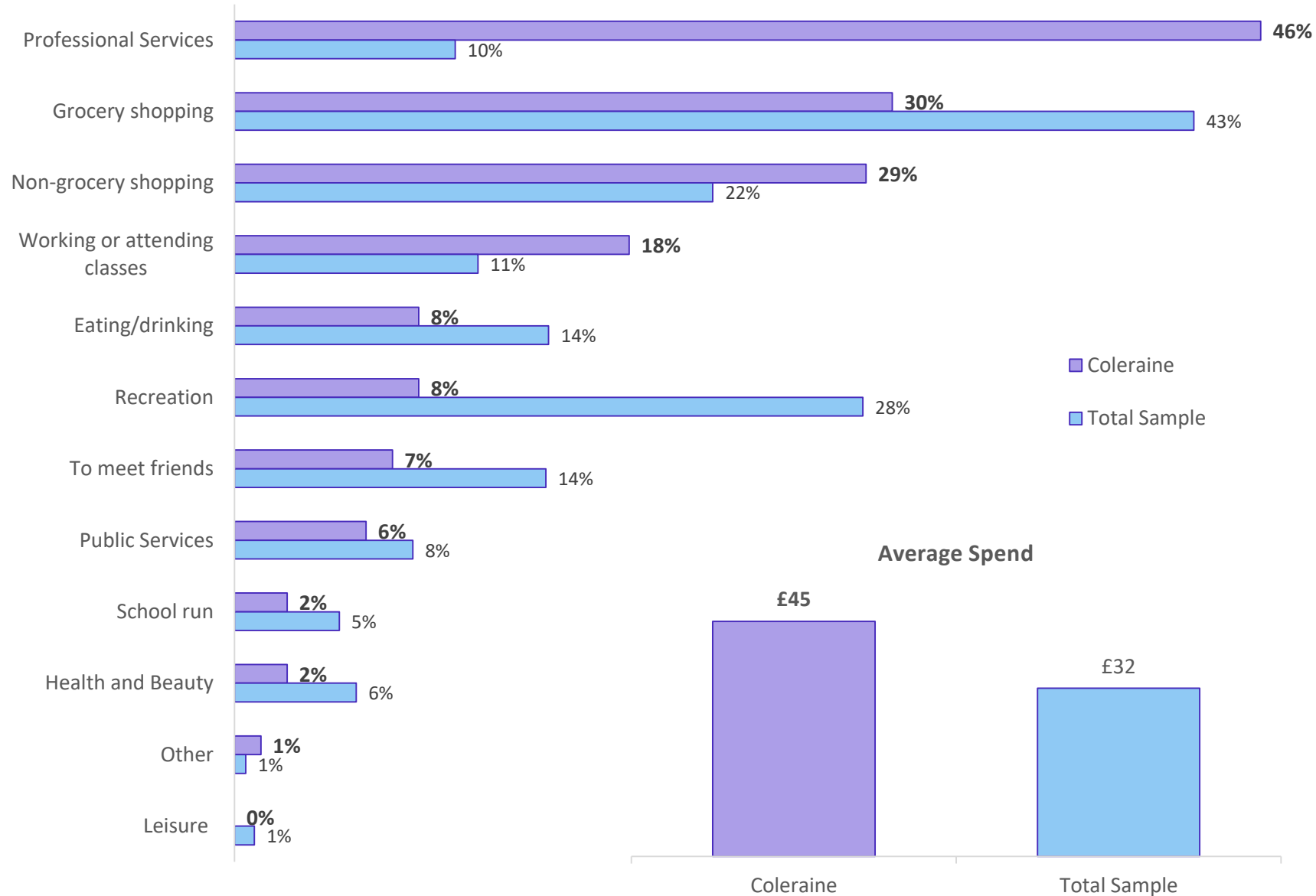
The primary source of visitors, outside of Coleraine itself, appears to be Ballymoney.

Compared to our general sample Coleraine visitors come from a tighter catchment with 87% coming from within a 15 mins drive.

Coleraine visitors also seem much more inclined to use Public Transport to access the town centre.







Location	Average Dwell Time	Average Spend per Minute
Coleraine	121 mins	£0.37
Total Sample	109 mins	£0.29

There are some notable differences in the reasons for visiting compared to our general sample.

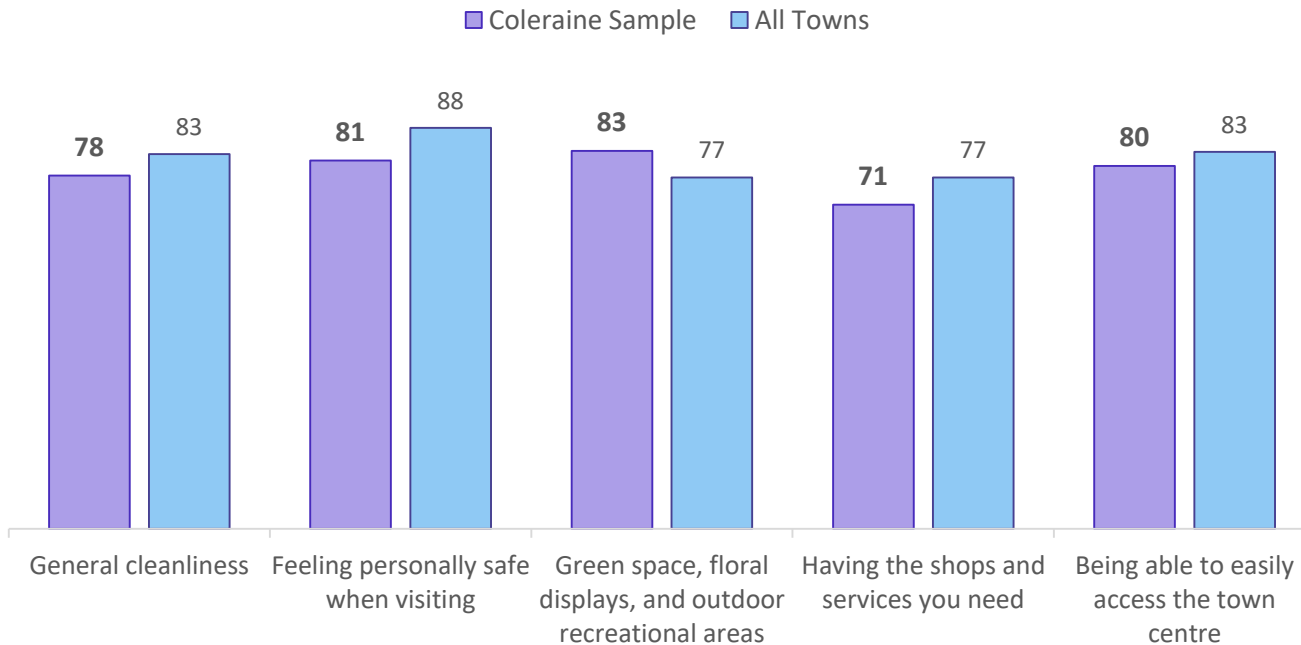
Accessing professional services, e.g. banks, mortgage brokers etc. appears to be the primary use for Coleraine among our sample.

Visits to Coleraine appear to revolve much more around tending to personal business, as opposed to any use for leisure or recreation.

Despite this, it does have a higher average spend – likely in part due to the higher rate of non-grocery shopping, and longer dwell times.

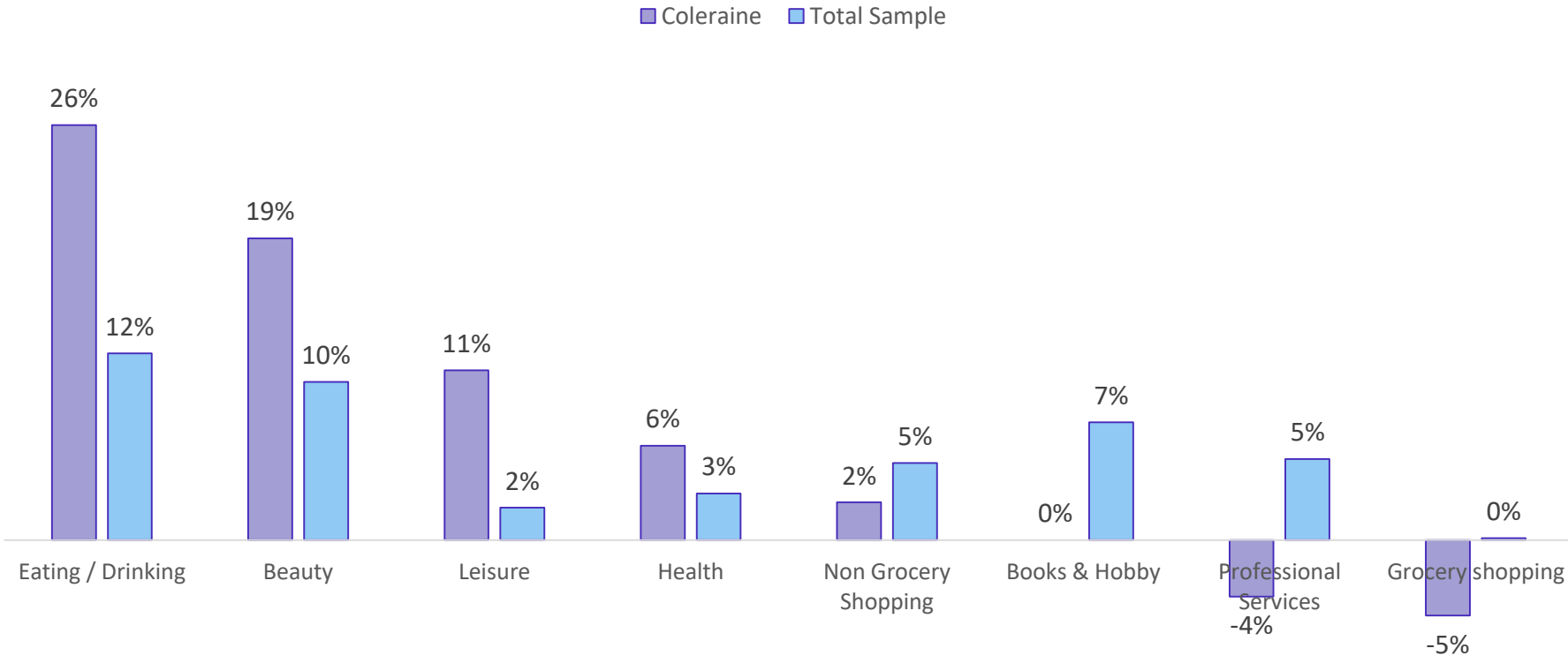
Coleraine Visitors					Score: +70					
	Dislike				Passive		Like			
Description	Hate	Dislike	Avoid	Not ok	Not for me	Ok	Like	Enjoy	One of my favourites	My favourite town
Score	1	2	3	4	5	6	7	8	9	10
Sample	0%	0%	0%	6%	6%	12%	18%	40%	14%	4%
Calculation	Total of 'Like' (76) – Total of Dislike (6) = +70									

Average Rating Coleraine Town Centre (out of 100)



- Above is the combined Sentiment Score for Coleraine. The rationale for Sentiment Scoring is outlined in Appendix 2.
- Visitor views of Coleraine appears to be on par with the average sentiment displayed by our overall sample. A sentiment score of 70 is almost in line with the borough wide average of 71;
- Average scores attributed to each town centre aspect tend to follow the general average also, albeit slightly behind in all but one;
- The one aspect where Coleraine eclipsed the average sentiment is in green space and recreational areas. This is slightly at odds with the lower rate of use of Coleraine, displayed previously, for leisure and recreational purposes.

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



Coleraine TC Use	Eating / Drinking	Beauty	Leisure	Health	Non Grocery Shopping	Books & Hobby	Professional Services	Grocery shopping
Before COVID	59.5%	56.0%	21.4%	53.6%	53.6%	39.3%	23.8%	71.4%
After COVID	85.7%	75.0%	32.1%	59.5%	56.0%	39.3%	20.2%	66.7%
Difference	+26.2%	+19.0%	+10.7%	+6.0%	+2.4%	0.0%	-3.6%	-4.8%

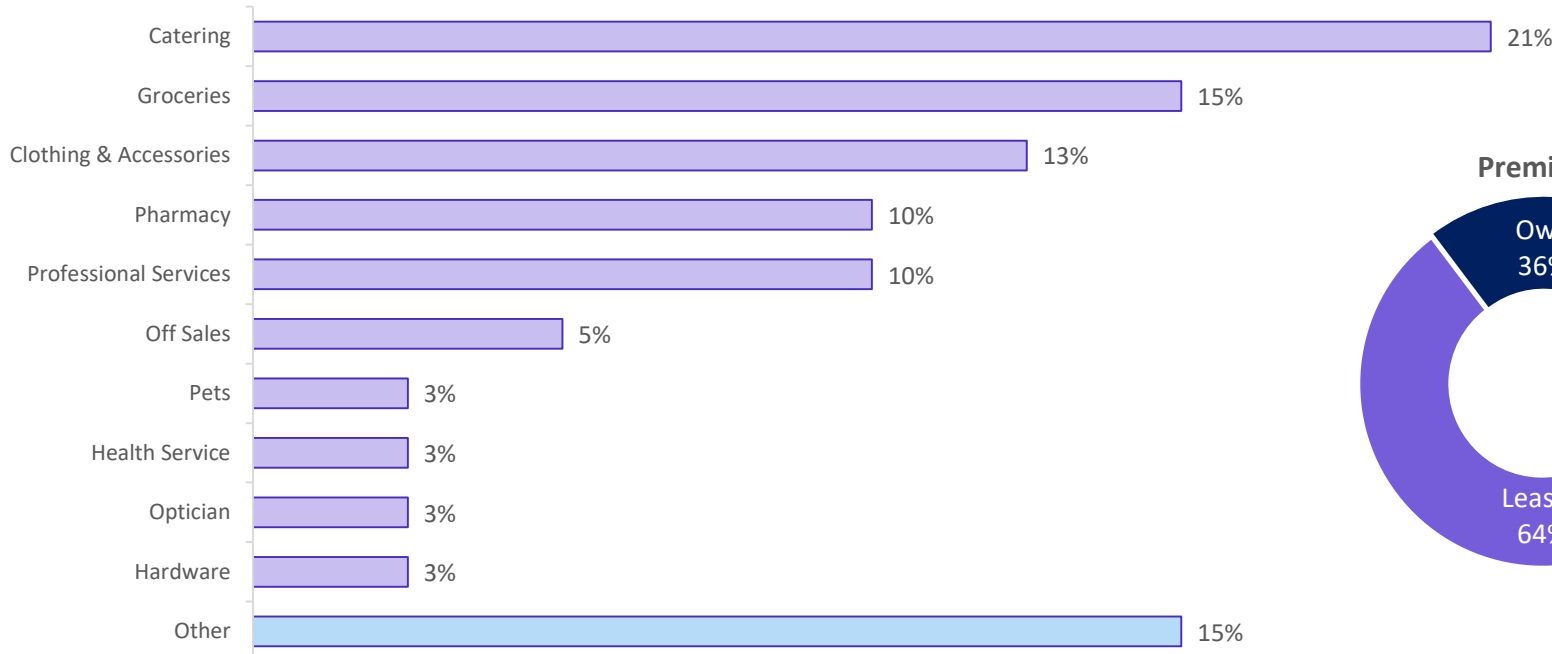
It would appear that the trends displayed on Page 6 could show significant alteration as the lockdown restrictions lift. Coleraine appears in line to see significant boost to its catering economy, while its two most utilised functions currently appear to show a decrease.

Issues of parking, as well as issues in the evening economy and catering offer, may restrict this as they have been identified as barriers to visits.

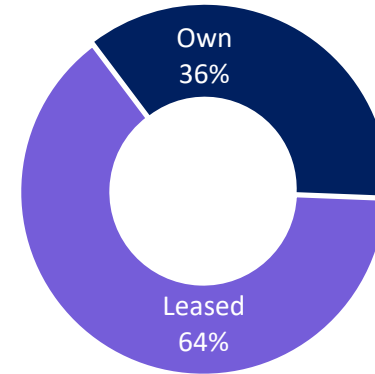
What prevents you from visiting the town centre more?	Coleraine	Total Sample
Parking	68%	15%
Unappealing retailers	34%	13%
Congestion and traffic	22%	19%
Habit	18%	8%
Evening economy options	18%	7%
Cafes and restaurant offer	14%	7%
Safety	6%	3%
Visually unappealing area	4%	7%
None of these	9%	52%

Traders

Business Sector



Premises

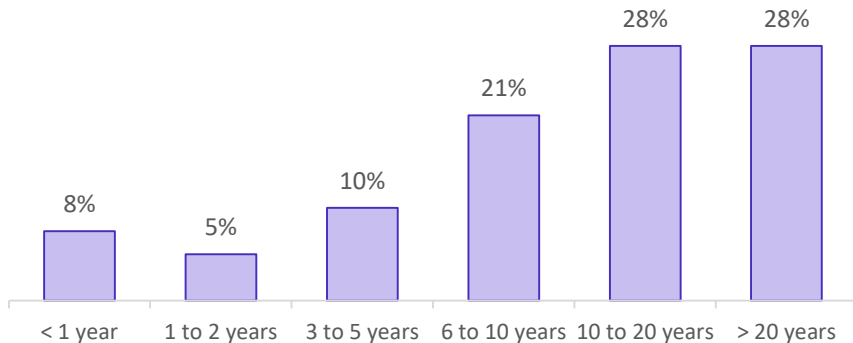


The profile of our Coleraine sample appears to be slightly younger than our overall Trader sample with 13% having operated for less than 2 years.

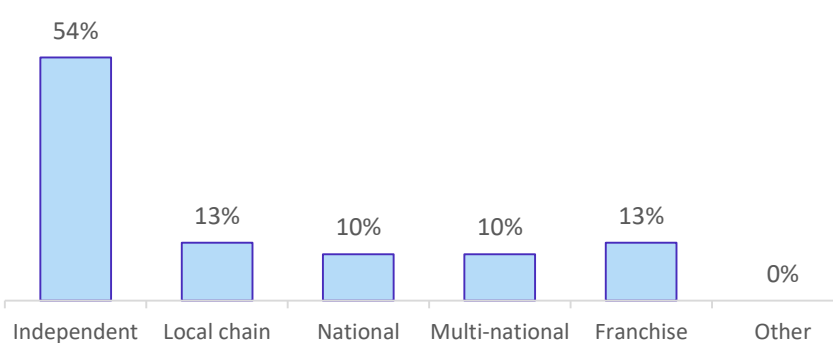
However the town shows a much lower proportion of 'independents' (54%) compared to 70% for our overall sample.

74% of traders operate with under 10 staff, just slightly higher than our borough wide average of 70%.

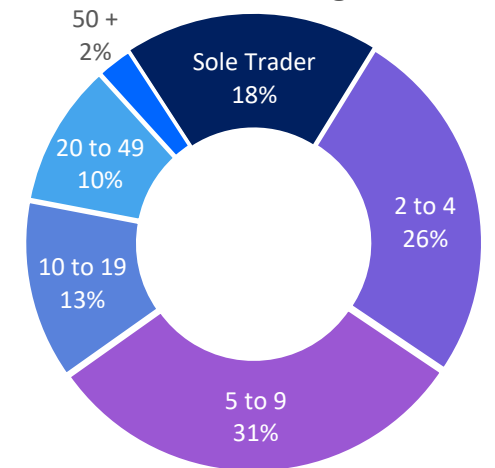
Business Age



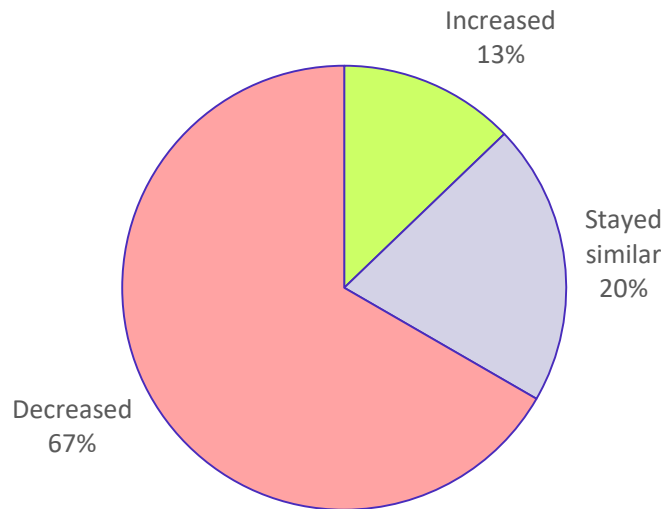
Business Ownership



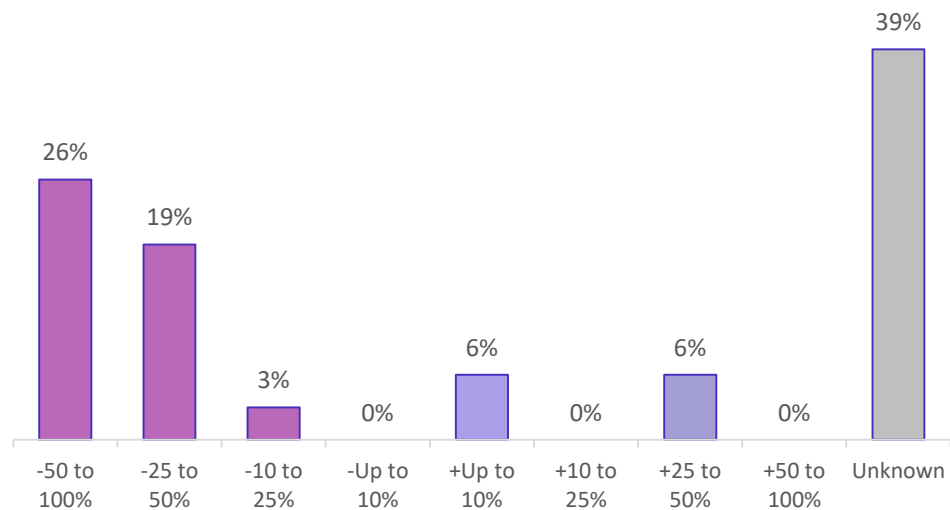
Current Staffing Levels



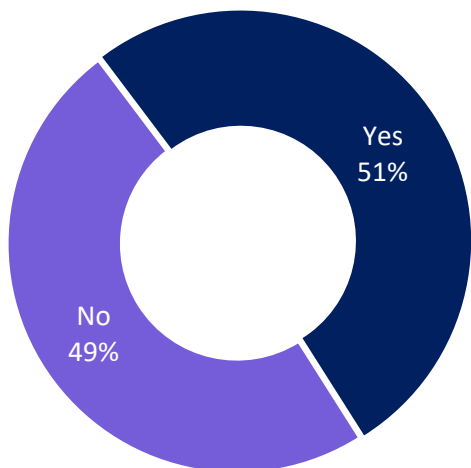
Impact on Turnover



Level of Impact



Were you forced to close operations at any point?



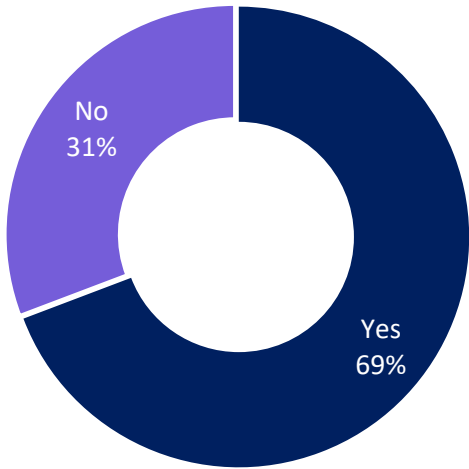
Did the business pivot to provide alternative services during the COVID lockdown ...	%
No	67%
Yes	33%
<i>Of those who said yes ...</i>	
Online selling & delivery	54%
Click & collect	46%
New services tailored to new circumstances	46%
New products tailored to new circumstances	31%

The COVID-19 crisis also appears to have hit the town harder compared to the borough wide sample, with around two thirds (67%) reporting a loss of revenue as a result.

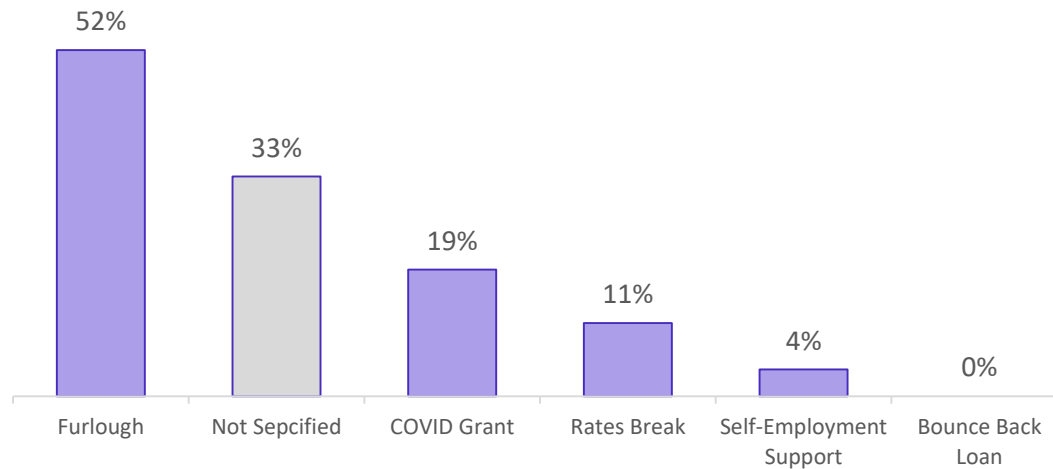
However fewer found themselves in the position of having to close over lockdown, presumably due to the higher concentration of 'essential' services in the town.

Likewise fewer felt compelled to branch out into different products/services as a result of lockdown, 33% compared to 44% for the overall sample.

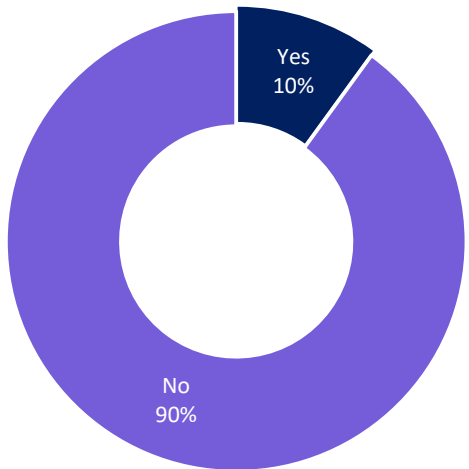
Did you avail of any Government support?



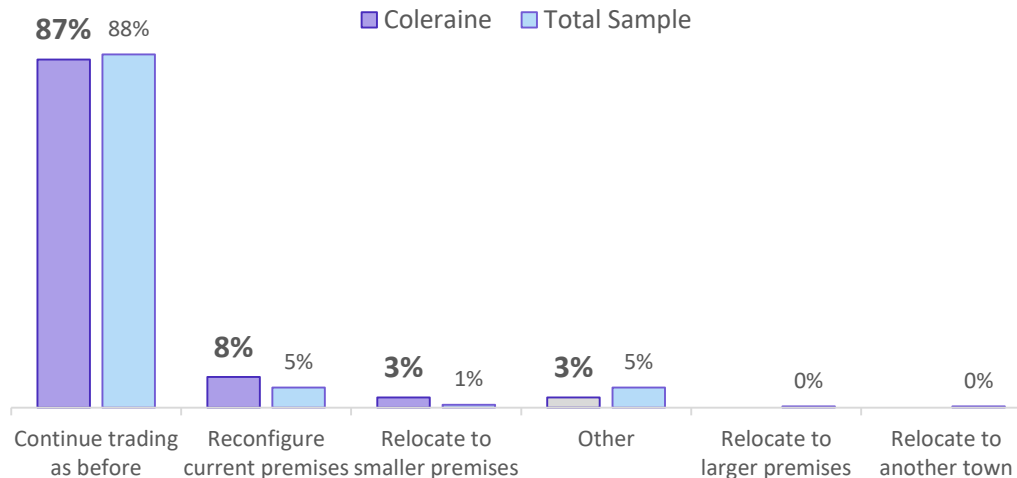
What kind of Government Support ...



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



Trading intentions going forward ...



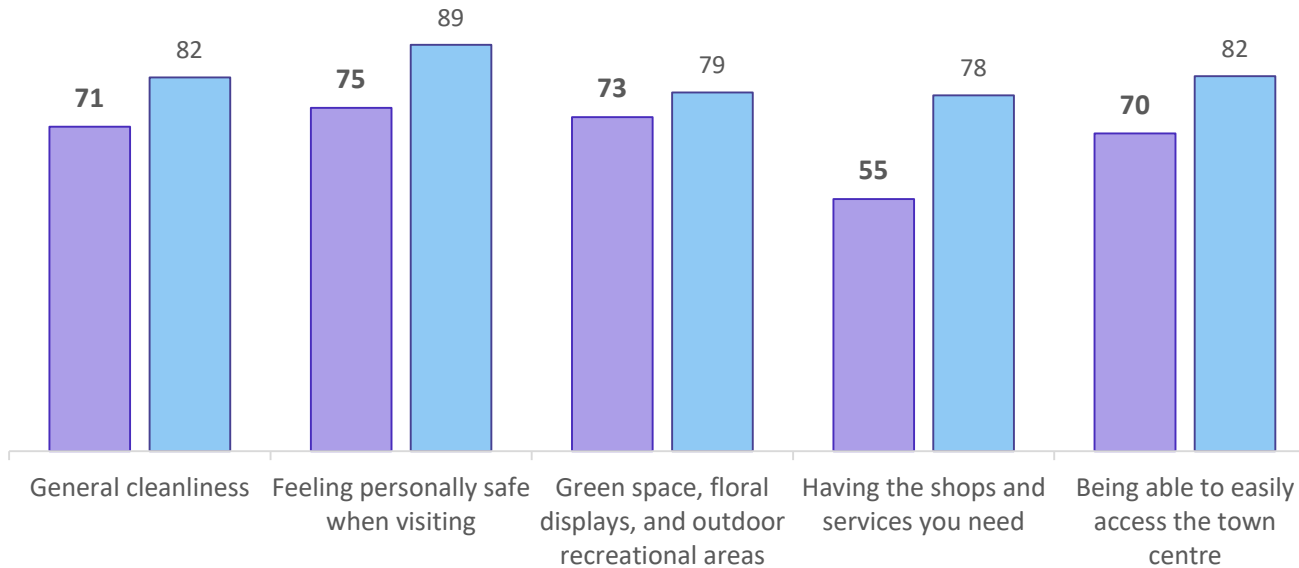
In line with greater reported loss of revenue, businesses in Coleraine relied more on government (69%) and council (10%) to make it through the period compared to the overall average, 65% & 5% respectively.

Furlough in particular, as a support mechanism, was used to a much greater degree compared to the average of 36%.

	Coleraine Traders				Score: +6					
	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%	3%	27%	3%	17%	10%	13%	23%	0%	3%
Calculation	Total of 'Like' (39) – Total of Dislike (33) = Coleraine Traders Score = 6									

Average Rating Coleraine Town Centre (out of 100)

■ Coleraine ■ All Towns



- Traders in Coleraine appear significantly more pessimistic in their sentiment ratings for the town, than the visitor population;
- Traders appear particularly negative on the range of shops and services in the town.
- The feeling was that a better offer will attract a higher rate of visitors sufficient to benefit all the traders.

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 Coleraine a sample size of 84 was achieved which provides us with a margin of error of +/- 10.7% @ 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 – 10.7% 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.

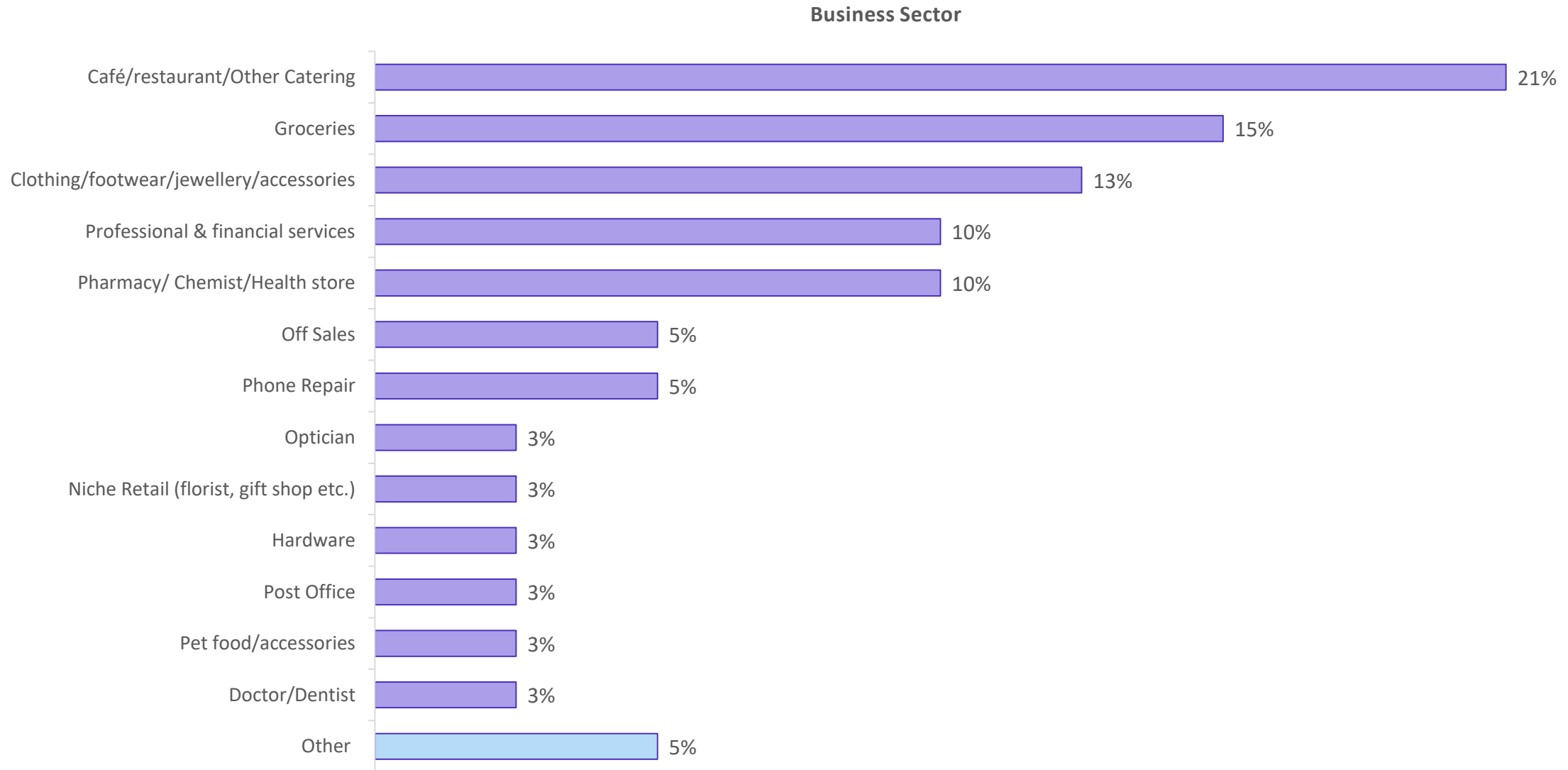
Score Range	Result	Rationale
-100 to -1	Very Poor	The town is actively disliked by its residents/traders. This should be the first targets for change
0 to 24	Poor	Overall the residents/traders have a low opinion of the town.
25 to 49	Neutral	a score between 25 and 50 indicates 25-50% more people like 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 Coleraine Visitors

No.	ACORN Group	Coleraine	Total Sample	Sub-Category		Coleraine	Total Sample
1	Affluent Achievers	10%	7%	A	Lavish Lifestyles	0%	0%
				B	Executive Wealth	5.1%	4.1%
				C	Mature Money	5.1%	2.9%
2	Rising Prosperity	0%	1%	D	City Sophisticates	0%	0%
				E	Career Climbers	0%	0.8%
3	Comfortable Communities	40%	52%	F	Countryside Communities	35.9%	45.6%
				G	Successful Suburbs	2.6%	2.3%
				H	Steady Neighbourhoods	0.0%	1.6%
				I	Comfortable Seniors	0.0%	1.4%
				J	Starting Out	1.3%	1.1%
4	Financially Stretched	32%	28%	K	Student Life	1.3%	0.4%
				L	Modest Means	12.8%	8.4%
				M	Striving Families	7.7%	12.1%
				N	Poorer Pensioners	10.3%	7.7%
5	Urban Adversity	18%	12%	O	Young Hardship	9.0%	7.1%
				P	Struggling Estates	6.4%	3.0%
				Q	Difficult Circumstances	2.6%	1.5%

Traders – Coleraine Business Sectors Expanded



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