Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Cushendall

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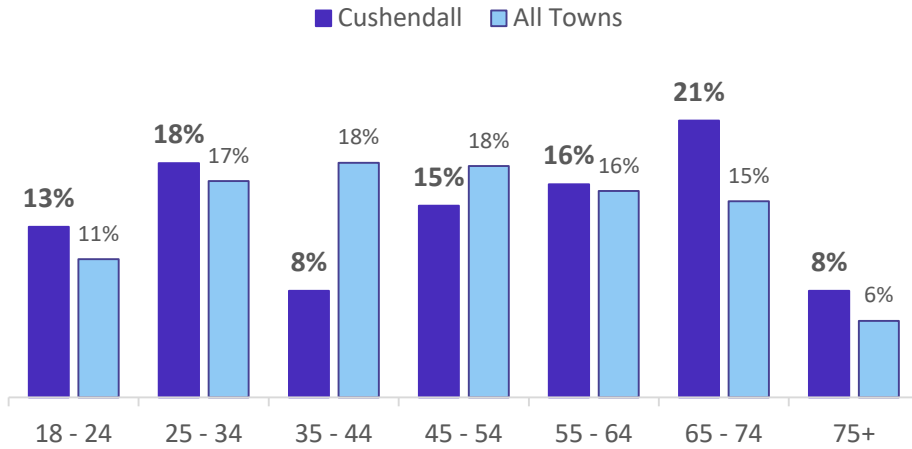
The following report is a sub-report seeking to provide a summarised snapshot of our results, emanating from the Causeway Coast & Glens visitor & traders sampling, at a **local** level. This particular sub-report provides the snapshot for sampling that took place in **Cushendall**;

- The visitor results are based on an overall sample of **61** respondents;

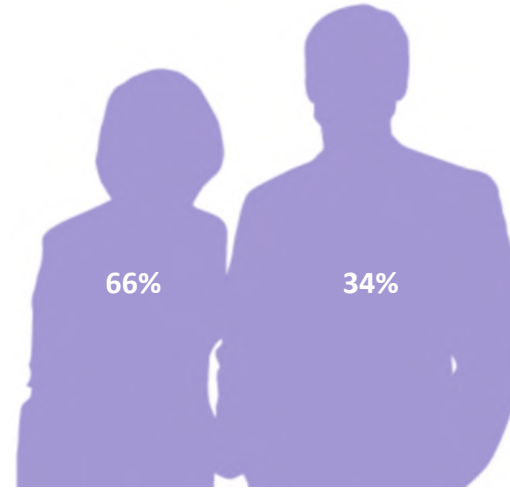- The trader's results are based on a sample of **14** traders within the town centre.

Sampling for visitors and traders in Cushendall took place between 24th March and 17th 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.

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Visitors

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Respondents by Age Group

Legend: ■ Cushendall ■ All Towns

Age Group	Cushendall	All Towns
18 - 24	13%	11%
25 - 34	18%	17%
35 - 44	8%	18%
45 - 54	15%	18%
55 - 64	16%	16%
65 - 74	21%	15%
75+	8%	6%

Respondent Gender Split

66%   34%

Cushendall ACORN Profile* vs Overall Sample

ACORN Category	Cushendall	Overall Sample
Affluent Achievers	3%	7%
Rising Prosperity	0%	1%
Comfortable Communities	81%	52%
Financially Stretched	14%	28%
Urban Adversity	2%	12%

Darker shade denotes the Cushendall respondent profile while lighter shades denote the CCGBC baseline.
See Appendix 2 for further information on ACORN classifications and Appendix 3 for detailed breakdown
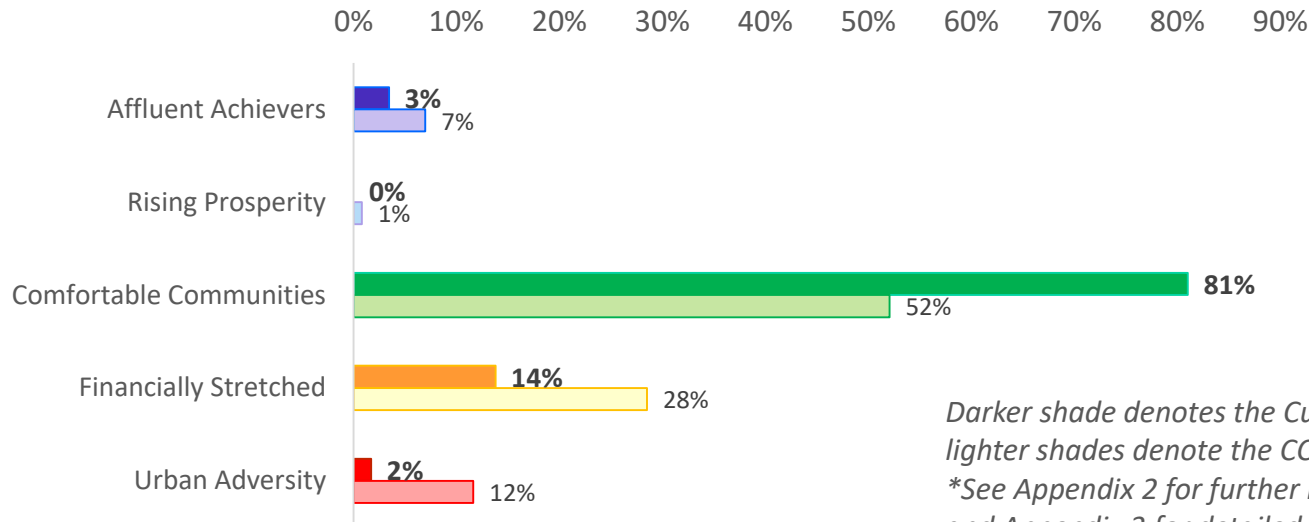
The age profile of our sample showed a tendency towards younger (<35) and older (65+) visitors. The core working age population (35 – 64) was conspicuously more absent at 39%, which is the second lowest in the borough and well below the borough wide average of 52%.
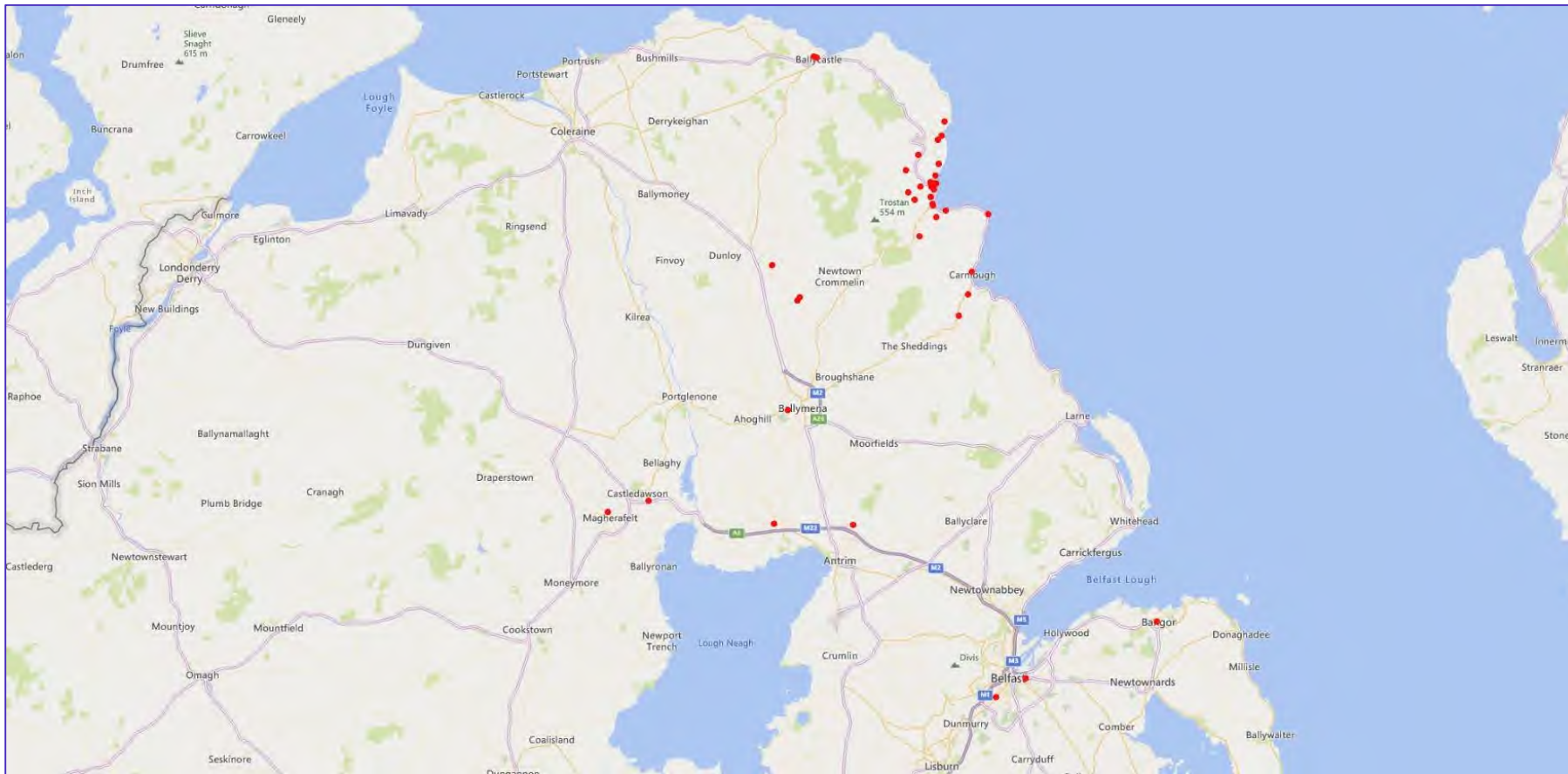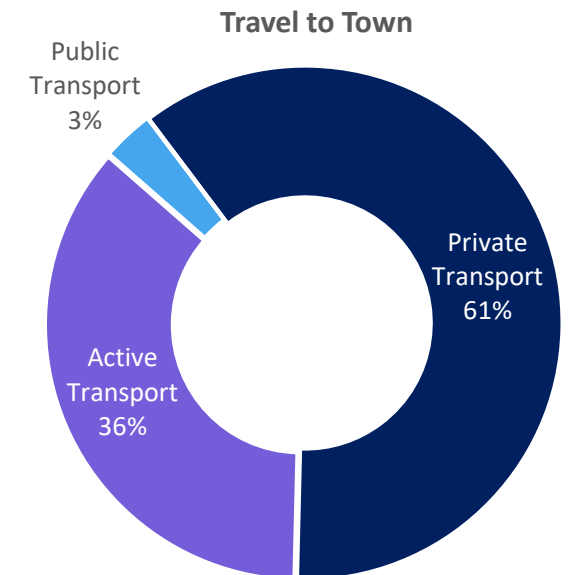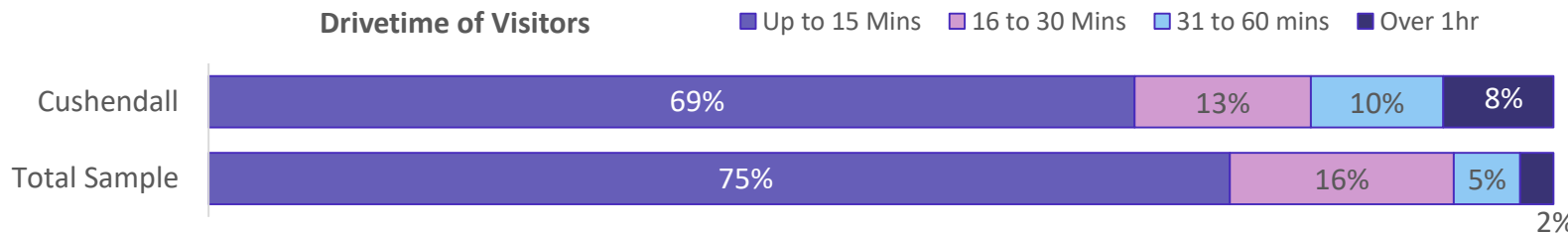
The town visitor profile is heavily dominated by those in the 'Countryside Communities' ACORN sub-category. This shouldn't be too surprising given the rural nature of the town and its wider catchment.
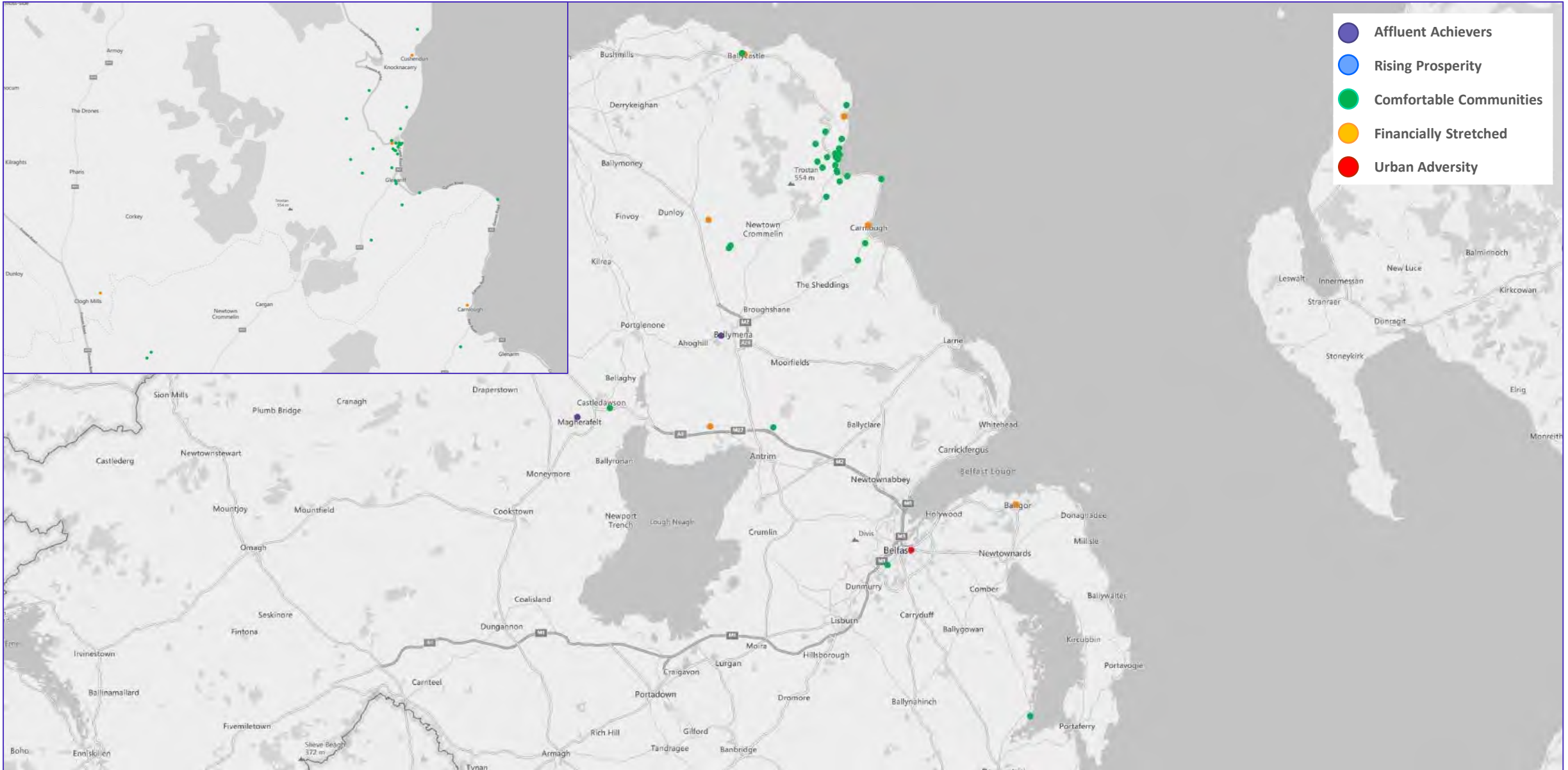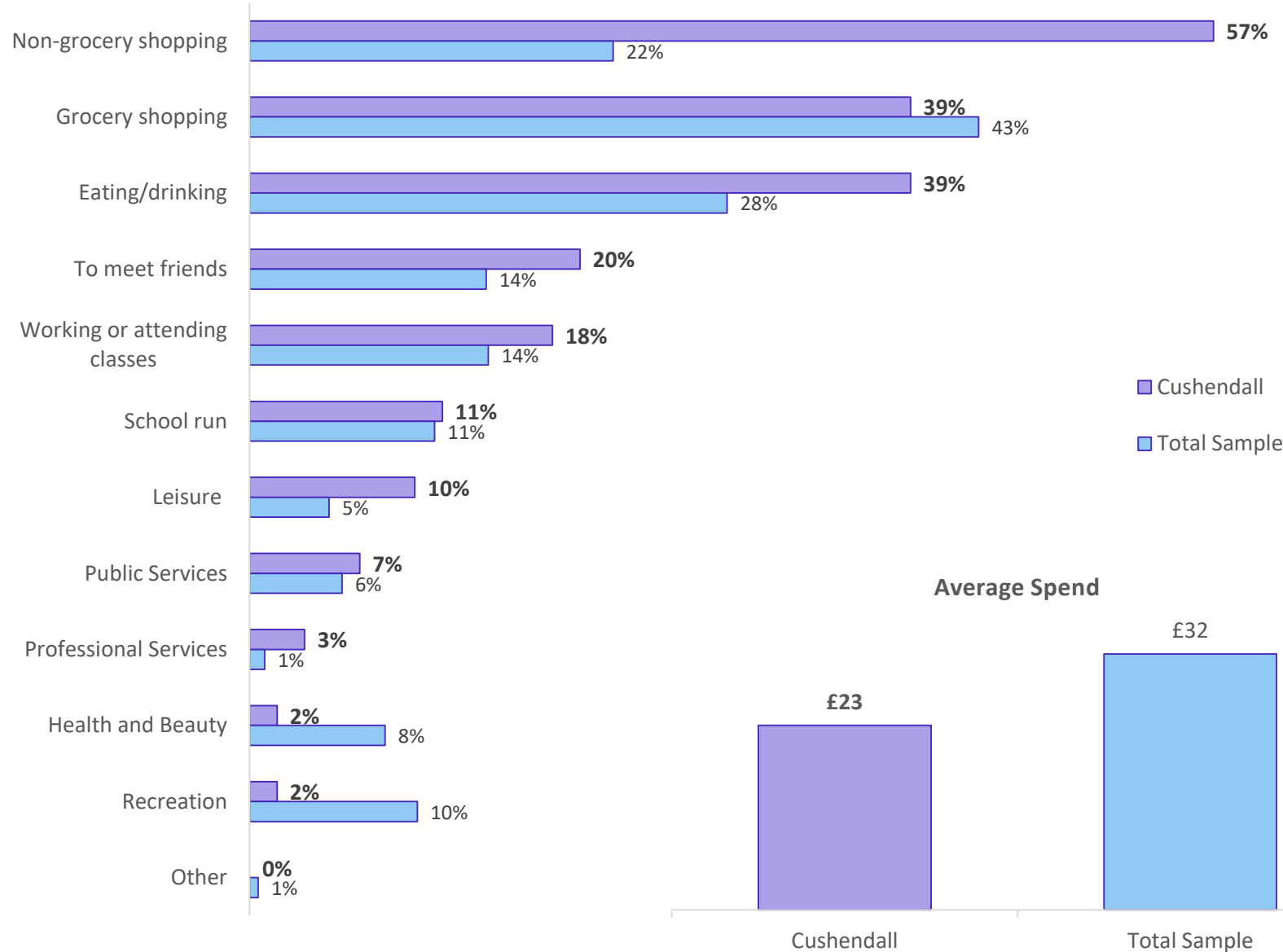
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Cushendall appears to have a higher geographical spread of visitors relative to most other towns in our study. Only Ballycastle has a lower % (52%) of visitors originating from within a 15 minute drive.

Despite the COVID restrictions in place it would appear the town was still hosting a large number of tourist / day tripper visitors.

There was a relatively high rate of people using 'active transport'. On closer inspection many of these were people with higher drivetimes. The assumption here is these are the aforementioned outside visitors staying within or close to the town.

Travel to Town

Public Transport 3%

Private Transport 61%

Active Transport 36%

Drivetime of Visitors	Up to 15 Mins	16 to 30 Mins	31 to 60 mins	Over 1hr	Average
Cushendall	69%	13%	10%	8%	16 mins
Total Sample	75%	16%	5%	2%	10 mins

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Chart: Why are people going to the town centres? (Cushendall vs Total Sample)

Reason	Cushendall	Total Sample
Non-grocery shopping	57%	22%
Grocery shopping	39%	43%
Eating/drinking	39%	28%
To meet friends	20%	14%
Working or attending classes	18%	14%
School run	11%	11%
Leisure	10%	5%
Public Services	7%	6%
Professional Services	3%	1%
Health and Beauty	2%	8%
Recreation	2%	10%
Other	0%	1%

Location	Average Dwell Time	Average Spend per Minute
Cushendall	172 mins	£0.13
Total Sample	109 mins	£0.29

Visitors to Cushendall display the highest average dwell time of all 12 towns sampled.

There are some interesting contrasts in interactions between the different visitors.

Those from within 15 mins typically have the lowest average dwell (2.6 hours) but highest average spend (£26).

Those from 15 – 45 mins away have a very low average spend of £5.

For those from over 45 mins away, average spend increases again to £22, as does dwell to around 3.1 hours. We would attribute these figures to the visit/spend habits of tourist visitors to the town.

Average Spend

Cushendall	Total Sample
£23	£32

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	Cushendall Visitors									Score: +79
	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%	2%	2%	0%	11%	16%	57%	7%	3%
Calculation	Total of 'Like' (**84**) – Total of Dislike (**5**) = **+79**									

Average Rating Cushendall Town Centre *(out of 100)*
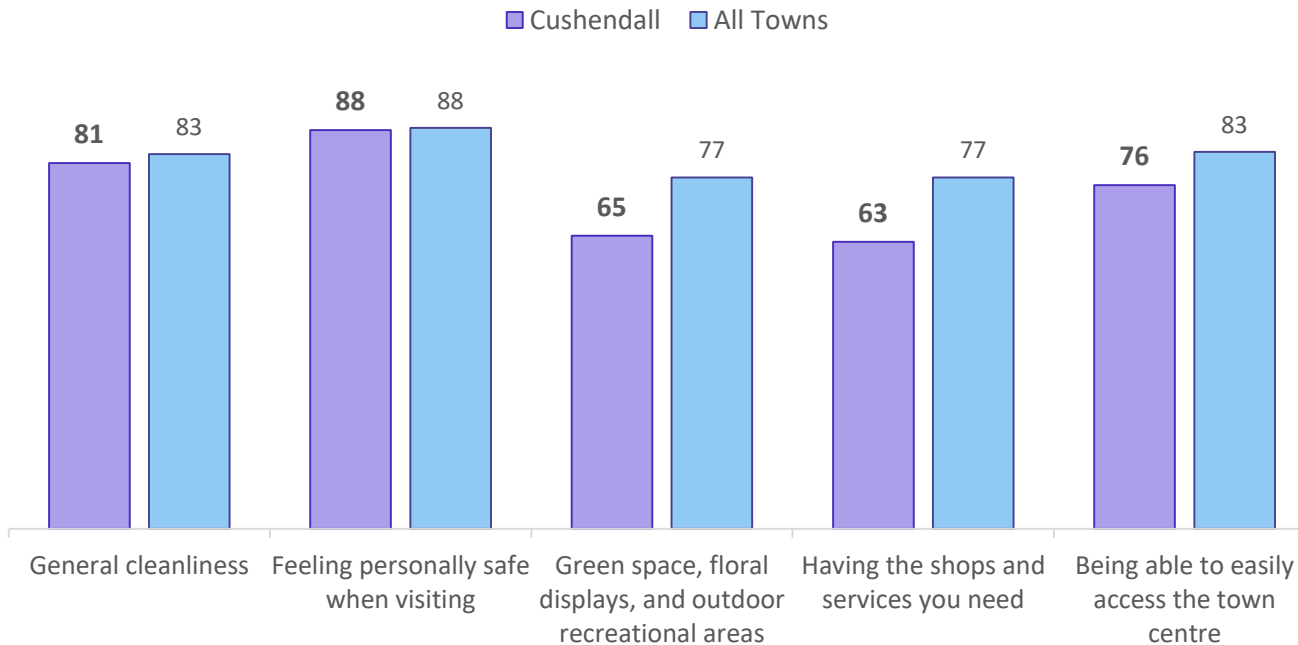
- Above is the combined Sentiment Score for Cushendall. The rationale for Sentiment Scoring is outlined in Appendix 2;

- Visitors views of Cushendall appear to be higher relative to the average sentiment displayed by our overall sample, an average of +71;

- Despite this, in all but one instance average town centre ratings fall below that of the borough average, in two areas especially.

- Given the smaller size of the town, the perceived lack of shops / services is understandable. The lack of greenspace and recreational areas is perhaps a little more surprising.

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

■ Cushendall ■ Total Sample
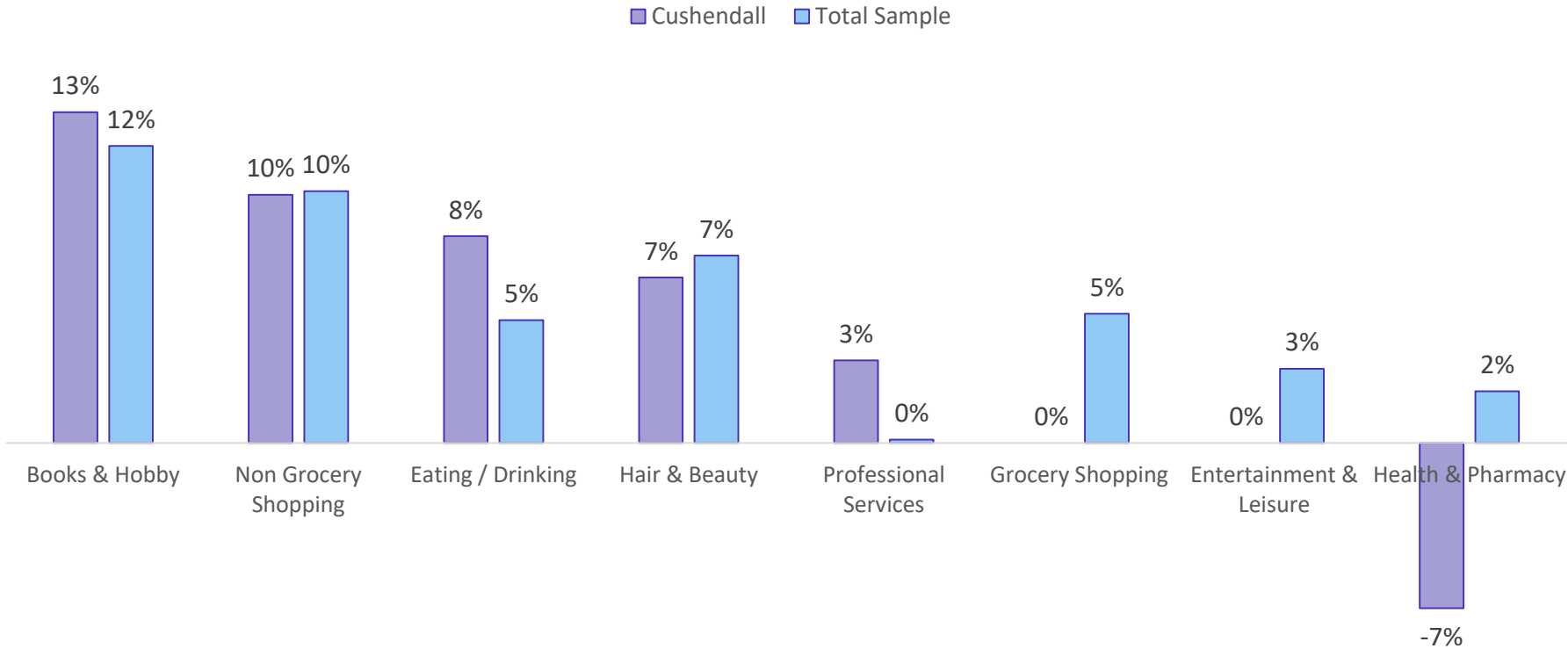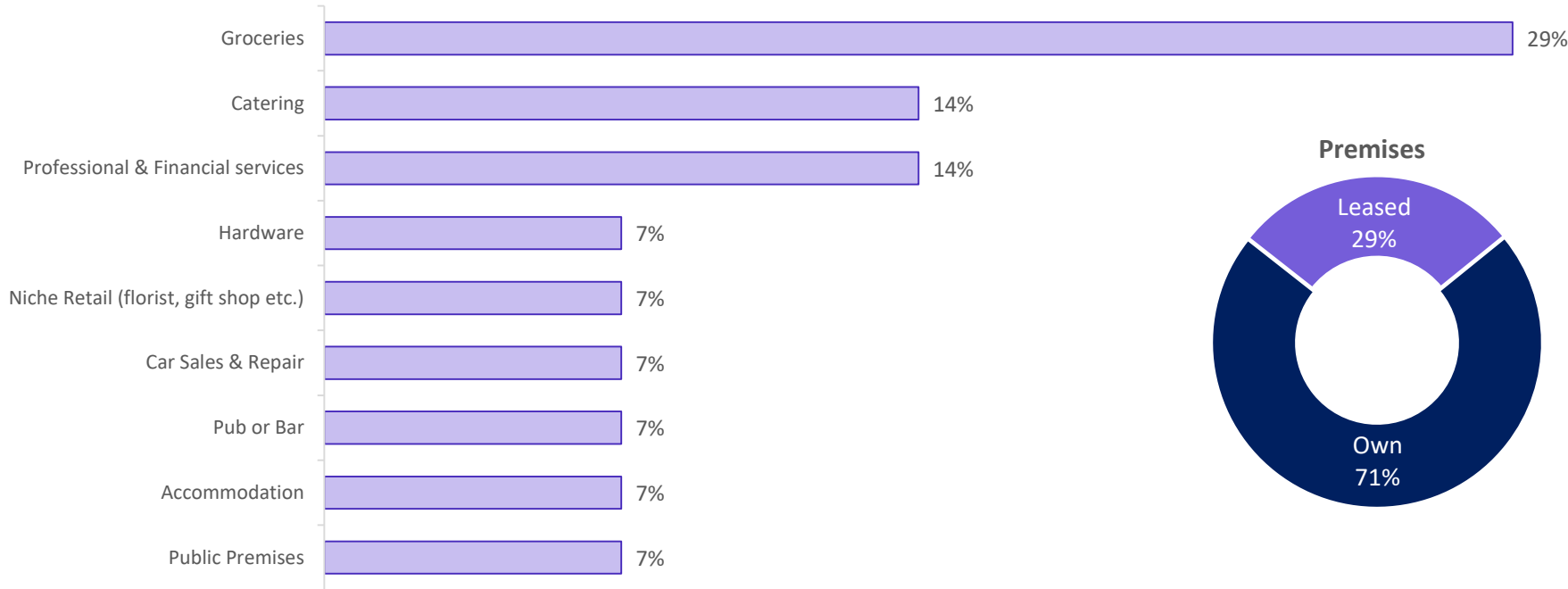

Visitors note very few barriers to visiting Cushendall town centre.

Activities that will likely see a boost post-Covid are generally in line with what has been noted across the borough.
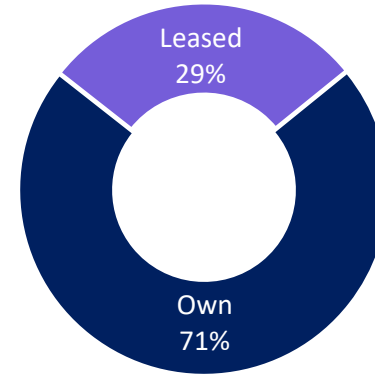
Cushendall TC Use	Books & Hobby	Non Grocery Shopping	Eating / Drinking	Hair & Beauty	Professional Services	Grocery Shopping	Entertainment & Leisure	Health & Pharmacy
Before COVID	36.1%	57.4%	73.8%	42.6%	3.3%	60.7%	6.6%	59.0%
After COVID	49.2%	67.2%	82.0%	49.2%	6.6%	60.7%	6.6%	52.5%
Difference	**+13.1%**	**+9.8%**	**+8.2%**	**+6.6%**	**+3.3%**	**0.0%**	**0.0%**	**-6.6%**

What prevents you from visiting the town centre more?	Cushendall	Total Sample
Congestion & Traffic	16%	19%
Parking	5%	15%
Habit	0%	8%
Unappealing Retailers	3%	13%
Evening Economy Options	3%	7%
Visually Unappealing Area	0%	7%
Cafes & Restaurant Offer	0%	7%
Safety	2%	3%
None of these	**72%**	**52%**

Traders

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Business Sector

- Groceries — 29%
- Catering — 14%
- Professional & Financial services — 14%
- Hardware — 7%
- Niche Retail (florist, gift shop etc.) — 7%
- Car Sales & Repair — 7%
- Pub or Bar — 7%
- Accommodation — 7%
- Public Premises — 7%

Premises

Leased 29%
Own 71%

Business Age

- < 1 year — 0%
- 1 to 2 years — 0%
- 3 to 5 years — 21%
- 6 to 10 years — 14%
- 10 to 20 years — 7%
- > 20 years — 57%

Business Ownership

- Independent — 86%
- Local chain — 0%
- National — 0%
- Multi-national — 7%
- Franchise — 0%
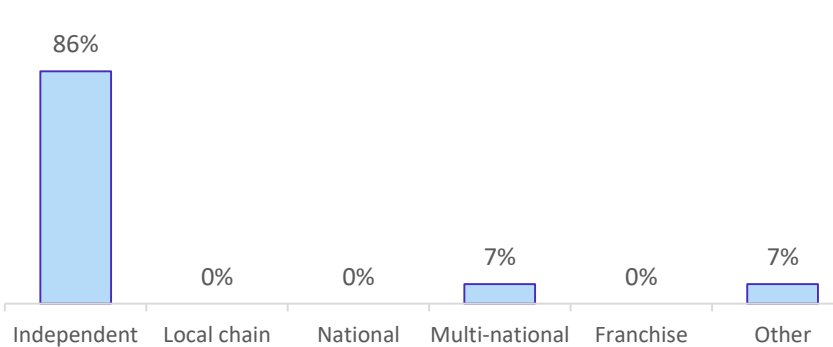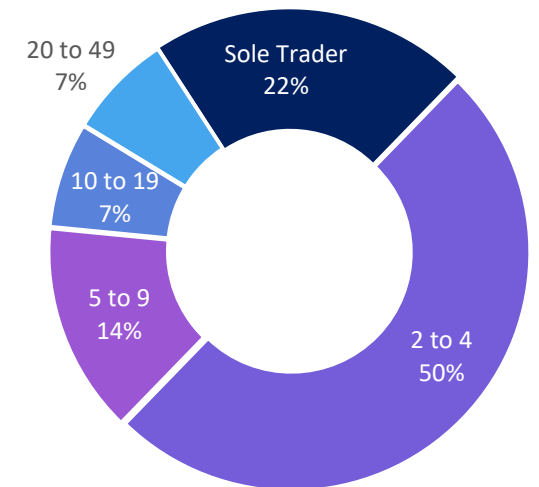- Other — 7%

The Cushendall trader profile is dominated by smaller and older, mature businesses.

86% of traders have less than 10 employees, the highest across the borough, and the average business age is also the oldest in the borough at 36.8 years (average = 20.0).
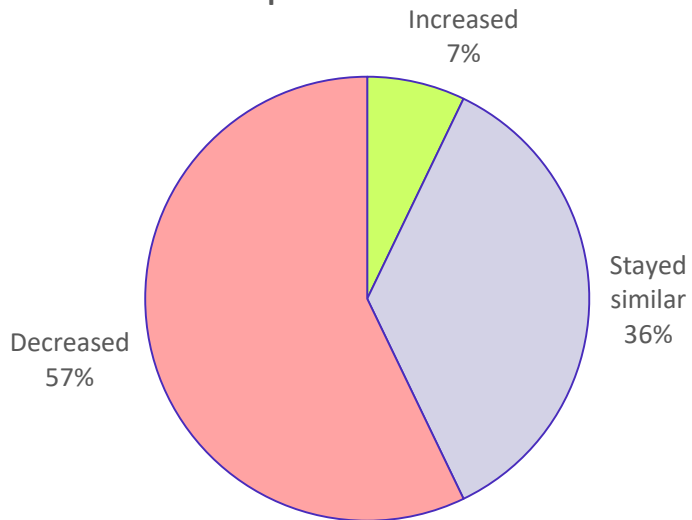
Due to the maturity of the businesses, it is not surprising that the rate of premises ownership is also one of the highest in the borough.

Cushendall also has the highest rate of 'sole traders' across our borough sample.
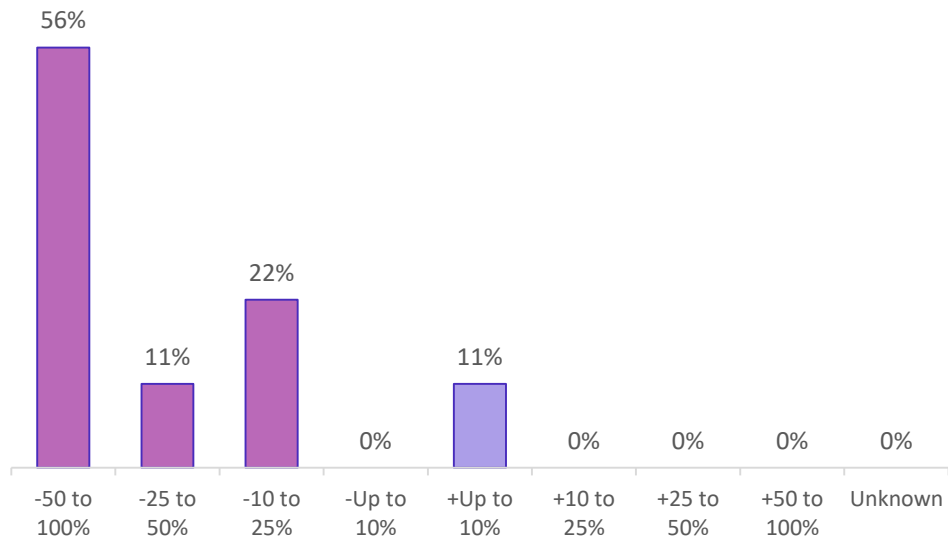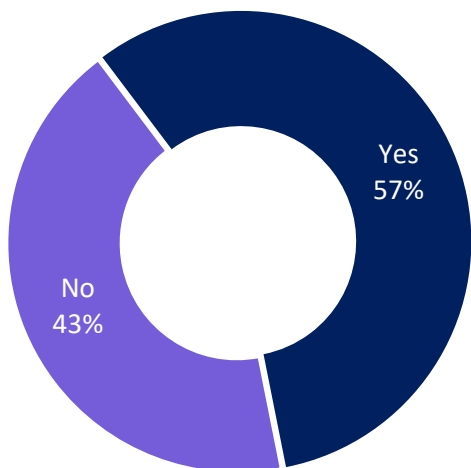
Current Staffing Levels

- Sole Trader 22%
- 2 to 4 50%
- 5 to 9 14%
- 10 to 19 7%
- 20 to 49 7%

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COVID Impact

Impact on Turnover

Increased 7%

Stayed similar 36%

Decreased 57%

Level of Impact

	-50 to 100%	-25 to 50%	-10 to 25%	-Up to 10%	+Up to 10%	+10 to 25%	+25 to 50%	+50 to 100%	Unknown
	56%	11%	22%	0%	11%	0%	0%	0%	0%

Were you forced to close operations at any point?

Yes 57%

No 43%

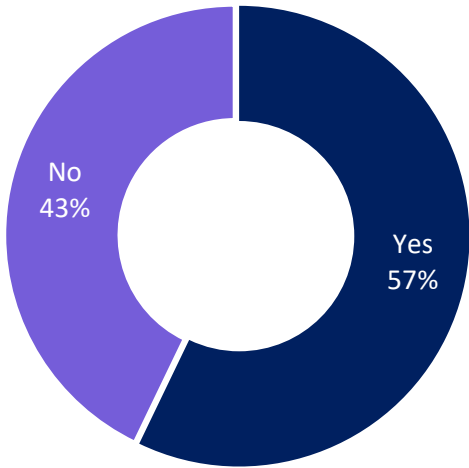| Did the business pivot to provide alternative services during the COVID lockdown …	%
No	100%
Yes	0%
Of those who said yes …	
Online selling & delivery	0%
Click & collect	0%
New services tailored to new circumstances	0%
New products tailored to new circumstances	0%

57% of Cushendall traders noted a decrease in their income over the course of the COVID crisis, in line with a borough average of 59%. However, only 7% noted an increase, matching Portstewart as the lowest rate across the borough.

Within those that saw a decrease, over half (58%) saw it decrease by over 50%.

No traders saw an opportunity to pivot their business activities over the course of lockdown. It may be that as a more rural, and isolated part of the borough the businesses are more entrenched in providing their services in a 'traditional' manner, a point possibly reinforced by the relatively high age of most businesses in the town as seen on page 10.

The Council wish to investigate whether there is a deficit in digital capability within the town.

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Did you avail of any Government support?

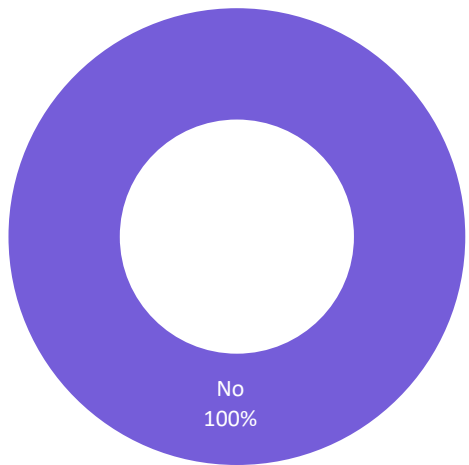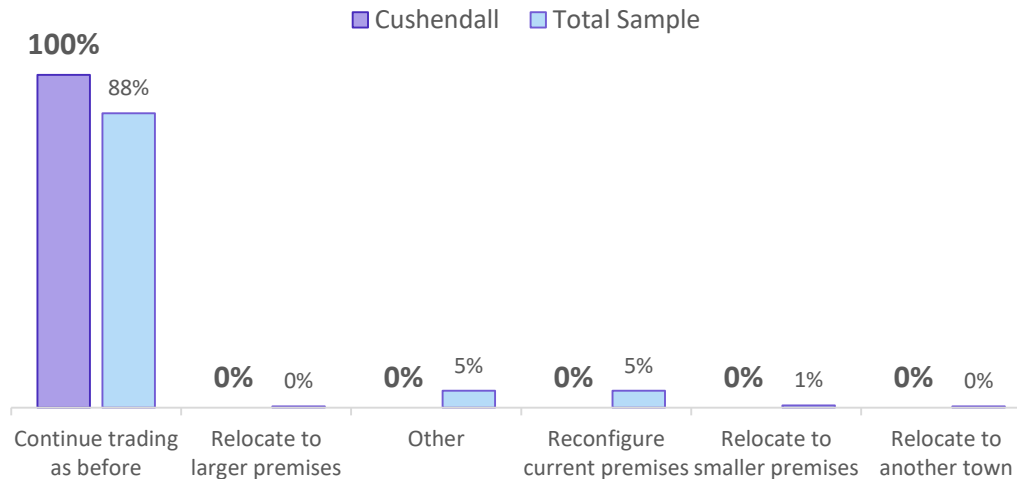No 43%
Yes 57%

What kind of Government Support …

Not Specified	Rates Break	COVID Grant	Furlough	Self Employment Support	Bounce Back Loan
63%	25%	13%	0%	0%	0%
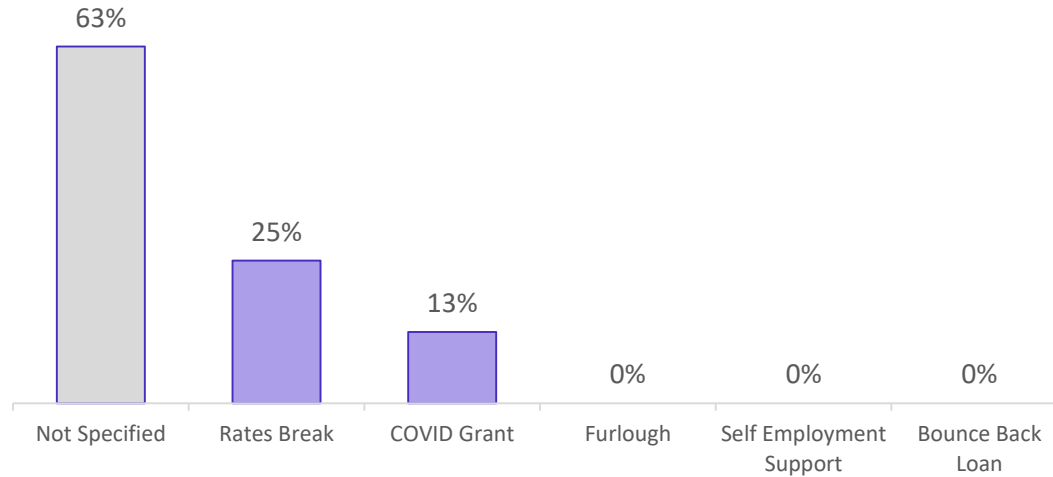
Did you avail of any CC&G Business Support …

No 100%

Trading intentions going forward …

■ Cushendall ■ Total Sample

	Continue trading as before	Relocate to larger premises	Other	Reconfigure current premises	Relocate to smaller premises	Relocate to another town
Cushendall	100%	0%	0%	0%	0%	0%
Total Sample	88%	0%	5%	5%	1%	0%

Despite the significant downturn in revenue highlighted previously, only 57% decided to avail of government support offered during the pandemic, and no traders took up any support offered by the council.
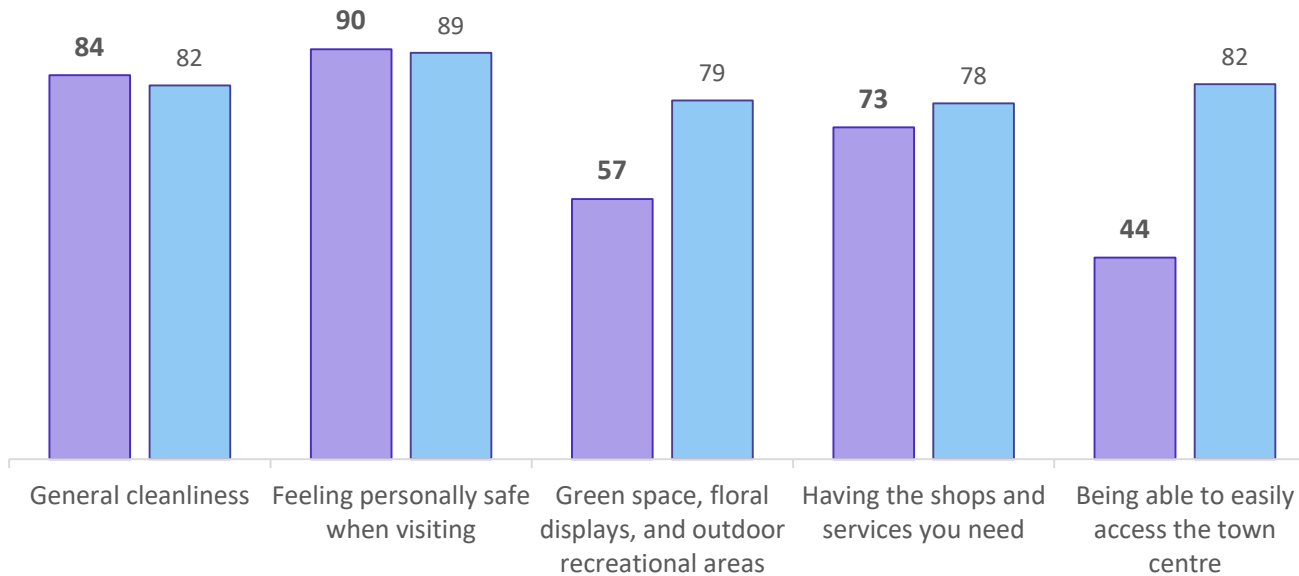
Unfortunately traders were not willing to provide much information on which government supports they had decided to utilise.

In line with a lack of willingness to pivot during the pandemic, going forward there appears to be no intentions to make any changes to current trading arrangements within the town.

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What is your opinion of the town centre?

	Cushendall Traders									Score: +93
	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%	0%	7%	7%	36%	50%	0%
Calculation	Total of 'Like' (**93**) − Total of Dislike (**0**) = **Cushendall Traders Score = +93**									

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

Legend: ■ Cushendall ■ All Towns

- General cleanliness: **84** / 82
- Feeling personally safe when visiting: **90** / 89
- Green space, floral displays, and outdoor recreational areas: **57** / 79
- Having the shops and services you need: **73** / 78
- Being able to easily access the town centre: **44** / 82

- The sentiment score among traders in Cushendall is extremely high, only just behind Portrush and Portstewart as the highest in the borough.

- There are certainly some issues with regards to the town centre ratings however. Green space and recreational areas is once again highlighted as a problem area, as it was by visitors.

- However traders appear to rate access to the town particularly poorly. While this is not expanded upon in any verbatim remarks, it would appear the rural nature of the town and indirect nature of the access roads would be a key contributor to this. This is in contrast to the rating for the same aspect provided by visitors.

- There was a divergence in visitor vs trader ratings on 'having the shops and services you need' where traders appear, to a greater degree, to feel the offer is sufficient as it is.

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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 Cushendall a sample size of 61 was achieved which provides us with a margin of error of +/- 12.5% @ 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 – 12.5% 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.

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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.

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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

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Appendix 3 – Results Expanded

Detailed ACORN Results for Cushendall Visitors

No.	ACORN Group	Cushendall	Total Sample		Sub-Category	Cushendall	Total Sample
1	Affluent Achievers	3%	7%	A	Lavish Lifestyles	0%	0%
				B	Executive Wealth	3.4%	4.1%
				C	Mature Money	0%	2.9%
2	Rising Prosperity	0%	1%	D	City Sophisticates	0%	0%
				E	Career Climbers	0%	0.8%
3	Comfortable Communities	81%	52%	F	Countryside Communities	75.9%	45.6%
				G	Successful Suburbs	1.7%	2.3%
				H	Steady Neighbourhoods	1.7%	1.6%
				I	Comfortable Seniors	0%	1.4%
				J	Starting Out	1.7%	1.1%
4	Financially Stretched	14%	28%	K	Student Life	0%	0.4%
				L	Modest Means	5.2%	8.4%
				M	Striving Families	3.4%	12.1%
				N	Poorer Pensioners	5.2%	7.7%
5	Urban Adversity	2%	12%	O	Young Hardship	0%	7.1%
				P	Struggling Estates	0%	3.0%
				Q	Difficult Circumstances	1.7%	1.5%

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