

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Dungiven

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.

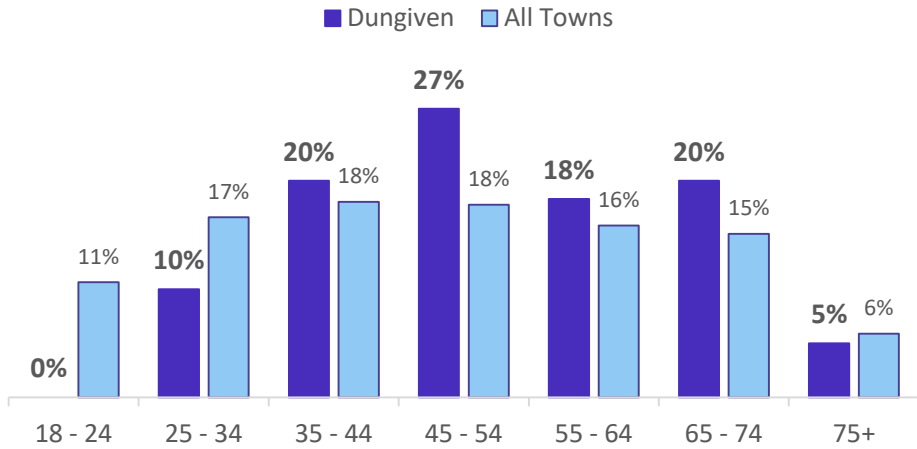
The following report is a sub-report seeking to provide a summarised snapshot of our results, emanating from the Causeway Coast & Glens visitor & traders sampling, at a **local** level. This particular sub-report provides the snapshot for sampling that took place in **Dungiven**;

- The visitor results are based on an overall sample of **60** respondents;
- The trader's results are based on a sample of **19** traders within the town centre.

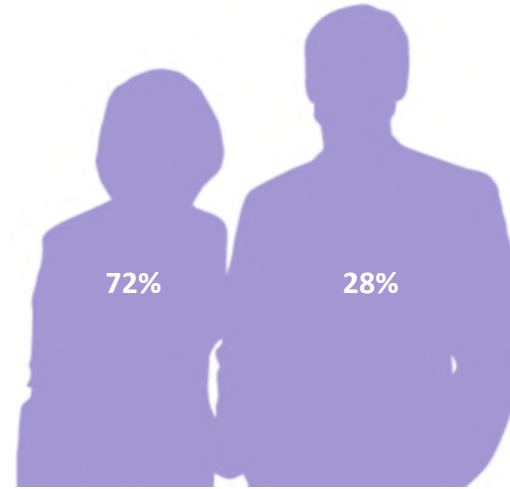
Sampling for visitors and traders in Dungiven took place between 23rd March and 10th April 2021. It is important to note that during this period, there were a range of continuing restrictions in place owing to the ongoing Coronavirus pandemic. The specific restrictions at the time are outlined in Appendix 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

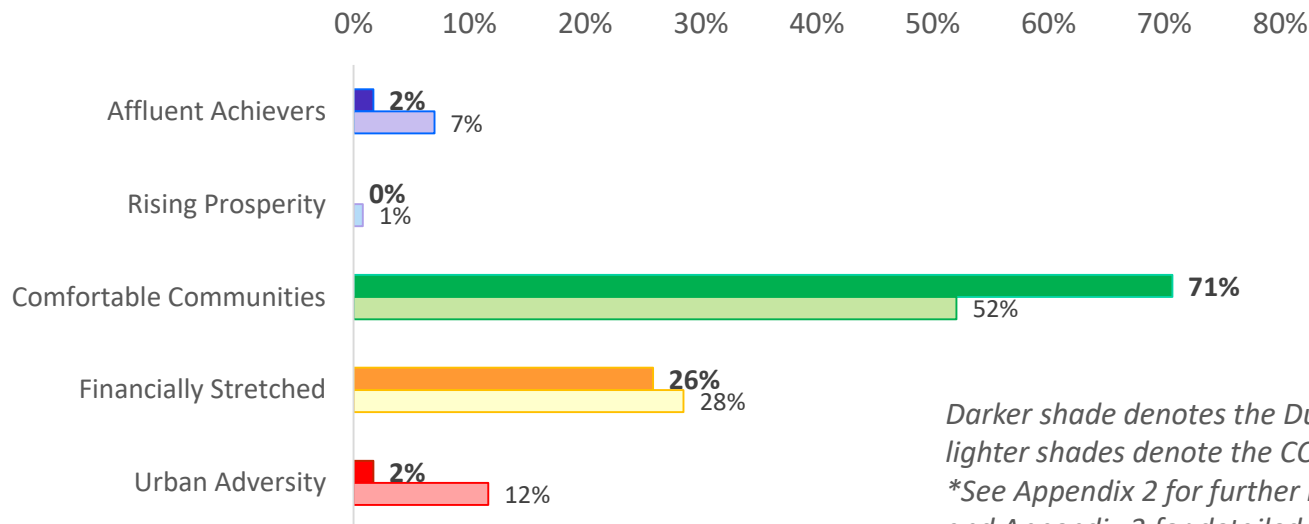


The visitor age profile is heavily weighted towards middle aged visitors between 35 and 54, accounting for 57% of visitors.

Only 10% of the sample was made up by those under 35, the lowest across the borough with the average being 27%.

The absence of younger visitors gives the town the highest average age (53) out of the 12 towns surveyed.

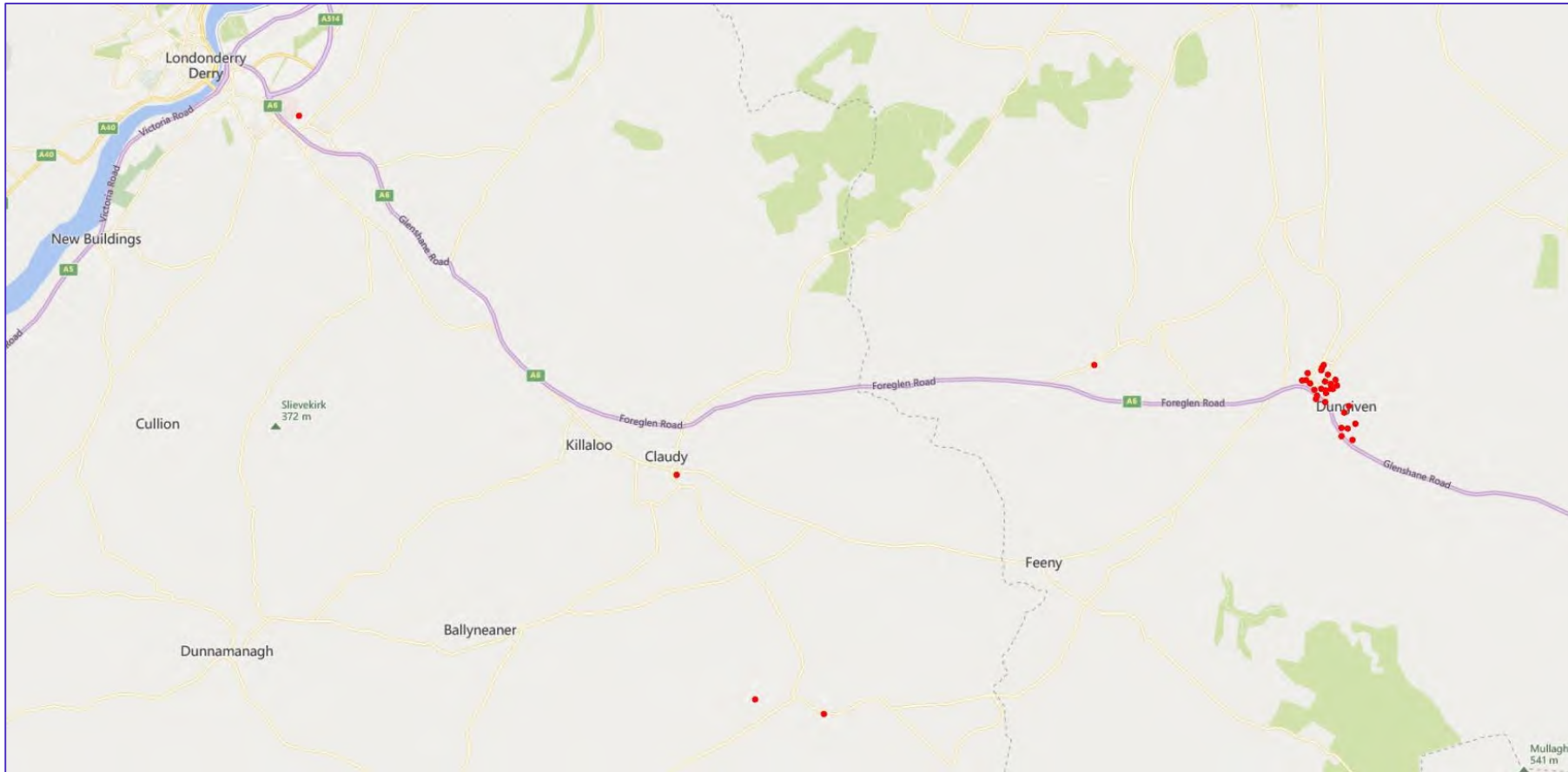
Dungiven ACORN Profile* vs Overall Sample



Darker shade denotes the Dungiven respondent profile while lighter shades denote the CCGBC baseline.

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

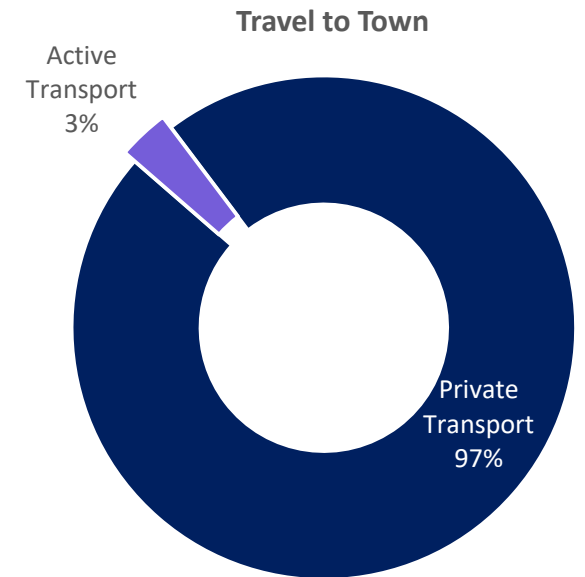
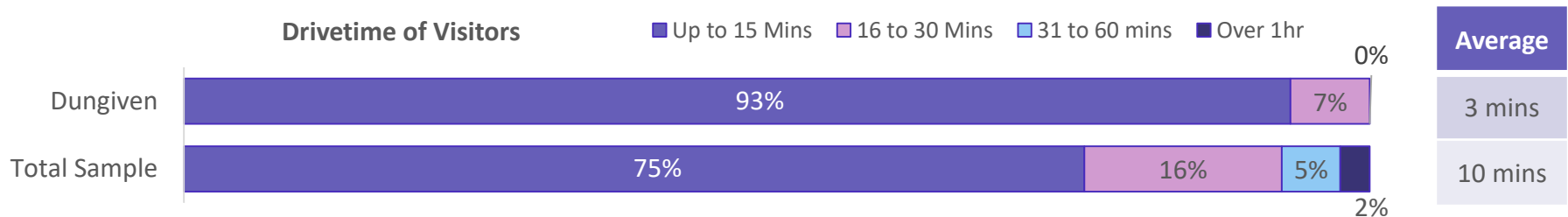
Dungiven is another town dominated by the 'Countryside Communities' ACORN sub-category. At 70.7% (see Annex 2) only Cushendall sees a higher proportion of this sub-category in its visitor make up.

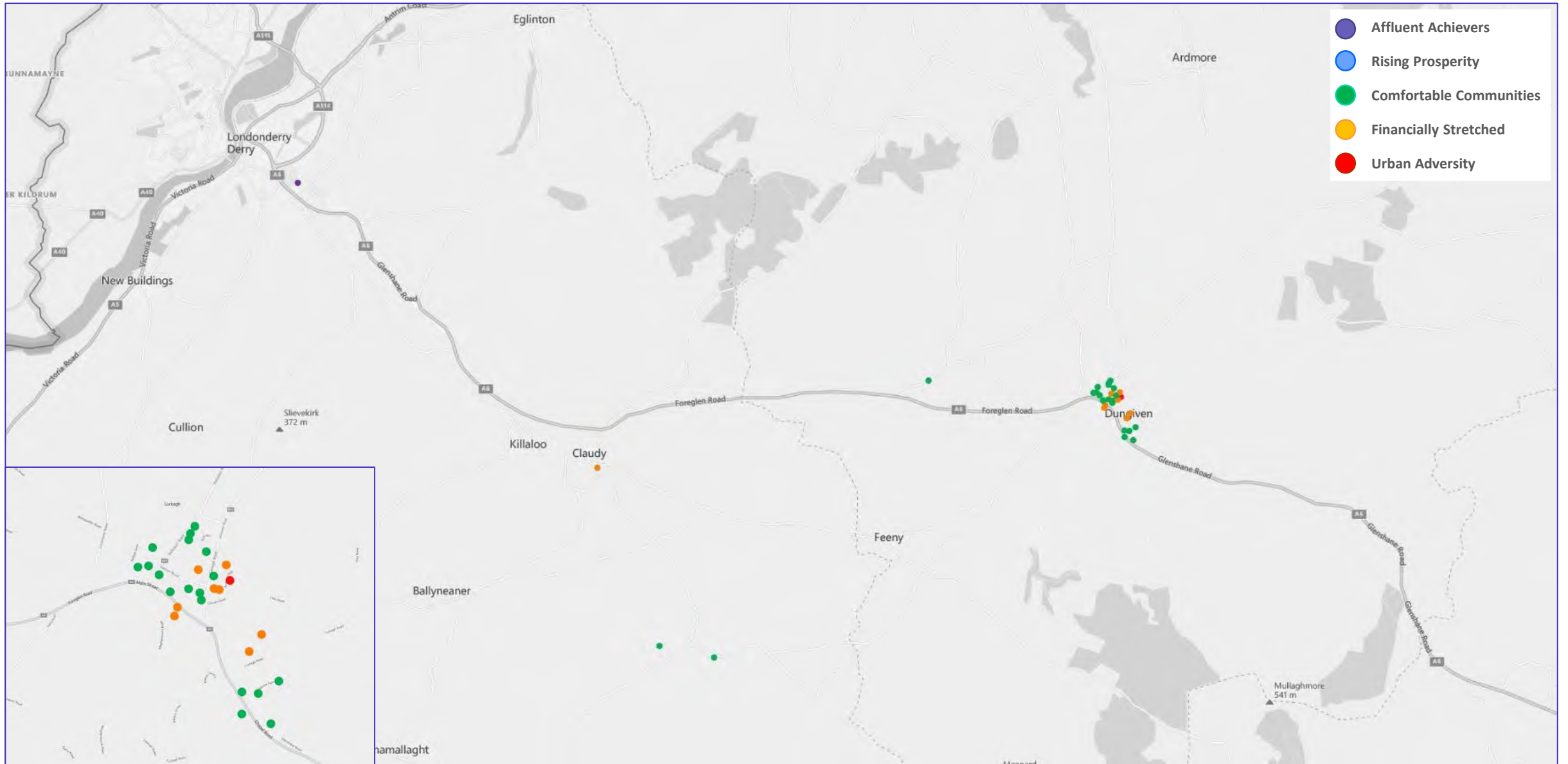


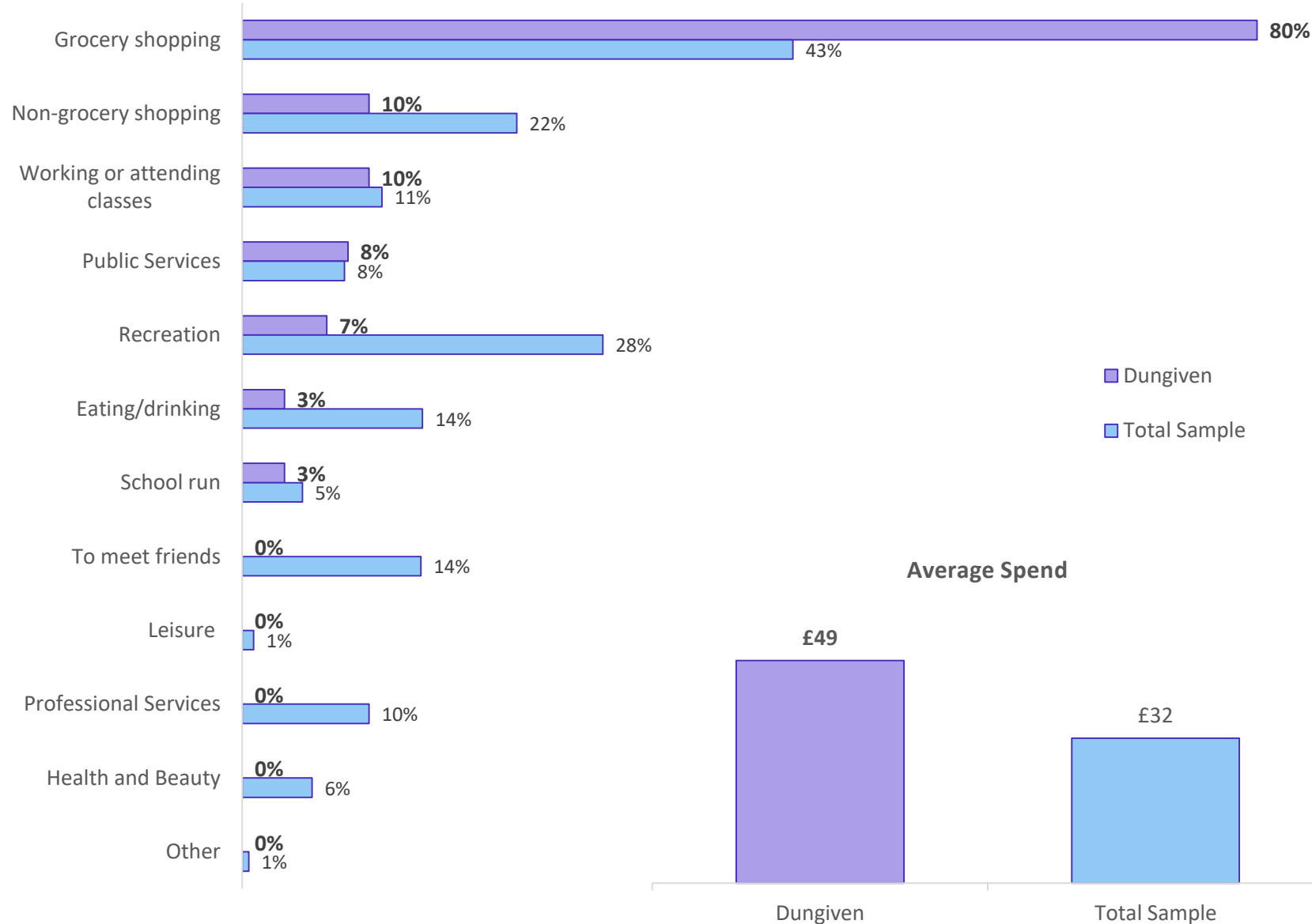
The concentration of visitors to the immediate area is particularly high for Dungiven.

The average drivetime for visitors is the lowest across all towns surveyed.

What is particularly surprising, given the high concentration in the town itself, is the high rate of use of private transport to access the town. This has implications for congestion which emerge later in the report.







Location	Average Dwell Time	Average Spend per Minute
Dungiven	79 mins	£0.62
Total Sample	109 mins	£0.29

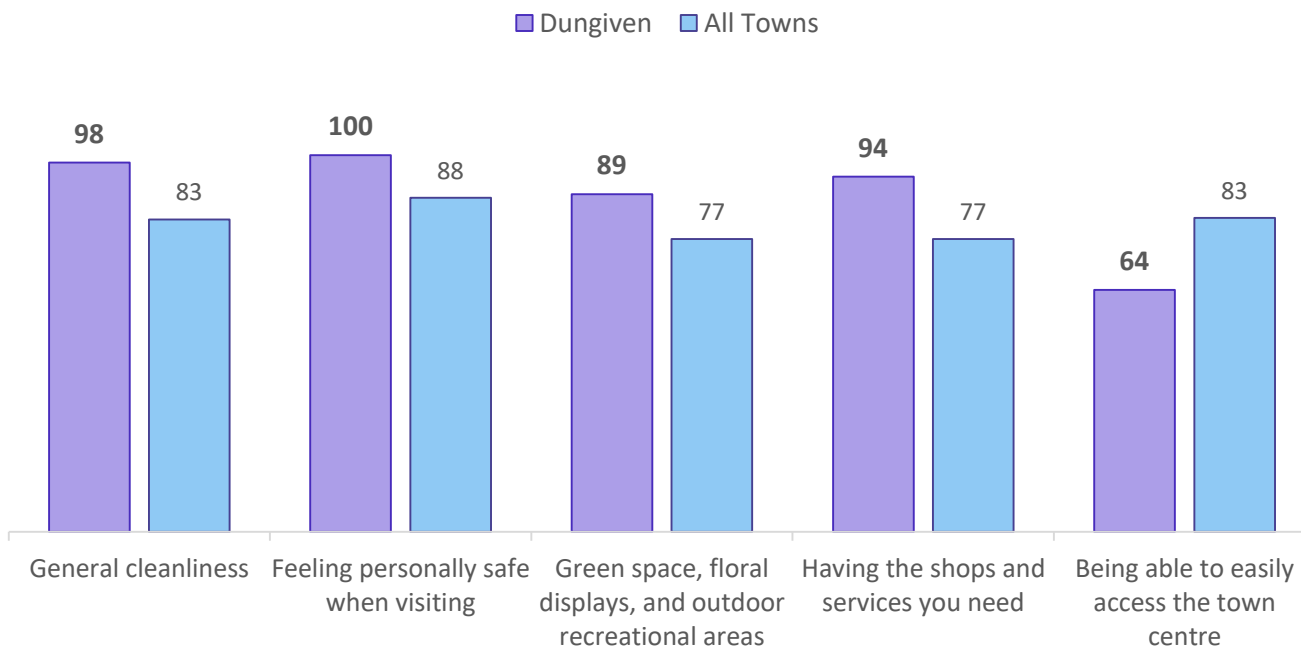
The use of the town centre by visitors provides some insight as to why use of private transport is so high. As shopping dominates Dungiven town centre interactions (90%), visitors feel that private transport is required to transport purchases.

The high rate of use of the town for shopping almost mirrors trends exhibited in Limavady and Ballykelly, where users spend higher than average but dwell for shorter than average.

Visitors appear to simply come in, shop and leave.

	Dungiven Visitors				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%	0%	15%	0%	0%	2%	7%	23%	15%	38%
Calculation	Total of 'Like' (83) – Total of Dislike (15) = +68									

Average Rating Dungiven Town Centre (out of 100)



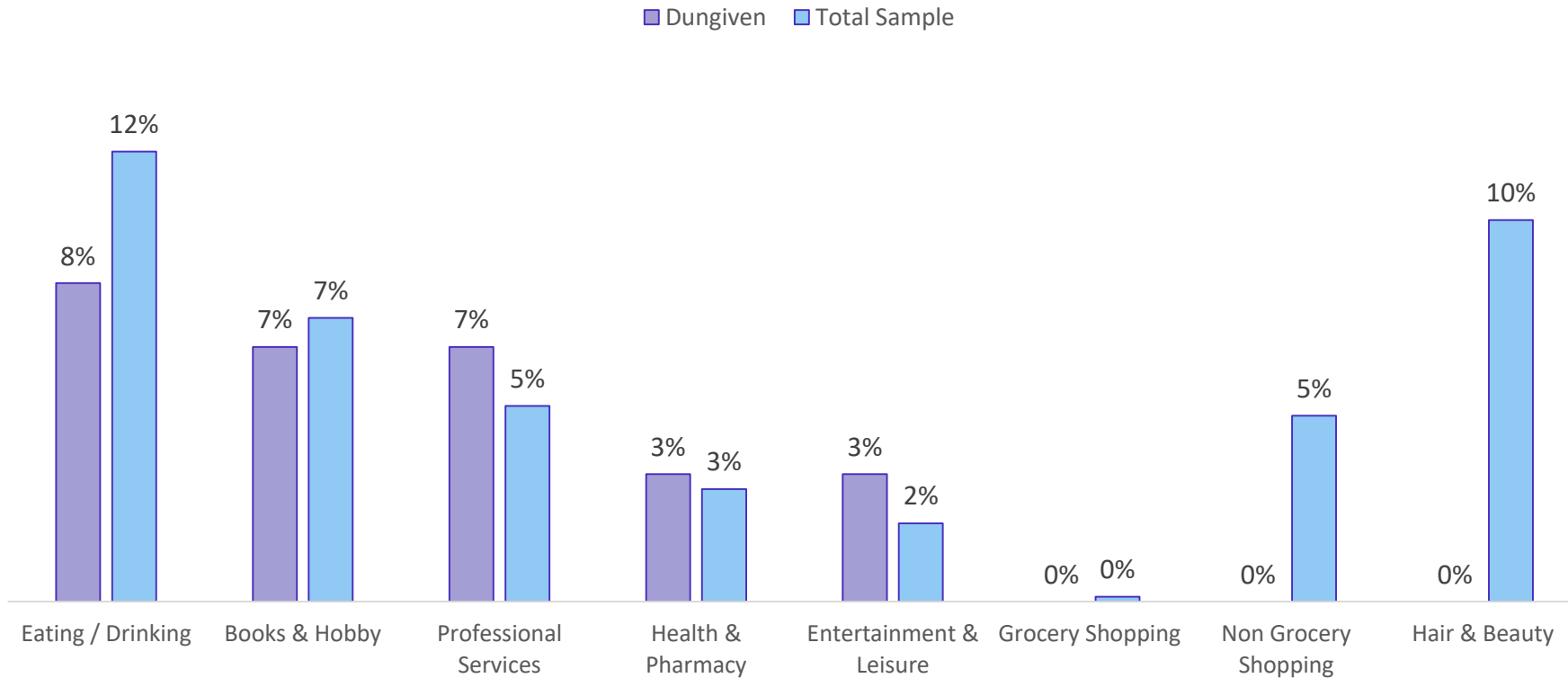
- Above is the combined Sentiment Score for Dungiven. The rationale for Sentiment Scoring is outlined in Appendix 2;
- We can see that visitors to the town retain a largely positive view of it;
- This is also reflected in the average town centre rating opposite, where the only aspect to rate below average was accessibility of the town centre. Indeed it is this aspect that was the primary motivation behind any low sentiment scores in our data.

"I avoid it because of the traffic, hopefully this new road gives us our town back"

"the traffic puts me off coming in to town"

"I come here to work most days, the traffic is awful, hopefully this new road will stop that."

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



Given the high rate of use for grocery shopping currently, it is not surprising that this won't see too much of an increase post-lockdown. Although non-grocery shopping only accounted for 10% of visits, it also doesn't appear likely to see a post-lockdown boost.

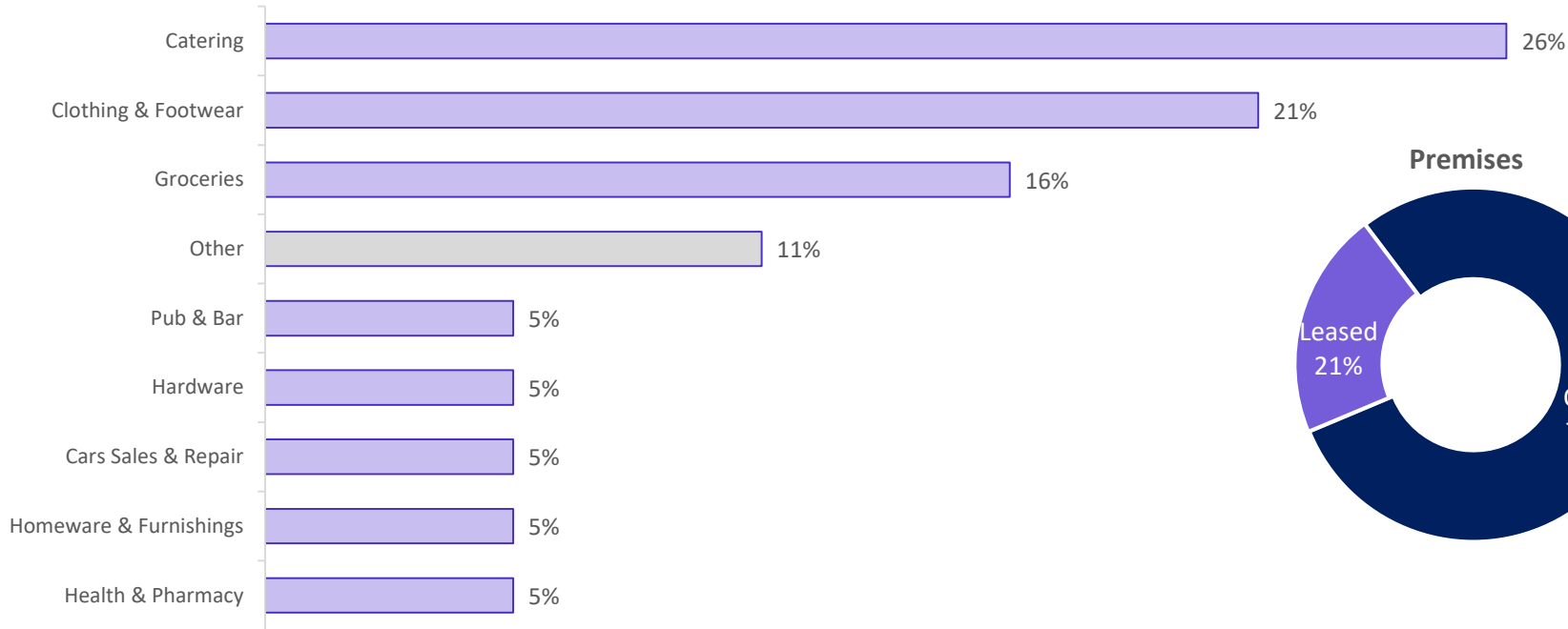
Unsurprisingly congestion is the top barrier to accessing the town. It should be noted that the development of a bypass for the town is in progress.

What prevents you from visiting the town centre more?	Dungiven	Total Sample
Congestion & Traffic	25%	19%
Parking	0%	15%
Habit	0%	8%
Unappealing Retailers	5%	13%
Evening Economy Options	0%	7%
Visually Unappealing Area	2%	7%
Cafes & Restaurant Offer	2%	7%
Safety	2%	3%
None of these	75%	52%

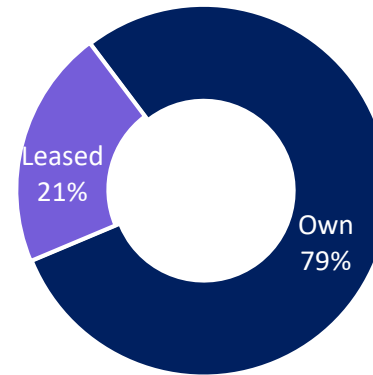
Dungiven TC Use	Eating / Drinking	Books & Hobby	Professional Services	Health & Pharmacy	Entertainment & Leisure	Grocery Shopping	Non Grocery Shopping	Hair & Beauty
Before COVID	70.0%	20.0%	85.0%	96.7%	91.7%	100.0%	88.3%	90.0%
After COVID	78.3%	26.7%	91.7%	100.0%	95.0%	100.0%	88.3%	90.0%
Difference	+8.3%	+6.7%	+6.7%	+3.3%	+3.3%	0.0%	0.0%	0.0%

Traders

Business Sector



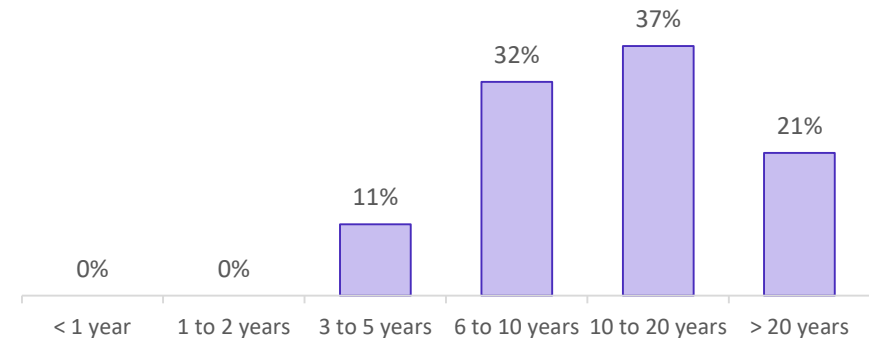
Premises



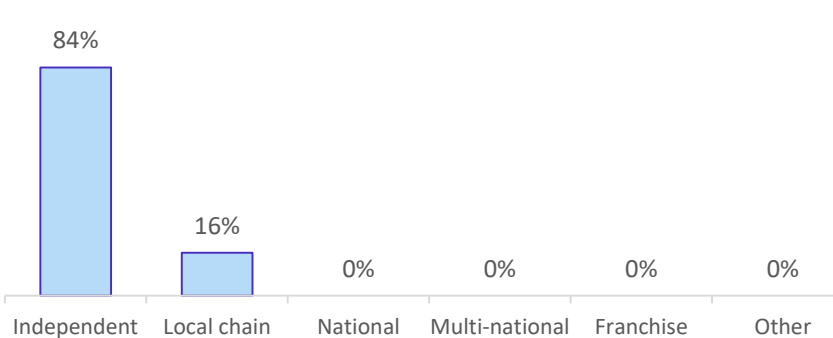
Given that around a third (31%) of our trader sample is within the catering or drinks sector, the anticipated post-lockdown boost for this sector (page 8) is welcome. There is a significant amount of non-grocery traders in our sample who may not experience such a boost.

The trader profile is largely made up of maturing, independent firms.

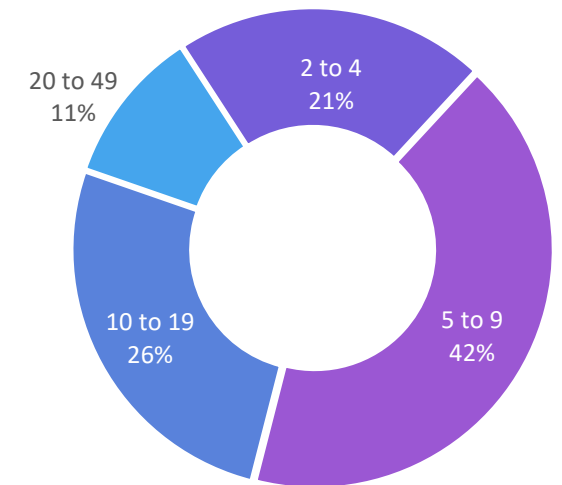
Business Age



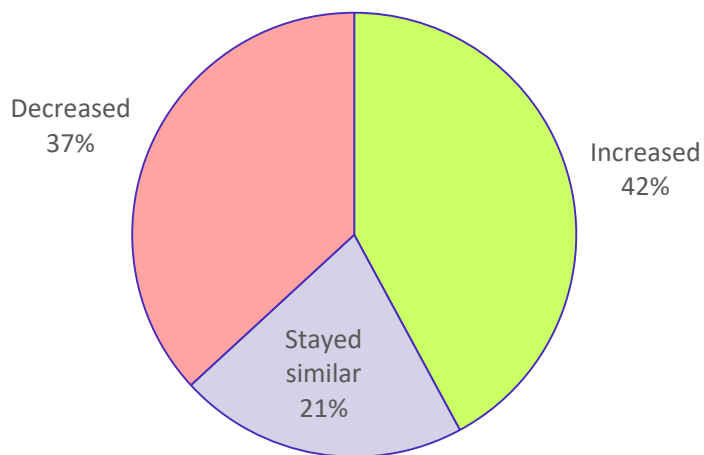
Business Ownership



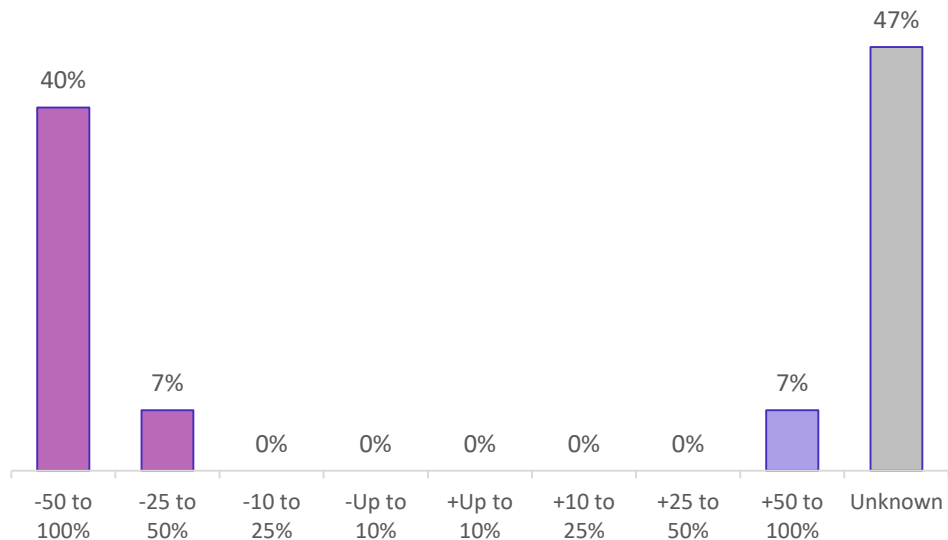
Current Staffing Levels



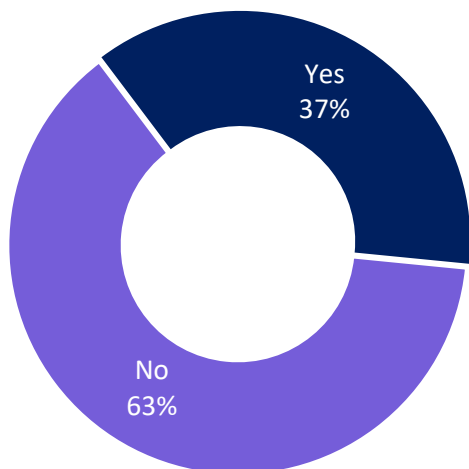
Impact on Turnover



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	37%
Yes	63%
<i>Of those who said yes ...</i>	
Online selling & delivery	100%
Click & collect	33%
New services tailored to new circumstances	0%
New products tailored to new circumstances	0%

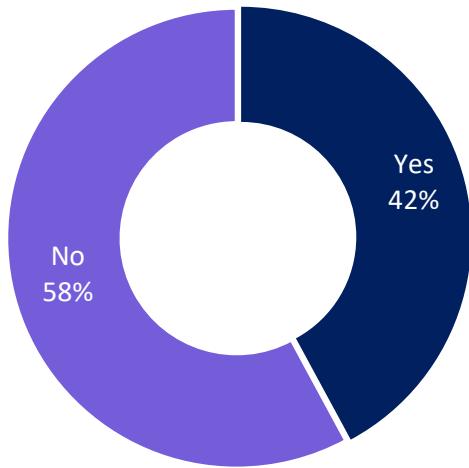
Dungiven had the highest rate of traders stating that they had actually managed to increase their turnover over the course of the pandemic.

These traders were primarily those from the non-grocery sector.

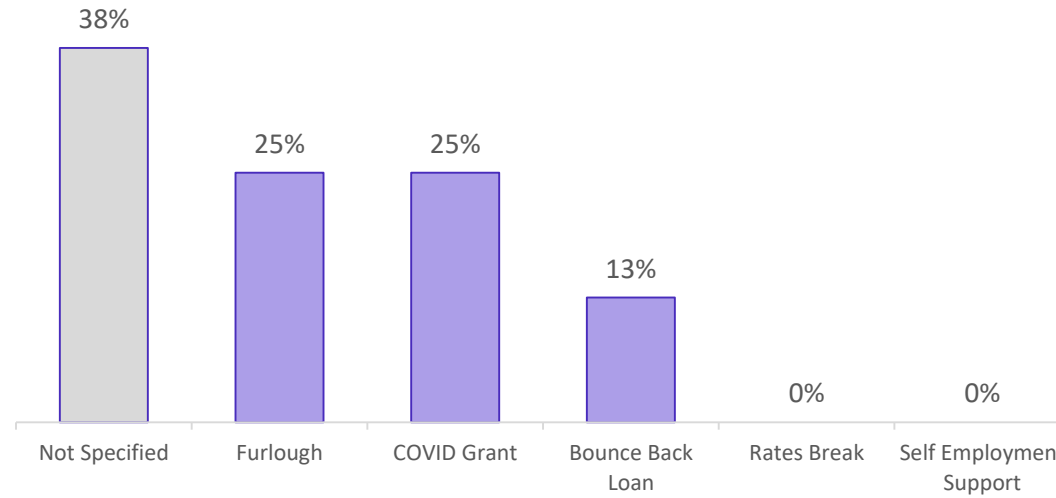
As a result only 37% stated they had to close during the lockdown period – the lowest in the borough.

Many of these traders attempted to pivot during the lockdown, but were still unable to avoid a reduction in their income.

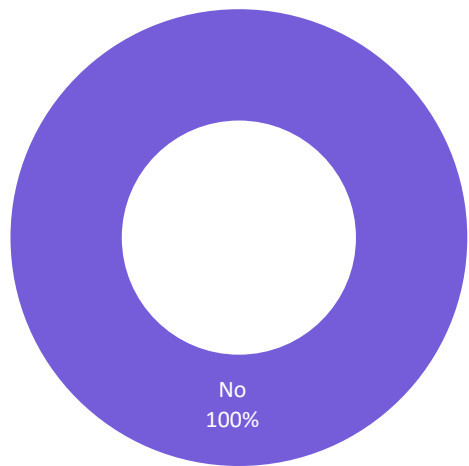
Did you avail of any Government support?



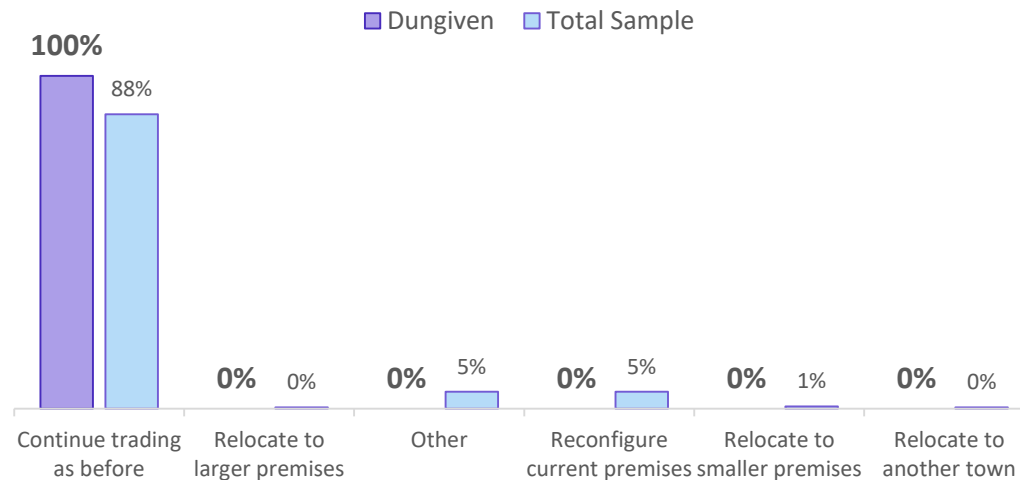
What kind of Government Support ...



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



Trading intentions going forward ...



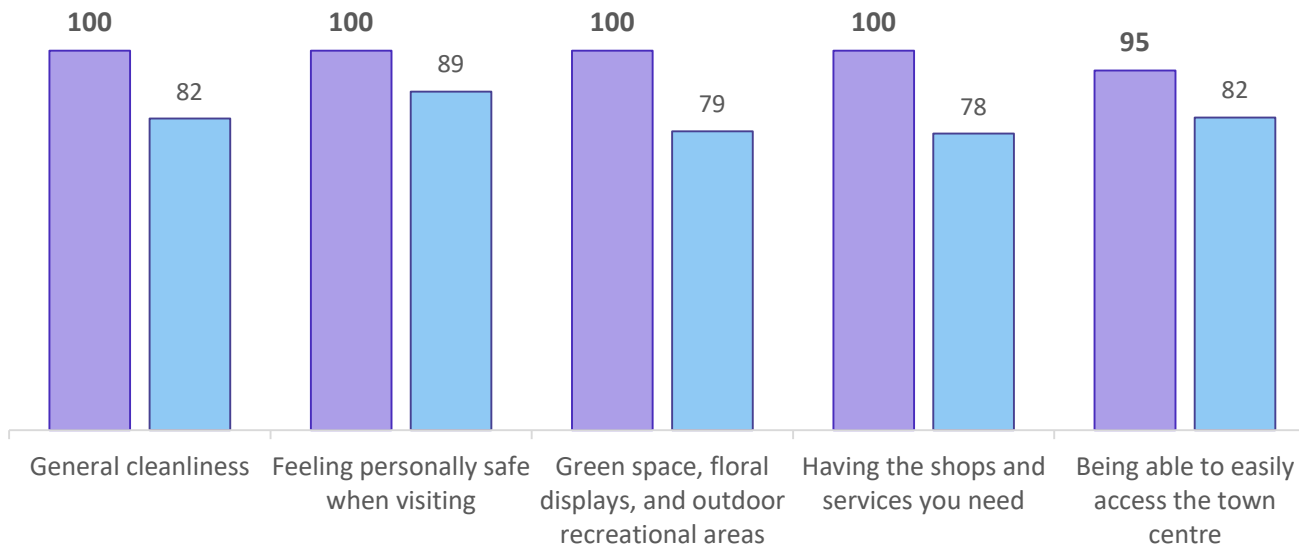
Consistent with the trends displayed in the previous page, the rate of uptake of government support was lowest in Dungiven out of all towns surveyed.

Uptake of council support appears to have been virtually non-existent, and going forward it appears the traders in the town intend to continue trading 'as you were'.

	Dungiven Traders				Score: +47					
	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%	53%	11%	26%	0%	11%
Calculation	Total of 'Like' (47) – Total of Dislike (0) = Dungiven Traders Score = +47									

Average Rating Dungiven Town Centre (out of 100)

■ Dungiven ■ All Towns



- There was some contrast between a reduced sentiment score for the town, and almost unanimous positive ratings for it in the chart opposite.
- When looking at the individual sentiment scores, we see that many of them are concentrated into the 'OK' category, with none scoring below this.
- While several who scored the town with this didn't provide further reasoning, there was some feedback provided which may help explain this difference.
*"there are lots of nice shops and it is nice to eat out **when everywhere is open**"*
- There may be reason to believe that a significant number of this scoring is due to the restrictions in place, and that many of the 'OK' ratings may well be higher once the town is open for business again.

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 Dungiven a sample size of 60 was achieved which provides us with a margin of error of +/- 12.7% @ 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 – 12.7% 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 Dungiven Visitors

No.	ACORN Group	Dungiven	Total Sample	Sub-Category		Dungiven	Total Sample
1	Affluent Achievers	2%	7%	A	Lavish Lifestyles	0%	0%
				B	Executive Wealth	1.7%	4.1%
				C	Mature Money	0.0%	2.9%
2	Rising Prosperity	0%	1%	D	City Sophisticates	0%	0%
				E	Career Climbers	0.0%	0.8%
3	Comfortable Communities	71%	52%	F	Countryside Communities	70.7%	45.6%
				G	Successful Suburbs	0.0%	2.3%
				H	Steady Neighbourhoods	0.0%	1.6%
				I	Comfortable Seniors	0.0%	1.4%
				J	Starting Out	0.0%	1.1%
4	Financially Stretched	26%	28%	K	Student Life	0.0%	0.4%
				L	Modest Means	5.2%	8.4%
				M	Striving Families	20.7%	12.1%
				N	Poorer Pensioners	0.0%	7.7%
5	Urban Adversity	2%	12%	O	Young Hardship	0.0%	7.1%
				P	Struggling Estates	1.7%	3.0%
				Q	Difficult Circumstances	0.0%	1.5%

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