



Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Kilrea

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.

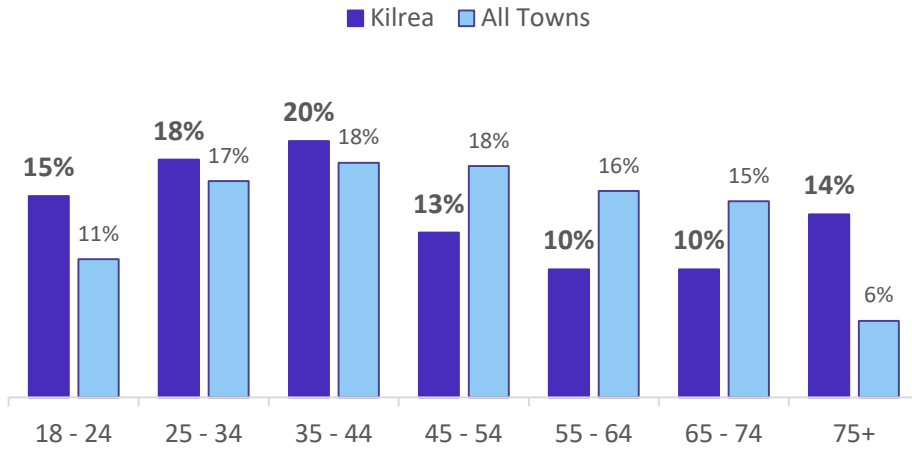
The following report is a sub-report seeking to provide a summarised snapshot of our results, emanating from the Causeway Coast & Glens visitor & traders sampling, at a **local** level. This particular sub-report provides the snapshot for sampling that took place in Kilrea;

- The visitor results are based on an overall sample of 71 respondents;
- The trader's results are based on a sample of 23 traders within the town centre.

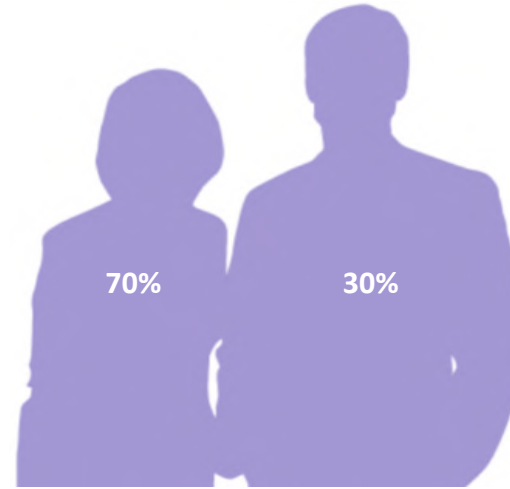
Sampling for visitors and traders in Kilrea took place between 24th March and 15th April 2021. It is important to note that during this period, there were a range of continuing restrictions in place owing to the ongoing Coronavirus pandemic. The specific restrictions at the time are outlined in Appendix 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

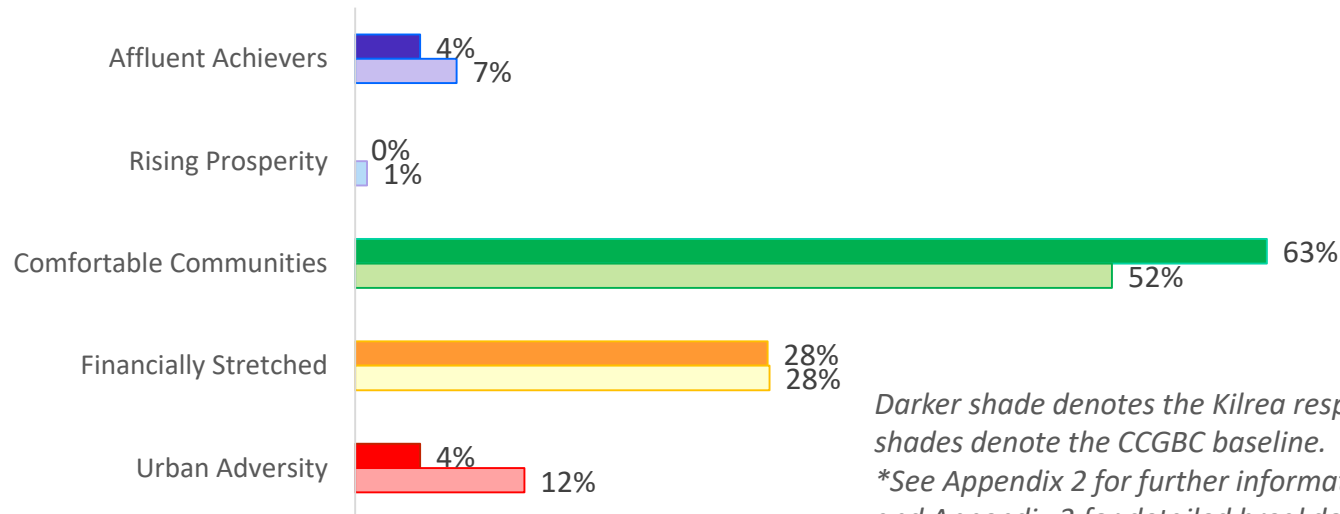


Respondent Gender Split



The visitor profile of Kilrea was overall younger than our overall sample. Over half (54%) were under the age of 35, giving us an average visitor age of 46.

Kilrea ACORN Profile* vs Overall Sample



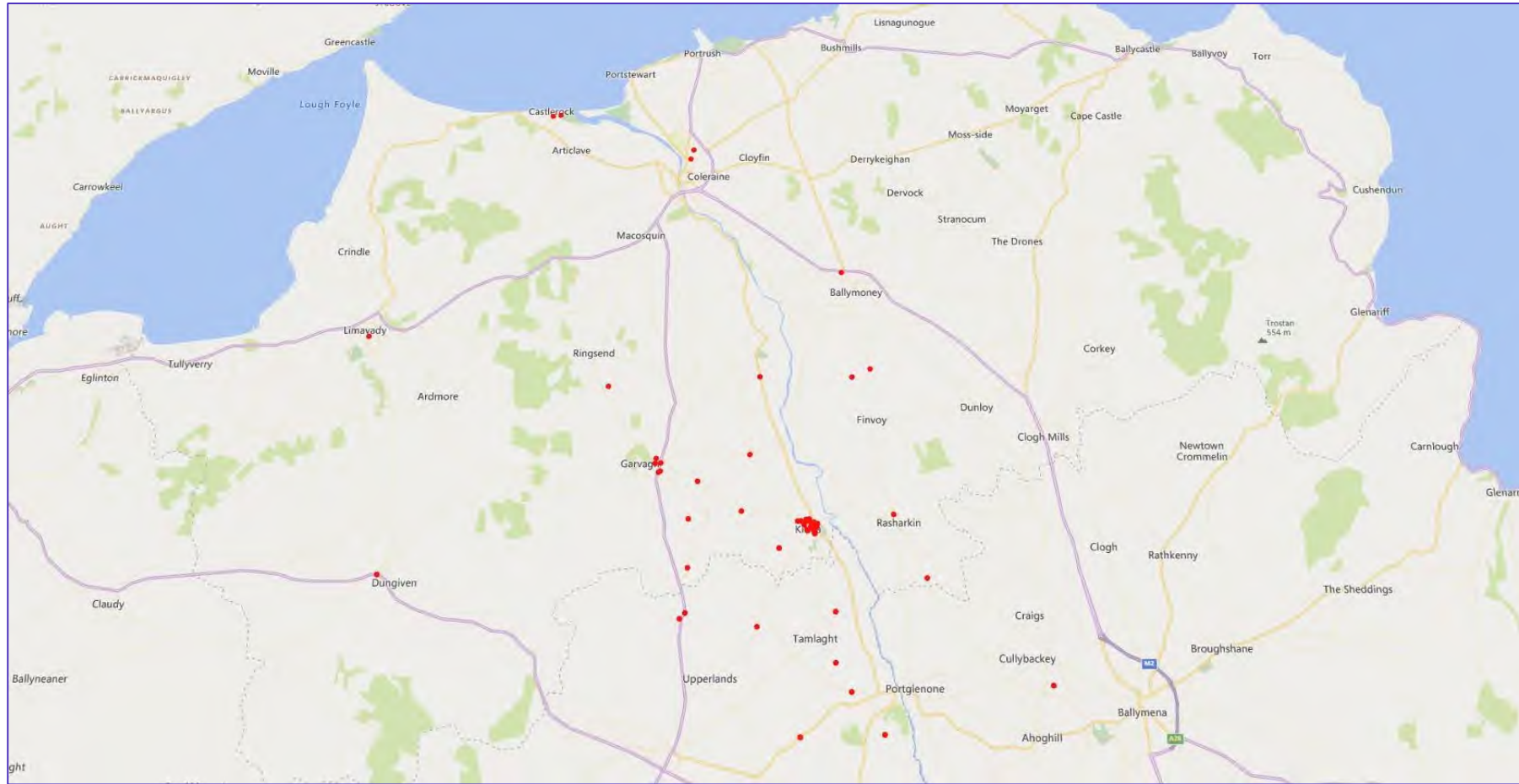
Darker shade denotes the Kilrea respondent profile while lighter shades denote the CCGBC baseline.

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

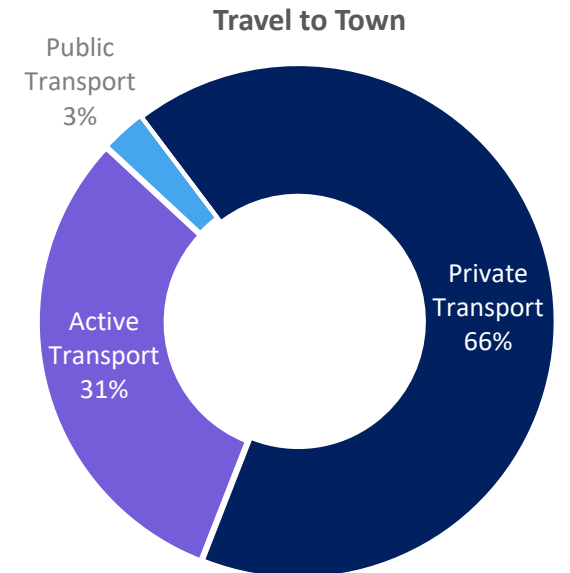
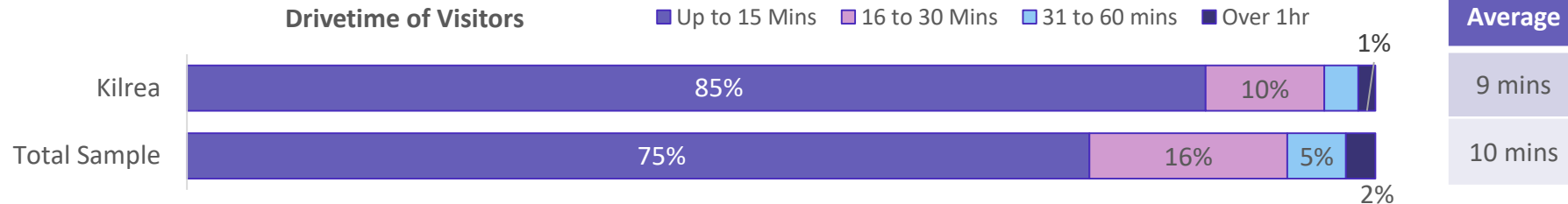
Given the rural nature of the town and its wider catchment, it is not surprising to see that the Comfortable Communities ACORN classification is more dominant (63%), which is wholly made up of the 'Countryside Communities' subset within, *Appendix 3*.

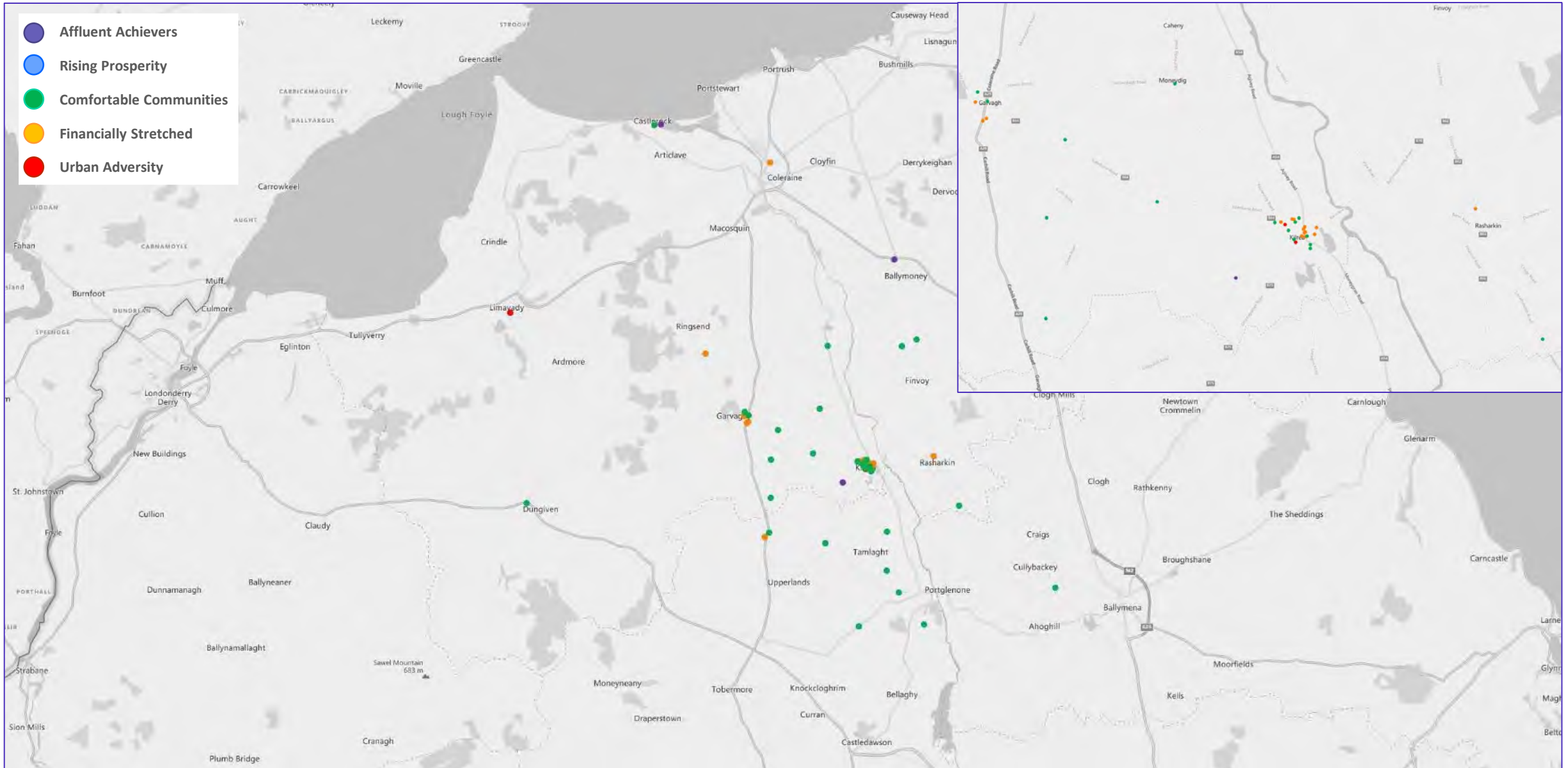
Visitors are primarily concentrated to the town itself as well as the immediate surrounding rural catchment. There is only a slight draw on visitors from Garvagh. As a result the average drivetime is lower and reliance on own residents is high.

High use of private transport is typical of more rural locations with people visiting from the surrounding area. However people within the immediate town area rely more on 'active' transport.

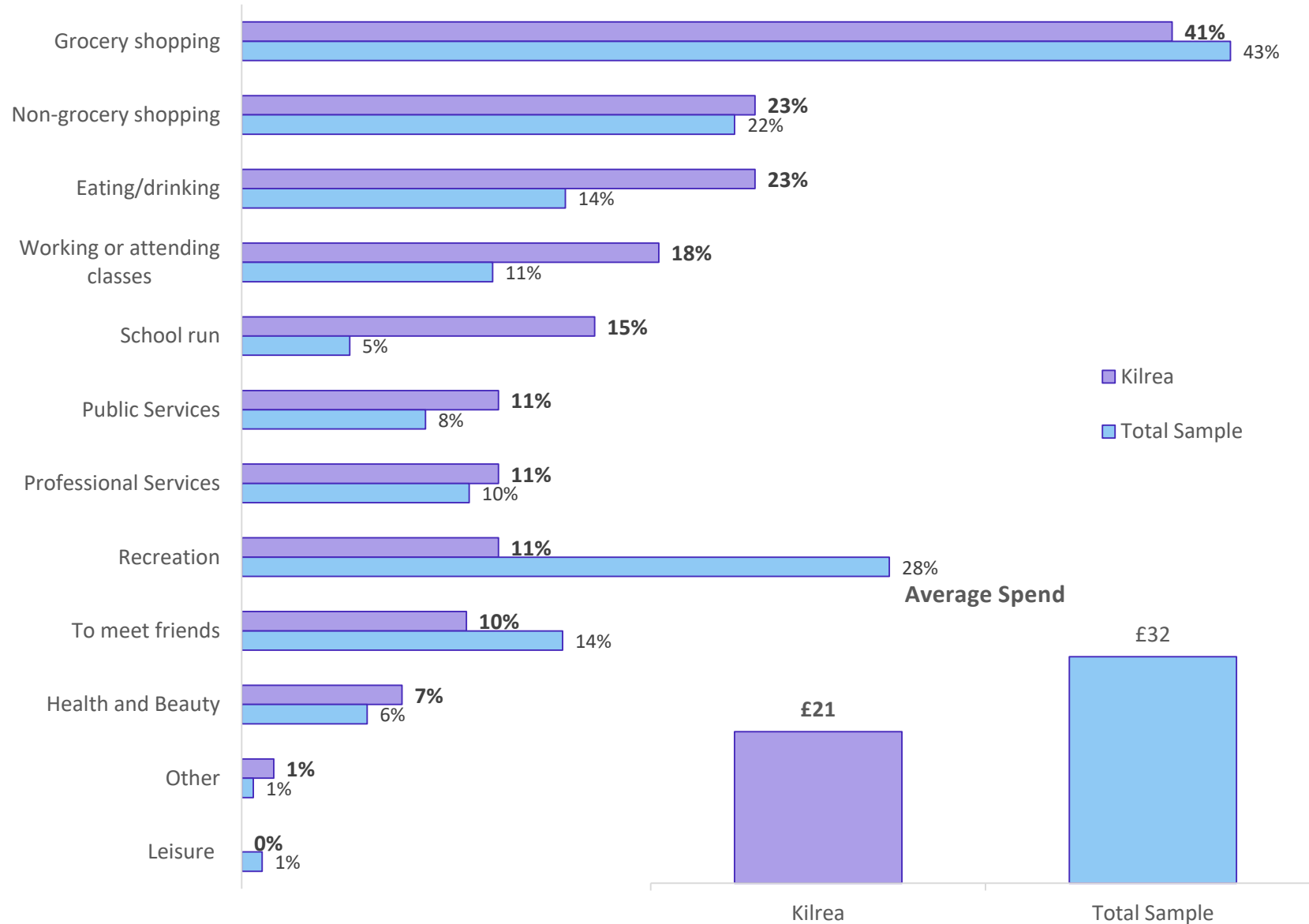


Drivetime of Visitors





Why are people going to the town centres?



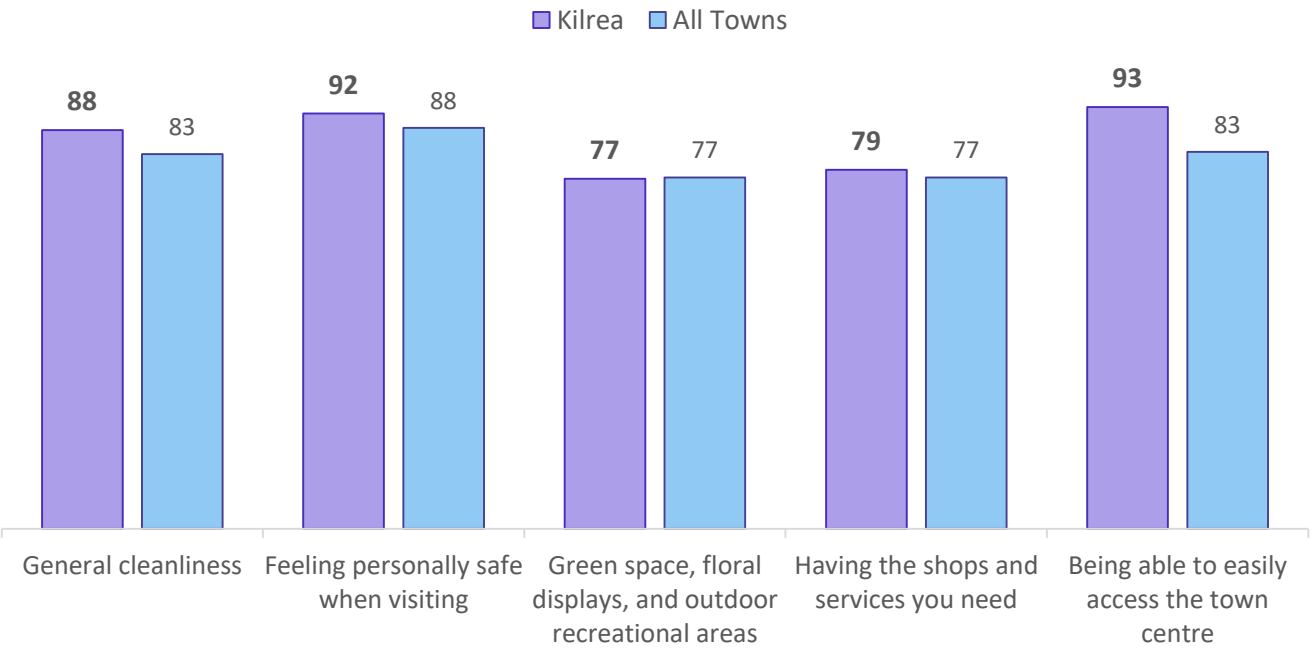
Location	Average Dwell Time	Average Spend per Minute
Kilrea	115 mins	£0.19
Total Sample	109 mins	£0.29

While both grocery and non-grocery shopping purposes dominate the use of Kilrea, the rate of visitor spend is the third lowest of the 12 towns sampled in (87%).

Similarly, for those who spent money, the average rate of spend was the third lowest as well (£21) suggesting the grocery shopping is primarily geared toward convenience items and smaller basket shopping, while non-grocery geared toward smaller and less expensive items.

	Kilrea Visitors				Score: +56					
	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%	1%	4%	3%	1%	25%	11%	41%	11%	1%
Calculation	Total of 'Like' (64) – Total of Dislike (8) = +56									

Average Rating Kilrea Town Centre (out of 100)

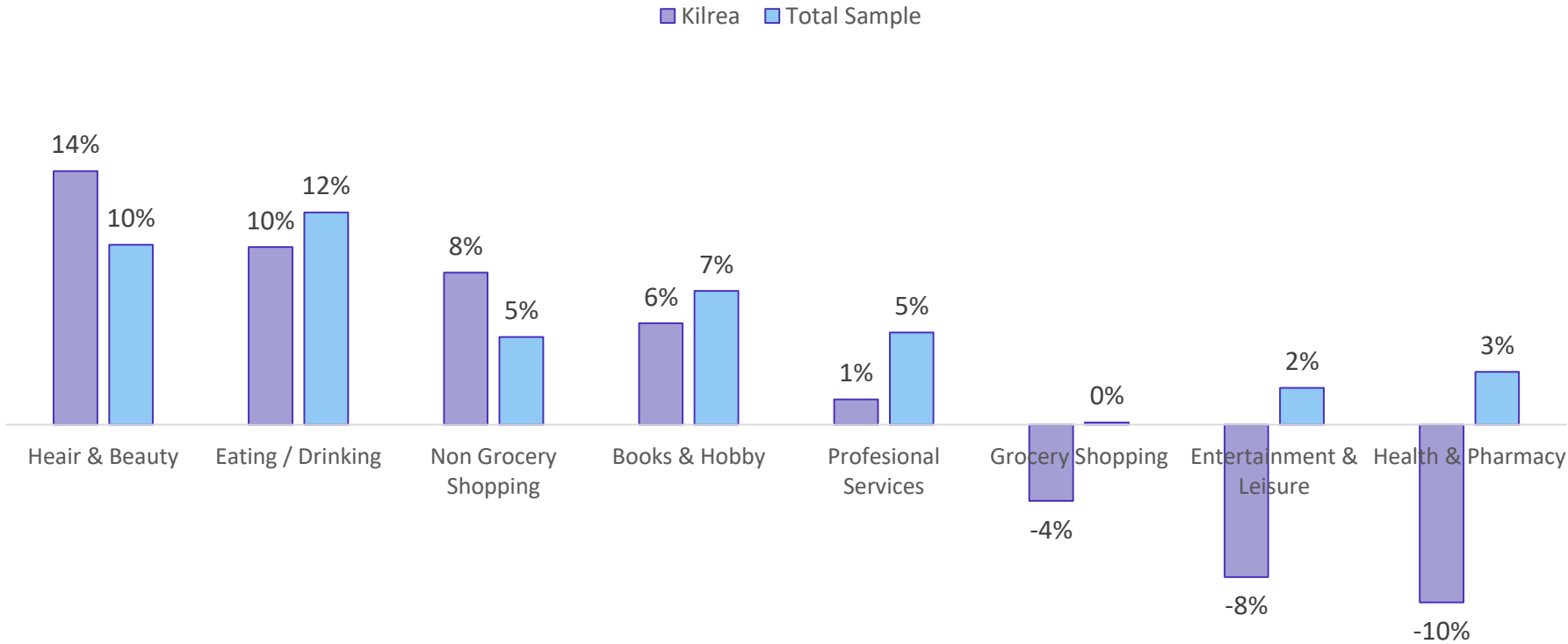


- Above is the combined Sentiment Score for Kilrea. The rationale for Sentiment Scoring it outlined in Appendix 2.
- In keeping with other towns, the sentiment score for Kilrea is generally positive but in this case does sit relatively low (ranked 9th) compared to the rest.
- As we can see from the table, there was a latent level of passive opinion of the town (26%) which impacted the score significantly. Common sentiment among these respondents included:

“Here because it's necessary but wouldn't come just for recreational purposes. The ice-cream is the most appealing part but wouldn't go in unless kids are here.”

“There's nothing wrong with the town, but it's also nothing special”

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



It appears that a number of business sectors could see a drop in usage when COVID restrictions are lifted in the town.

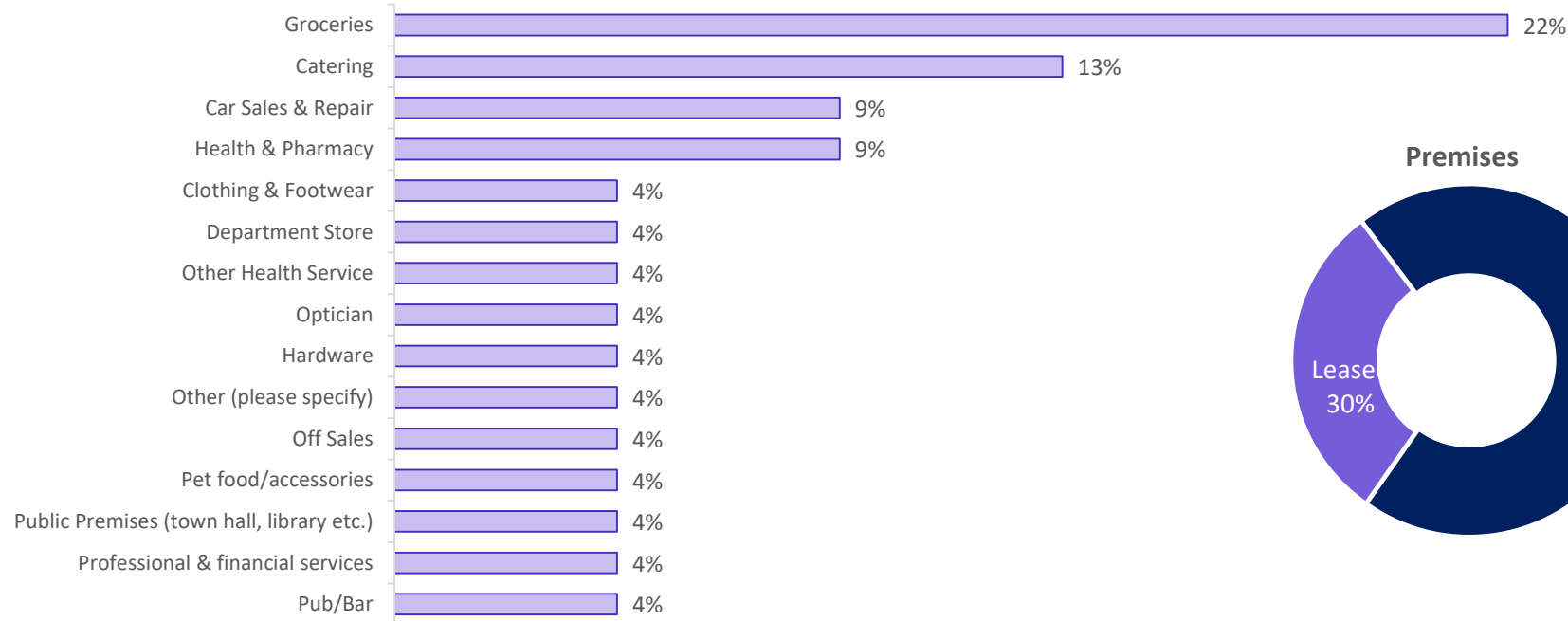
Similar to much of the borough, Hair & Beauty and Eating / Drinking are likely to see the biggest benefit of restrictions lifting in the town.

What prevents you from visiting the town centre more?	Kilrea	Total Sample
Habit	13%	8%
Unappealing retailers	11%	13%
Unappealing caterers	11%	7%
Congestion and traffic	7%	19%
Visually unappealing area	7%	7%
Parking	6%	15%
Evening economy options	3%	7%
Safety	0%	3%
None of these	54%	52%

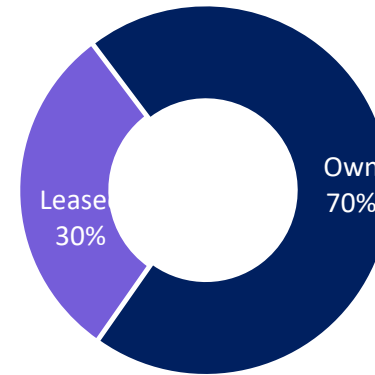
Kilrea TC Use	Hair & Beauty	Eating / Drinking	Non Grocery Shopping	Books & Hobby	Professional Services	Grocery Shopping	Entertainment & Leisure	Health & Pharmacy
Before COVID	45.1%	54.9%	32.4%	22.5%	8.5%	36.6%	18.3%	32.4%
After COVID	59.2%	64.8%	40.8%	28.2%	9.9%	32.4%	9.9%	22.5%
Difference	+14.1%	+9.9%	+8.5%	+5.6%	+1.4%	-4.2%	-8.5%	-9.9%

Traders

Business Sector



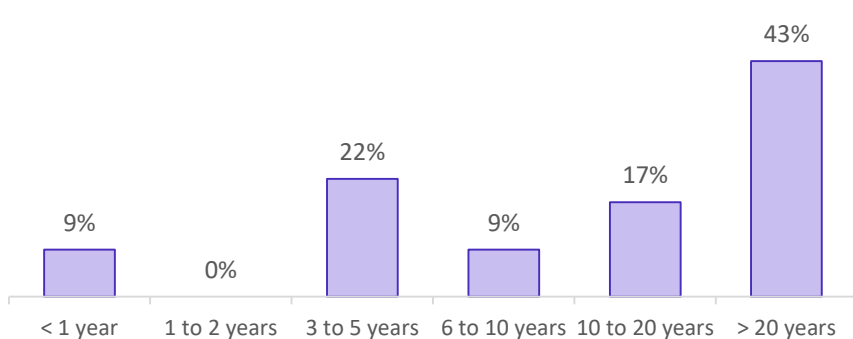
Premises



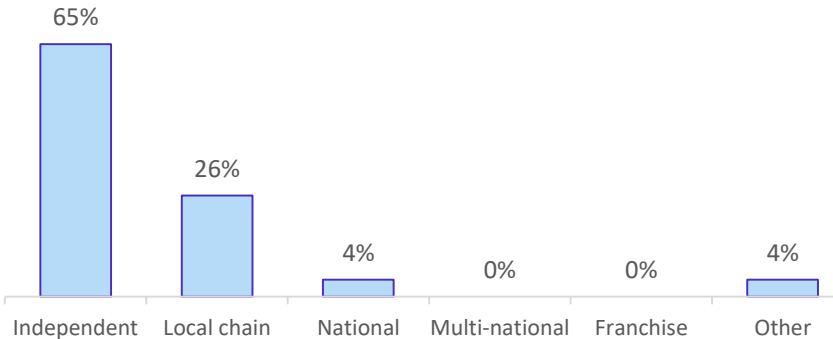
Given the smaller sample sizes involved it's not surprising to see the traders split quite evenly across a broad number of sectors.

We tend to see a higher rate of owned premises vs leased in the more rural locations and Kilrea is no exception. With an ownership rate of 70%, this is 3rd highest in the borough and well above our overall average of 51%.

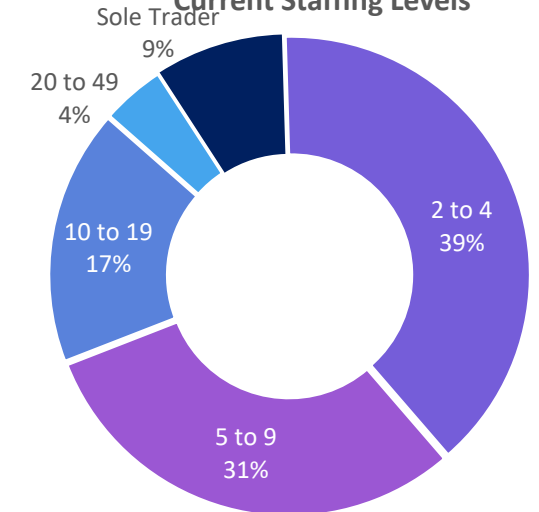
Business Age



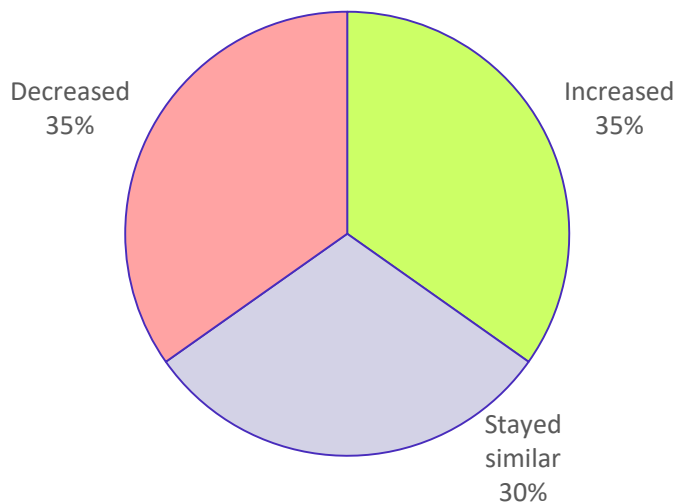
Business Ownership



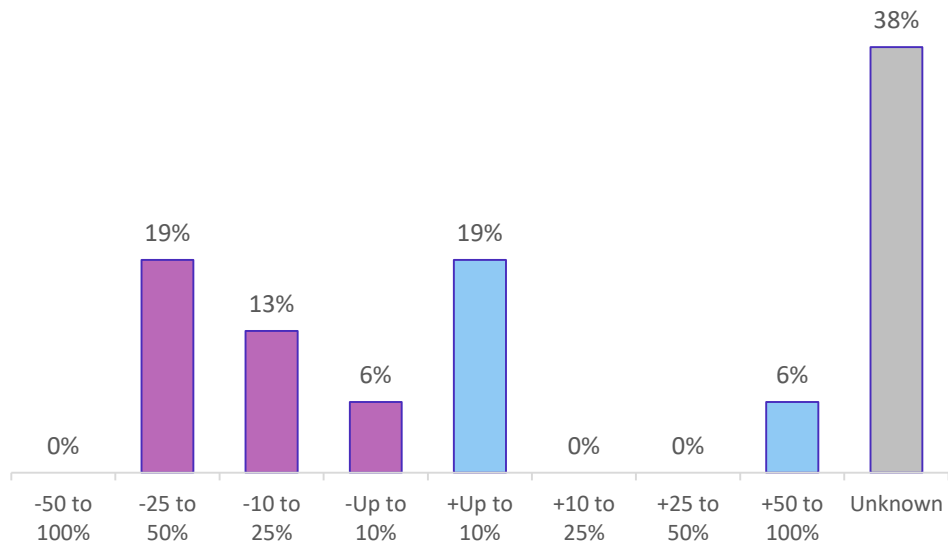
Current Staffing Levels



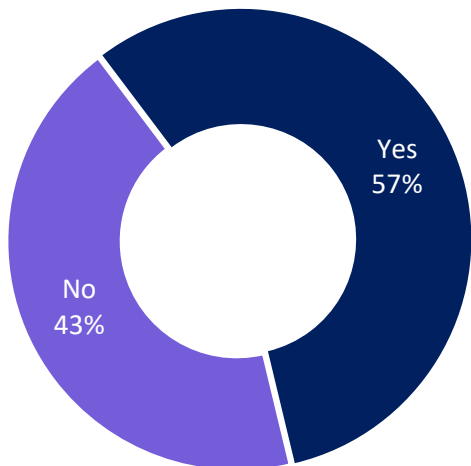
Impact on Turnover



Level of Impact



Were you forced to close operations at any point?

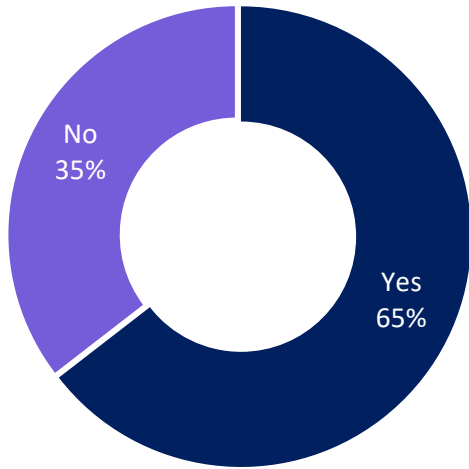


Did the business pivot to provide alternative services during the COVID lockdown ...	%
No	52%
Yes	48%
<i>Of those who said yes ...</i>	
Online selling & delivery	55%
Click & collect	64%
New services tailored to new circumstances	55%
New products tailored to new circumstances	18%

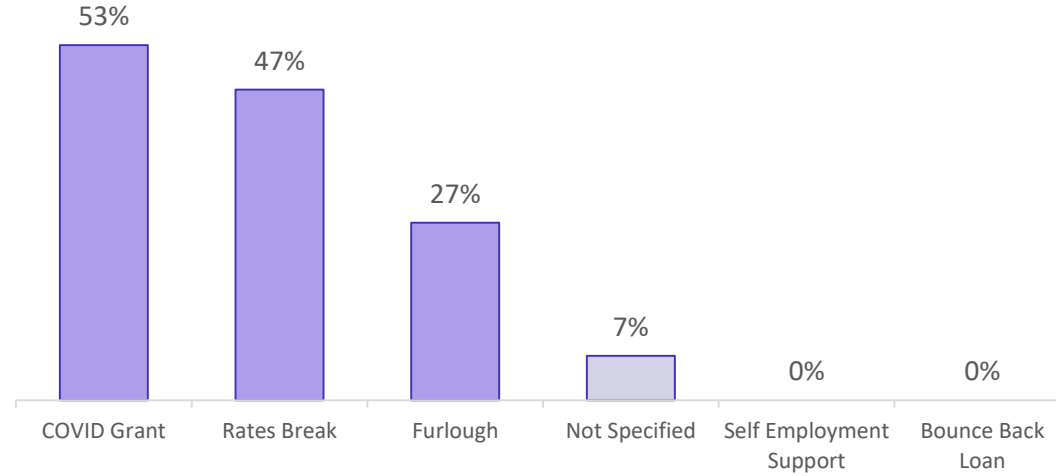
Kilrea appeared to suffer from the Coronavirus pandemic to a much lesser degree compared to other towns sampled.

35% stated they saw an increase in turnover (the highest of the 12 towns), and another 35% stated their revenue decreased (the lowest in the borough).

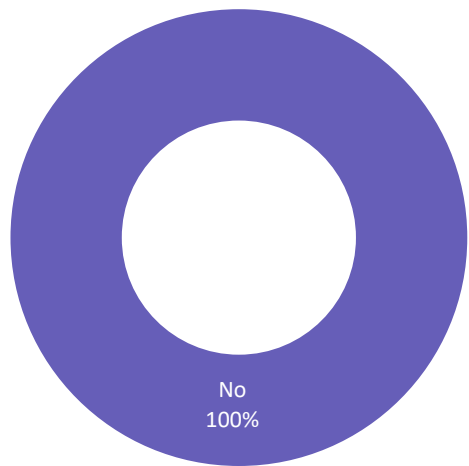
Did you avail of any Government support?



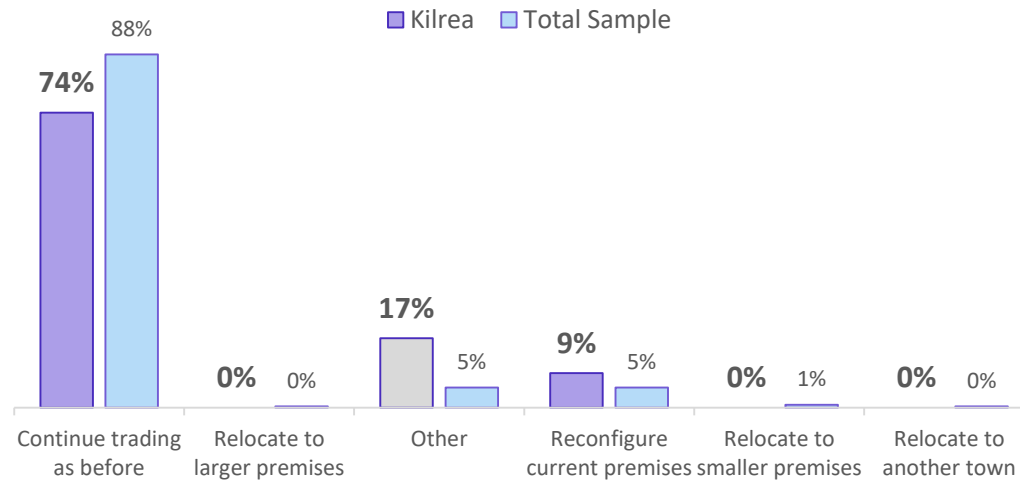
What kind of Government Support ...



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



Trading intentions going forward ...



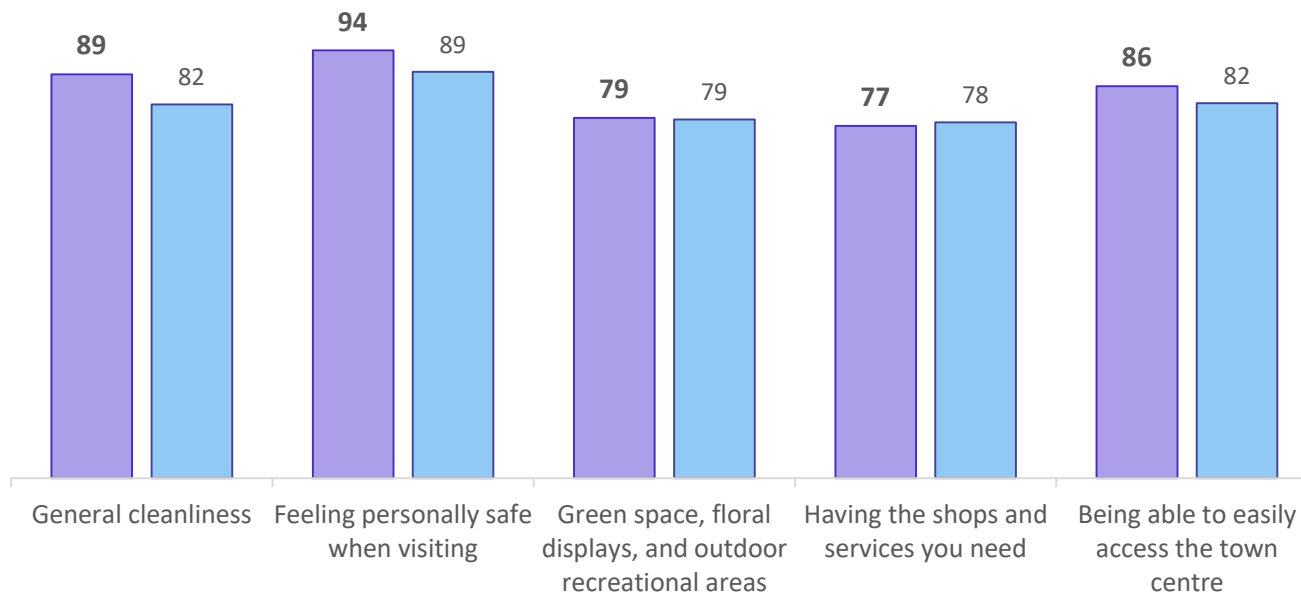
Despite appearing to be less affected by the COVID lockdown than the rest of the borough, the rate of uptake of government supports during the pandemic was directly line with the borough average of 65%, suggesting that the supports availed of helped mitigate the worst impacts of lockdown.

There was no uptake recorded in the town of any of the supports available via the Council.

	Kilrea Traders				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%	0%	0%	0%	13%	9%	9%	52%	9%	9%
Calculation	Total of 'Like' (78) – Total of Dislike (0) = Kilrea Traders Score = +78									

Average Rating Kilrea Town Centre (out of 100)

■ Kilrea ■ All Towns



- In the case of Kilrea, trader sentiment towards the town eclipses that of the visitors.
- This is by no means unique, happening in 5 towns, but the difference in sentiment is quite notable at 22 points between the two.
- Only in Limavady does the trader sentiment eclipse visitor sentiment by a greater degree.

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 Kilrea a sample size of 71 was achieved which provides us with a margin of error of +/- 11.6% @ 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 – 11.6% 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 visitors/traders. This should be the first targets for change
0 to 24	Poor	Overall the visitors/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 Kilrea Visitors

No.	ACORN Group	Kilrea	Total Sample	Sub-Category		Kilrea	Total Sample
1	Affluent Achievers	4%	7%	A	Lavish Lifestyles	0%	0%
				B	Executive Wealth	4.5%	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	63%	52%	F	Countryside Communities	62.7%	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	28%	28%	K	Student Life	0.0%	0.4%
				L	Modest Means	7.5%	8.4%
				M	Striving Families	11.9%	12.1%
				N	Poorer Pensioners	9.0%	7.7%
5	Urban Adversity	4%	12%	O	Young Hardship	1.5%	7.1%
				P	Struggling Estates	1.5%	3.0%
				Q	Difficult Circumstances	1.5%	1.5%

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For further information please contact:

Albert Hamilton

Chief Executive

albert.hamilton@card-group.com

+44 (0) 78 1211 1262

Niall Murphy

Head of Insight

niall.murphy@card-group.com

+44 (0) 78 4939 6385

Aedan Beatty

Analyst

aedan.beatty@card-group.com