Causeway Coast & Glens Borough Council

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Limavady

August 2021

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Client Analysis & Relationship Development

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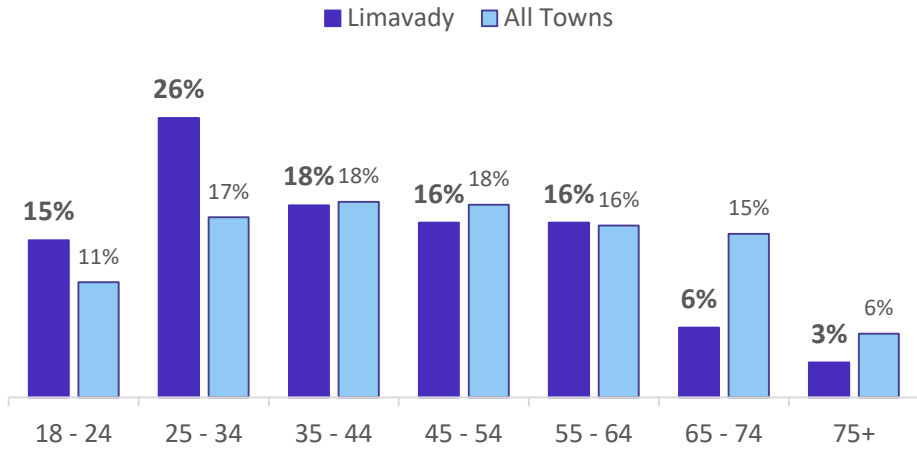
The following report is a sub-report seeking to provide a summarised snapshot of our results, emanating from the Causeway Coast & Glens visitor & traders sampling, at a **local** level. This particular sub-report provides the snapshot for sampling that took place in **Limavady**;

- The visitor results are based on an overall sample of **62** respondents;

- The trader's results are based on a sample of **34** traders within the town centre.
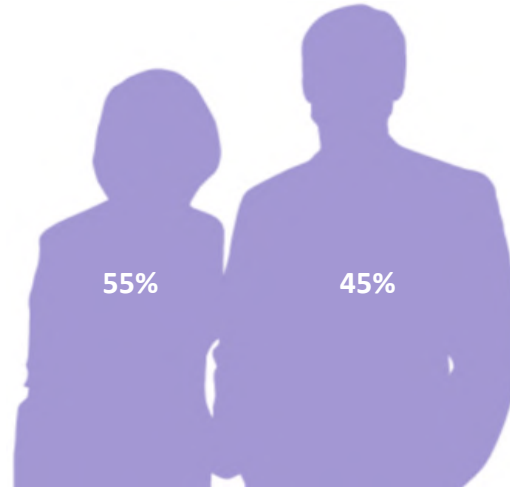
Sampling for visitors and traders in Limavady took place between 30th March and 15th April 2021. It is important to note that during this period, there were a range of continuing restrictions in place owing to the ongoing Coronavirus pandemic. The specific restrictions at the time are outlined in Appendix 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.

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Visitors

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Respondents by Age Group

■ Limavady □ All Towns

- 18 - 24: **15%** / 11%
- 25 - 34: **26%** / 17%
- 35 - 44: **18%** / 18%
- 45 - 54: **16%** / 18%
- 55 - 64: **16%** / 16%
- 65 - 74: **6%** / 15%
- 75+: **3%** / 6%

Respondent Gender Split

55%   **45%**

Limavady ACORN Profile* vs Overall Sample

- Affluent Achievers: **10%** / 7%
- Rising Prosperity: **2%** / 1%
- Comfortable Communities: **40%** / 52%
- Financially Stretched: **34%** / 28%
- Urban Adversity: **14%** / 12%

Darker shade denotes the Limavady 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 Limavady visitor sample is quite young relative to our total sample in the towns. Over 40% were under the age of 35 while less than 10% were over 65.
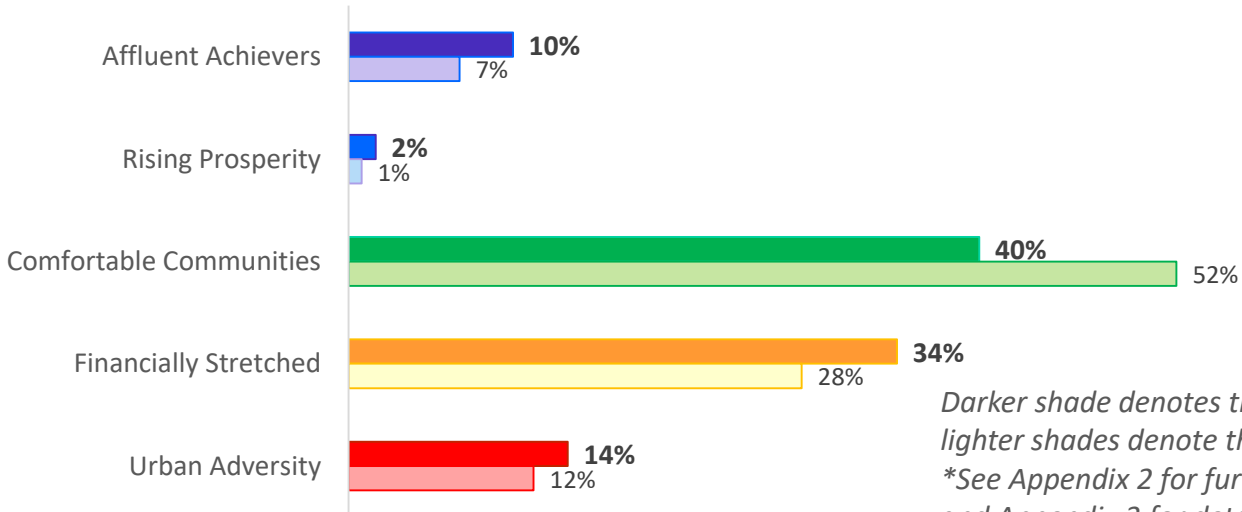
This gave the town visitors an average age of 42, only matched by Bushmills as the youngest visitor population in the borough.

The ACORN profile also showed a significant diversion from the wider area profile. There is a greater prevalence of the 2 less affluent ACORN categories.

In terms of the sub-categories, the prevalence of the 2 least affluent – *'Struggling Estates' & 'Difficult Circumstances'* – is 12.1%, compared to 4.5% for the general area.
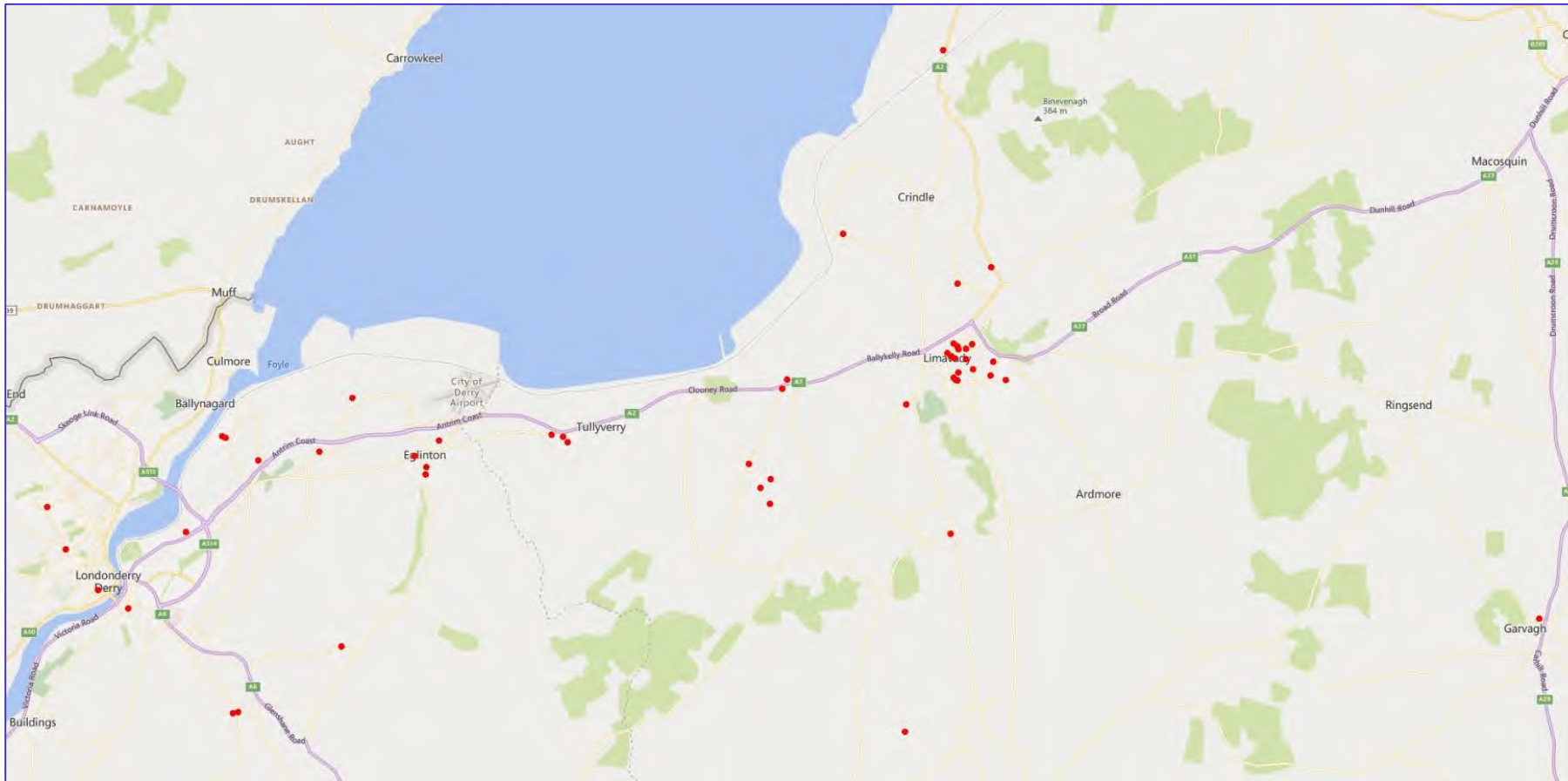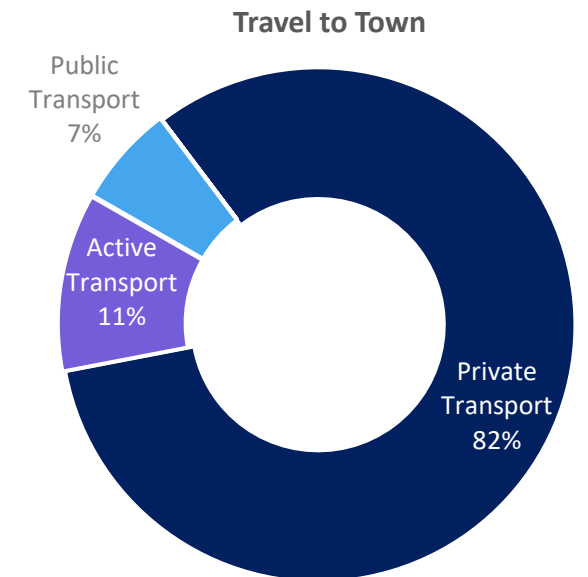
With a slightly elevated rate of Affluent Achievers also, the population of Limavady appears to show a greater degree of polarity in affluence.

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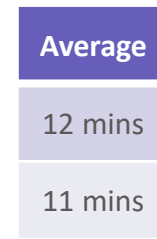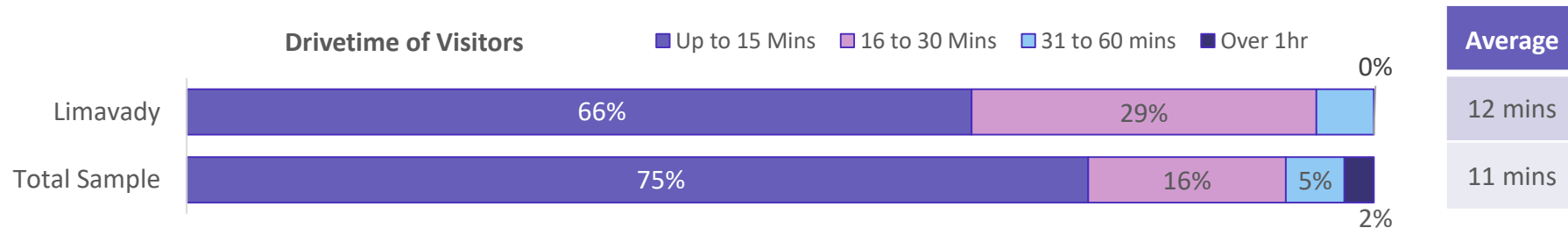
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There was a significant proportion of the visitor population from outside the immediate town, 16-30 mins drive away. We can see they primarily come from along the A2 corridor, with concentrations in Derry / Londonderry and Eglinton.

Interesting is that virtually all visitors originate from the West of the town. Only one recorded from the East.

Travel to Town

Public Transport 7%

Active Transport 11%

Private Transport 82%

Drivetime of Visitors ■ Up to 15 Mins ■ 16 to 30 Mins ■ 31 to 60 mins ■ Over 1hr

	Average
Limavady — 66% / 29% / 0%	12 mins
Total Sample — 75% / 16% / 5% / 2%	11 mins

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Why are people going to the town centres?

Horizontal bar chart comparing Limavady and Total Sample by reason for visiting:

Reason	Limavady	Total Sample
Grocery shopping	58%	43%
Recreation	18%	28%
Working or attending classes	16%	11%
Non-grocery shopping	13%	22%
To meet friends	13%	14%
Eating/drinking	6%	14%
Public Services	6%	8%
Professional Services	6%	10%
School run	5%	5%
Leisure	0%	1%
Health and Beauty	0%	6%
Other	0%	1%

Location	Average Dwell Time	Average Spend per Minute
Limavady	115 mins	£0.46
Total Sample	109 mins	£0.29

Average Spend
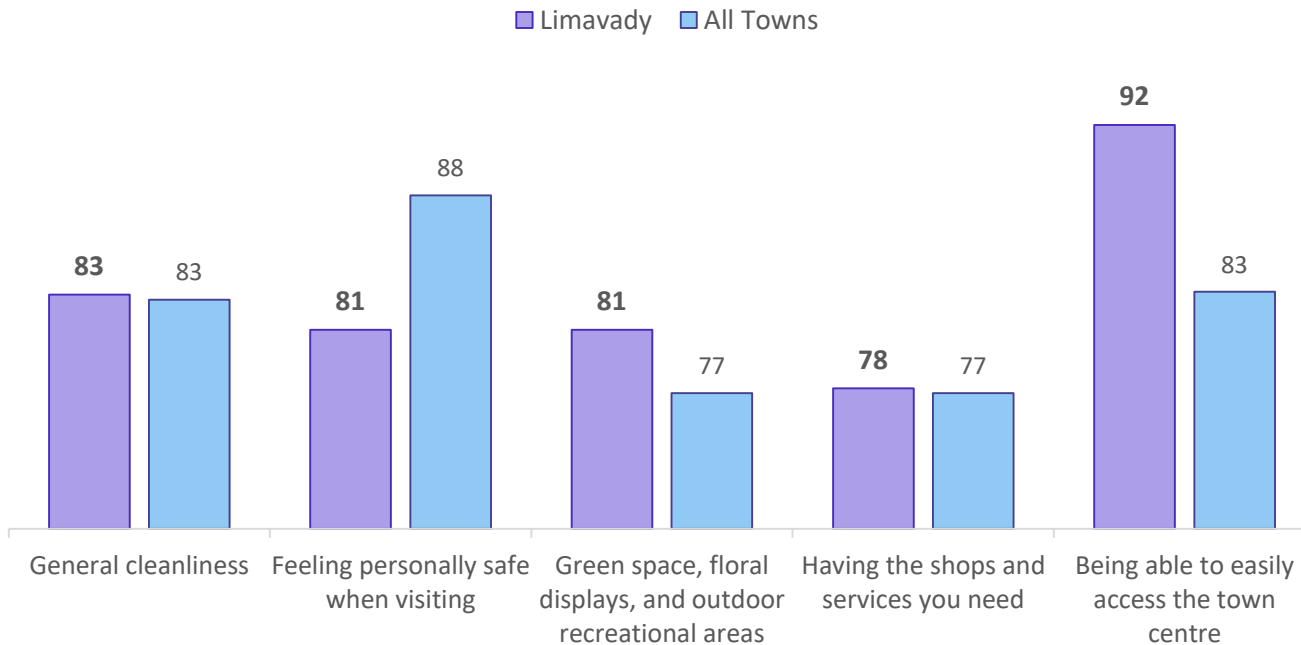
Limavady	Total Sample
£54	£32

By a significant margin, the primary use of Limavady town centre is for the purposes of 'Grocery Shopping'.

In contrast to some other towns where Grocery Shopping was predominant, but spend was low – Limavady looks to be utilised for larger grocery shopping trips, as opposed to smaller grocery visits.

Just over 27% of our Limavady sample spent over £70 in the town. By contrast, the next largest proportion to spend over this amount was 13% in Ballymoney.

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	Limavady Visitors									Score: +45
	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	3%	3%	0%	10%	8%	15%	6%	34%	6%	15%
Calculation	Total of 'Like' (61) – Total of Dislike (16) = +45									

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

■ Limavady ■ All Towns

| General cleanliness | Feeling personally safe when visiting | Green space, floral displays, and outdoor recreational areas | Having the shops and services you need | Being able to easily access the town centre |

- Above is the combined Sentiment Score for Limavady. The rationale for Sentiment Scoring it outlined in Appendix 2.

- Despite this high rate of spend, Limavady receives the second lowest Sentiment Score among the 12 towns sampled.

- Limavady has the lowest feelings of personal safety across all towns, yet scores relatively favourably across the other aspects – it appears this is the primary factor bringing the sentiment down.

"Entrance is shocking. Roundabout is very unwelcoming to outside visitors coming in. The council need to look at allowing that. It would drive tourists away too."

"Unwelcoming atmosphere, at times, to members of the Catholic community"

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

■ Limavady   ■ Total Sample
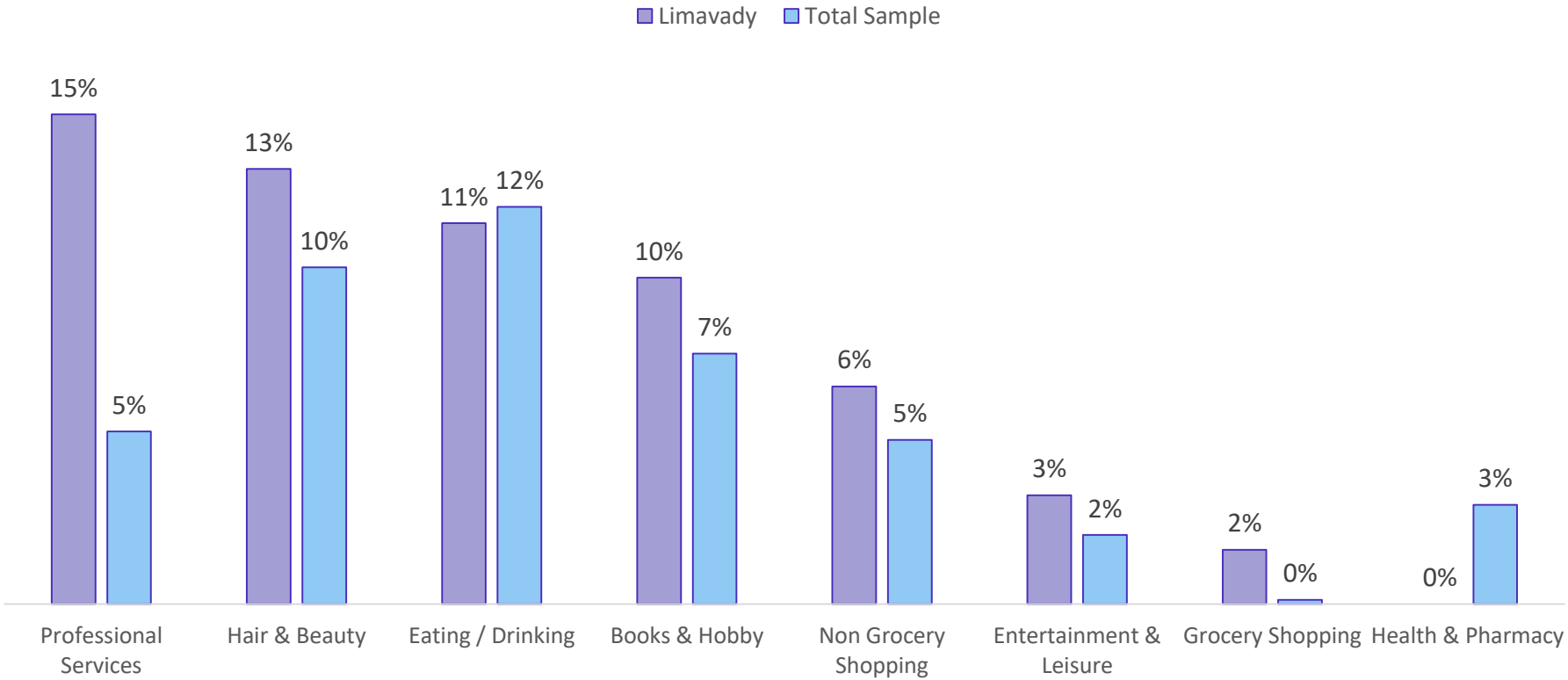
As the town centre is already highly utilised for purposes of grocery shopping, the impact of the restrictions lifting is likely to be muted for this sector.
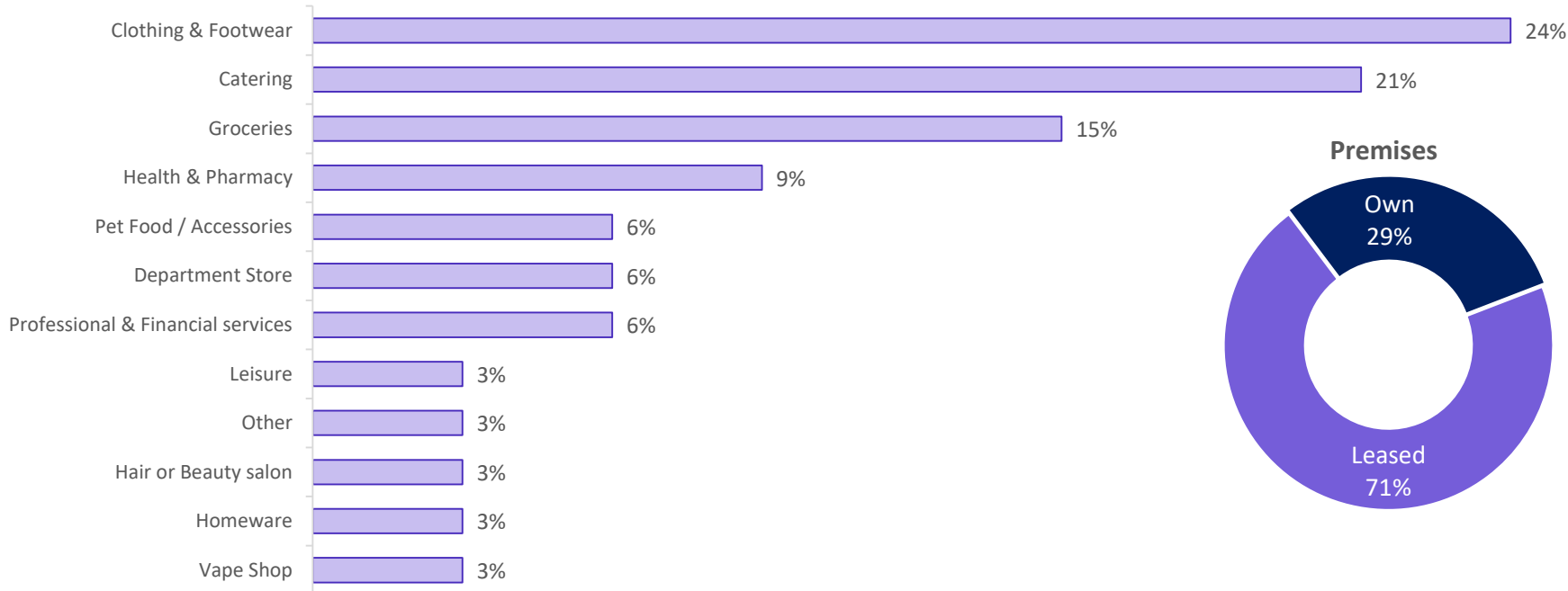
Surprisingly it is the Services sector in the town which appears may benefit the most.

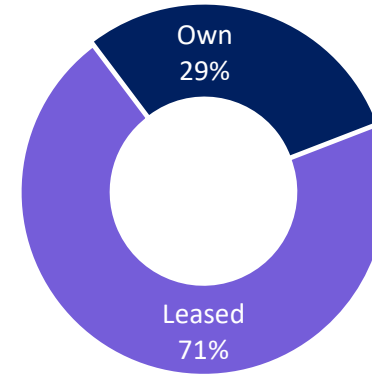| What prevents you from visiting the town centre more?	Limavady	Total Sample
Congestion & Traffic	21%	19%
Parking	15%	15%
Habit	13%	8%
Unappealing Retailers	18%	13%
Evening Economy Options	16%	7%
Visually Unappealing Area	23%	7%
Cafes & Restaurant Offer	15%	7%
Safety	19%	3%
None of these	44%	52%

Limvady TC Use	Professional Services	Hair & Beauty	Eating / Drinking	Books & Hobby	Non Grocery Shopping	Entertainment & Leisure	Grocery Shopping	Health & Pharmacy
Before COVID	32.3%	38.7%	50.0%	35.5%	48.4%	45.2%	85.5%	59.7%
After COVID	46.8%	51.6%	61.3%	45.2%	54.8%	48.4%	87.1%	59.7%
Difference	14.5%	12.9%	11.3%	9.7%	6.5%	3.2%	1.6%	0.0%

Traders

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Business Sector

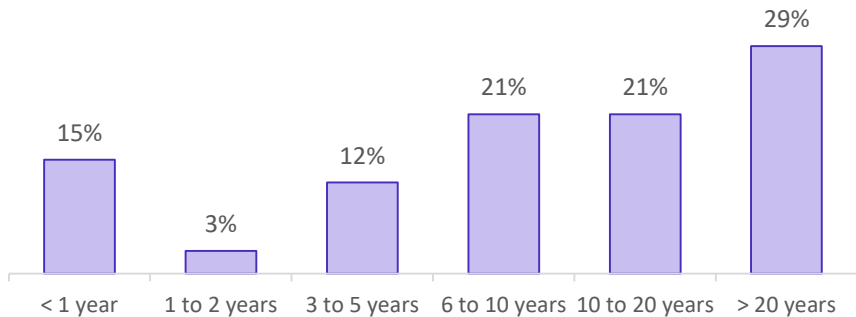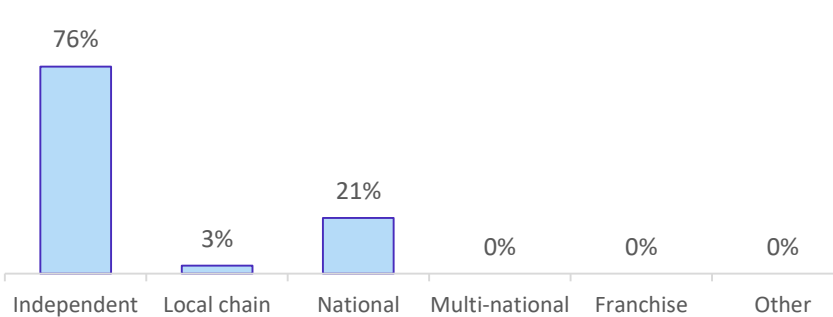| Sector	%
Clothing & Footwear	24%
Catering	21%
Groceries	15%
Health & Pharmacy	9%
Pet Food / Accessories	6%
Department Store	6%
Professional & Financial services	6%
Leisure	3%
Other	3%
Hair or Beauty salon	3%
Homeware	3%
Vape Shop	3%

Premises

Own 29%
Leased 71%

Limavady recorded the highest rate of 'leased' premises among our trader sample.

The trader profile is also relatively young with only 50% aged over 10 years. Only Bushmills had a similarly low rate of mature businesses.
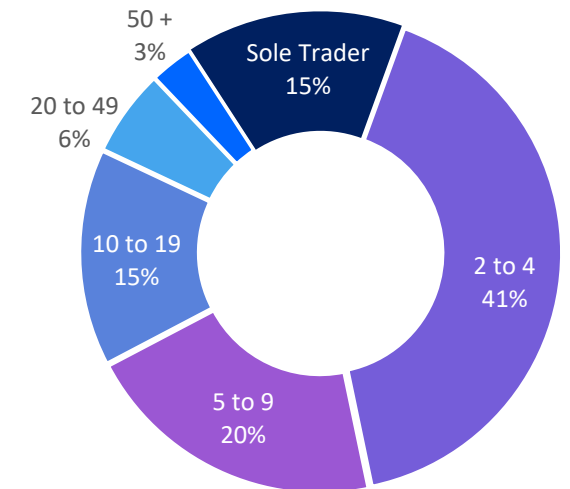
Current Staffing Levels

Sole Trader 15%
2 to 4 41%
5 to 9 20%
10 to 19 15%
20 to 49 6%
50 + 3%

Business Age

Age	%
< 1 year	15%
1 to 2 years	3%
3 to 5 years	12%
6 to 10 years	21%
10 to 20 years	21%
> 20 years	29%

Business Ownership

Ownership	%
Independent	76%
Local chain	3%
National	21%
Multi-national	0%
Franchise	0%
Other	0%

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Impact on Turnover

Increased
26%

Decreased
56%

Stayed similar
18%

Level of Impact

21%	4%	7%	0%	0%	7%	7%	4%	50%
-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

Were you forced to close operations at any point?

Yes
53%

No
47%
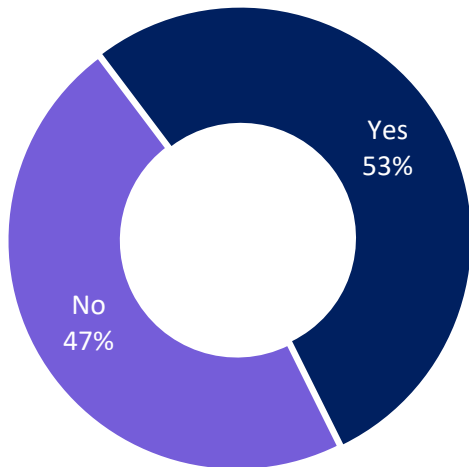
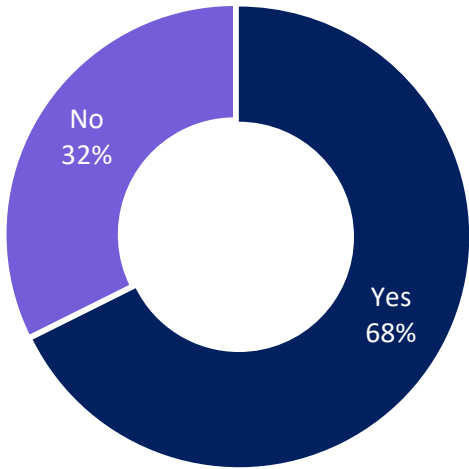| Did the business pivot to provide alternative services during the COVID lockdown …	%
No	38%
Yes	62%
Of those who said yes …	
Online selling & delivery	57%
Click & collect	71%
New services tailored to new circumstances	14%
New products tailored to new circumstances	10%

The impact of COVID restrictions was generally in line with the average borough-wide trends.

56% noted a reduction in revenue, compared to 59% for the borough. Similarly a slightly lower rate (53%) had to close while the rate for the borough was 58%.
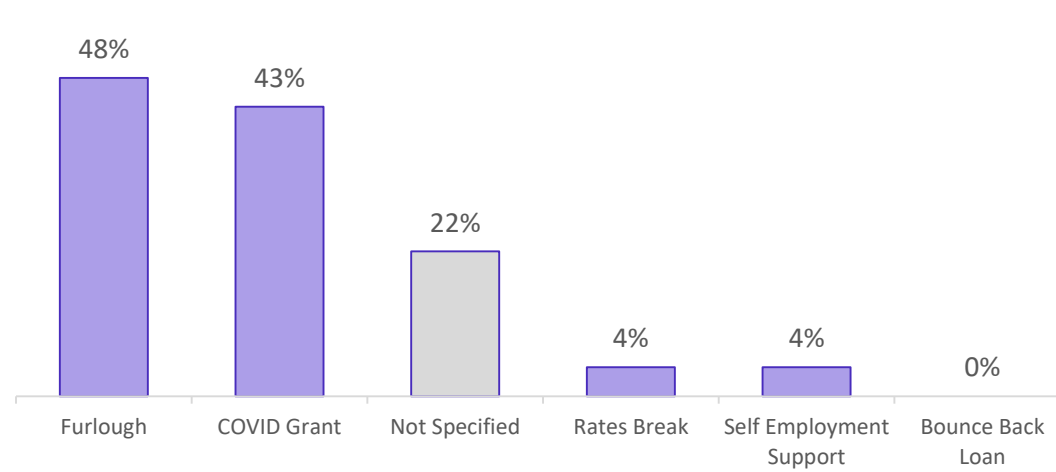
26% of traders did note an increase in their turnover during the lockdown period. This is slightly above the borough average of 19%.

While grocery shops and pharmacies make up the bulk of these traders, for obvious reasons, there was the interesting inclusion of a café and a gym in this cohort.
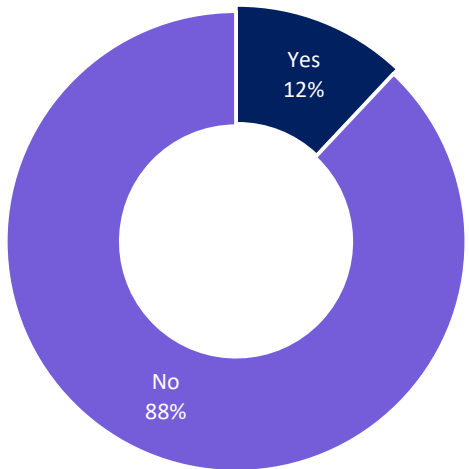
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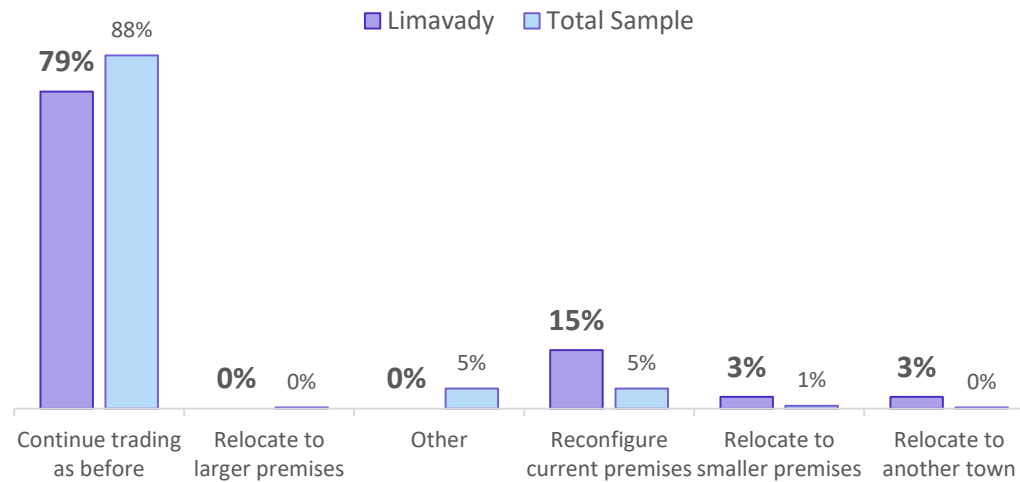
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Did you avail of any Government support?

- No 32%
- Yes 68%

What kind of Government Support …

Furlough	COVID Grant	Not Specified	Rates Break	Self Employment Support	Bounce Back Loan
48%	43%	22%	4%	4%	0%

Did you avail of any CC&G Business Support …

- Yes 12%
- No 88%

Trading intentions going forward …

■ Limavady ■ Total Sample

	Continue trading as before	Relocate to larger premises	Other	Reconfigure current premises	Relocate to smaller premises	Relocate to another town
Limavady	79%	0%	0%	15%	3%	3%
Total Sample	88%	0%	5%	5%	1%	0%

Uptake of government support among Limavady traders was also in line with general borough wide trends.

The uptake of supports provided by Council, however, was the highest among all our towns. The breakdown of this uptake among those who said 'yes' is broken down below.

Support	%
Alchemy	25%
COVID-19 Recovery Revitalise Fund	50%
Digital Causeway Program	25%

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Limavady Traders									Score: +71
	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%	3%	26%	3%	15%	29%	24%
Calculation	Total of 'Like' (**71**) – Total of Dislike (**0**) = **Limavady Traders Score = +71**									

Average Rating Limavady Town Centre (out of 100)

■ Limavady   ■ All Towns
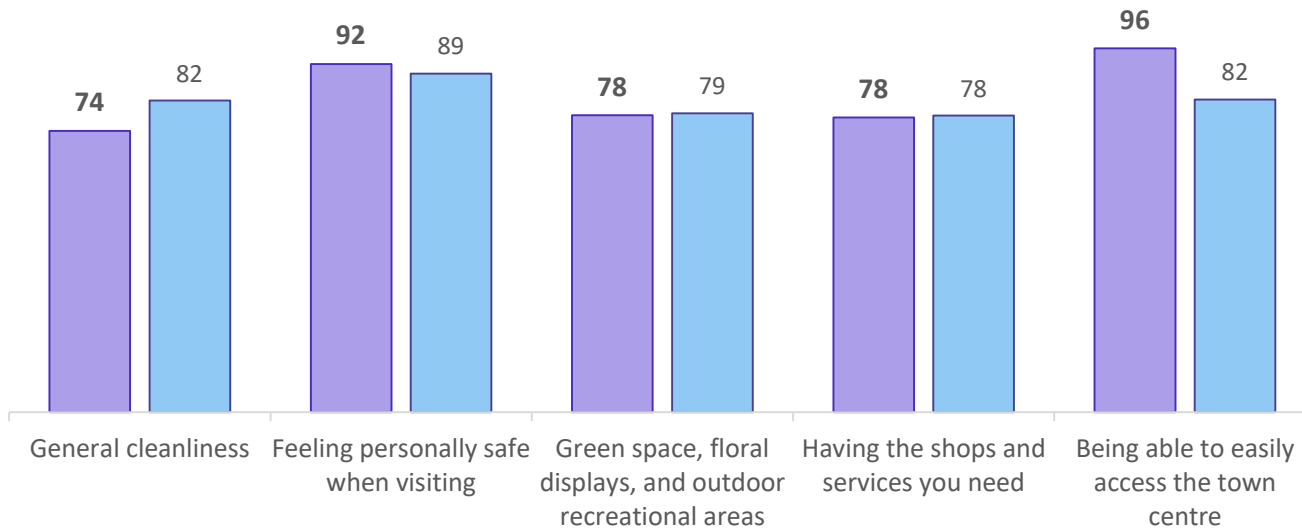
- In contrast to our visitor sample, the town received quite a positive Sentiment Score from our traders.

- There were no 'dislikes' recorded among our sample.

- However some of the usual sentiment around a lack of shop variety, and a lack of footfall was present in our ratings.

- Once again, as recorded among our visitor sample, the town centre appears to be regarded well for its ease of accessibility.

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 Limavady a sample size of 62 was achieved which provides us with a margin of error of +/- 12.4% @ 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 – 12.4% 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 Limavady Visitors

No.	ACORN Group	Limavady	Total Sample		Sub-Category	Limavady	Total Sample
1	Affluent Achievers	10%	7%	A	Lavish Lifestyles	0%	0%
				B	Executive Wealth	6.9%	4.1%
				C	Mature Money	3.4%	2.9%
2	Rising Prosperity	2%	1%	D	City Sophisticates	0%	0%
				E	Career Climbers	1.7%	0.8%
3	Comfortable Communities	40%	52%	F	Countryside Communities	32.8%	45.6%
				G	Successful Suburbs	0%	2.3%
				H	Steady Neighbourhoods	6.9%	1.6%
				I	Comfortable Seniors	0%	1.4%
				J	Starting Out	0%	1.1%
4	Financially Stretched	34%	28%	K	Student Life	0%	0.4%
				L	Modest Means	6.9%	8.4%
				M	Striving Families	20.7%	12.1%
				N	Poorer Pensioners	6.9%	7.7%
5	Urban Adversity	14%	12%	O	Young Hardship	1.7%	7.1%
				P	Struggling Estates	6.9%	3.0%
				Q	Difficult Circumstances	5.2%	1.5%

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Analyst

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