Causeway Coast & Glens Borough Council

Title of Report:	**Borough towns - Business and Public Perception Studies.**
Committee Report Submitted To:	**PLANNING COMMITTEE**
Date of Meeting:	**27th October 2021**
For Decision or For Information	**For Decision**

Linkage to Council Strategy (2021-25)	
Strategic Theme	Cohesive Leadership
Outcome	Our elected members work collaboratively and make decisions on an evidence led basis and in line with its policies.
Lead Officer	Principal Planning Officer

Budgetary Considerations: Not applicable in this case	
Cost of Proposal	
Included in Current Year Estimates	
Capital/Revenue	
Code	
Staffing Costs	

Screening Requirements	Required for new or revised Policies, Plans, Strategies or Service Delivery Proposals. **Not applicable in this case.**		
Section 75 Screening	Screening Completed:	Yes/No	Date:
	EQIA Required and Completed:	Yes/No	Date:
Rural Needs Assessment (RNA)	Screening Completed	Yes/No	Date:
	RNA Required and Completed:	Yes/No	Date:
Data Protection Impact Assessment (DPIA)	Screening Completed:	Yes/No	Date:
	DPIA Required and Completed:	Yes/No	Date:

1.0 <u>Purpose of Report</u>

1.1 To present updated public and business perception studies for 12no. towns within the Borough.

2.0 Background

2.1 Under the provisions of the Strategic Planning Policy Statement (SPPS) and in preparation of its Local Development Plan (LDP), Councils are required to undertake an assessment of the need or capacity for retail and other main town centre uses across the plan area, and to prepare town centre health checks.

2.2 Retail capacity work and some aspects of town centre health check work are specialisms within planning, and, therefore, in recognition of the requirement to undertake this work as part of the LDP process, and of the need in relation to the determination of planning applications for retail development within the Borough, the Council appointed two consultants back in November 2016 to prepare two separate but related pieces of work, as follows:

- Nexus Planning - Retail and Leisure Capacity Study; and
- Sproule Consulting - Public and Business Perception Studies

2.3 In late 2020 the Council commissioned Nexus Planning to update the retail (only) part of the 2016 Retail and Leisure Capacity Study, to provide an updated evidence base to inform the LDP preparation and to assist in the determination of a number of planning applications within the Borough. This update was presented and agreed at the 25th November 2020 Planning Committee.

2.4 In March 2021, the Council appointed Client Analysis & Relationship Development (CARD) Group Ltd to carry out updated public and business perception surveys in 12 designated towns within the Borough (see individual reports attached at Appendix 1). The aim of the survey was to assess how people and businesses perceive these towns in order to assist both the Council's Planning and its Prosperity & Place departmental operations.

2.4 The study is broken into twelve separate reports – one for each of the following towns:

- Ballycastle
- Ballykelly
- Ballymoney
- Bushmills
- Coleraine
- Cushendall
- Dungiven
- Garvagh
- Kilrea
- Limavady
- Portrush
- Portstewart

2.6 Each report sets out the following:

- Visitor sample size
- Trader sample size
- Date of survey
- Caveat re restrictions in place at the time of survey

Visitors

- Visitor Profile
- Origins & travel
- Associated mapping
- Reasons for visiting
- Opinions
- Pre and post-COVID use

Traders

- Trader Profile
- COVID Impact
- Opinions
- Appendix 1: Terminology and Clarification
- Appendix 2: ACORN & Sentiment explained
- Appendix 3: Results explained
- Disclaimer

3.0 Recommendation

3.1 **It is recommended** that the Planning Committee accept the CARD Public and Business Perception Surveys to inform the Local Development Plan preparation and the determination of relevant planning applications within the Borough.

Appendices:

Appendix 1: CARD Business & Public Perception Studies - Individual town survey results.

Causeway Coast & Glens Borough Council

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Limavady

August 2021

card

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**;

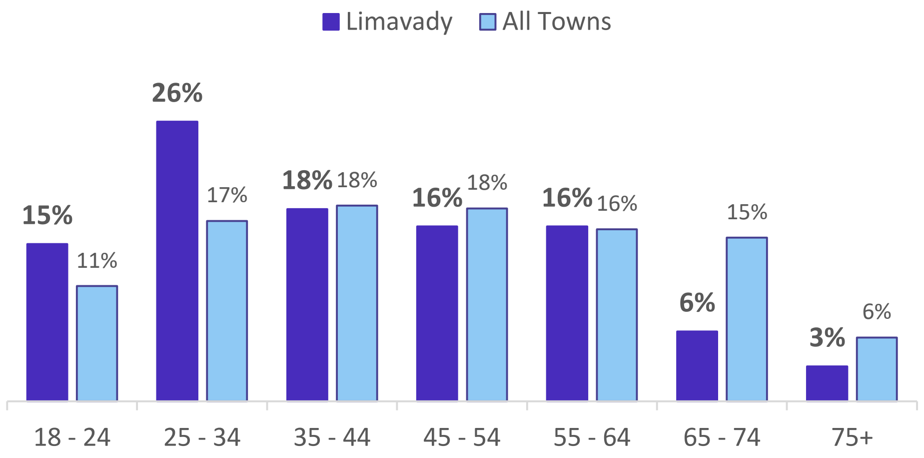
- The visitor results are based on an overall sample of **62** respondents;
- The trader's results are based on a sample of **34** traders within the town centre.

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.

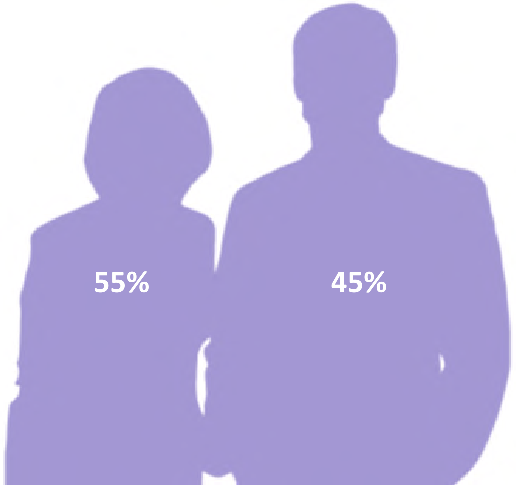
Visitors

Respondent Profile

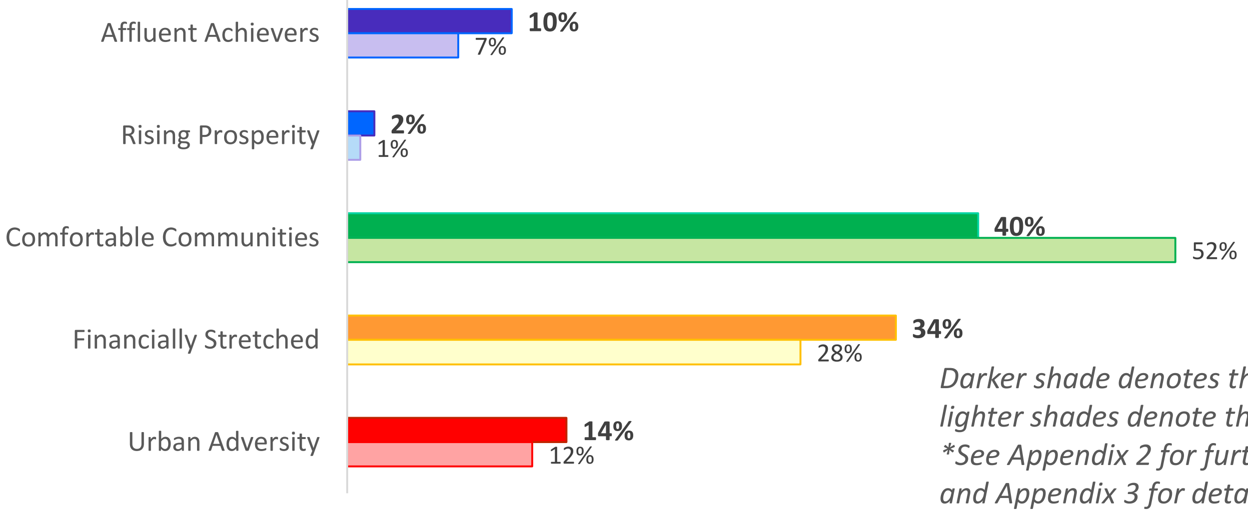
Respondents by Age Group



Respondent Gender Split



Limavady ACORN Profile* vs Overall Sample



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.

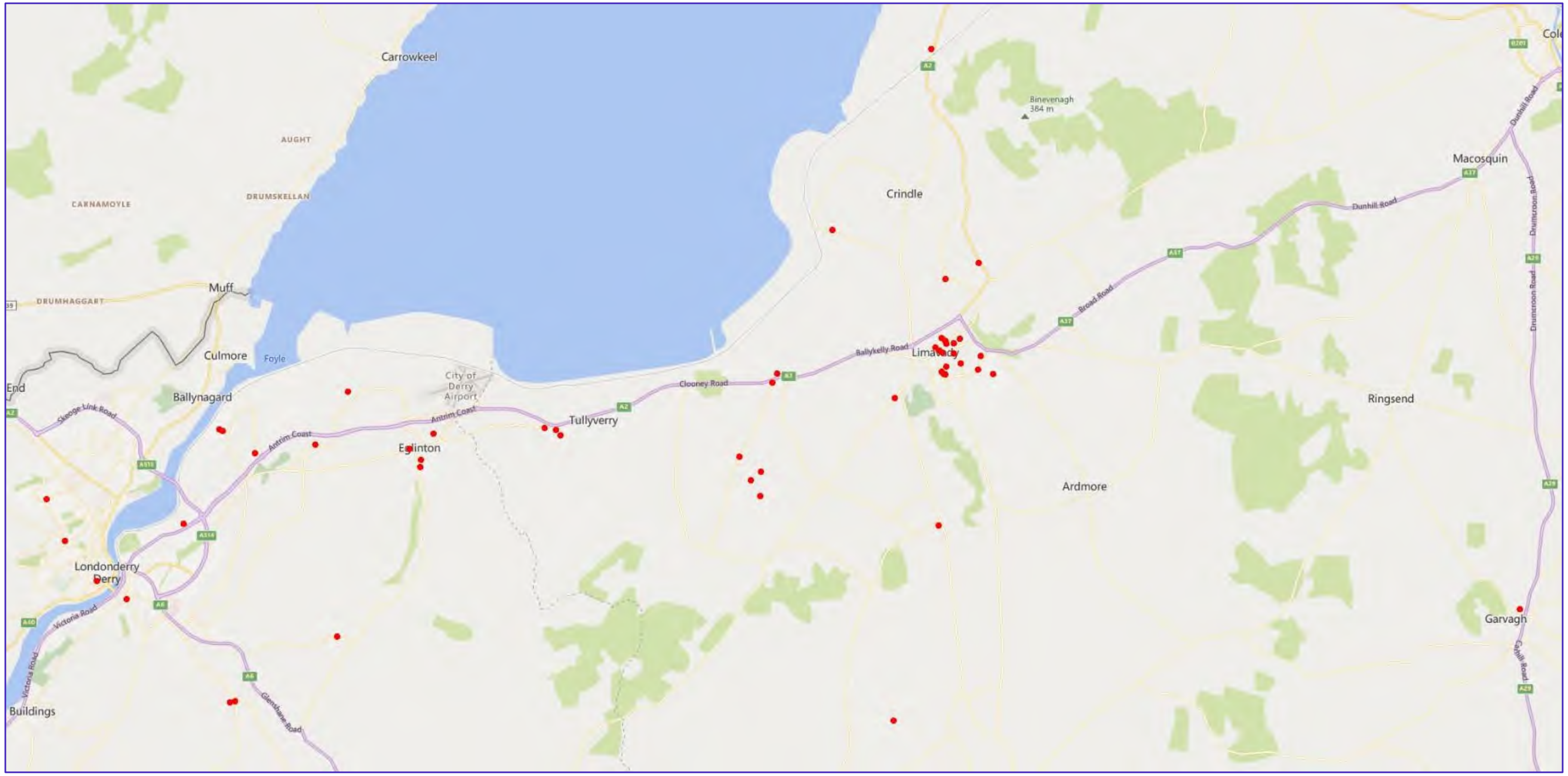
The ACORN profile also showed a significant diversion from the wider area profile. There is a greater prevalence of the 2 less affluent ACORN categories.

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.

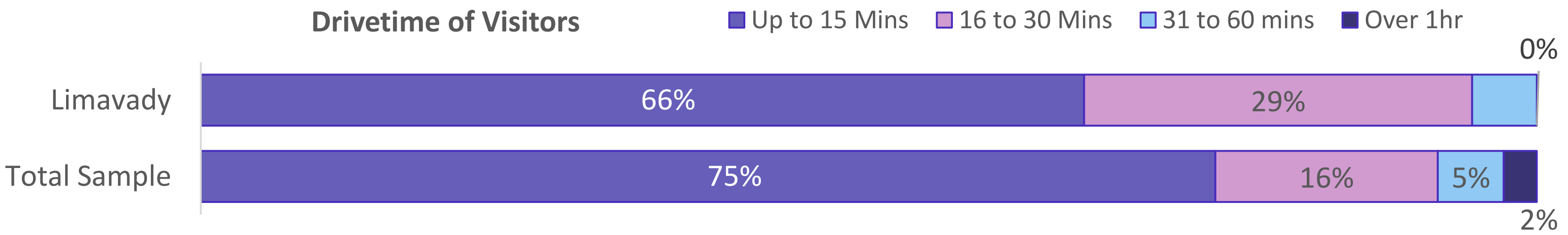
Origins & Travel

Causeway Coast & Glens Borough Council

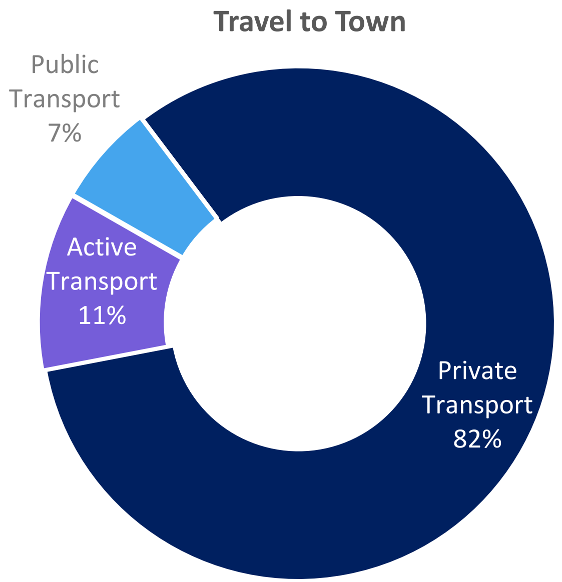


There was a significant proportion of the visitor population from outside the immediate town, 16-30 mins drive away. We can see they primarily come from along the A2 corridor, with concentrations in Derry / Londonderry and Eglinton.

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



Average
12 mins
11 mins



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ACORN Mapping

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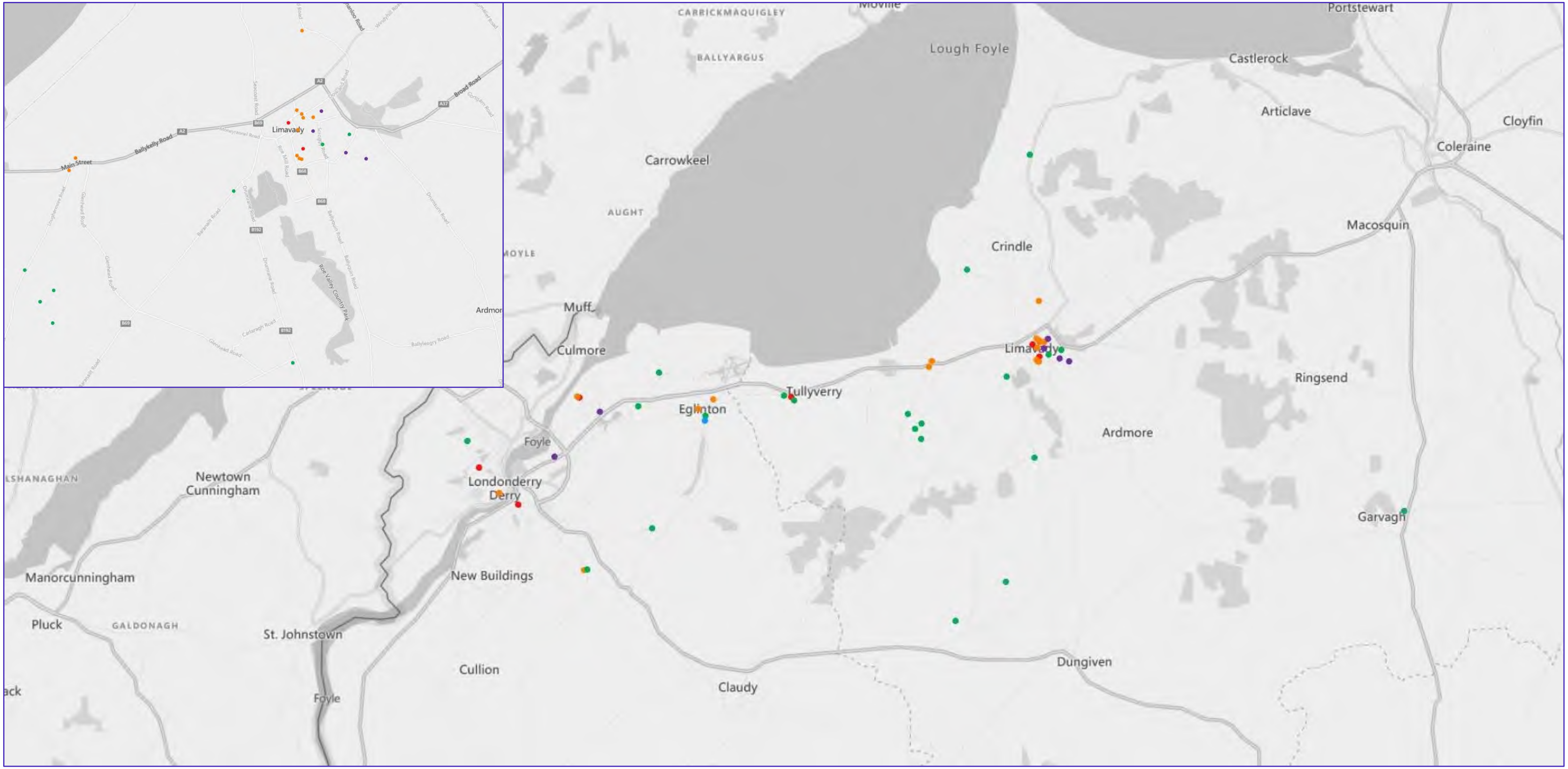

Empowering accurate consumer understanding

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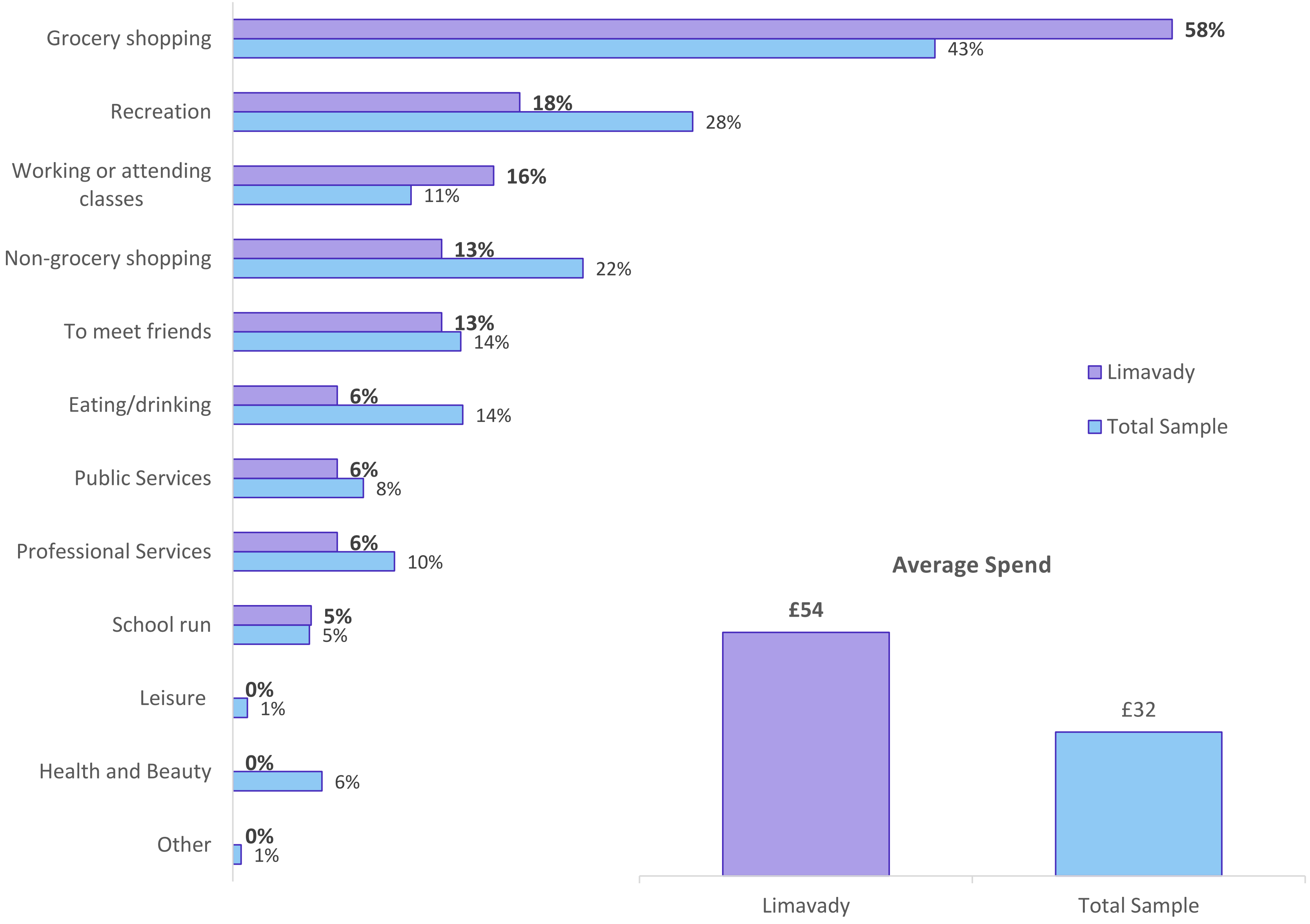
Why are people going to the town centres?



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

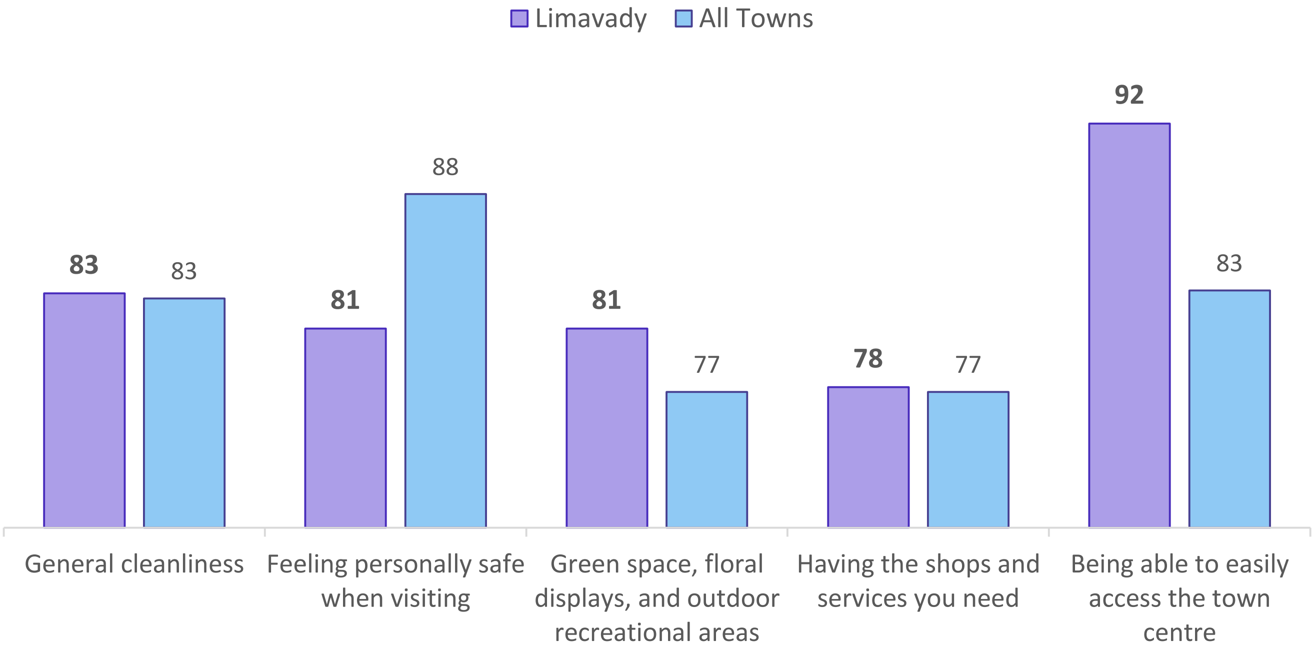
By a significant margin, the primary use of Limavady town centre is for the purposes of ‘Grocery Shopping’.

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.

	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)*



- 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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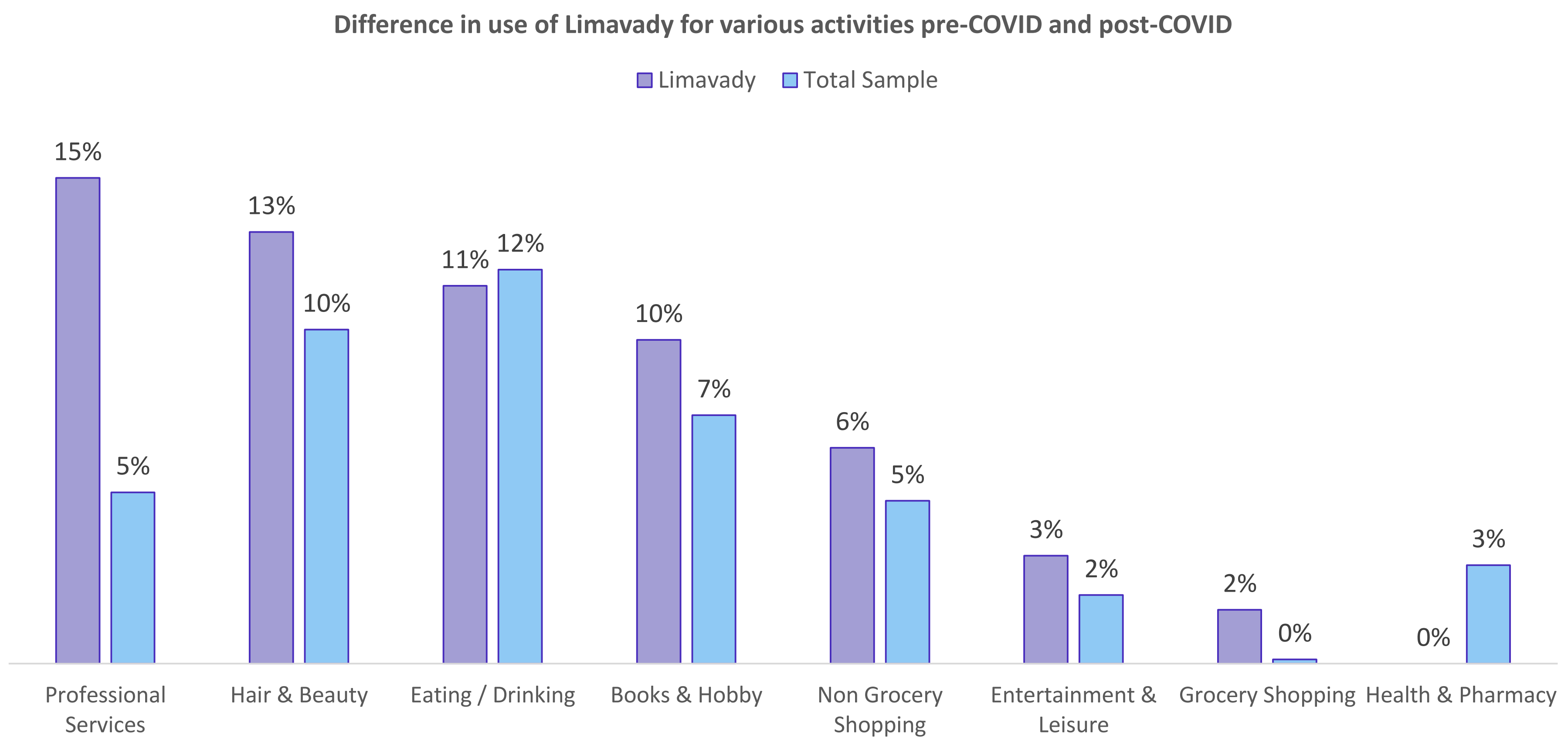

Limvady TC Use	Professional Services	Hair & Beauty	Eating / Drinking	Books & Hobby	Non Grocery Shopping	Entertainment & Leisure	Grocery Shopping	Health & Pharmacy
Before COVID	32.3%	38.7%	50.0%	35.5%	48.4%	45.2%	85.5%	59.7%
After COVID	46.8%	51.6%	61.3%	45.2%	54.8%	48.4%	87.1%	59.7%
Difference	**14.5%**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

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%**

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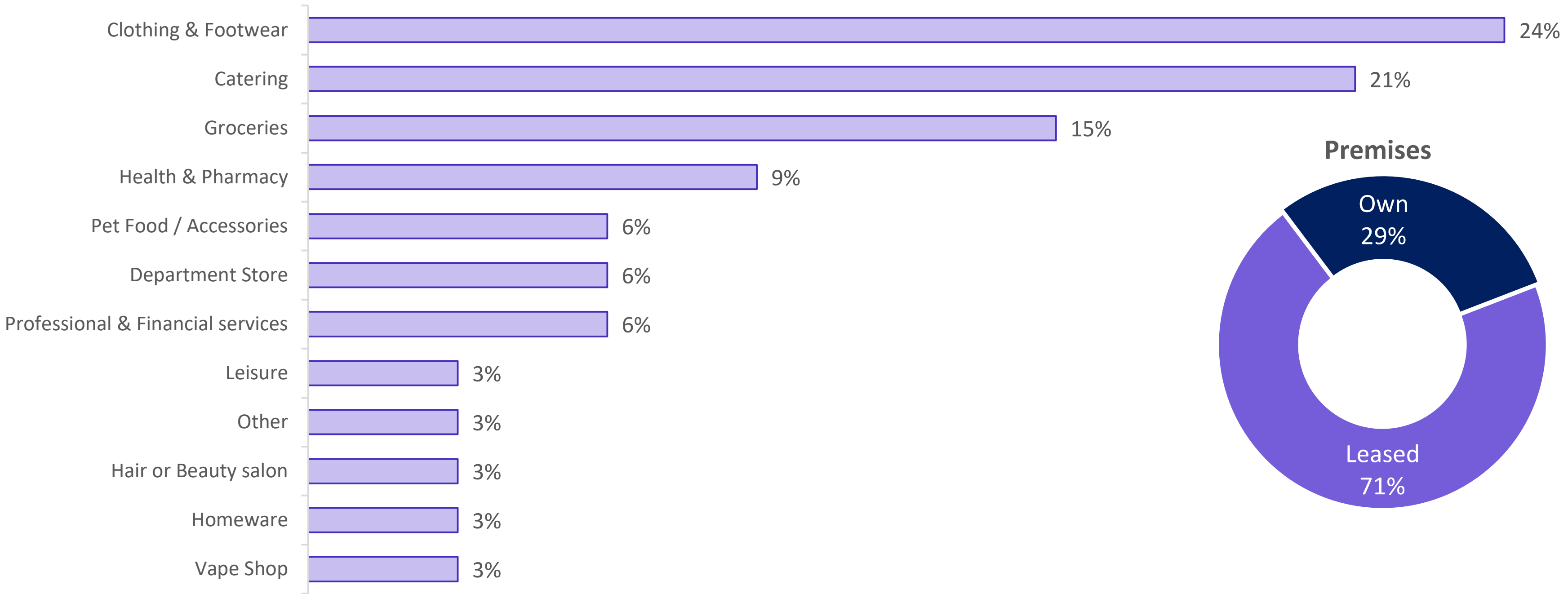
Traders

Trader Profile

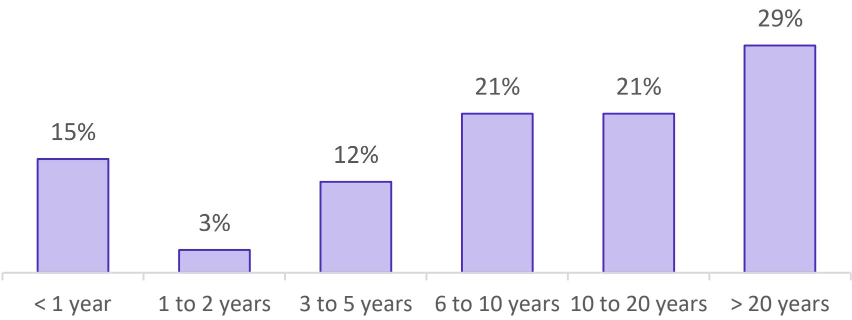
Business Sector



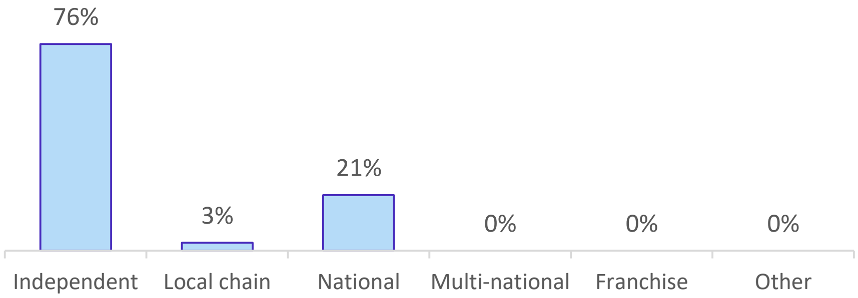
Limavady recorded the highest rate of ‘leased’ premises among our trader sample.

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

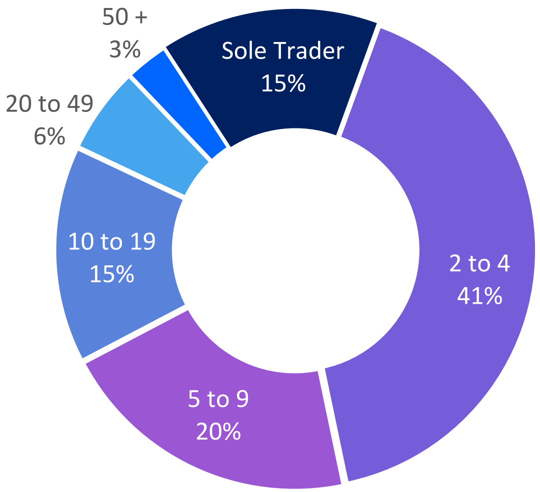
Business Age

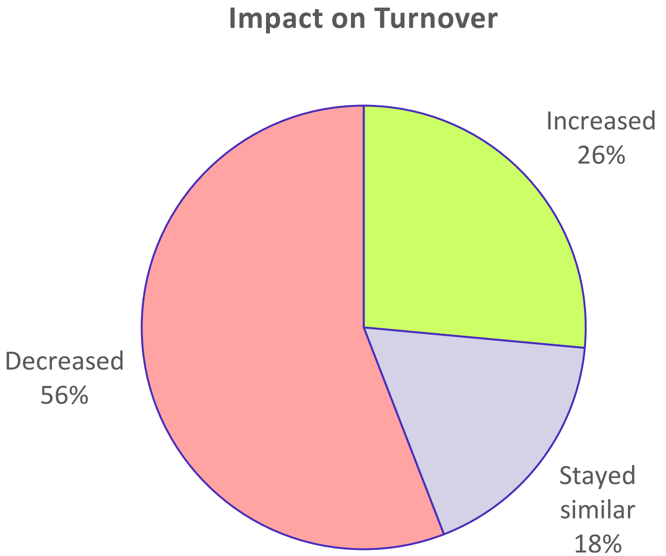


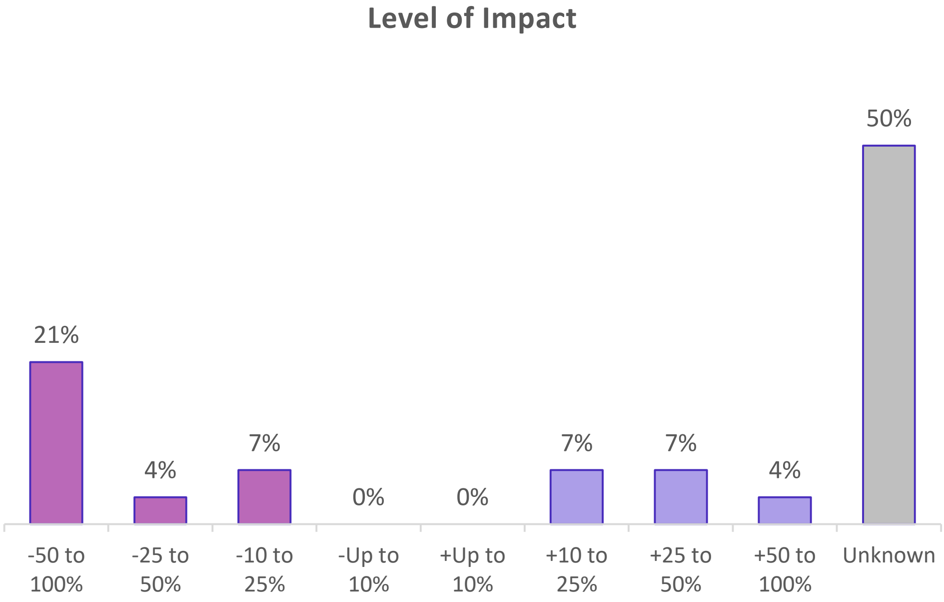
Business Ownership

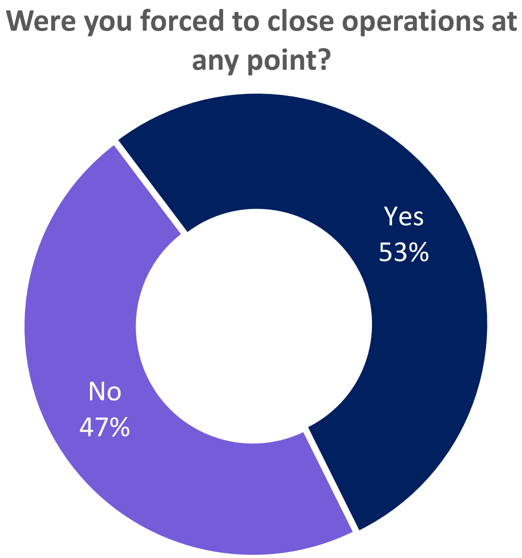


Current Staffing Levels









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%

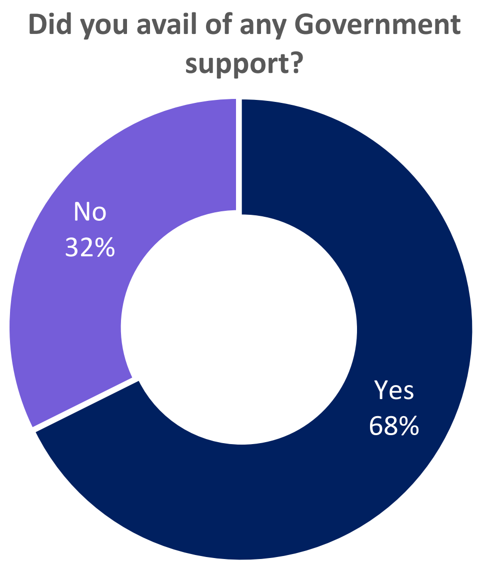
The impact of COVID restrictions was generally in line with the average borough-wide trends.

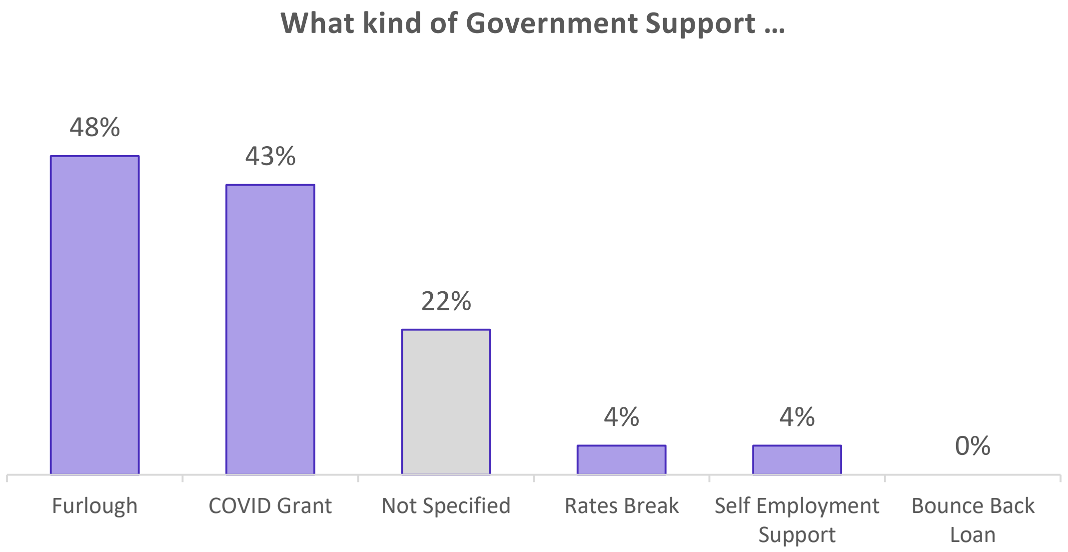
56% noted a reduction in revenue, compared to 59% for the borough. Similarly a slightly lower rate (53%) had to close while the rate for the borough was 58%.

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.

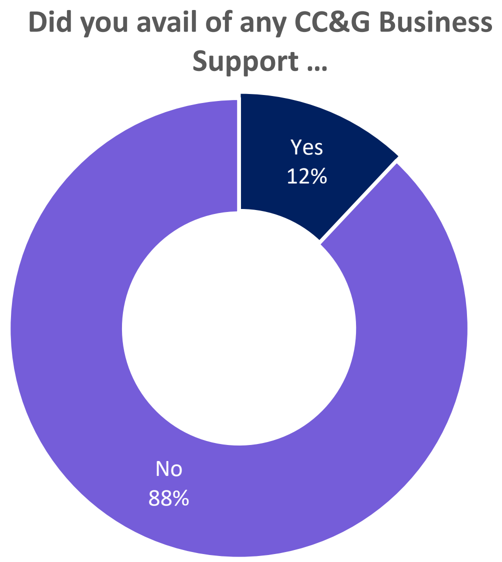
COVID Impact continued

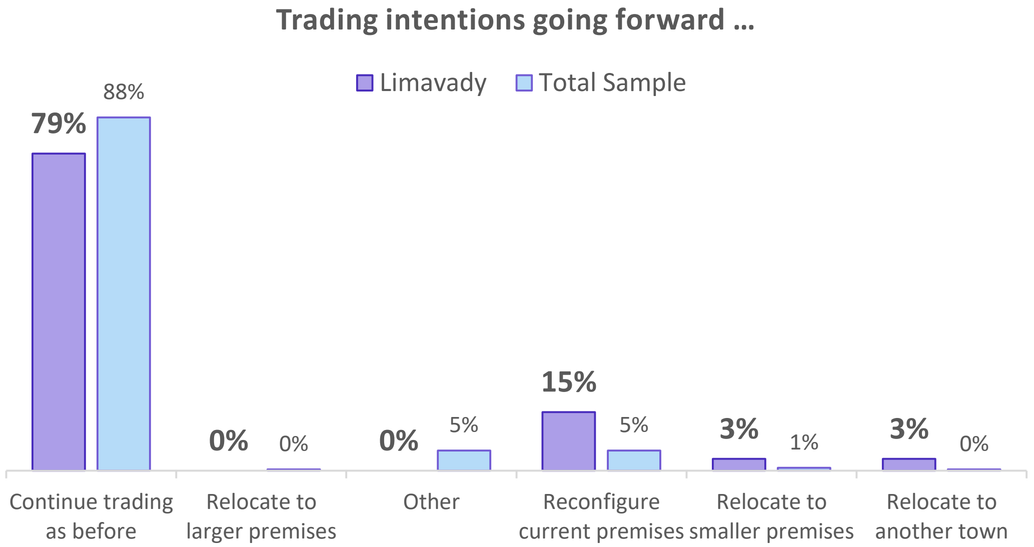




Uptake of government support among Limavady traders was also in line with general borough wide trends.

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.





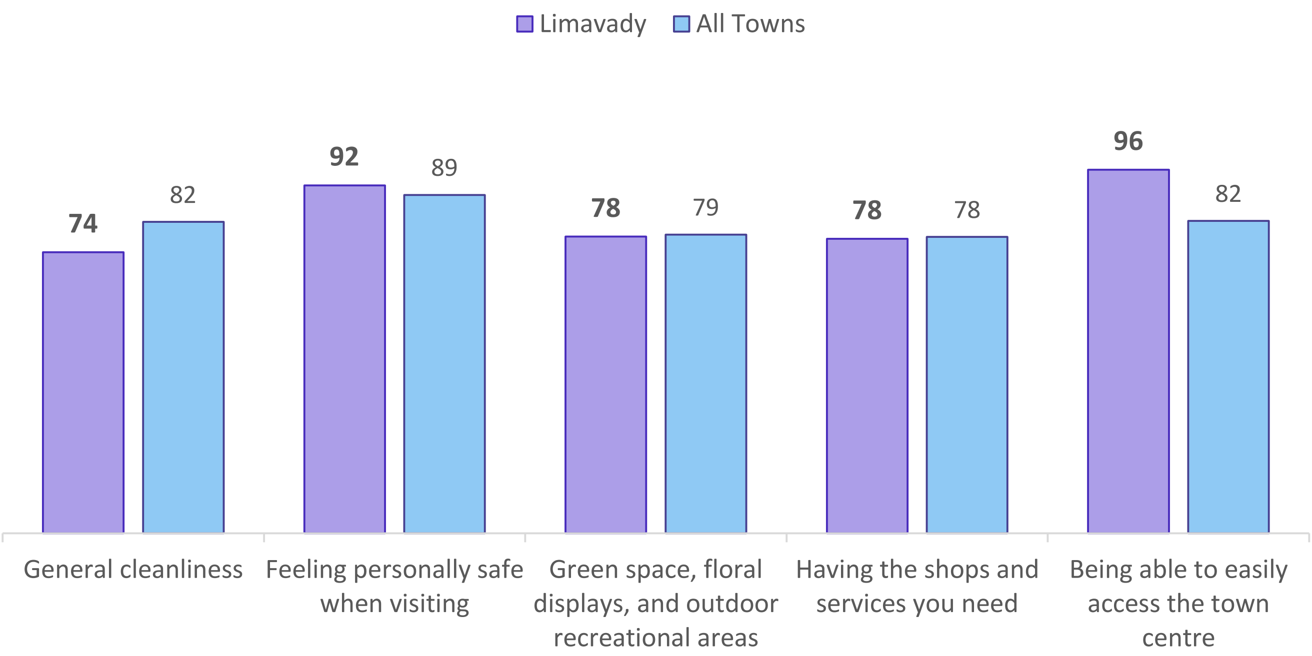
Support	%
Alchemy	25%
COVID-19 Recovery Revitalise Fund	50%
Digital Causeway Program	25%

What is your opinion of the town centre?

Causeway Coast & Glens Borough Council

	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)*



- 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.

Appendix 2 – ACORN & Sentiment Explained

Annex 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

<table>
<tr><th></th><th colspan="2">ACORN Groups</th><th colspan="2">Sub-Categories</th></tr>
<tr><td rowspan="3">1</td><td rowspan="3">Affluent Achievers</td><td rowspan="3">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.</td><td>Lavish Lifestyles</td><td>The most affluent people in the UK who live comfortable lifestyles with few financial concerns.</td></tr>
<tr><td>Executive Wealth</td><td>High income people, successfully combining jobs and families.</td></tr>
<tr><td>Mature Money</td><td>Older, affluent people with the money and time to enjoy life.</td></tr>
<tr><td rowspan="2">2</td><td rowspan="2">Rising Prosperity</td><td rowspan="2">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.</td><td>City Sophisticates</td><td>Younger individuals enjoying the city lifestyle with lots of opportunities to socialise and spend.</td></tr>
<tr><td>Career Climbers</td><td>Younger singles and couples, some with young children, living in more urban locations.</td></tr>
<tr><td rowspan="5">3</td><td rowspan="5">Comfortable Communities</td><td rowspan="5">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.</td><td>Countryside Communities</td><td>Older people with leisure interests reflecting rural locations.</td></tr>
<tr><td>Successful Suburbs</td><td>Home-owning families living comfortably in stable areas in suburban and semi-rural locations</td></tr>
<tr><td>Steady Neighbourhoods</td><td>These working families form the bedrock of many towns across the UK.</td></tr>
<tr><td>Comfortable Seniors</td><td>Older people with sufficient investments and pensions for a secure future.</td></tr>
<tr><td>Starting Out</td><td>Young couples and early career climbers in their first homes.</td></tr>
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Causeway Coast & Glens Borough Council

	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

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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Causeway Coast & Glens Borough Council

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Portstewart

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.

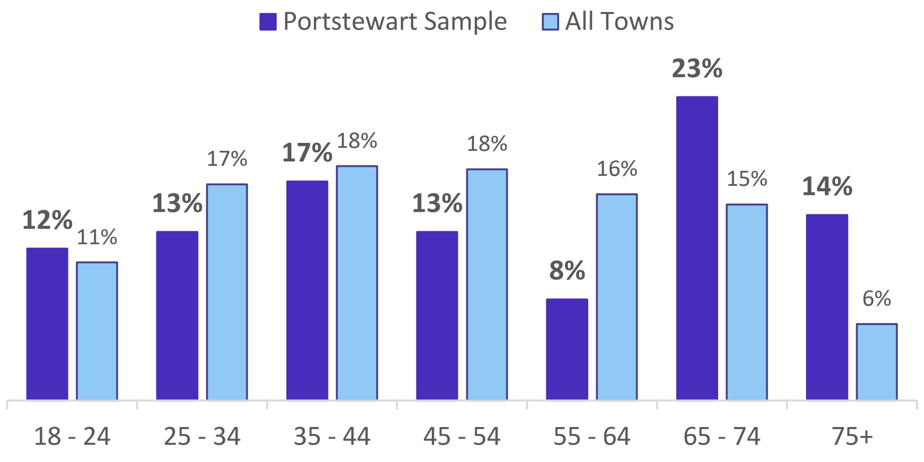
The following report is a sub-report seeking to provide a summarised snapshot of our results, emanating from the Causeway Coast & Glens visitor & traders sampling, at a **local** level. This particular sub-report provides the snapshot for sampling that took place in **Portstewart**;

- The visitor results are based on an overall sample of **77** respondents;
- The trader's results are based on a sample of **30** traders within the town centre.

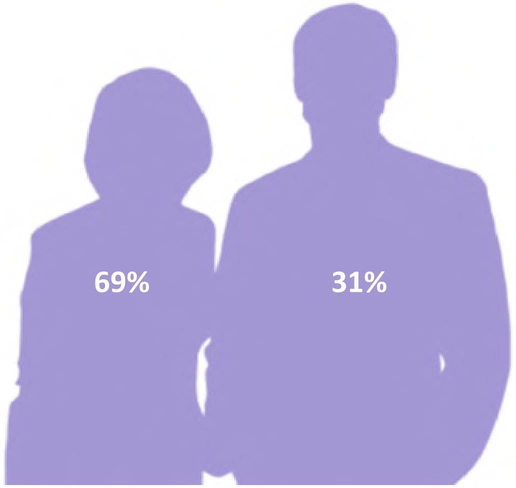
Sampling for visitors and traders in Portstewart took place between 29th March and 15th April 2021. It is important to note that during this period, there were a range of continuing restrictions in place owing to the ongoing Coronavirus pandemic. The specific restrictions at the time are outlined in 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

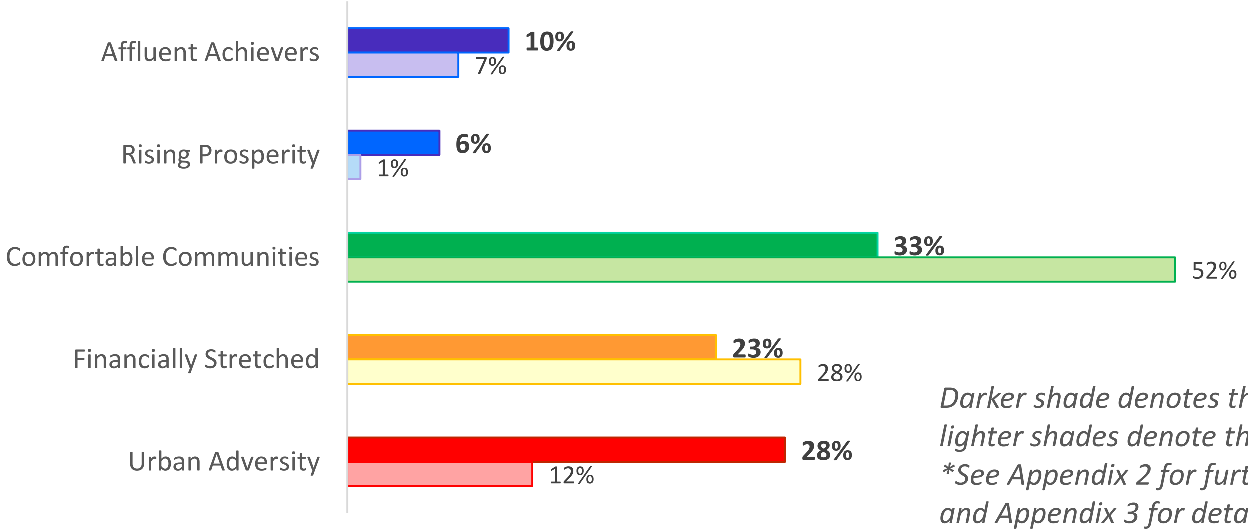
Respondents by Age Group



Respondent Gender Split



Portstewart ACORN Profile* vs Overall Sample



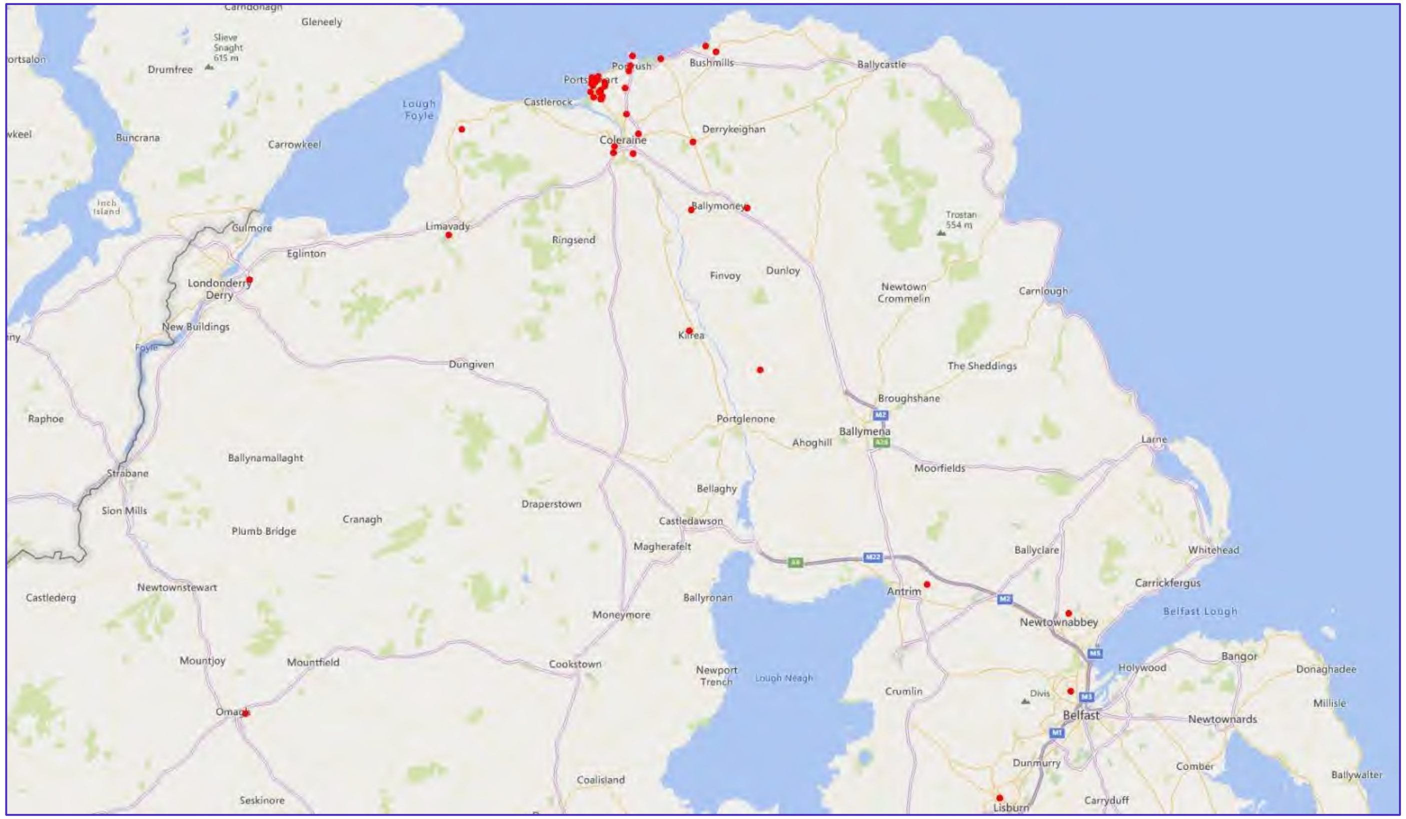
Darker shade denotes the Portstewart respondent profile while lighter shades denote the borough baseline.
**See Appendix 2 for further information on ACORN classifications and Appendix 3 for detailed breakdown*

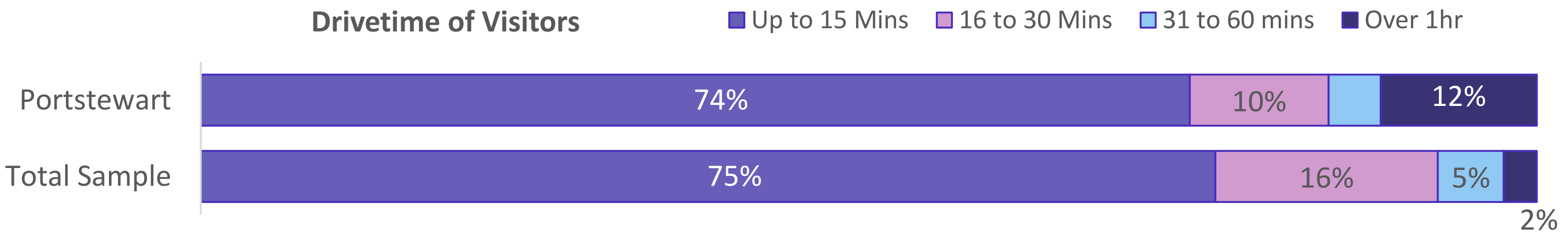
Our Portstewart sample was comparatively older with an average age of 51 *(overall sample = 47)*. Over a third (37%) of respondents were over the age of 65.

The ACORN profile is also notable for having a much lower representation of the 'Countryside Communities' sub category.

Slightly paradoxically, it is both more affluent and lesser affluent, particularly Urban Adversity, groups that have filled this deficit.

Origins & Travel

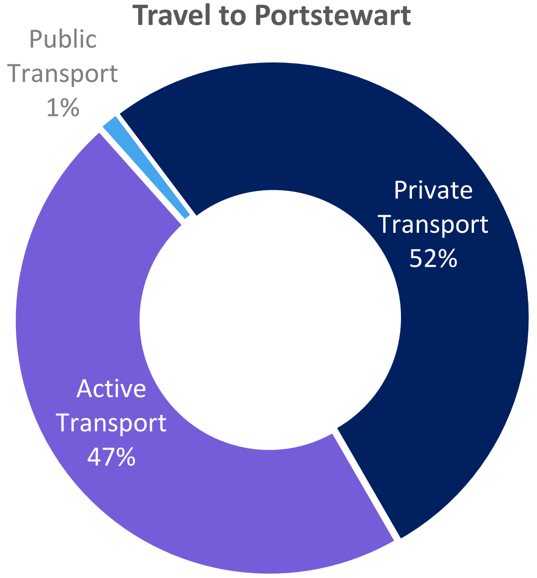




Average
11 mins
10 mins

The visitor profile appears to be polarised between those from the very immediate vicinity and those who visit from a fairly significant distance away. 66% actually were only a 5 minute drivetime from the town centre.

The relatively high rate of people utilising 'active transport' compared to the average of 37% is evidence of this contingent from the very immediate area.



ACORN Mapping

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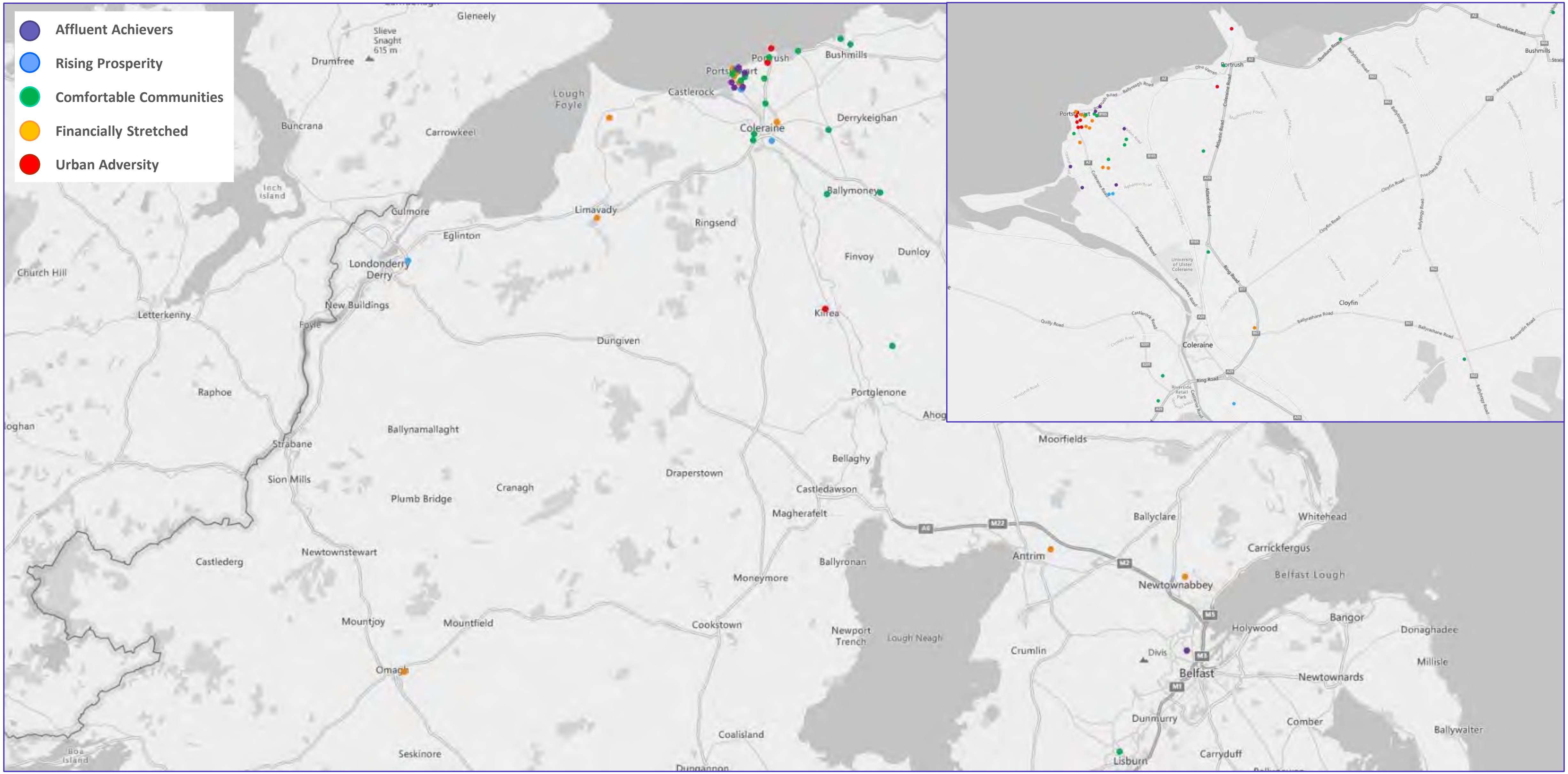

Empowering accurate consumer understanding

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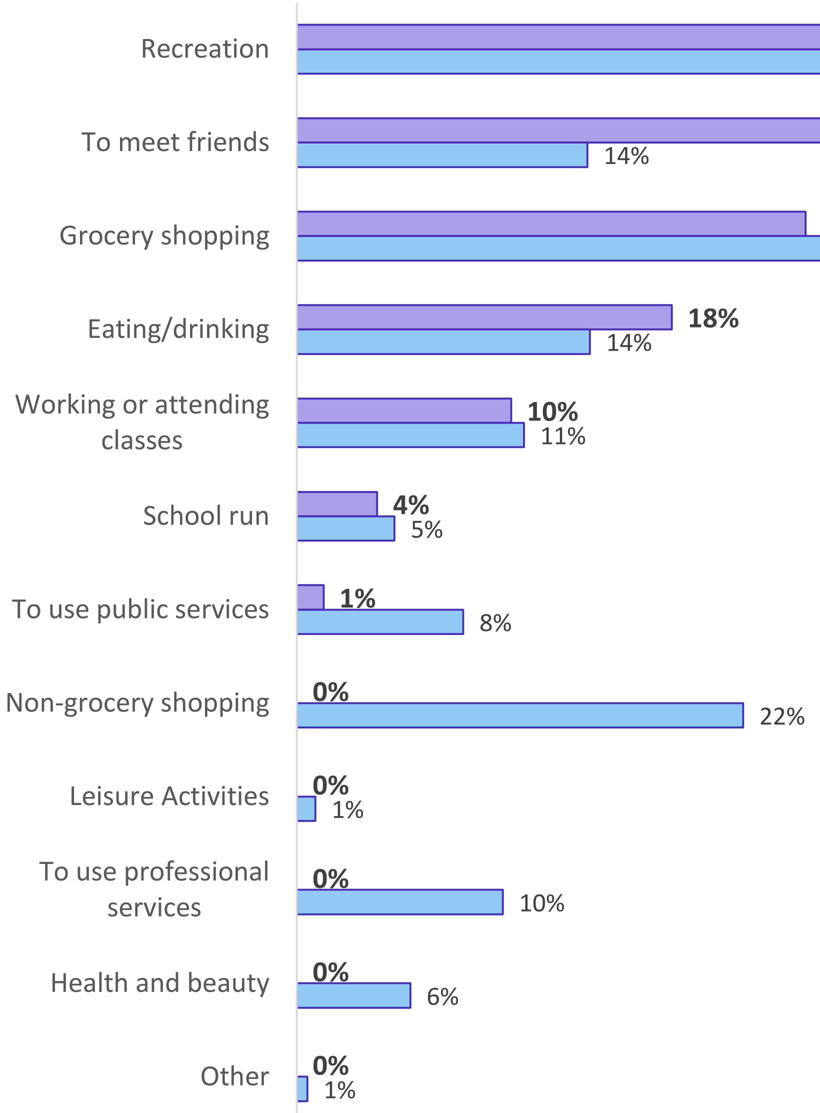
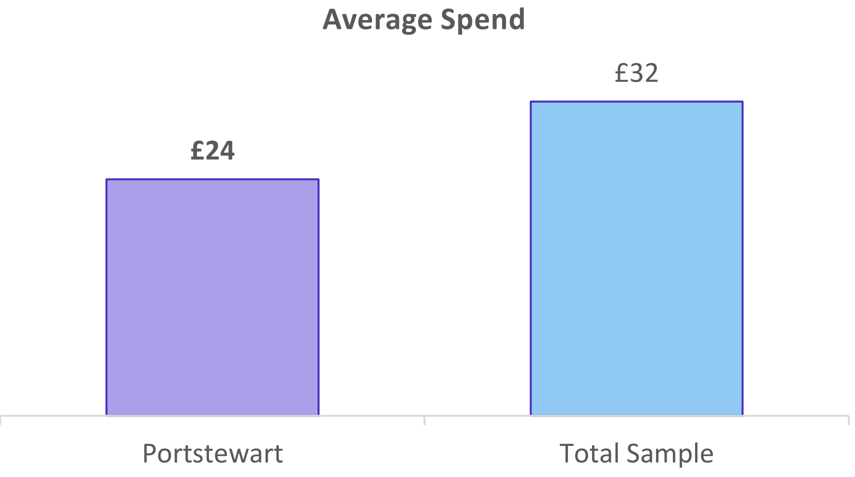
Why are people going to the town centres?





Location	Average Dwell Time	Average Spend per Minute
Portstewart	108 mins	£0.25
Total Sample	109 mins	£0.29

This disparity in visitor types has persisted when we look at reasons for visit and actual interactions. For the most part people come into the town for recreational purposes.

Actual spending interactions e.g. shopping, eating etc. are comparatively lower than the borough average, as a result, the averages spend was also lower.

However we appear to have 2 opposing visitor types in the town – those who visit longer but do not spend, those who stay in town shorter but do the bulk of the spending.

What is your opinion of the town centre?

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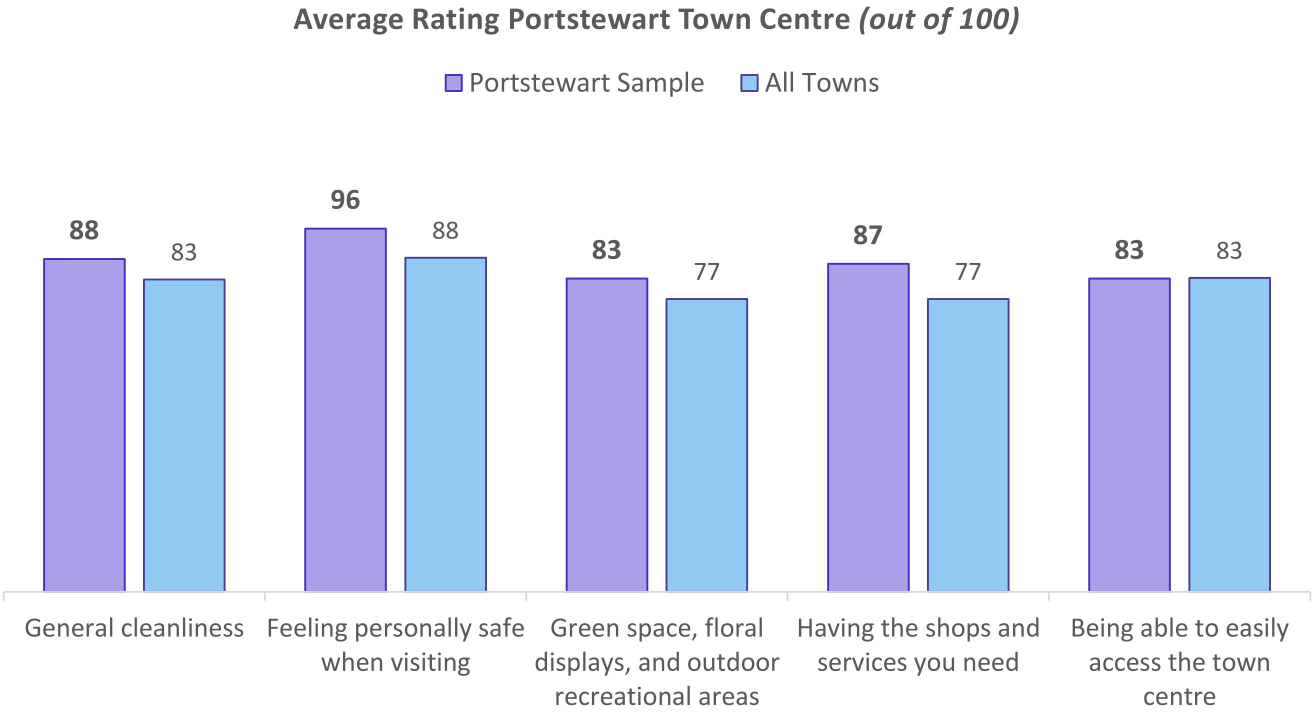
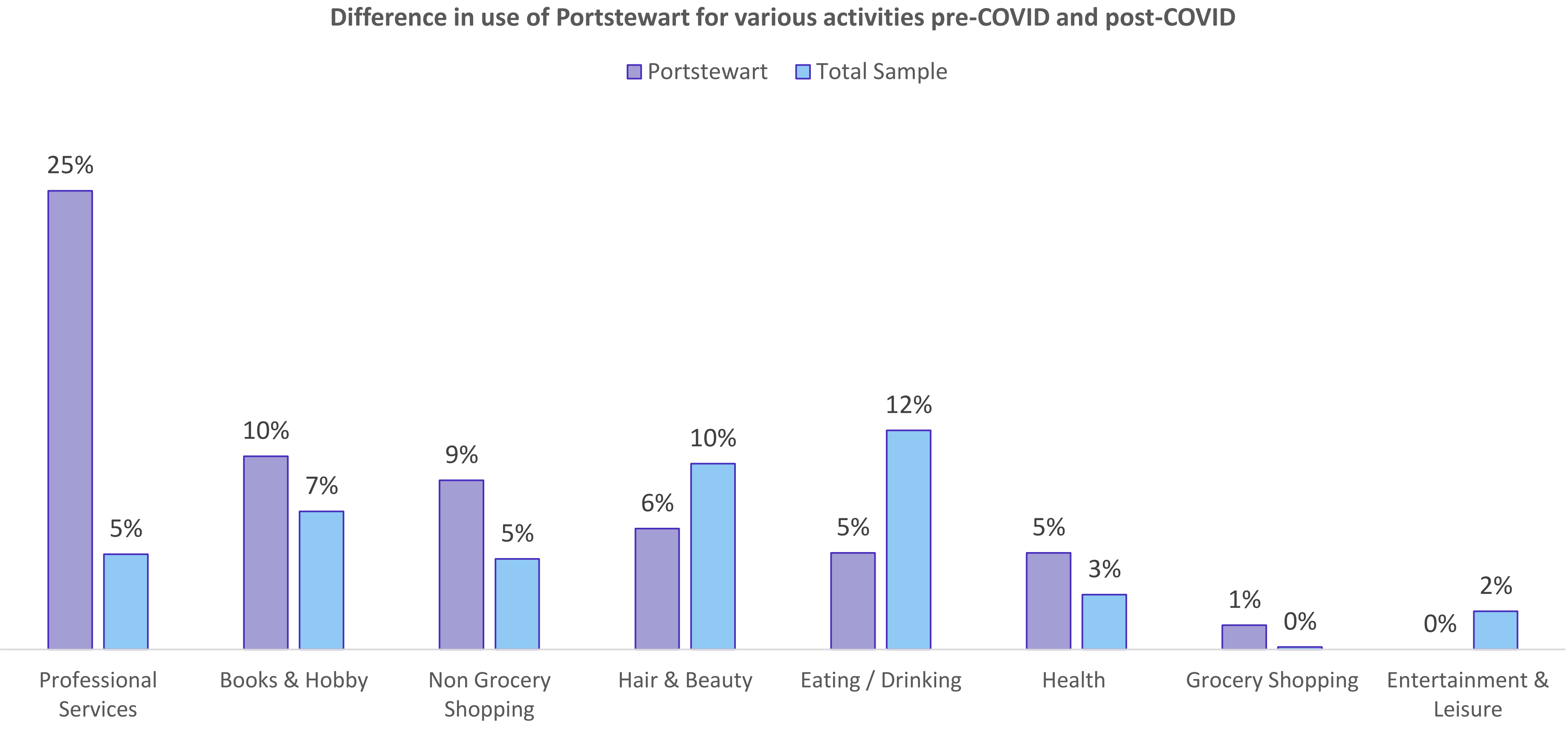
	Portstewart Visitors									Score: +70
	Dislike				**Passive**		**Like**			
Description	Hate	Dislike	Avoid	Not ok	Not for me	Ok	Like	Enjoy	One of my favourites	My favourite town
Score	1	2	3	4	5	6	7	8	9	10
Sample	0%	0%	0%	0%	0%	0%	3%	35%	12%	51%
Calculation	Total of 'Like' (**100**) – Total of Dislike (**0**) = **+100**									



- Above is the combined Sentiment Score for Portstewart. The rationale for Sentiment Scoring is outlined in Appendix 2.
- Portstewart visitors appear to carry a lot of positive sentiment with regard to the town centre with no negativity apparent within our sample.
- This is further reflected with the town centre ratings, with Portstewart surpassing the Borough-wide average in 4 out of the 5 ratings criteria.

Pre & Post-COVID Use



Portstewart TC Use	Professional Services	Books & Hobby	Non Grocery Shopping	Hair & Beauty	Eating / Drinking	Health	Grocery Shoppinh	Entertainment & Leisure
Before COVID	22.1%	51.9%	61.0%	49.4%	89.6%	54.5%	64.9%	74.0%
After COVID	46.8%	62.3%	70.1%	55.8%	94.8%	59.7%	66.2%	74.0%
Difference	**24.7%**	**10.4%**	**9.1%**	**6.5%**	**5.2%**	**5.2%**	**1.3%**	**0.0%**

Curiously it appears to be the use of professional services that will see the biggest upswing post-Covid.

Potential upswing in Hair & Beauty, and Catering appears low despite these being the most anticipated post-Covid activities across the borough.

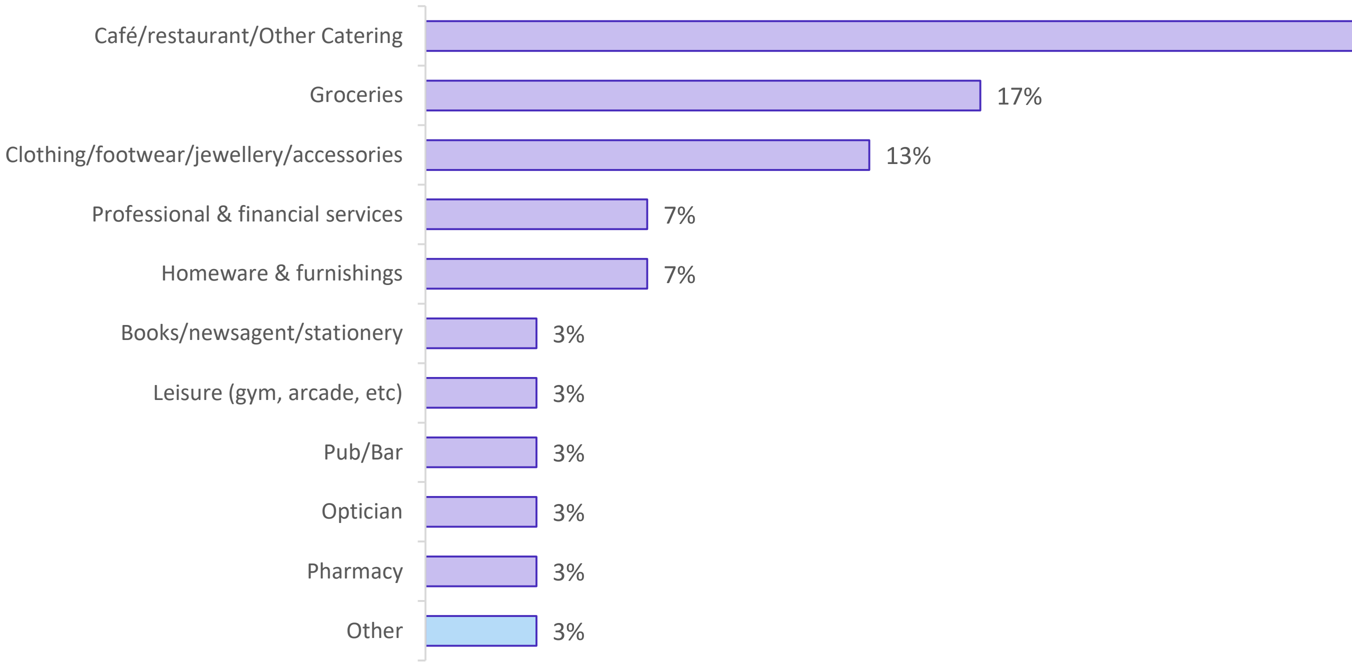
Almost two thirds of visitors (64%) identified no issues preventing them from visiting the town centre. However a significant minority (34%) did flag up traffic and parking as a barrier to visits.

What prevents you from visiting the town centre more?	Portstewart	Total Sample
Congestion and traffic	32%	19%
Parking	14%	15%
Evening economy options	5%	7%
Unappealing retailers	1%	13%
Habit	1%	8%
Café and restaurant offer	0%	7%
Visually unappealing area	0%	7%
Safety	0%	3%
None of these	**64%**	**52%**

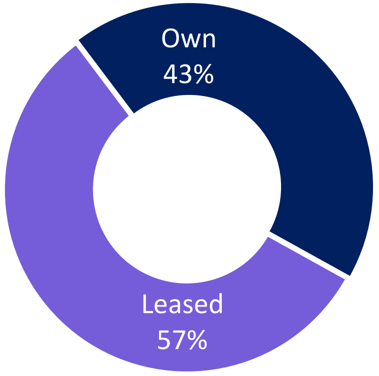
Traders

Trader Profile

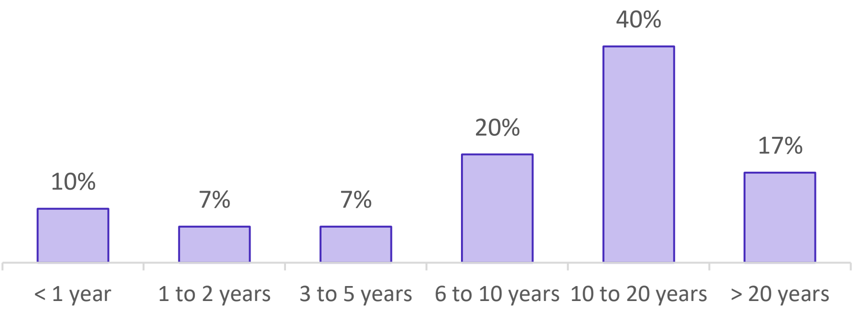
Business Sector



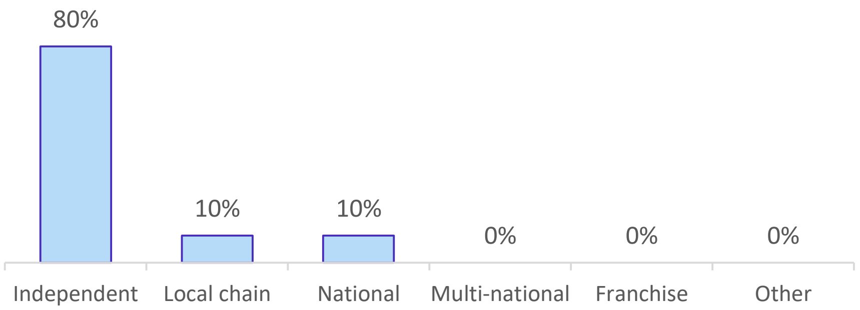
Premises



Business Age



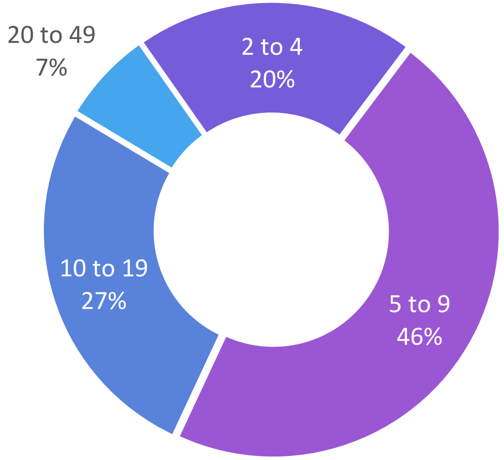
Business Ownership



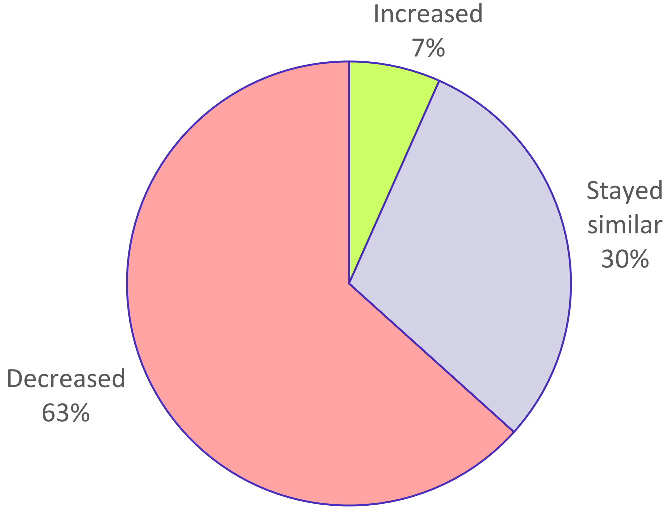
The relatively lower enthusiasm for Catering post-Covid may be of some concern to businesses given how weighted the town appears to be towards that sector.

There were no sole traders identified within our Portstewart sample. This is not to say they are not there within the town, but certainly they make up a much lower proportion of the town's trader profile.

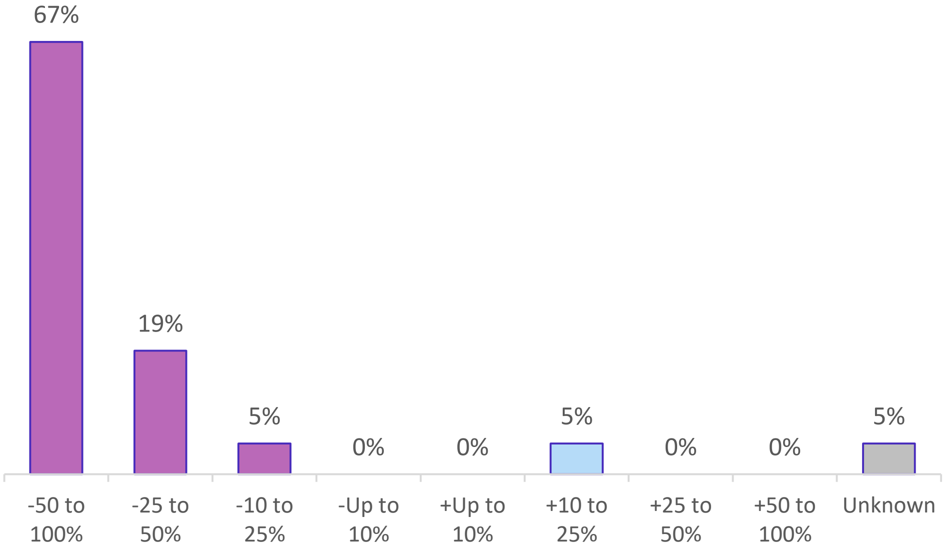
Current Staffing Levels



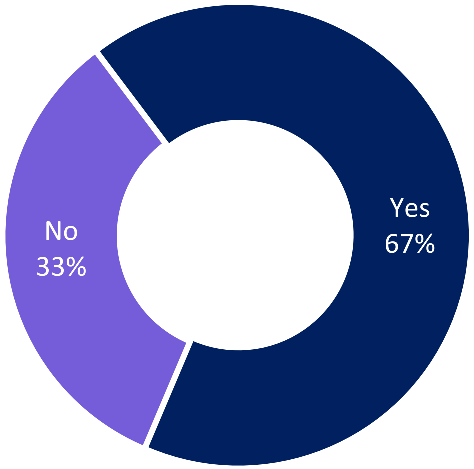
Impact on Turnover



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	**83%**
Yes	**17%**
Of those who said yes …	
Online selling & delivery	40%
Click & collect	60%
New services tailored to new circumstances	20%
New products tailored to new circumstances	0%

The weighting towards the catering sector can be further seen in the acute impact our sampled traders have noted from the pandemic and its associated restrictions.

Almost two thirds of traders (63%) saw a decrease in their revenue, and of these, a further two thirds (67%) noted this decrease to be a reduction of 50% or more of their normal earnings.

17% stated they had to pivot to provide a different offer during the lockdown period, the lowest rate out of all 12 towns.

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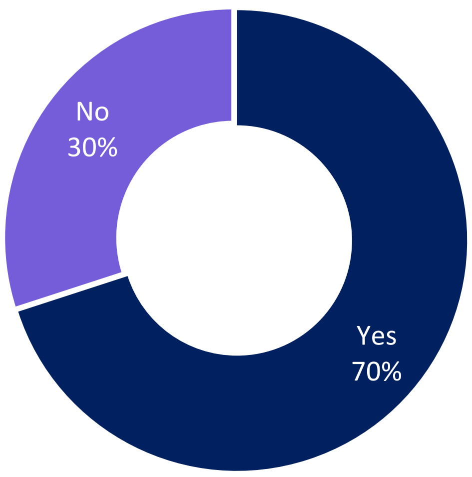
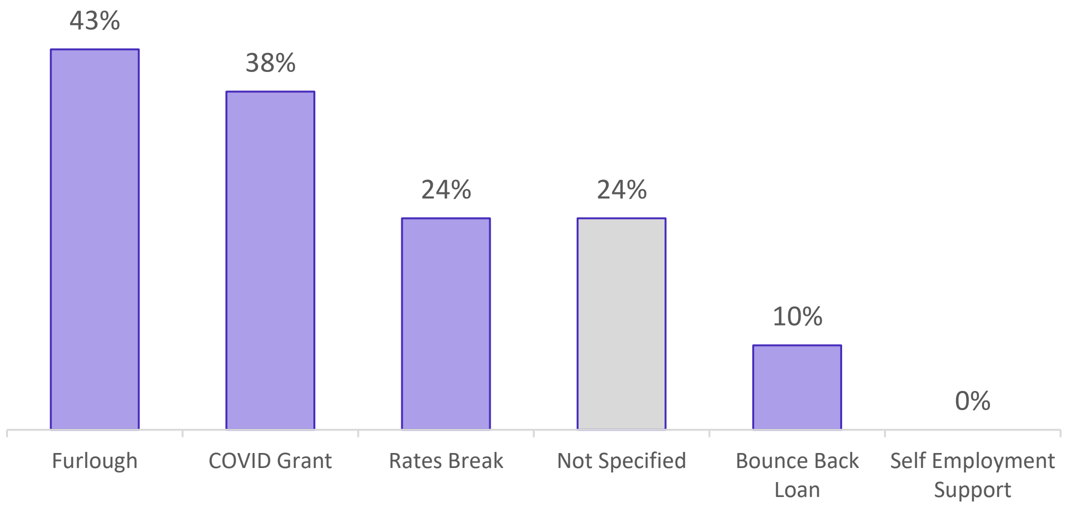
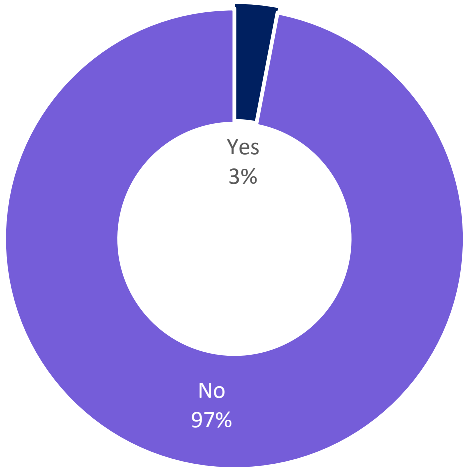
Did you avail of any Government support?



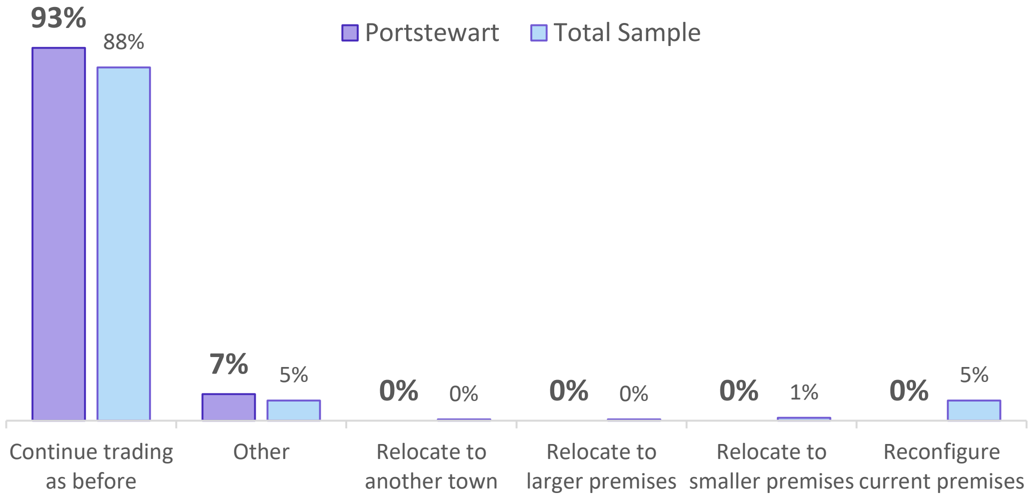
What kind of Government Support …



Did you avail of any CC&G Business Support …



Trading intentions going forward …



Portstewart also saw a higher rate of utilisation of government support on offer.

However there was very little uptake in terms of council supports available.

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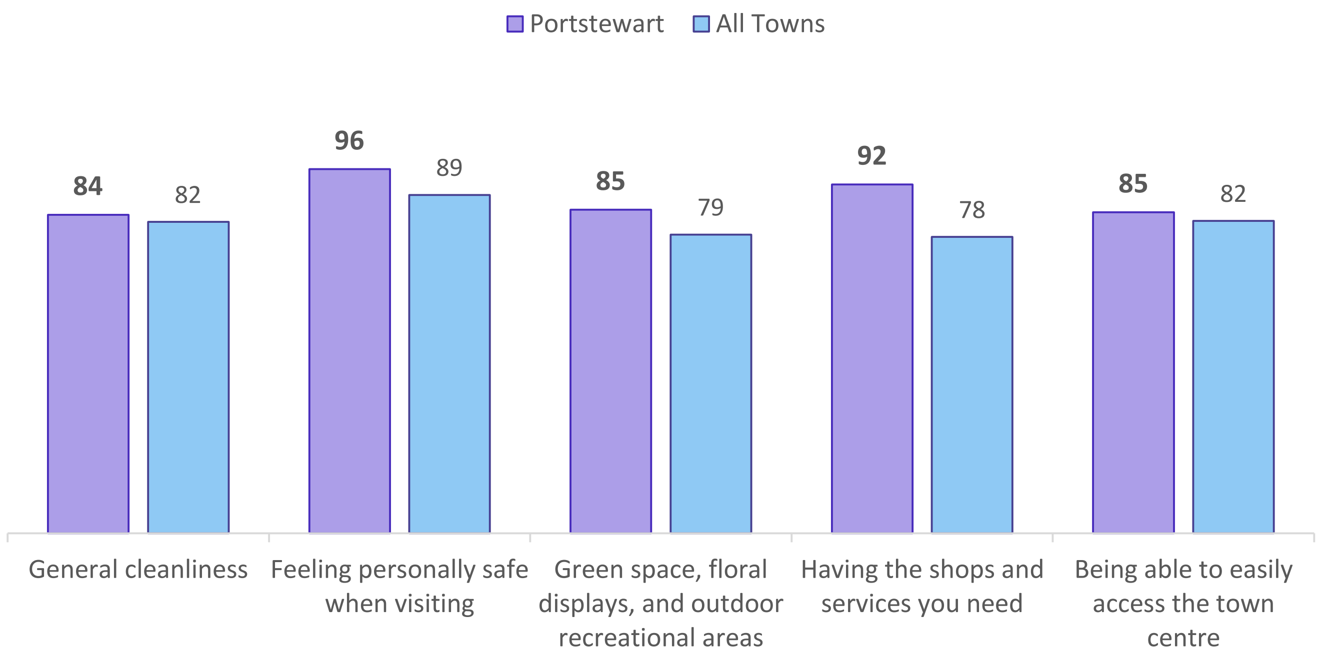
What is your opinion of the town centre?

	Portstewart Traders									Score: +100
	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%	0%	0%	53%	13%	33%
Calculation	Total of 'Like' (**100**) – Total of Dislike (**0**) = **Portstewart Traders Score = 100**									

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



- Despite the impacts of COVID, the sentiment among traders towards the high remains extremely high.
- The traders would rightly attribute current difficulties to external factors outside of anyone's control, and not in anyway a reflection of the town itself.

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 Portstewart a sample size of 77 was achieved which provides us with a margin of error of +/- 11.2% @ 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 – 11.2% 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

Annex 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

Appendix 3 – Results Expanded

Detailed ACORN Results for Portstewart Visitors

No.	ACORN Group	Portstewart	Total Sample	Sub-Category		Portstewart	Total Sample
1	Affluent Achievers	**10%**	7%	A	Lavish Lifestyles	**0%**	0%
				B	Executive Wealth	**5.8%**	4.1%
				C	Mature Money	**4.3%**	2.9%
2	Rising Prosperity	**6%**	1%	D	City Sophisticates	**0%**	0%
				E	Career Climbers	**5.8%**	0.8%
3	Comfortable Communities	**33%**	52%	F	Countryside Communities	**23.2%**	45.6%
				G	Successful Suburbs	**1.4%**	2.3%
				H	Steady Neighbourhoods	**1.4%**	1.6%
				I	Comfortable Seniors	**5.8%**	1.4%
				J	Starting Out	**1.4%**	1.1%
4	Financially Stretched	**23%**	28%	K	Student Life	**2.9%**	0.4%
				L	Modest Means	**10.1%**	8.4%
				M	Striving Families	**7.2%**	12.1%
				N	Poorer Pensioners	**2.9%**	7.7%
5	Urban Adversity	**28%**	12%	O	Young Hardship	**24.6%**	7.1%
				P	Struggling Estates	**2.9%**	3.0%
				Q	Difficult Circumstances	**0%**	1.5%

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Causeway Coast & Glens Borough Council

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Causeway
Coast & Glens
Borough Council

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Bushmills

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 **Bushmills**;

- The visitor results are based on an overall sample of **51** respondents;
- The trader's results are based on a sample of **16** traders within the town centre.

Sampling for visitors and traders in Bushmills took place between 30th March and 23rd 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

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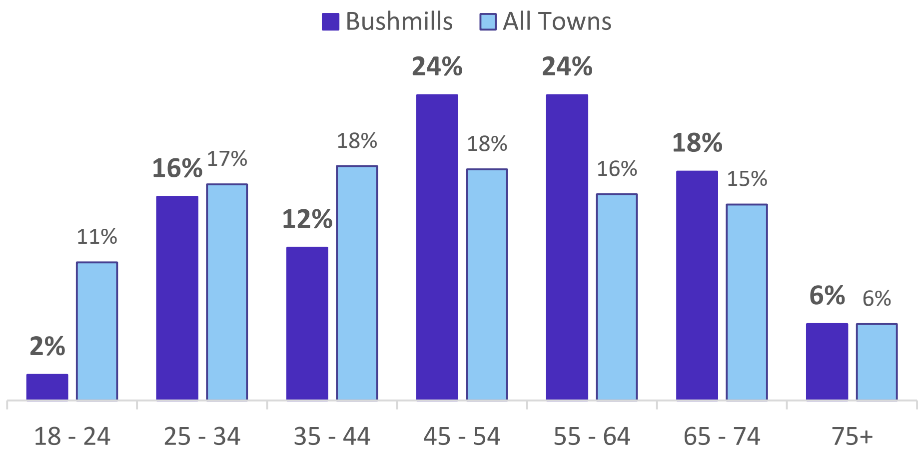
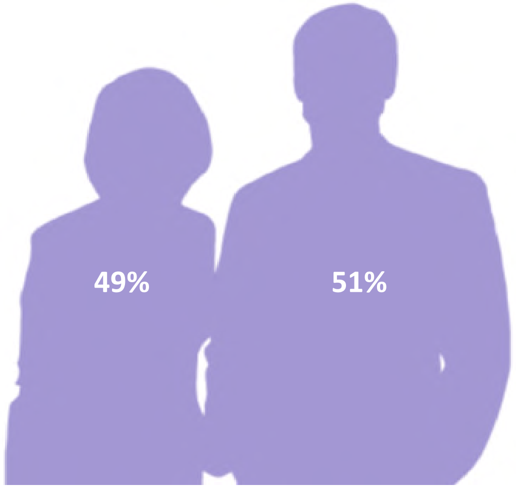
Respondents by Age Group



Respondent Gender Split

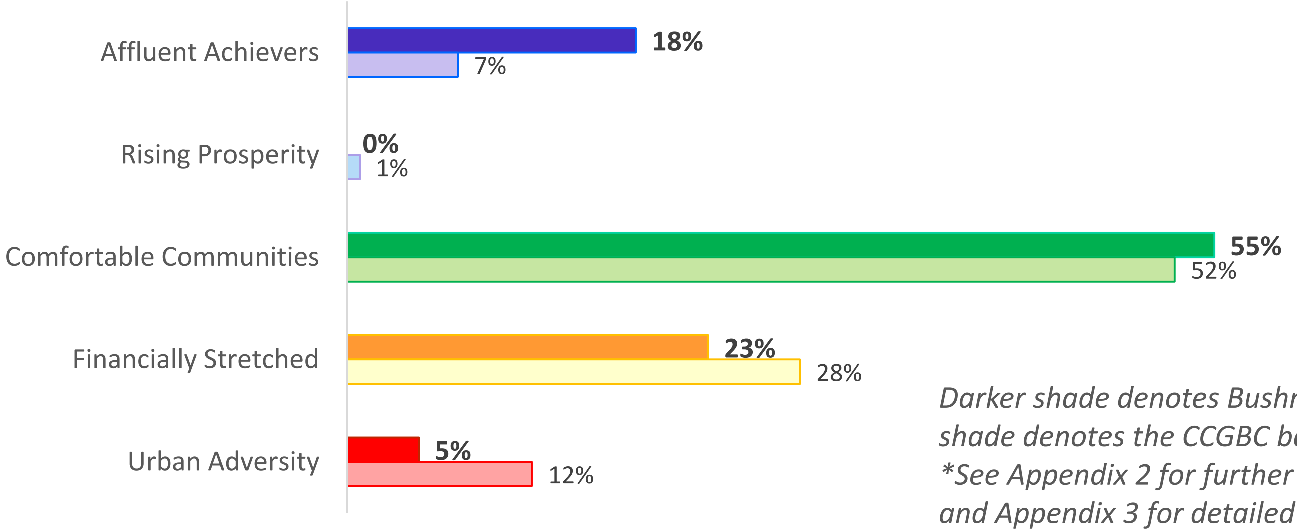


The visitor age profile is heavily weighted for visitors aged 45 to 64 accounting for 48% of the visitors compared to the average 34%.

Only 2% were people under 24 which is the lowest of the 12 towns.

This has given the town the second highest average age (52) out of the towns.

Bushmills ACORN Profile* vs Overall Sample

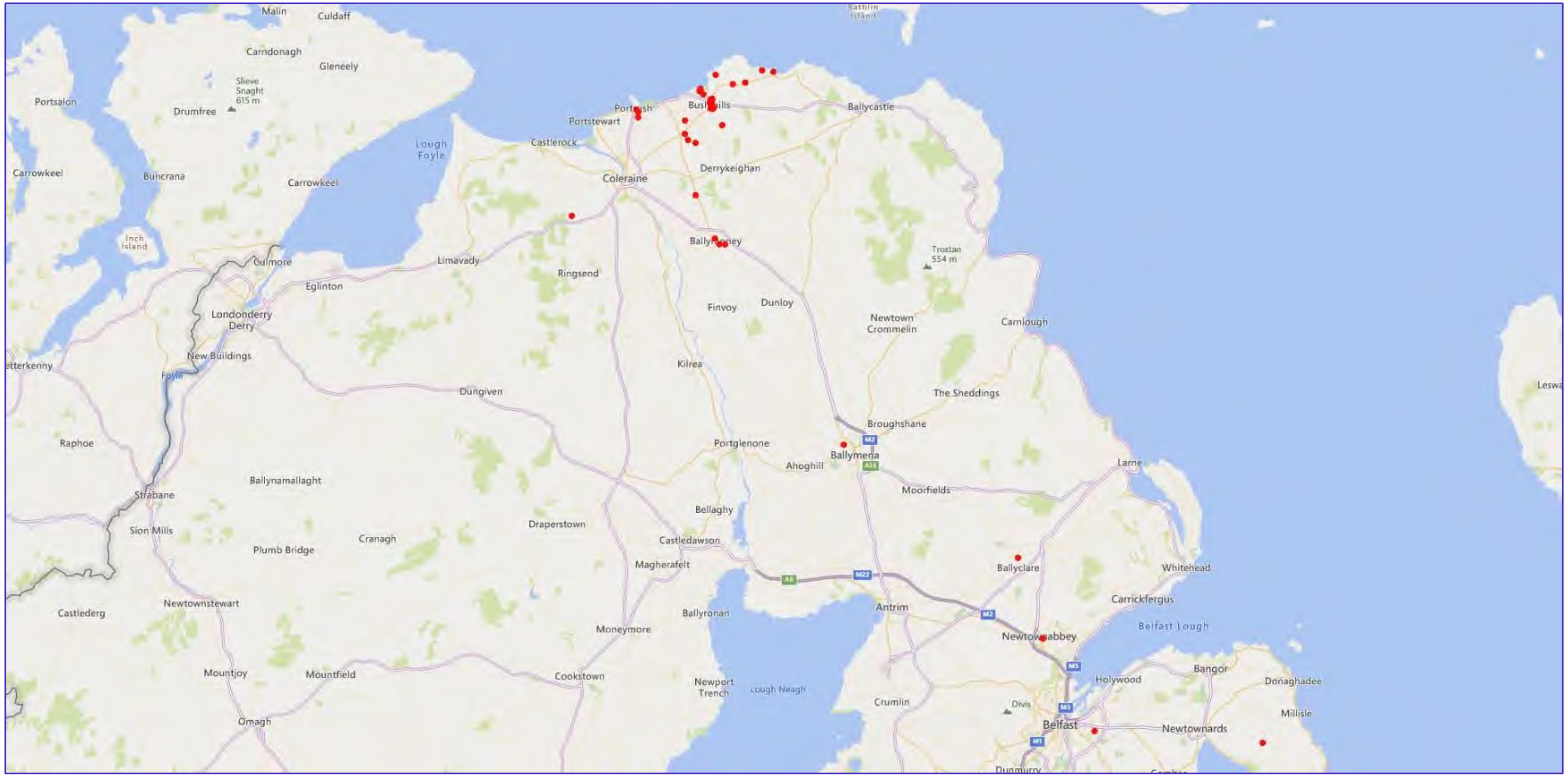


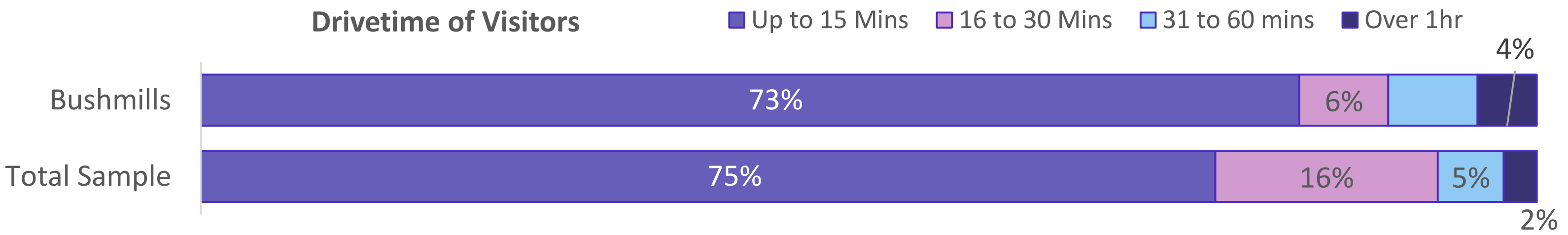
Darker shade denotes Bushmills respondent profile while lighter shade denotes the CCGBC baseline.
**See Appendix 2 for further information on ACORN classifications and Appendix 3 for detailed breakdown*

The majority of visitors are in the 'Comfortable Communities' sub-category which is standard across the borough.

Bushmills also appears to have the highest proportion of people who are 'Affluent Achievers'.

Origins & Travel



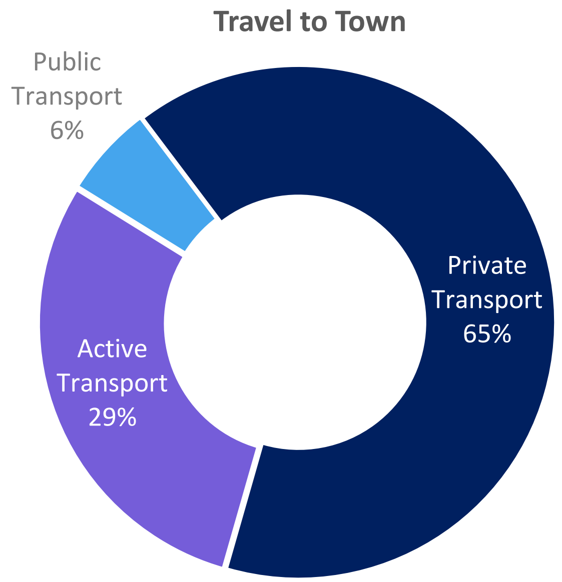


Average
12 mins
11 mins

The majority of visitors (73%) were from Bushmills or within a 15 minute drive. However, there were visitors from Belfast, Newtownabbey, Ballyclare, and Ballymena indicating there are some people travelling.

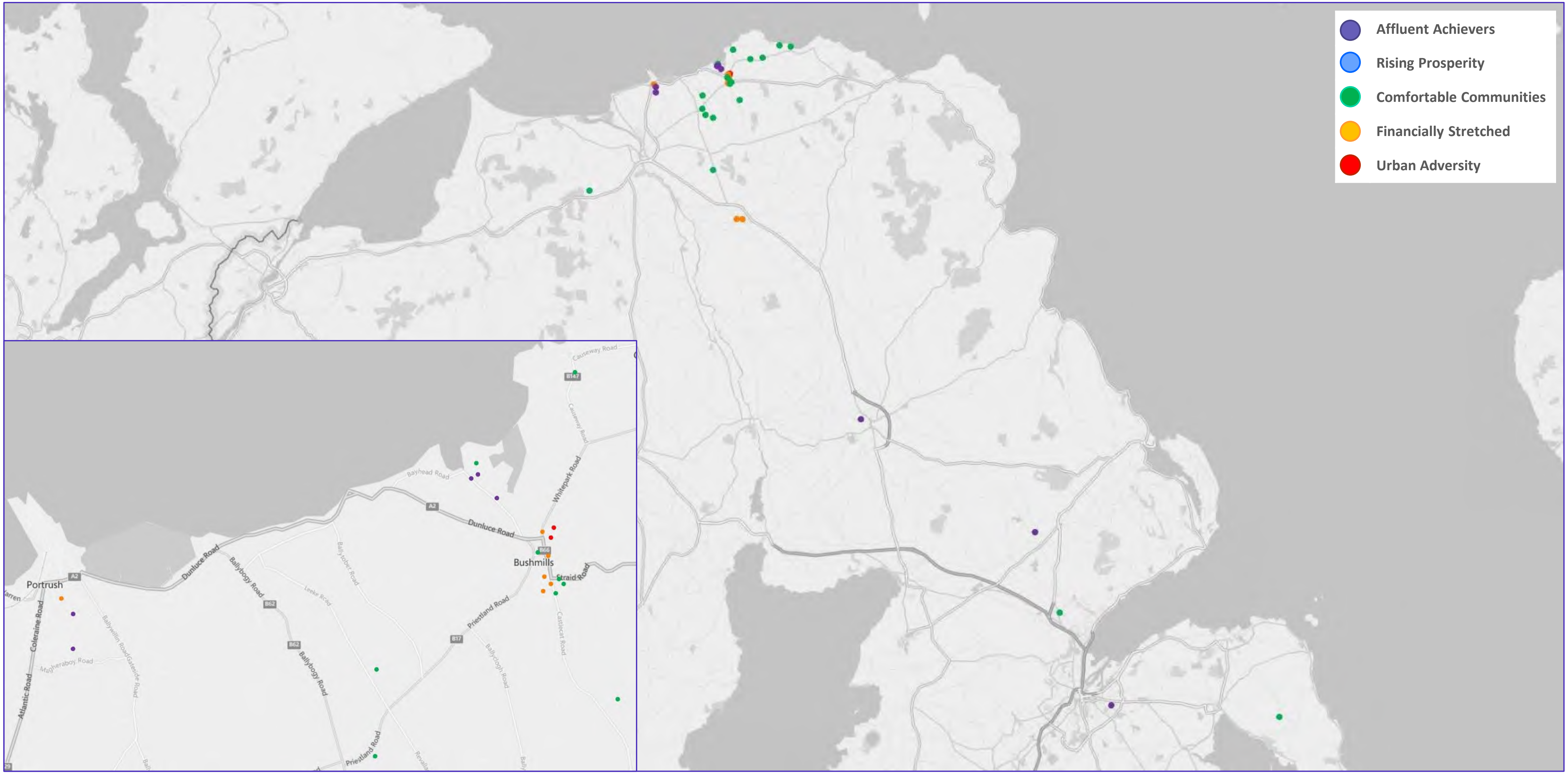
Primarily these people noted recreational purposes for their visit such as fishing and staying in their caravan.

Given the slightly wider dispersion of visitors use of own / private transport was relatively high.



ACORN Mapping

Causeway Coast & Glens Borough Council



Empowering accurate consumer understanding

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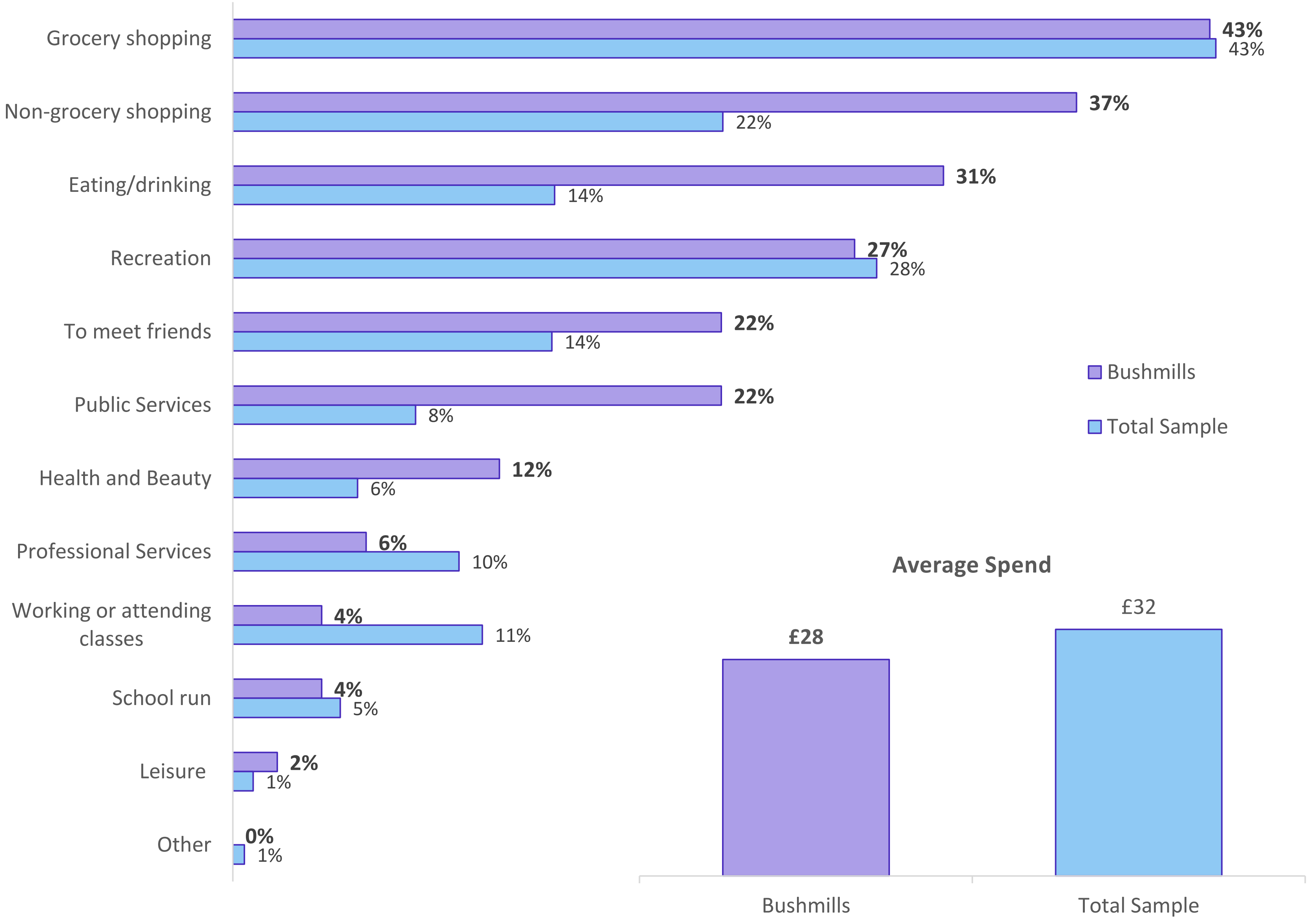
Why are people going to the town centres?



Location	Average Dwell Time	Average Spend per Minute
Bushmills	137 mins	£0.20
Total Sample	109 mins	£0.29

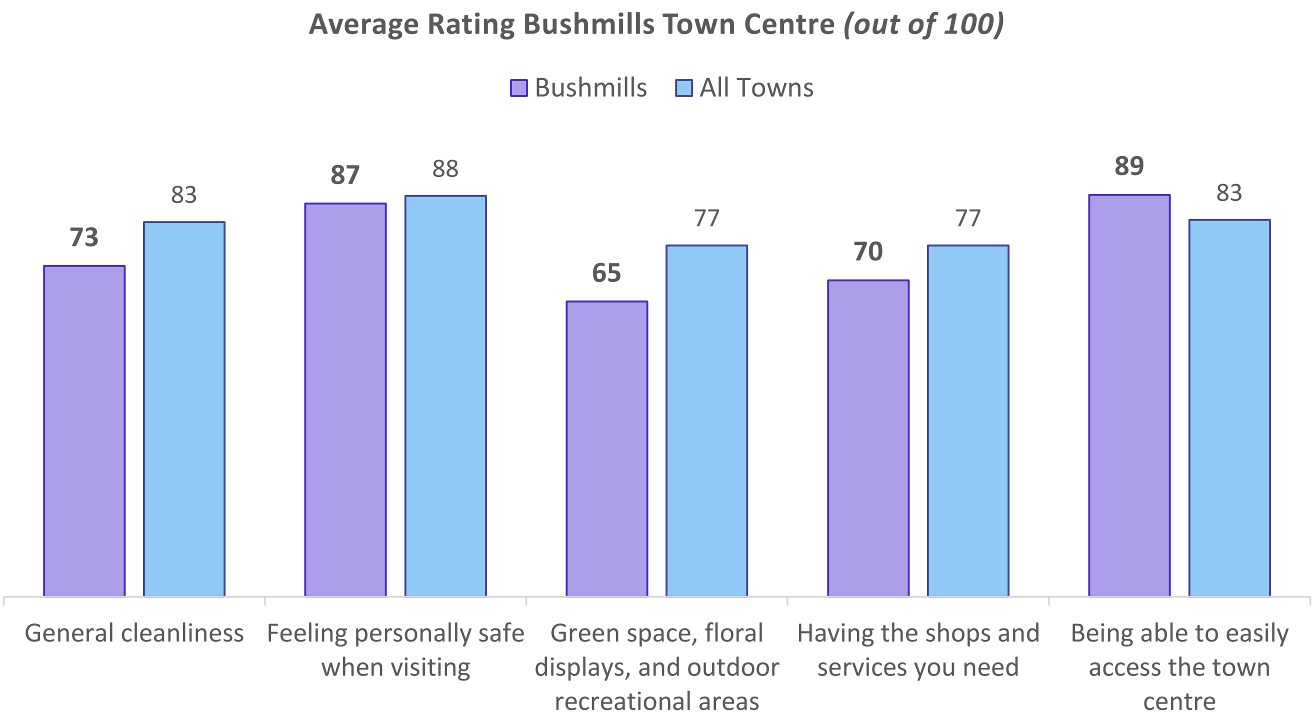
Bushmills has a larger proportion of visitors in town for non-grocery shopping and eating/drinking.

Bushmills has the highest dwell time of all 12 towns with only 6% of people staying in town for less than 45 minutes compared to the average of 26%.

This will have impacted on the average spend per minute in the town.

What is your opinion of the town centre?

	Bushmills Visitors									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%	2%	0%	2%	0%	14%	14%	55%	10%	4%
Calculation	Total of 'Like' (**82**) – Total of Dislike (**4**) = **+78**									



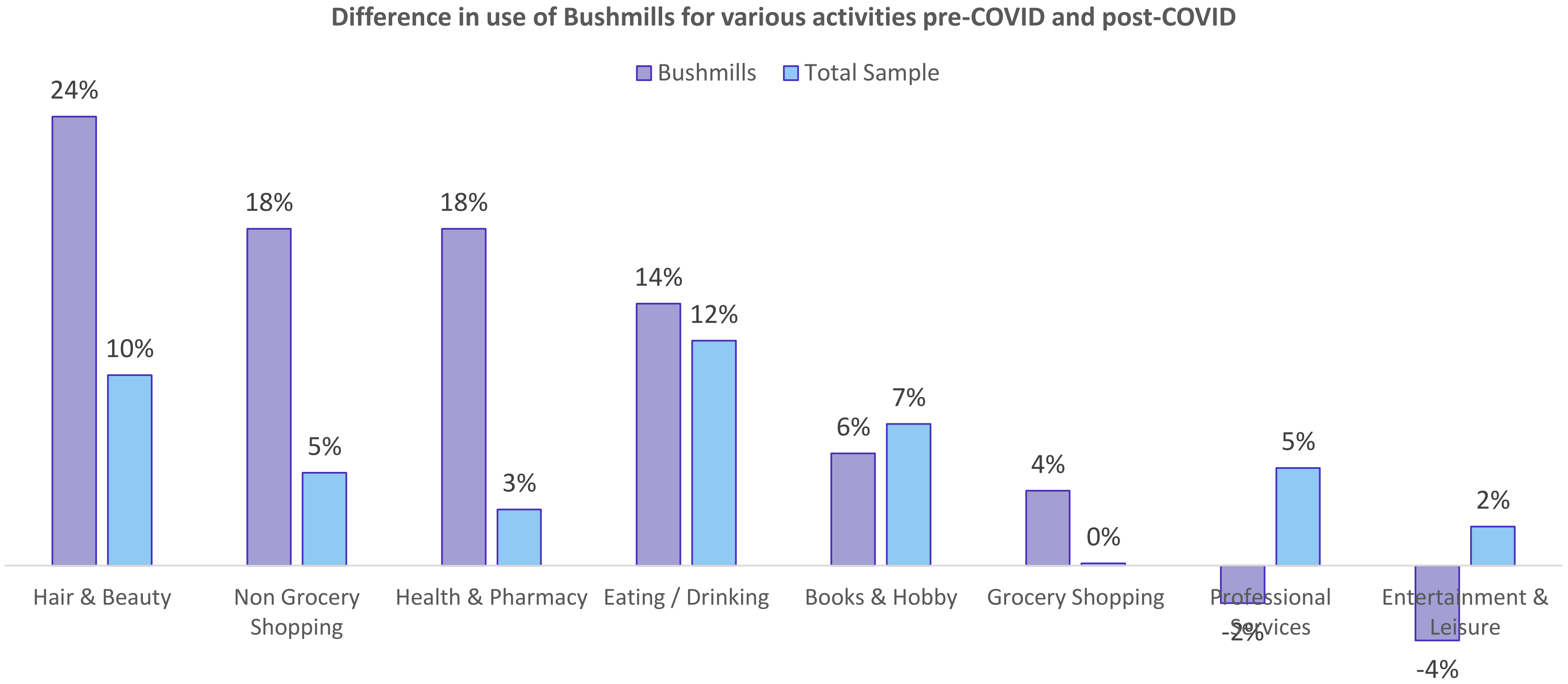
- Above is the Sentiment Score for Bushmills. The rationale for the Sentiment Scoring is outlined in Appendix 2.
- The visitors have a largely positive view of the town with only 4% saying it's 'Not ok' or they 'Dislike' Bushmills. The overall score is above the average town score of 71.
- The town centre ratings opposite show a slightly different picture with all ratings close to, or below, the average. Bushmills scores 10-12 points lower than average for 'General cleanliness' and 'green spaces'.

"it's okay to do a bit of small shopping for bits and pieces and handy for the post office"

"It's handy for coming in to get some groceries when I'm short at home"

"I'm very disappointed because of shortage of dog bins"

Causeway Coast & Glens Borough Council



Bushmills TC Use	Hair & Beauty	Non Grocery Shopping	Health & Pharmacy	Eating / Drinking	Books & Hobby	Grocery Shopping	Professional Services	Entertainment & Leisure
Before COVID	31.4%	45.1%	54.9%	60.8%	72.5%	68.6%	3.9%	5.9%
After COVID	54.9%	62.7%	72.5%	74.5%	78.4%	72.5%	2.0%	2.0%
Difference	**+23.5%**	**+17.6%**	**+17.6%**	**+13.7%**	**+5.9%**	**+3.9%**	**-2.0%**	**-3.9%**

Hair and Beauty traders are likely to see a large boost after COVID restrictions compared to other towns while Non-grocery shopping and Health & Pharmacy see similar large jumps compared to the average.

Non-grocery shopping accounts for 37% of visits indicating its importance in Bushmills.

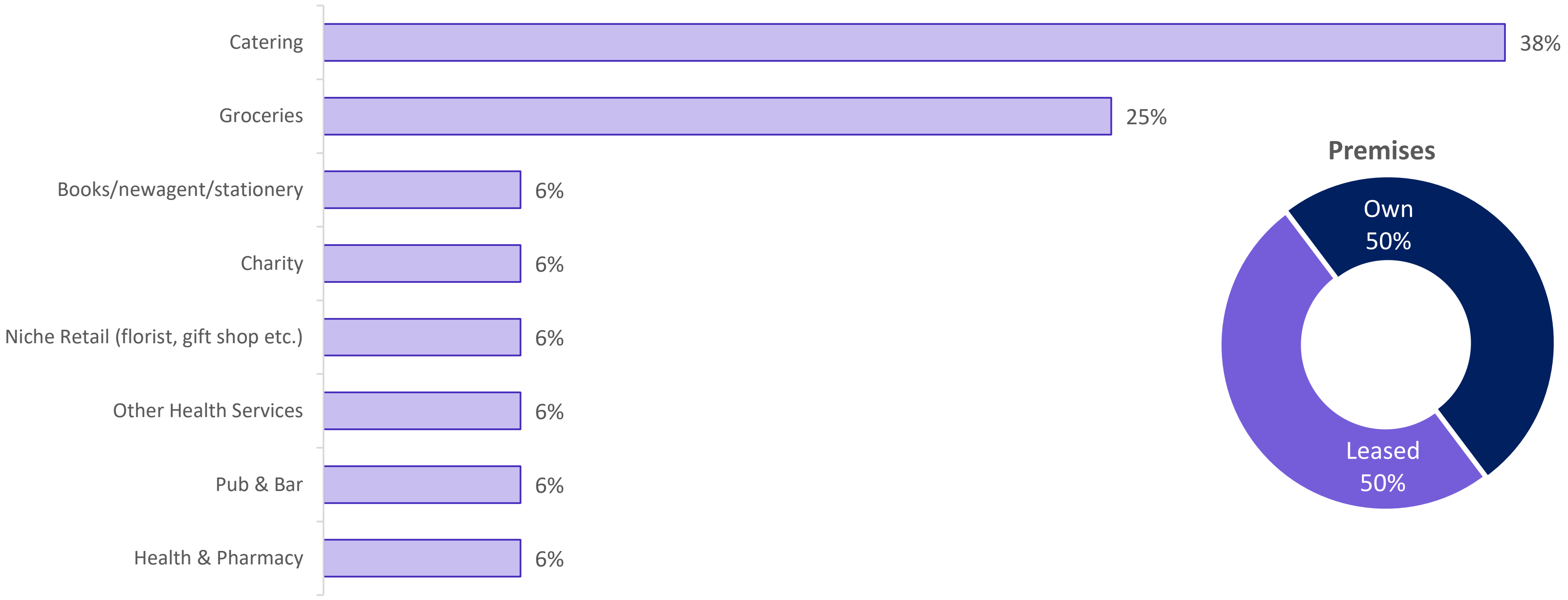
There do not appear to be any issues that stick out as a significant problem in terms of preventing visits to the town.

What prevents you from visiting the town centre more?	Bushmills	Total Sample
Congestion & Traffic	6%	19%
Parking	0%	15%
Habit	0%	8%
Unappealing Retailers	14%	13%
Evening Economy Options	4%	7%
Visually Unappealing Area	2%	7%
Cafes & Restaurant Offer	0%	7%
Safety	8%	3%
None of these	**69%**	**52%**

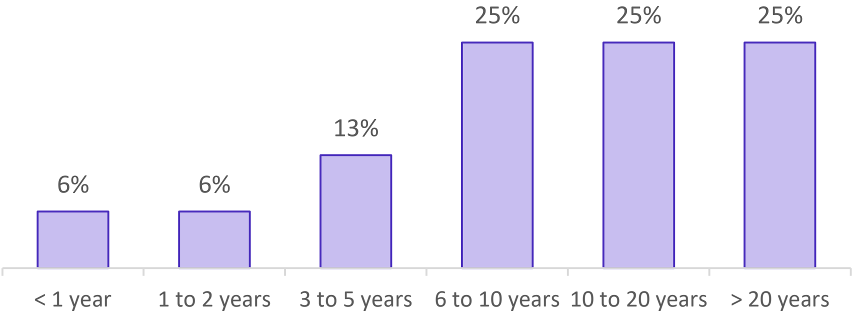
Traders

Trader Profile

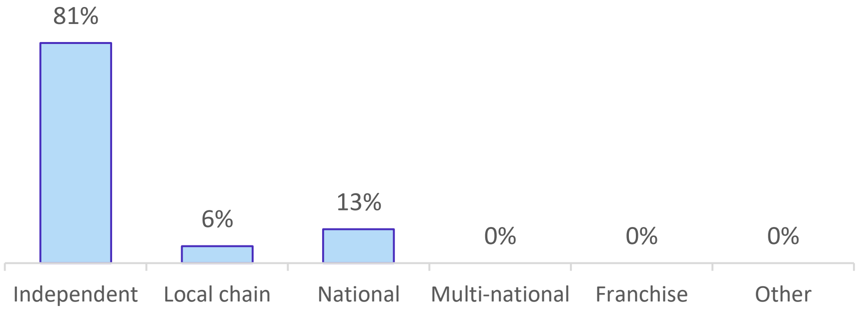
Business Sector



Business Age



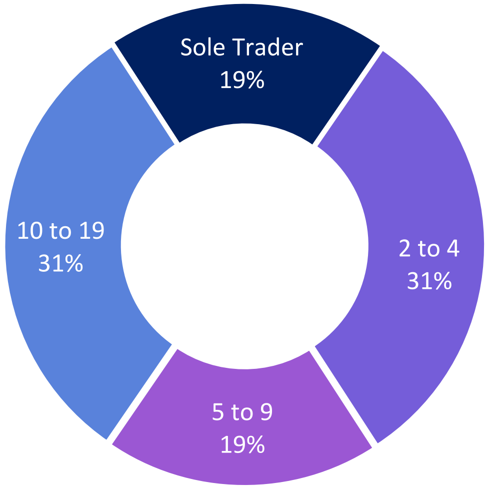
Business Ownership



With 38% of traders offering catering services, the 14% increase in use after COVID from visitors (slide 8) should impact Bushmills in a positive way.

The trader profile for Bushmills is mainly maturing independent businesses – 50% are over 10 years old. This is slightly below a borough wide average of 59%.

Current Staffing Levels



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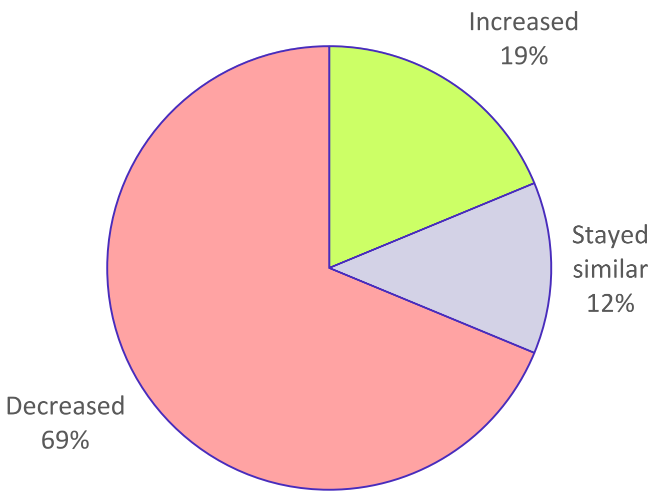
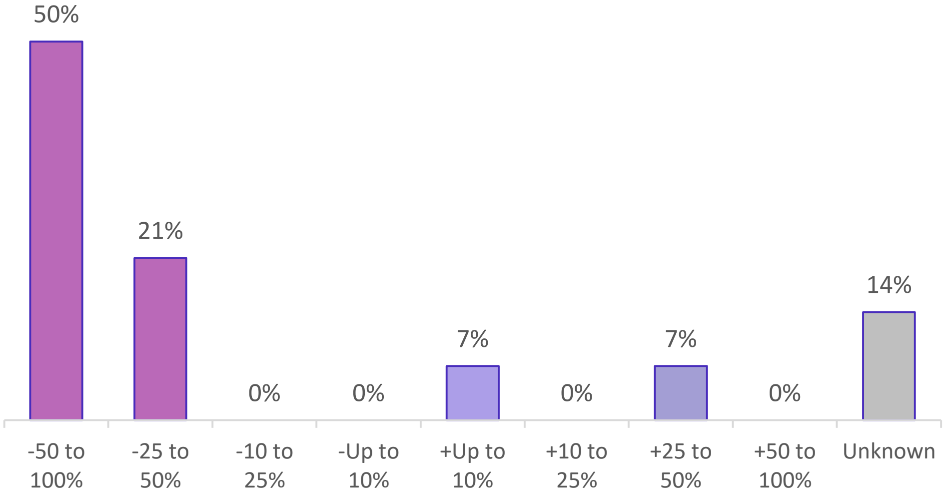
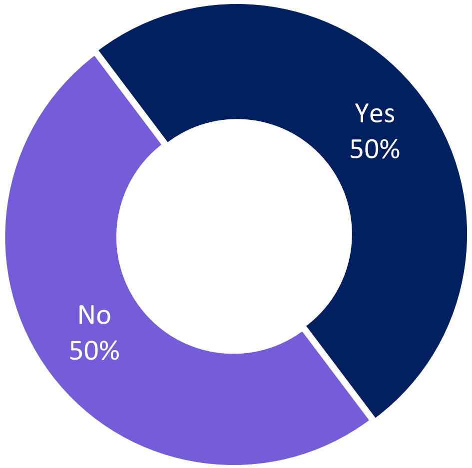
Impact on Turnover



Level of Impact



Were you forced to close operations at any point?



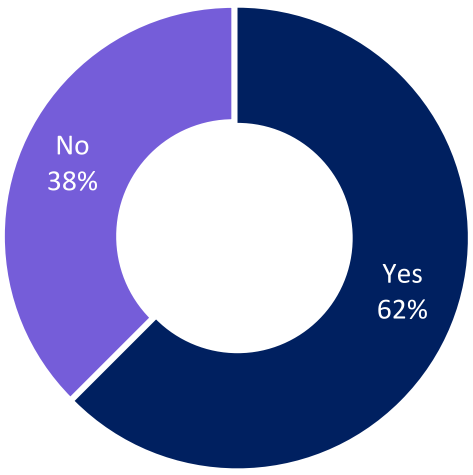
Did the business pivot to provide alternative services during the COVID lockdown ...	%
No	**56%**
Yes	**44%**
Of those who said yes ...	
Online selling & delivery	57%
Click & collect	71%
New services tailored to new circumstances	0%
New products tailored to new circumstances	0%

Bushmills has the second highest number of traders with decreased turnover with half of businesses having to close at some stage.

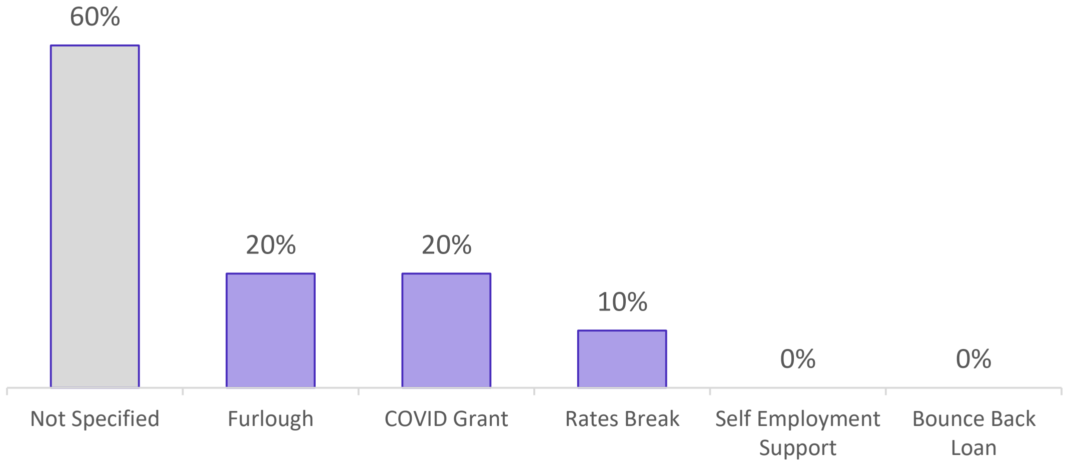
The majority of businesses having decreased turnover were in the catering category while the businesses with increased turnover were in the grocery, health services, and pharmacy categories.

COVID Impact continued

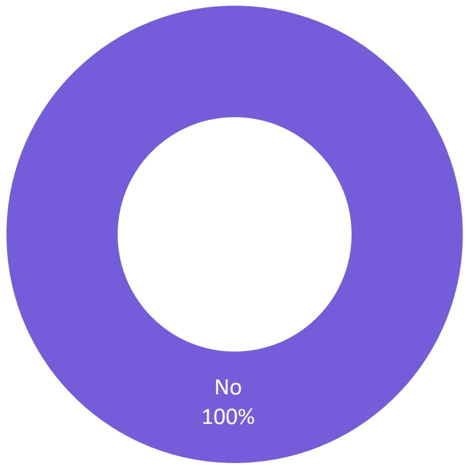
Did you avail of any Government support?



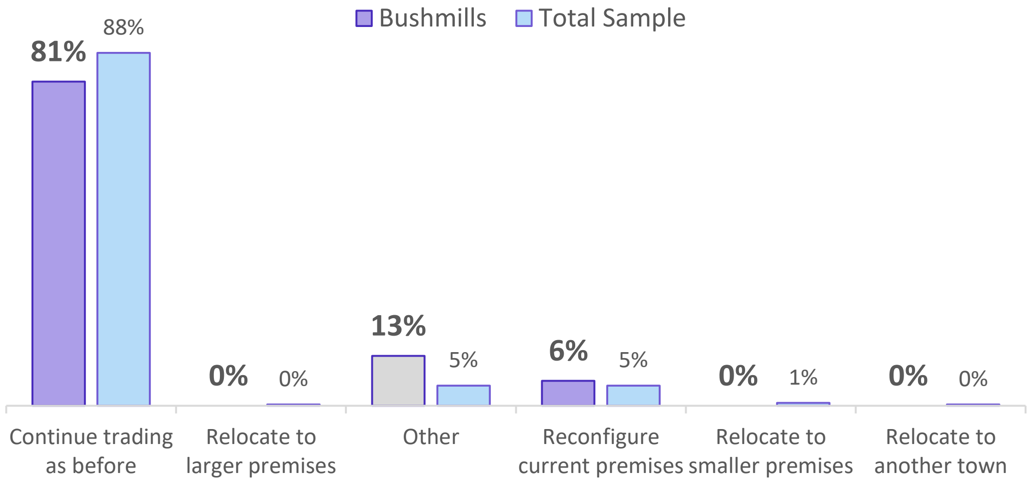
What kind of Government Support …



Did you avail of any CC&G Business Support …



Trading intentions going forward …



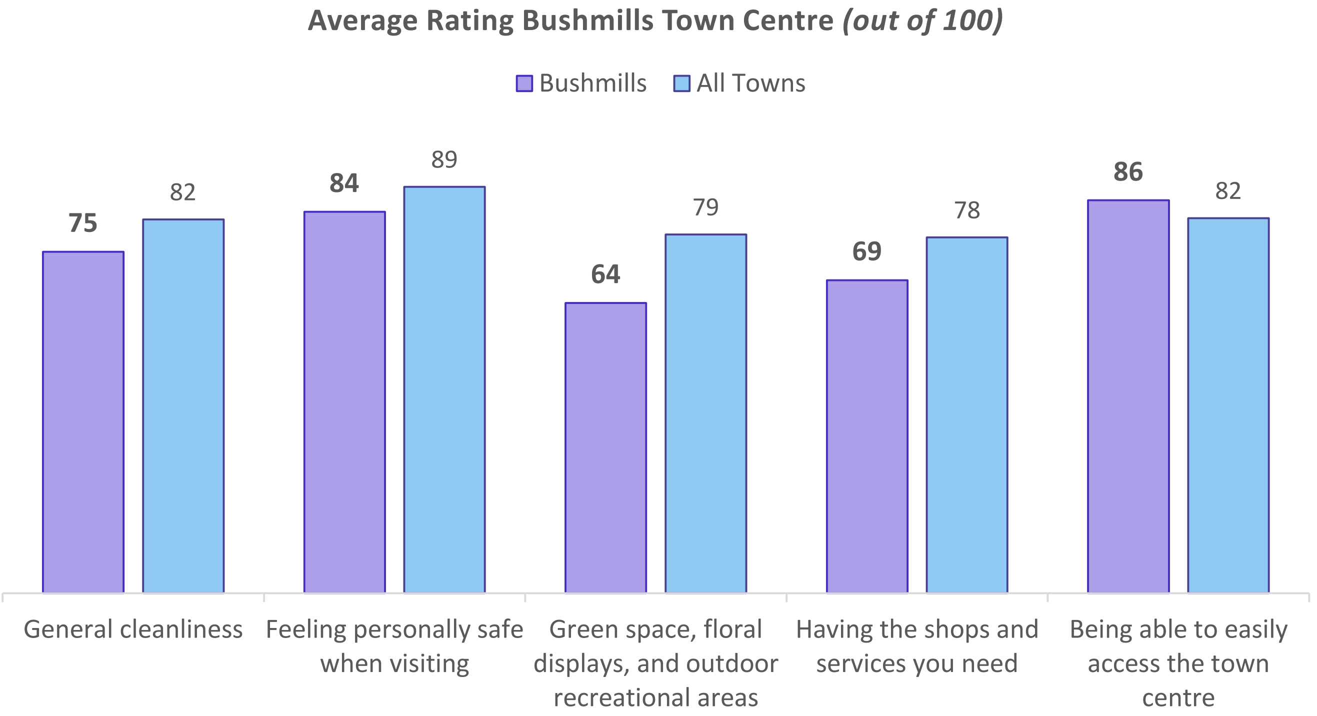
The majority of traders surveyed did use Government support but were not willing to specify what type of support.

As with other towns, no surveyed traders used council support. Going forward, most traders intend to continue as before, with one trader planning to reconfigure their current premises.

What is your opinion of the town centre?

Causeway Coast & Glens Borough Council

	Bushmills Traders									Score: +75
	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%	13%	6%	13%	44%	13%
Calculation	Total of 'Like' (**75**) – Total of Dislike (**0**) = **Bushmills Traders Score = +75**									



- Bushmills has a Sentiment Score higher than the average of +64 which contrasts slightly with the town centre ratings where they are below average on 4 of the 5 categories.
- When looking at the individual sentiment scores, 25% are categorised as 'Passive' meaning they have no strong opinion about Bushmills. All other traders feel positively about the town.
- Some feedback that stands out:

"Would like more investment for Bushmills, we're the gateway for the Giants Causeway."

"The shops that are closed need to reopen to bring back life into the town"

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 Bushmills a sample size of 51 was achieved which provides us with a margin of error of +/- 13.7% @ 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 – 13.7% 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

Causeway Coast & Glens Borough Council

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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Annex 2 – ACORN & Sentiment Explained

	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

Appendix 3 – Results Expanded

Detailed ACORN Results for Bushmills Visitors

No.	ACORN Group	Bushmills	Total Sample	Sub-Category		Bushmills	Total Sample
1	Affluent Achievers	**18%**	7%	A	Lavish Lifestyles	**0%**	0%
				B	Executive Wealth	**9.1%**	4.1%
				C	Mature Money	**9.1%**	2.9%
2	Rising Prosperity	**0%**	1%	D	City Sophisticates	**0%**	0%
				E	Career Climbers	**0.0%**	0.8%
3	Comfortable Communities	**55%**	52%	F	Countryside Communities	**52.3%**	45.6%
				G	Successful Suburbs	**2.3%**	2.3%
				H	Steady Neighbourhoods	**0%**	1.6%
				I	Comfortable Seniors	**0%**	1.4%
				J	Starting Out	**0%**	1.1%
4	Financially Stretched	**23%**	28%	K	Student Life	**0%**	0.4%
				L	Modest Means	**6.8%**	8.4%
				M	Striving Families	**6.8%**	12.1%
				N	Poorer Pensioners	**9.1%**	7.7%
5	Urban Adversity	**5%**	12%	O	Young Hardship	**0%**	7.1%
				P	Struggling Estates	**2.3%**	3.0%
				Q	Difficult Circumstances	**2.3%**	1.5%

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Causeway Coast & Glens Borough Council

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Dungiven

August 2021

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Client Analysis & Relationship Development

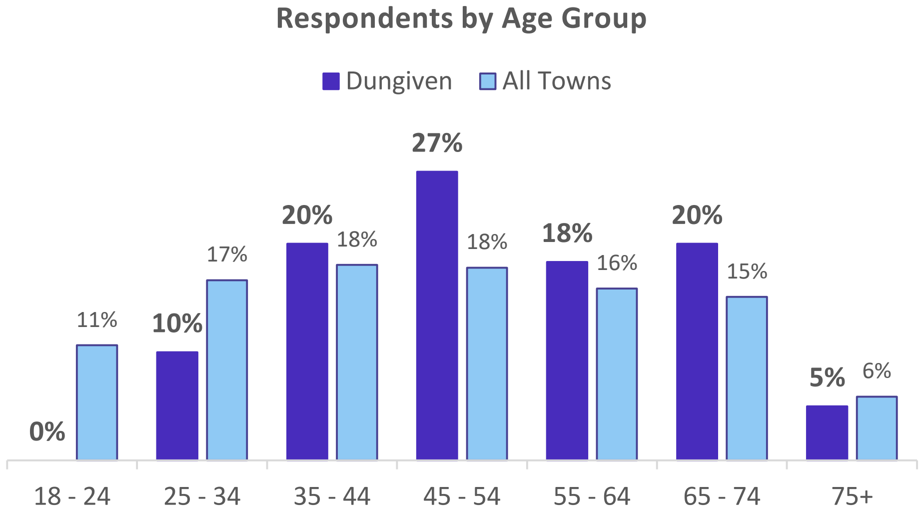
In March 2021, Causeway Coast and Glens Borough Council appointed CARD Group Ltd to carry out Perception and Opinion surveys, among people and businesses, within 12 designated town centres within the Borough. The aim of the survey is to assess how people and businesses perceive the town centres within Causeway Coast and Glens, in order to assist the Town & Village Management Team and Planning Department operations.

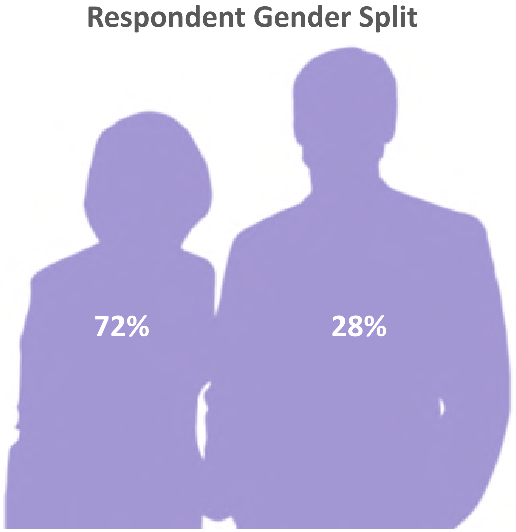
The following report is a sub-report seeking to provide a summarised snapshot of our results, emanating from the Causeway Coast & Glens visitor & traders sampling, at a **local** level. This particular sub-report provides the snapshot for sampling that took place in **Dungiven**;

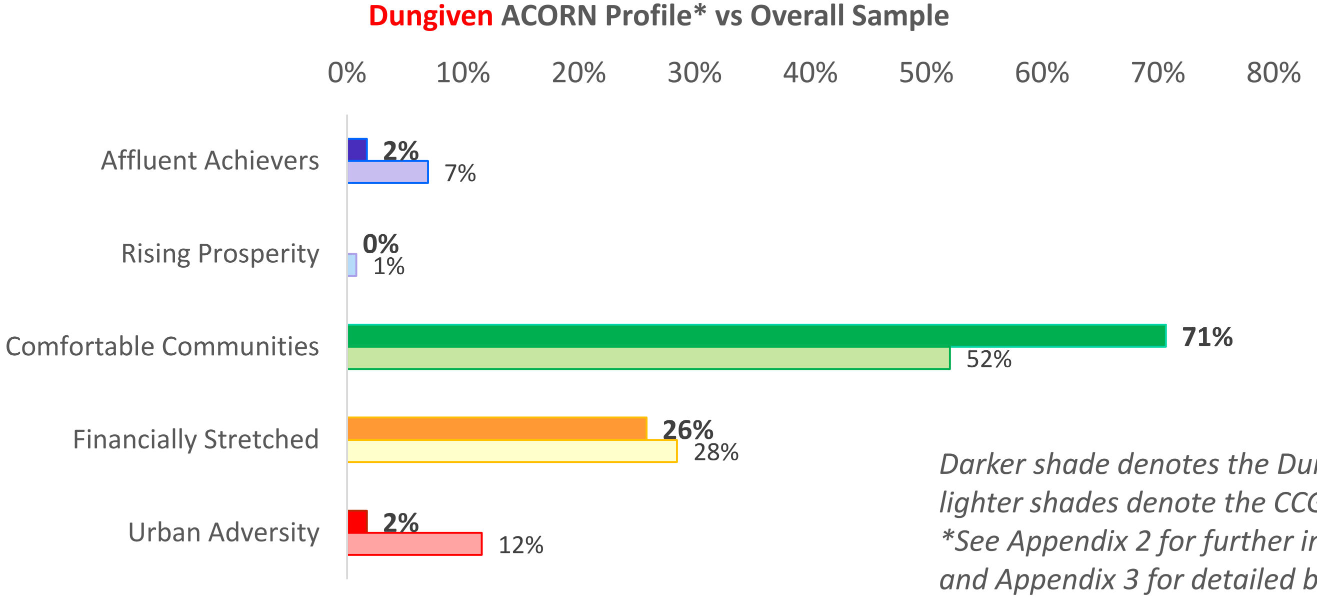
- The visitor results are based on an overall sample of **60** respondents;
- The trader's results are based on a sample of **19** traders within the town centre.

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







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*

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 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.

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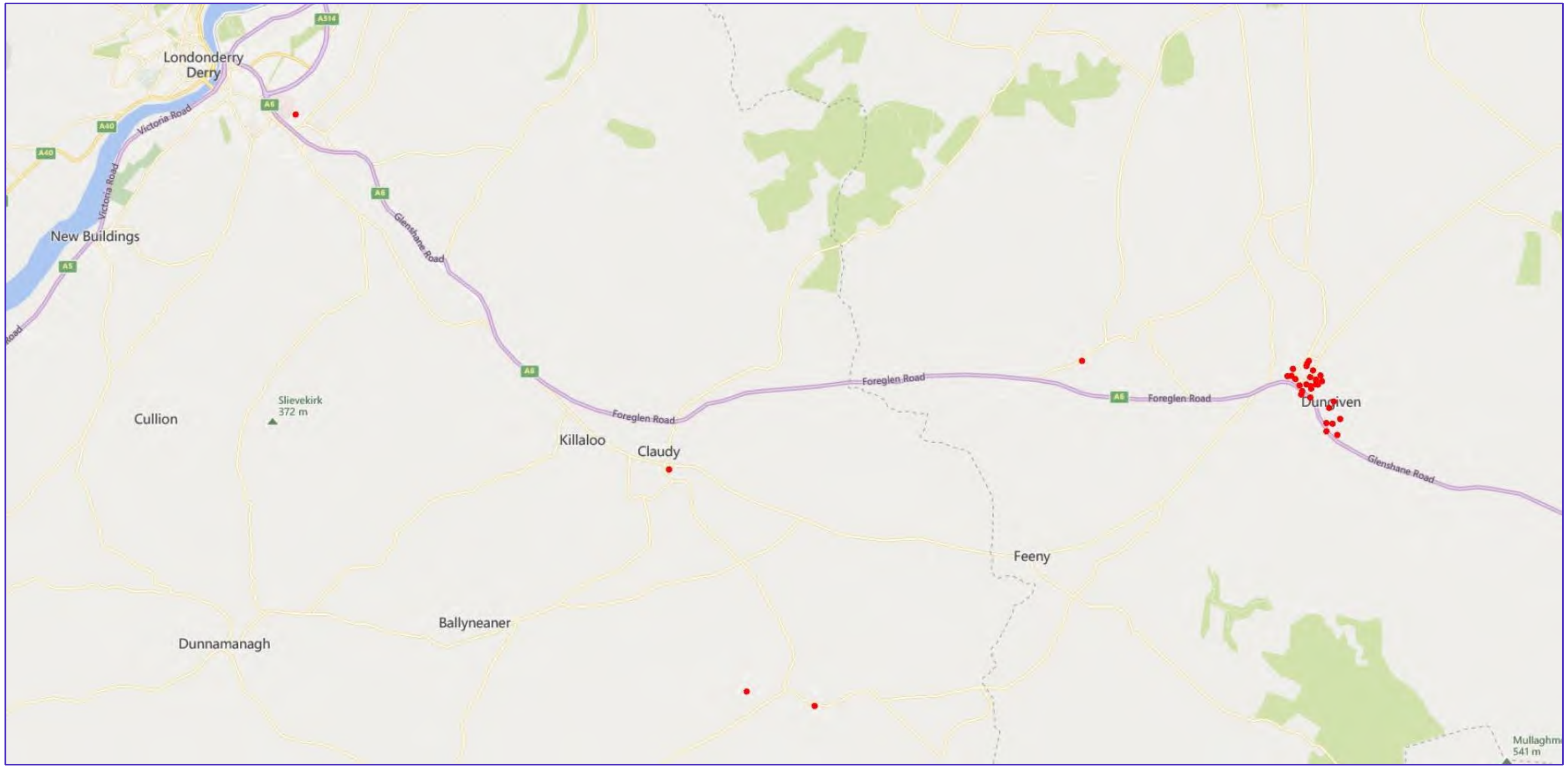
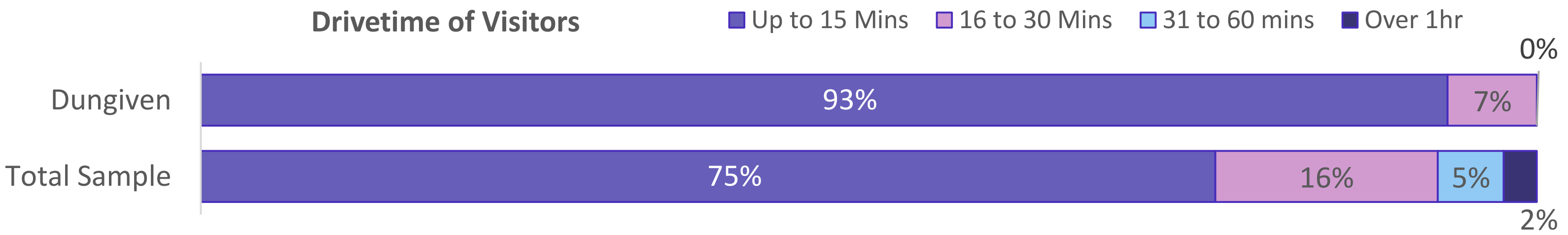


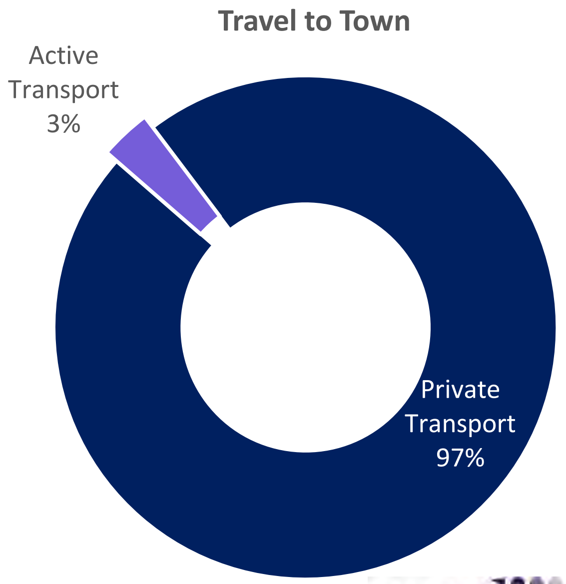
The concentration of visitors to the immediate area is particularly high for Dungiven.

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.



Average
3 mins
10 mins



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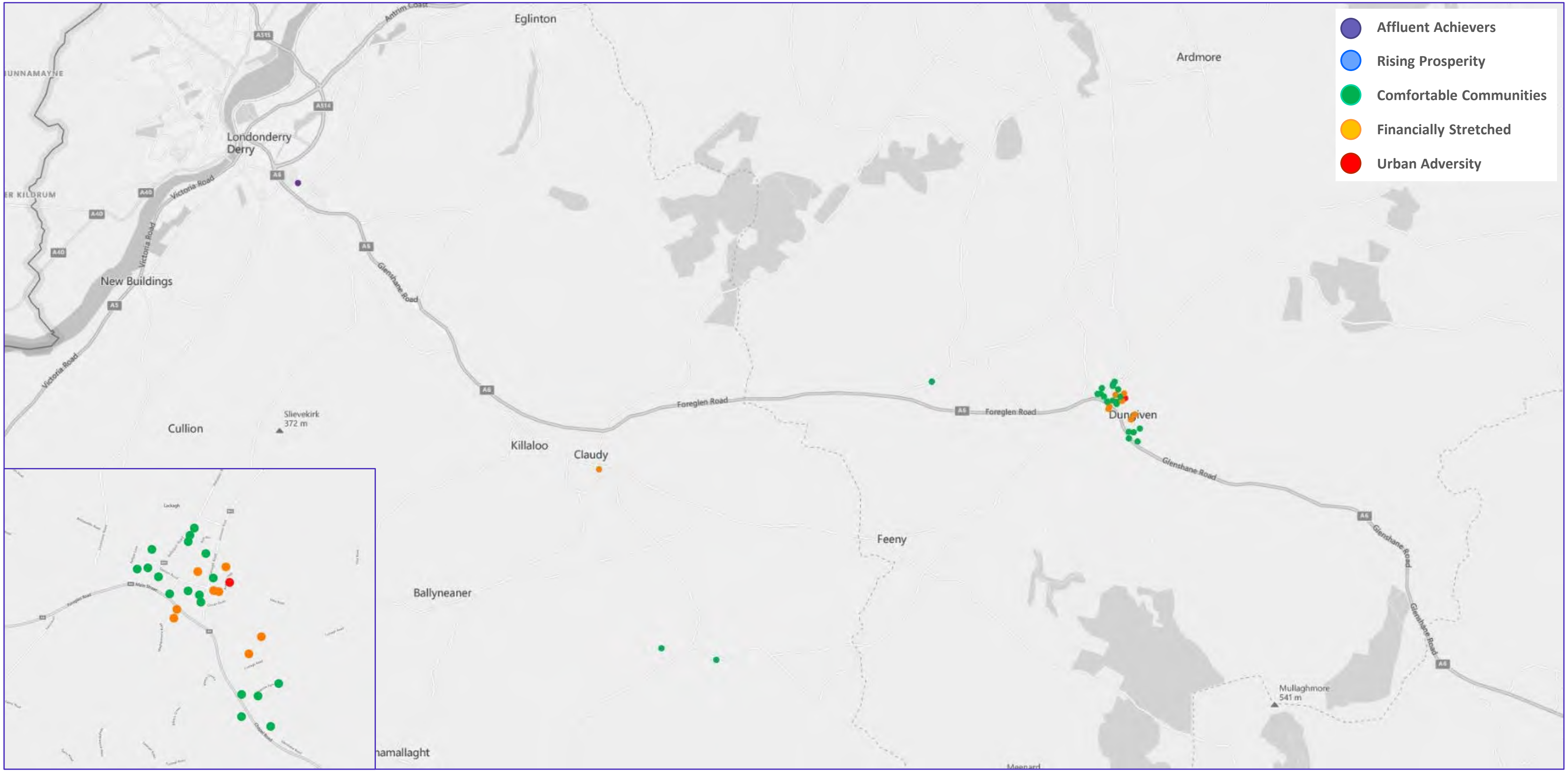
ACORN Mapping

Causeway Coast & Glens Borough Council



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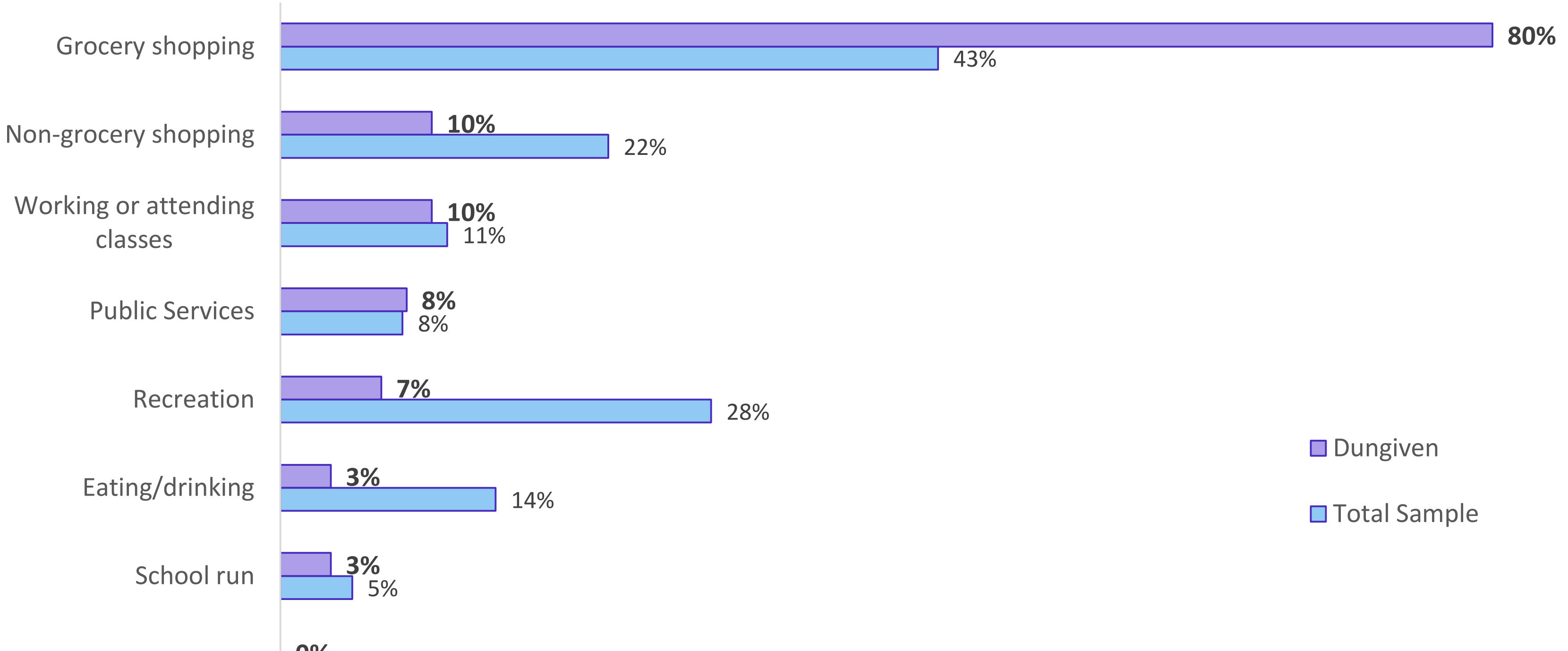
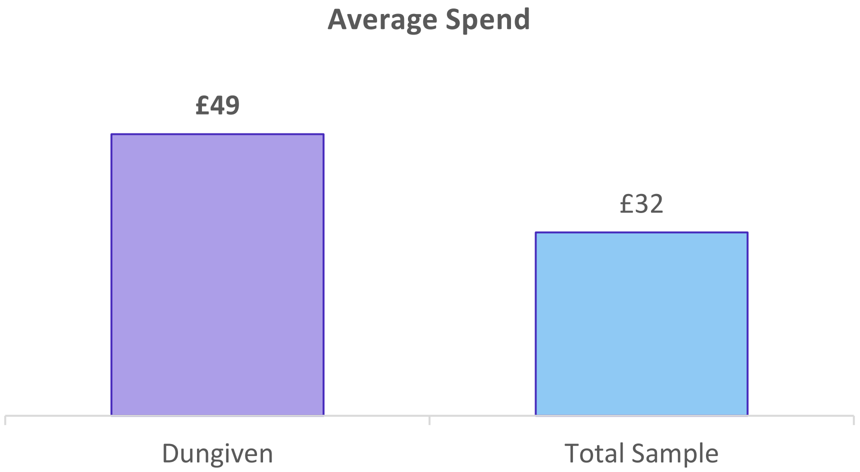
Why are people going to the town centres?





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.

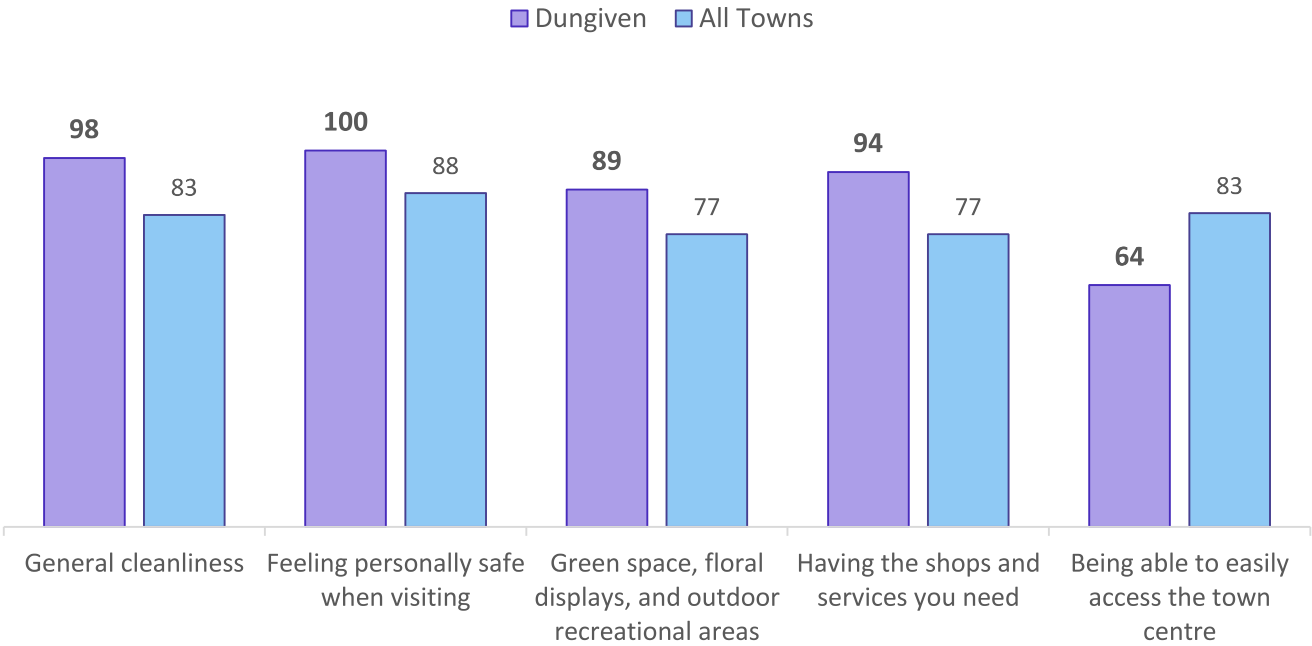
Visitors appear to simply come in, shop and leave.

What is your opinion of the town centre?

Causeway Coast & Glens Borough Council

	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."

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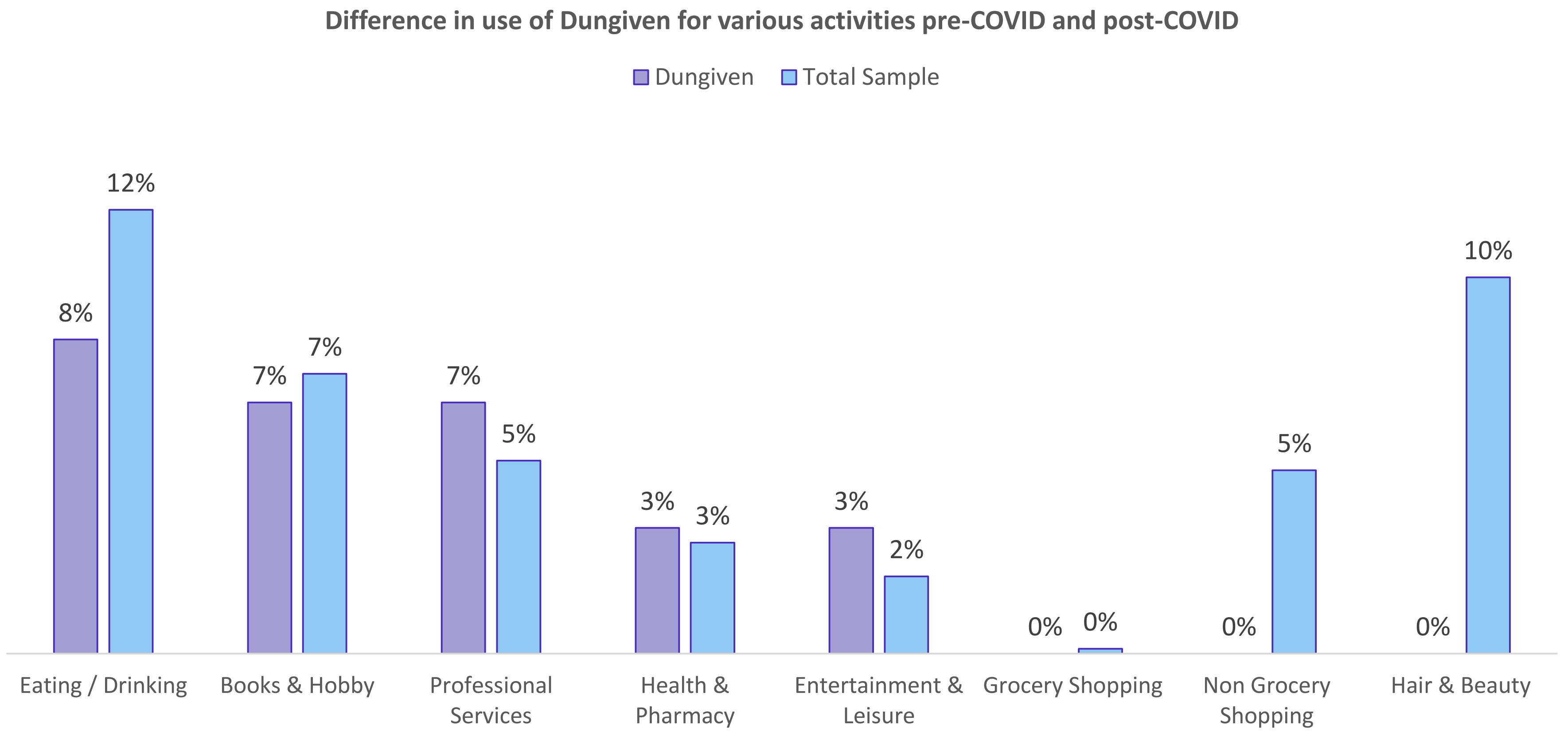


Dungiven TC Use	Eating / Drinking	Books & Hobby	Professional Services	Health & Pharmacy	Entertainment & Leisure	Grocery Shopping	Non Grocery Shopping	Hair & Beauty
Before COVID	70.0%	20.0%	85.0%	96.7%	91.7%	100.0%	88.3%	90.0%
After COVID	78.3%	26.7%	91.7%	100.0%	95.0%	100.0%	88.3%	90.0%
Difference	**+8.3%**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

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.

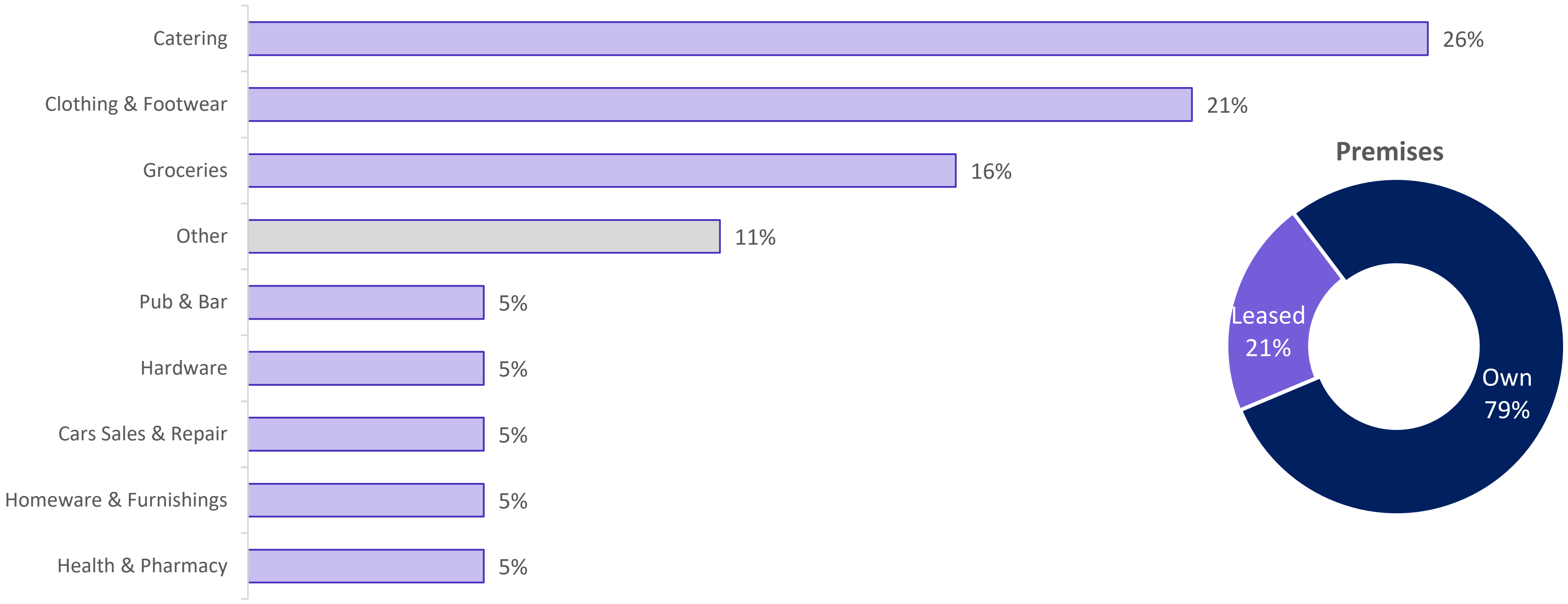
What prevents you from visiting the town centre more?	Dungiven	Total Sample
Congestion & Traffic	25%	19%
Parking	0%	15%
Habit	0%	8%
Unappealing Retailers	5%	13%
Evening Economy Options	0%	7%
Visually Unappealing Area	2%	7%
Cafes & Restaurant Offer	2%	7%
Safety	2%	3%
None of these	**75%**	**52%**

Traders

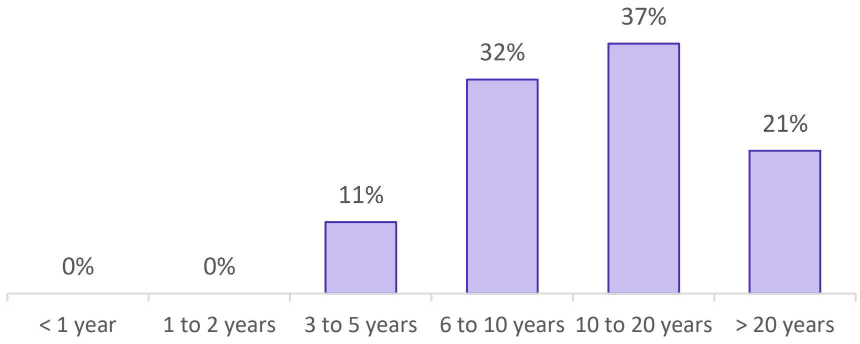
Trader Profile

Causeway Coast & Glens Borough Council

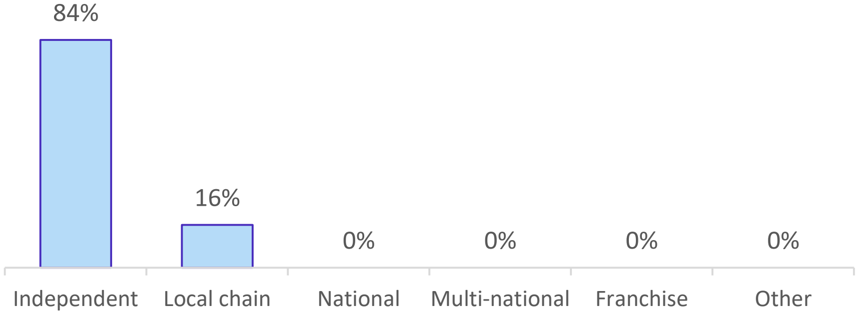
Business Sector



Business Age



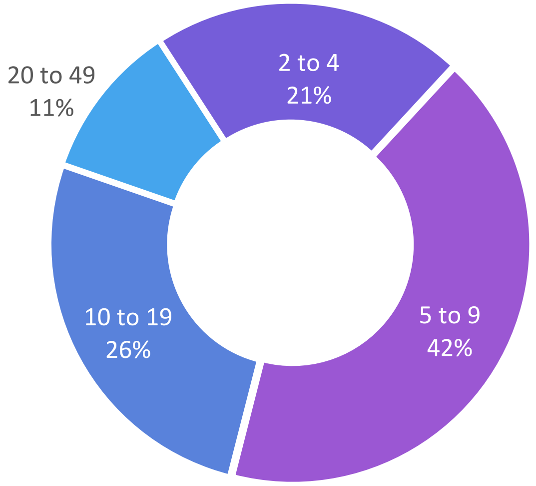
Business Ownership



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.

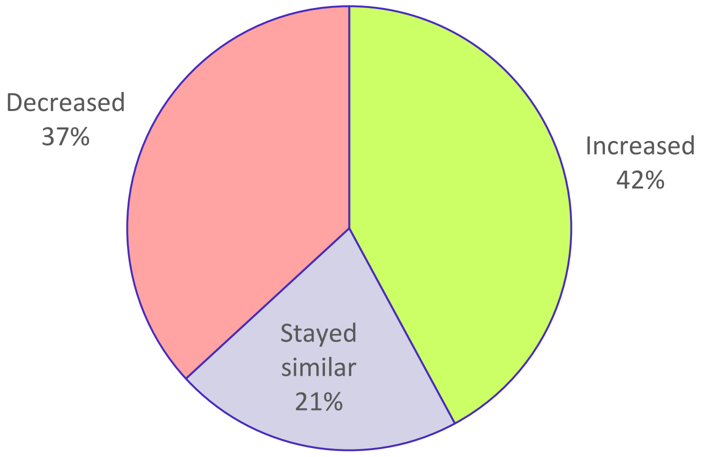
The trader profile is largely made up of maturing, independent firms.

Current Staffing Levels

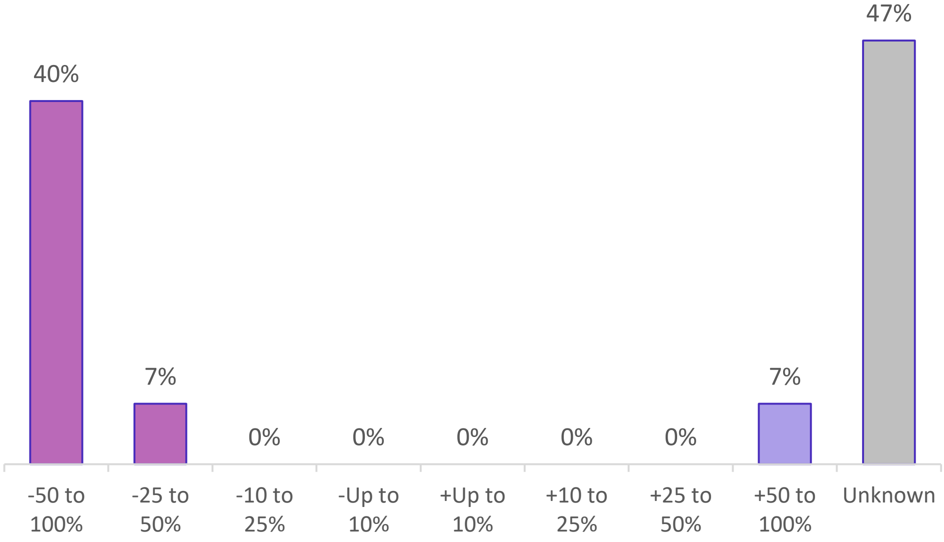


Causeway Coast & Glens Borough Council

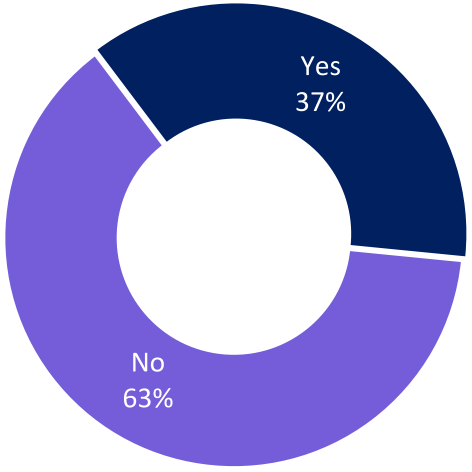
Impact on Turnover



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%**
Of those who said yes …	
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.

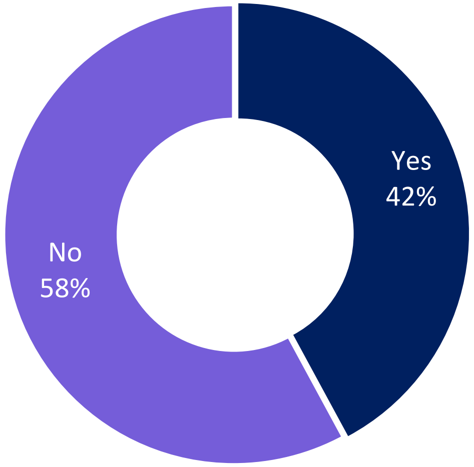
These traders were primarily those from the non-grocery sector.

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

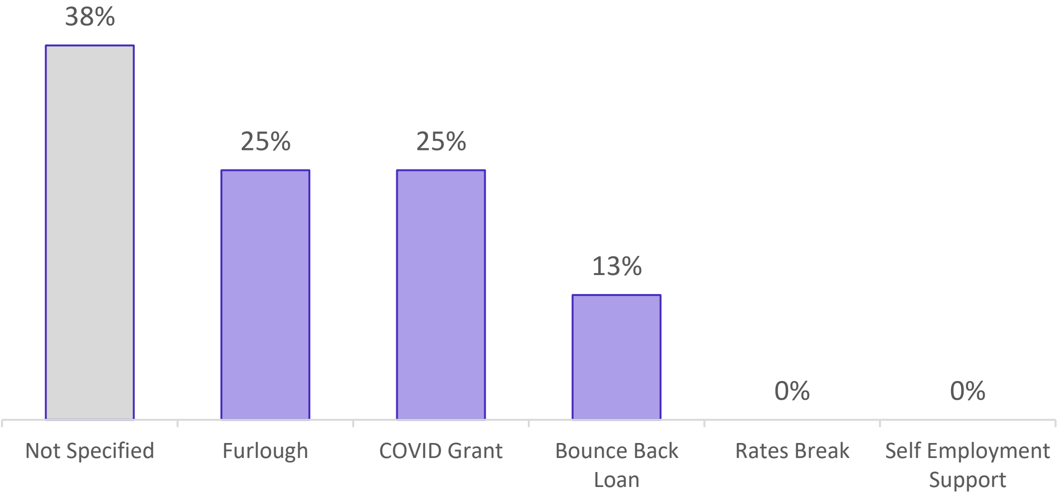
Many of these traders attempted to pivot during the lockdown, but were still unable to avoid a reduction in their income.

Causeway Coast & Glens Borough Council

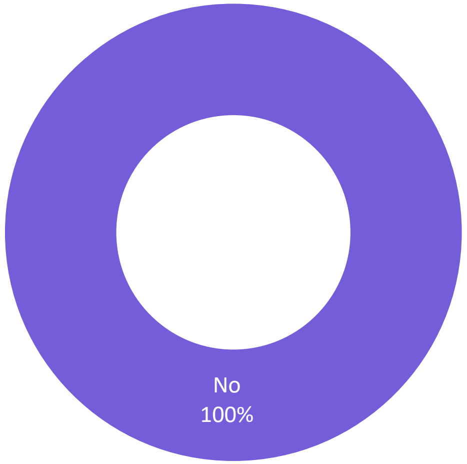
Did you avail of any Government support?



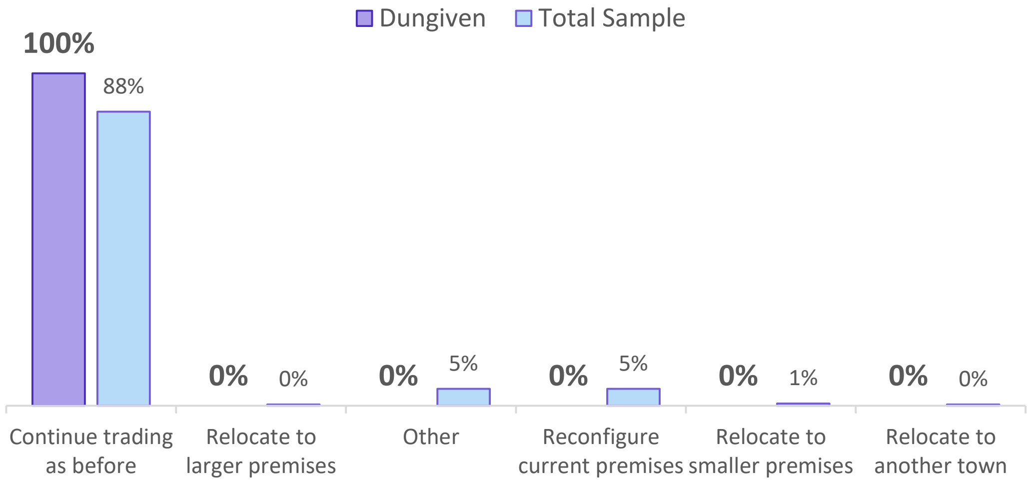
What kind of Government Support …



Did you avail of any CC&G Business Support …



Trading intentions going forward …



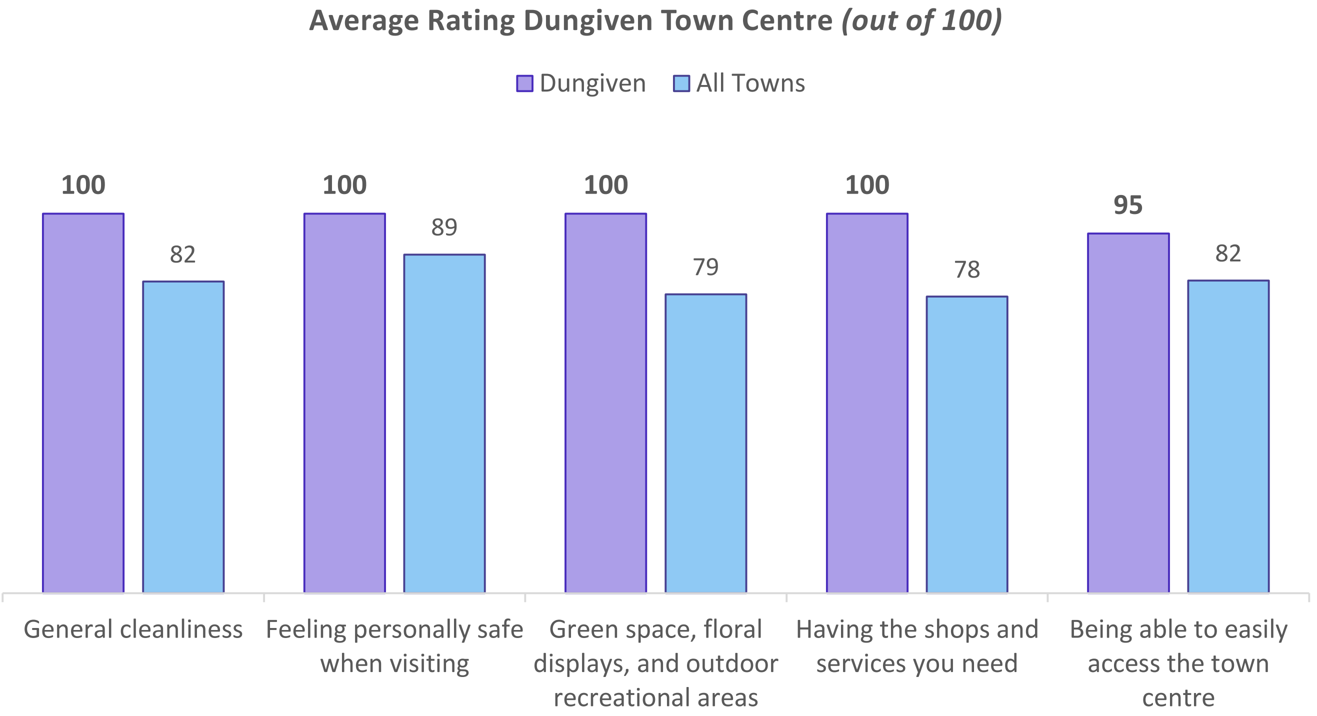
Consistent with the trends displayed in the previous page, the rate of uptake of government support was lowest in Dungiven out of all towns surveyed.

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'.

What is your opinion of the town centre?

Causeway Coast & Glens Borough Council

	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**									



- 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.

card

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 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

Appendix 3 – Results Expanded

Causeway Coast & Glens Borough Council

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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Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Portrush

August 2021

Introduction

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 **Portrush**;

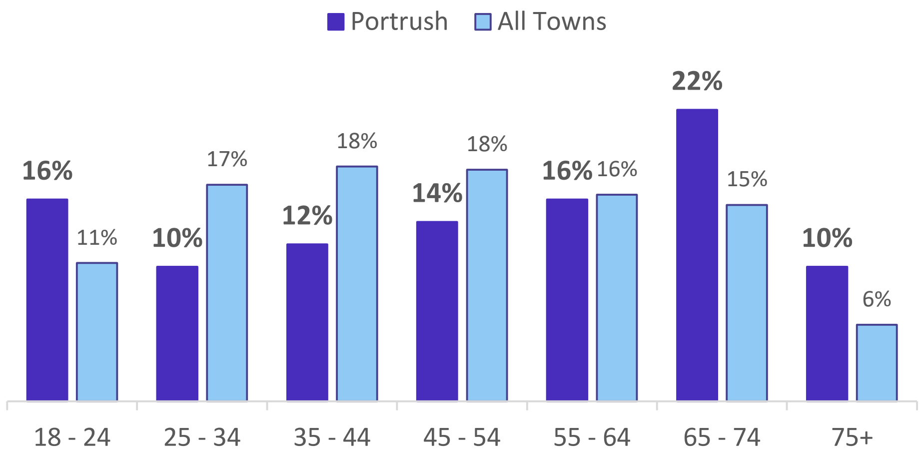
- The visitor results are based on an overall sample of **58** respondents;
- The trader's results are based on a sample of **28** traders within the town centre.

Sampling for visitors and traders in Portrush 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.

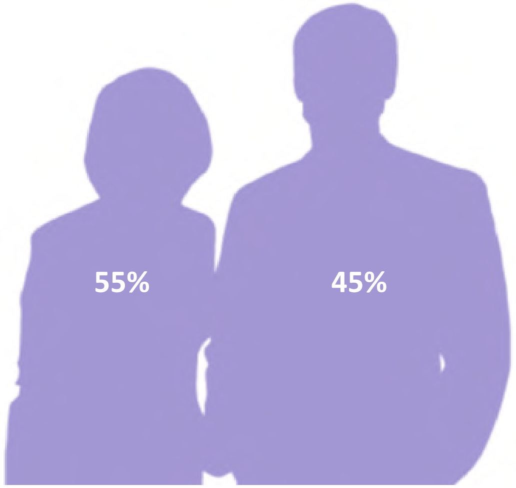
Visitors

Respondent Profile

Respondents by Age Group

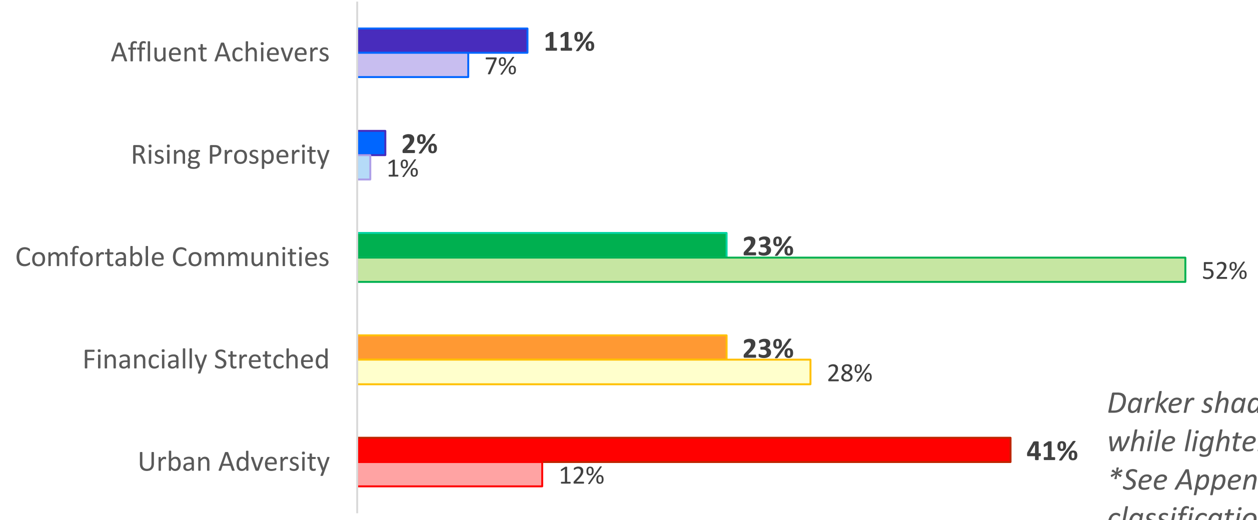


Respondent Gender Split



The age profile of the Portrush visitor sample is weighted towards older visitors over 65, accounting for 32% of visitors compared to the average 21%.

Portrush ACORN Profile* vs Overall Sample



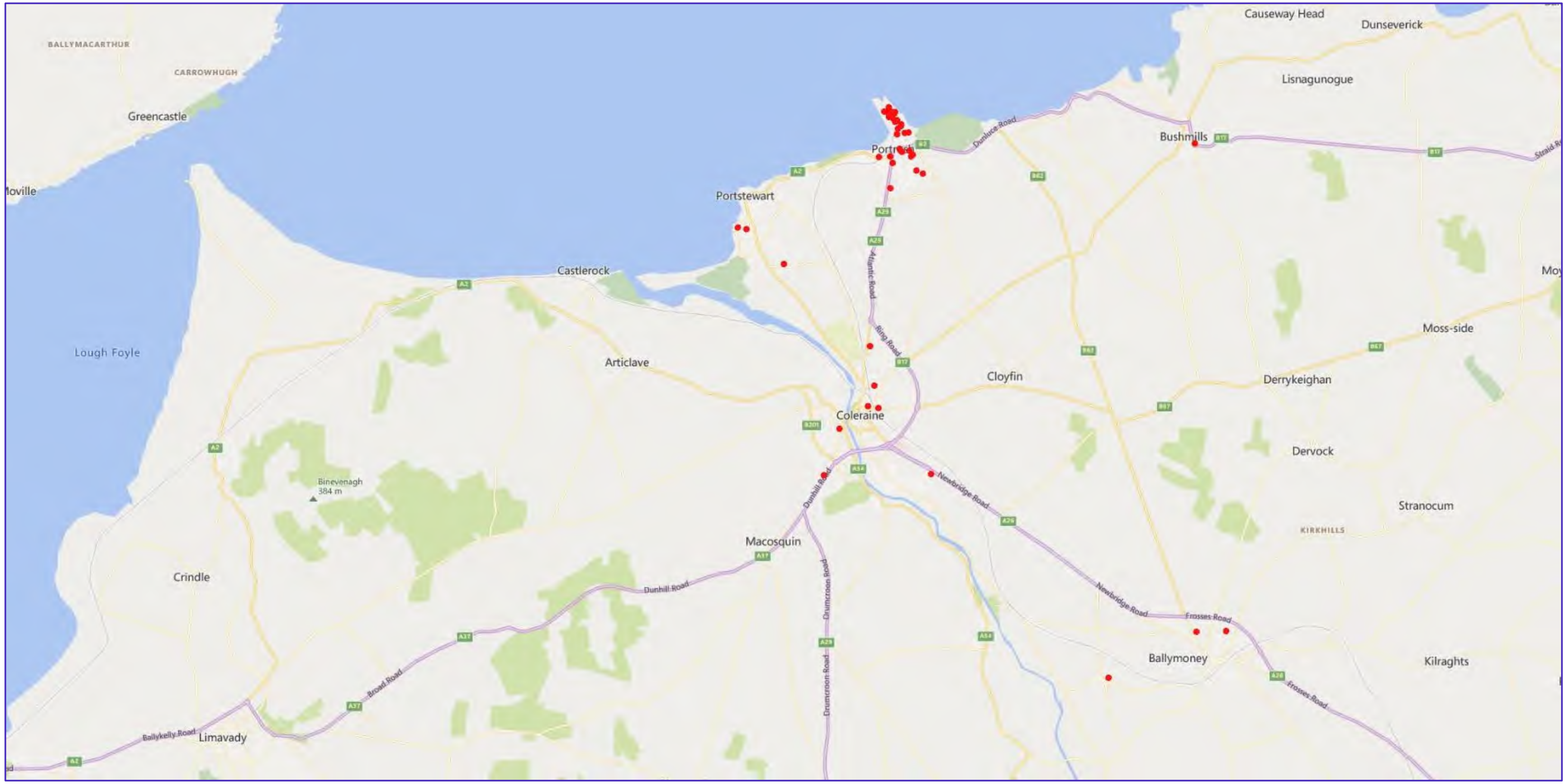
Darker shade denotes the Portrush respondent profile while lighter shade denotes the CCGBC baseline.
**See Appendix 2 for further information on ACORN classifications and Appendix 3 for detailed breakdown*

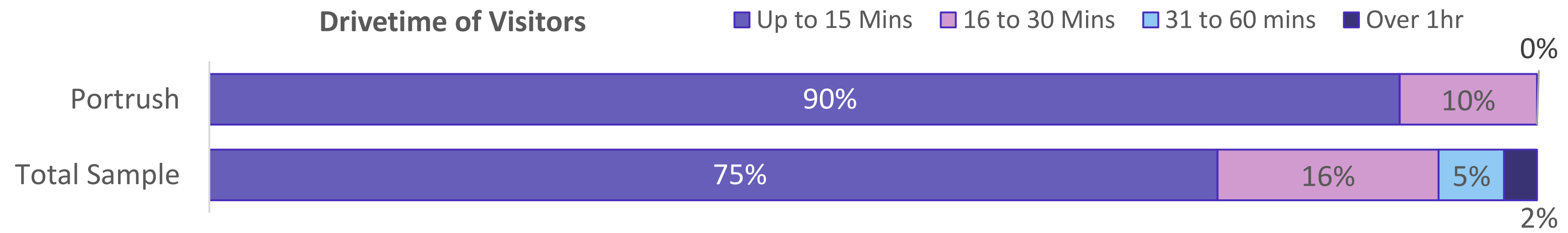
Portrush has the highest number of people in the ‘Urban Adversity’ ACORN sub- category of all towns, and the lowest number of people in the ‘comfortable communities’ sub-category.

These appear to be predominantly young people living in low income housing areas.

Origins & Travel

Causeway Coast & Glens Borough Council



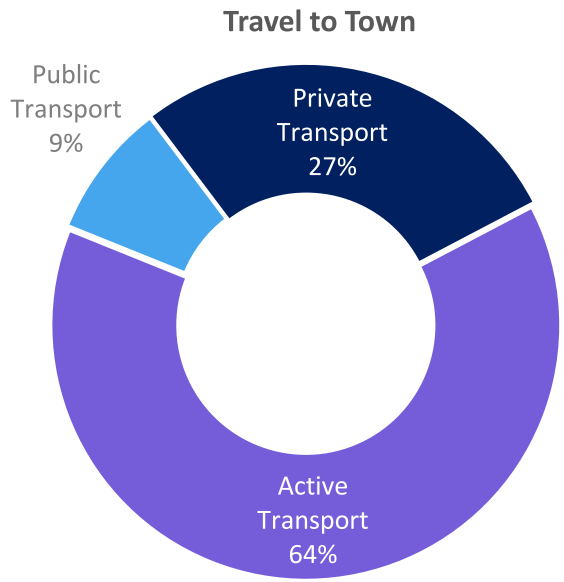


Average
7 mins
10 mins

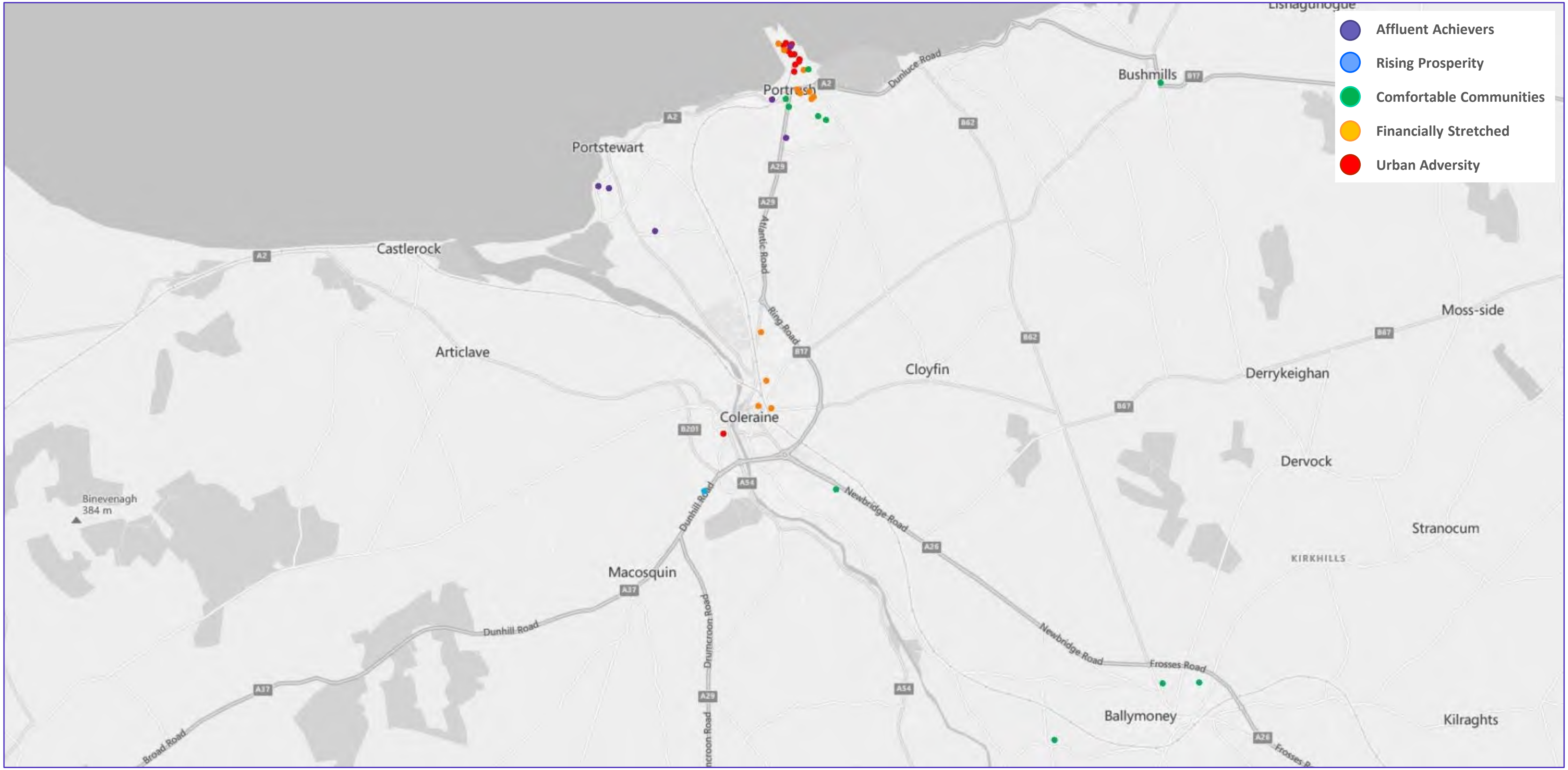
The concentration of visitors from the local area is high for Portrush.

The average drivetime is the third lowest of the towns with no one having travelled more than 30 minutes from the surrounding towns.

Portrush has the highest proportion of visitors using active transport (walking/cycling) considering the average is 30%.

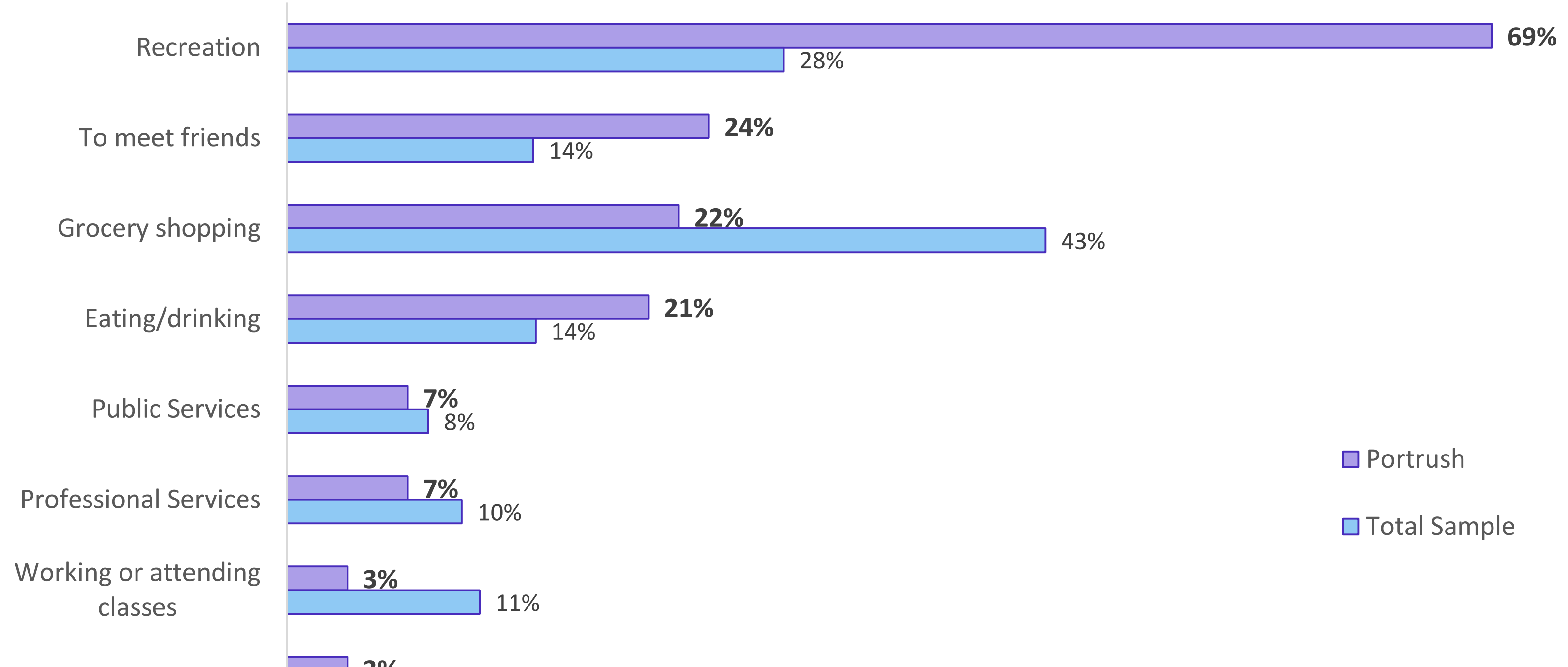


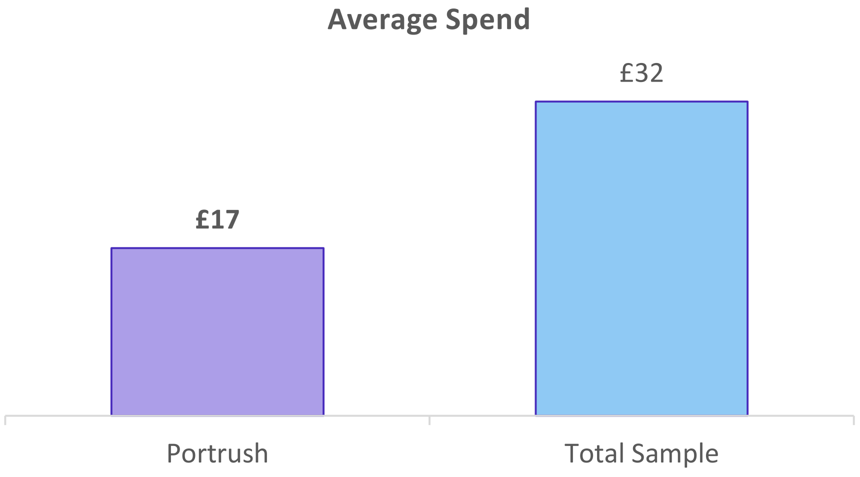
ACORN Mapping



Empowering accurate consumer understanding

Why are people going to the town centres?





Location	Average Dwell Time	Average Spend per Minute
Portrush	100 mins	£0.17
Total Sample	109 mins	£0.29

The majority of people are in Portrush for recreation. This contrasts with the average where Recreation is much lower, and Grocery Shopping and Non-grocery shopping are both also much lower than average.

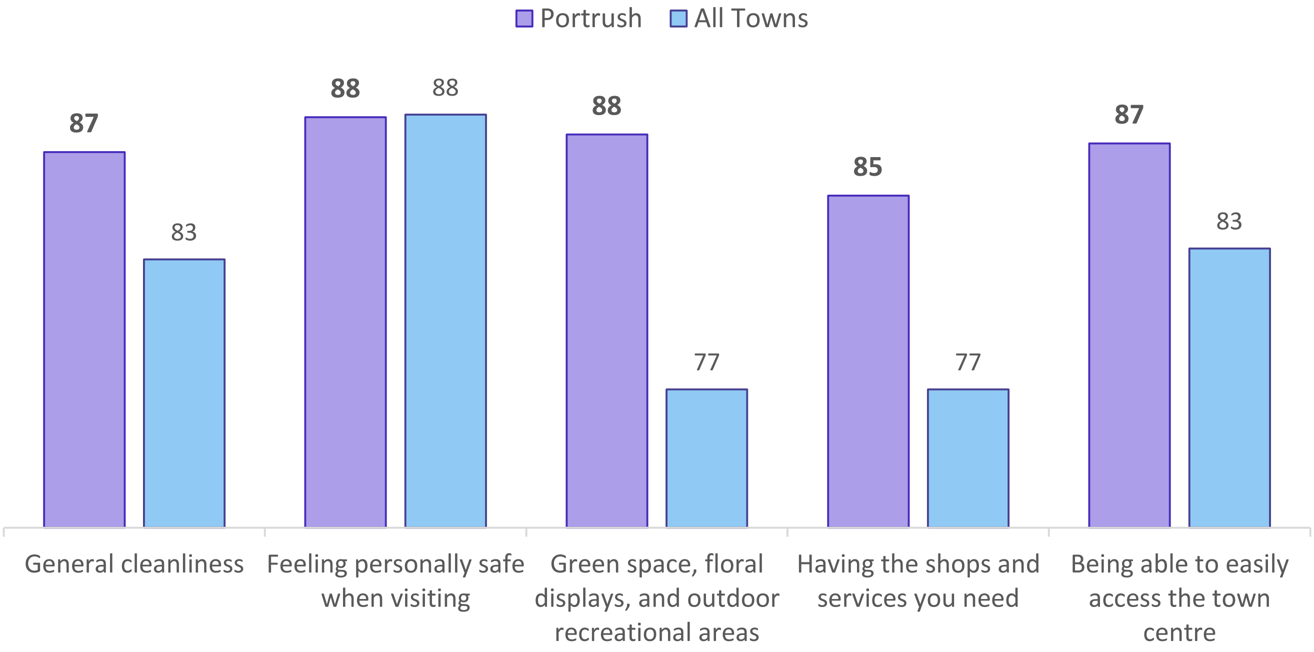
This is reflective of Portrush's status as a predominantly tourist / visitor town, while it also reflects the lack of grocery shopping offer in the town centre also.

The lower rates of shopping has caused a much lower average spend among visitors.

What is your opinion of the town centre?

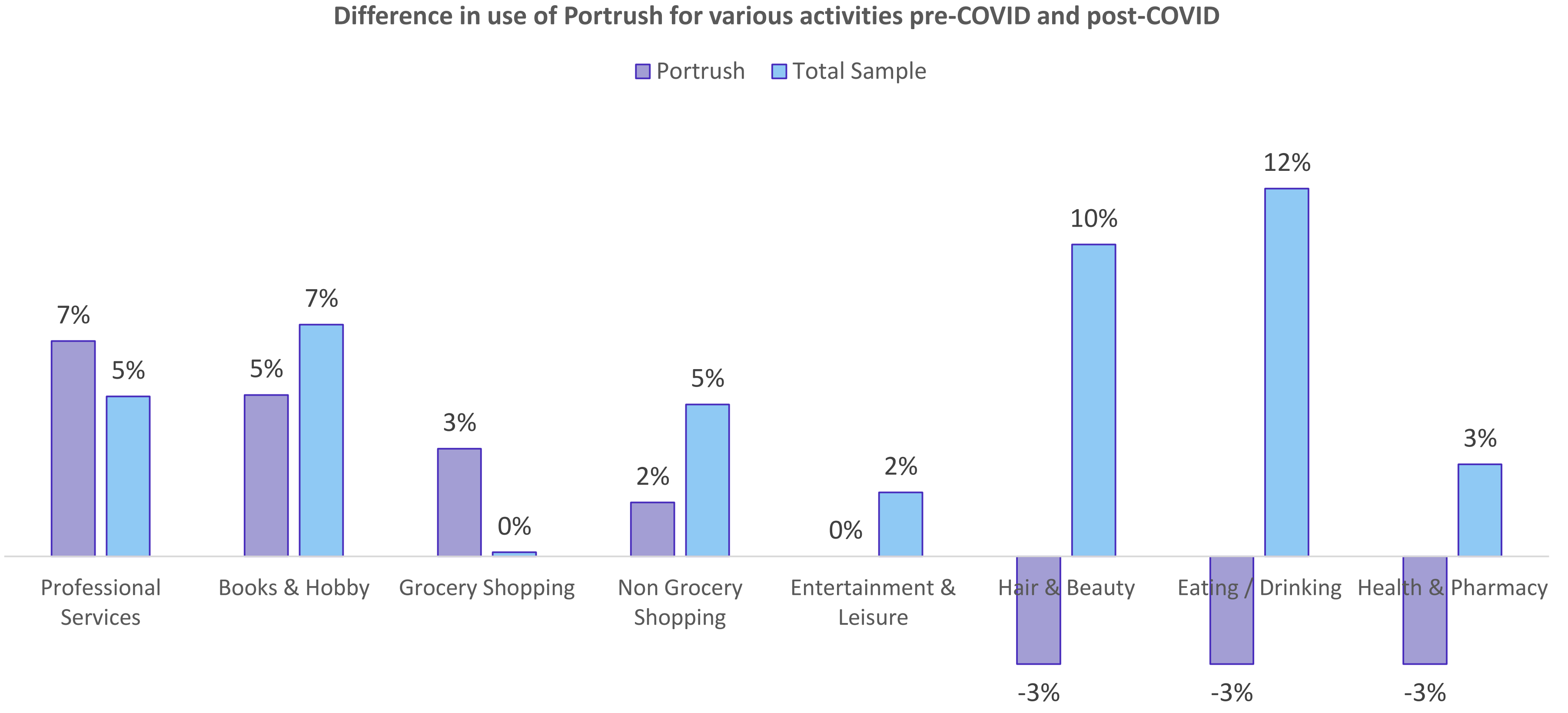
	Portrush Visitors									Score: +98
	Dislike				Passive		Like			
Description	Hate	Dislike	Avoid	Not ok	Not for me	Ok	Like	Enjoy	One of my favourites	My favourite town
Score	1	2	3	4	5	6	7	8	9	10
Sample	0%	0%	0%	0%	0%	2%	7%	38%	16%	38%
Calculation	Total of 'Like' (**98**) – Total of Dislike (**0**) = **+98**									

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



- Above is the combined Sentiment Score for Portrush. The rationale for Sentiment Scoring is outlined in Appendix 2.
- Portrush received the second highest Sentiment Score of the 12 towns. None of the visitors disliked the town with everyone stating 'Ok' or above.
- This is also reflected in the average town centre ratings, where Portrush was higher than, or matched, the average across all categories.

Causeway Coast & Glens Borough Council



Portrush TC Use	Professional Services	Books & Hobby	Grocery Shopping	Non Grocery Shopping	Entertainment & Leisure	Hair & Beauty	Eating / Drinking	Health & Pharmacy
Before COVID	6.9%	55.2%	77.6%	65.5%	50.0%	55.2%	96.6%	63.8%
After COVID	13.8%	60.3%	81.0%	67.2%	50.0%	51.7%	93.1%	60.3%
Difference	**+6.9%**	**+5.2%**	**+3.4%**	**+1.7%**	**0.0%**	**-3.4%**	**-3.4%**	**-3.4%**

Portrush sees less variation than other towns pre and post COVID.

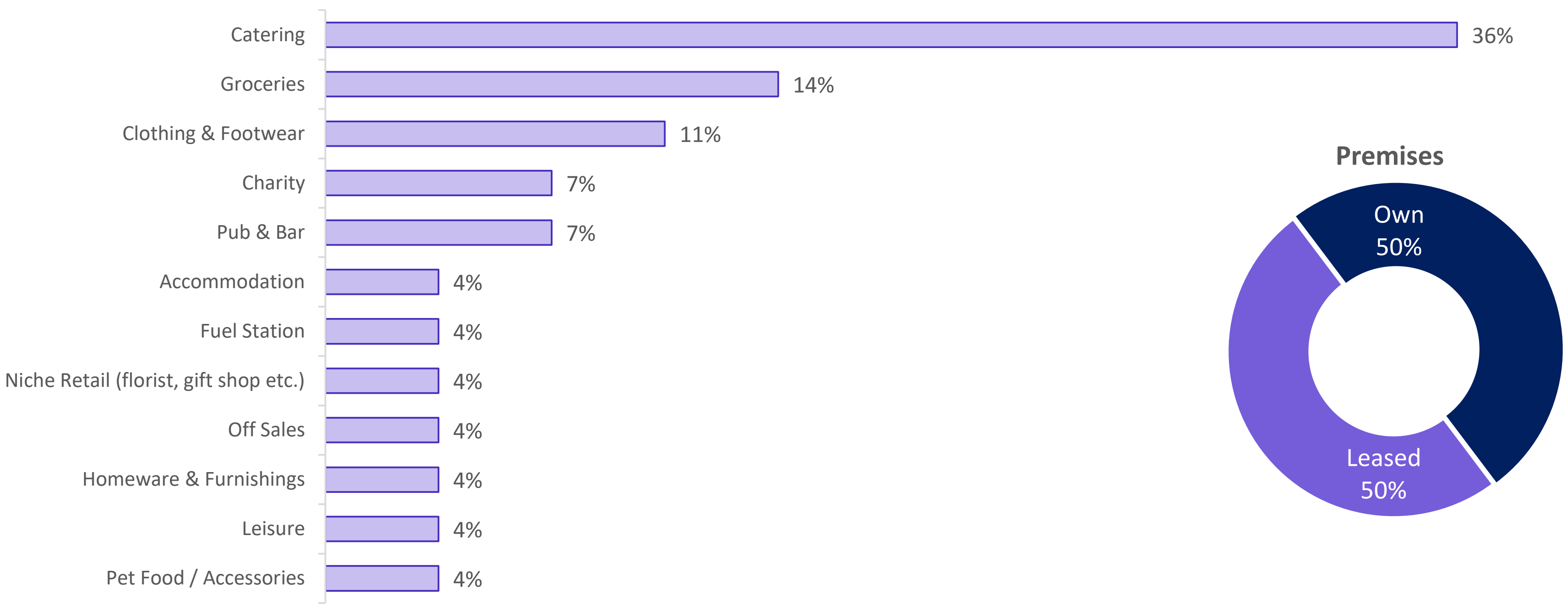
Professional services are to see a 7% increase in use after covid while 'Books & Hobby' will see a small increase. All other categories see little or no change.

The largest factor preventing visitors from coming to Portrush is Congestion & Traffic which is consistent with other towns. However, 16% of people feel the 'Cafes & Restaurant Offer' is an issue.

What prevents you from visiting the town centre more?	Portrush	Total Sample
Congestion & Traffic	22%	19%
Parking	12%	15%
Habit	9%	8%
Unappealing Retailers	17%	13%
Evening Economy Options	9%	7%
Visually Unappealing Area	2%	7%
Cafes & Restaurant Offer	16%	7%
Safety	0%	3%
None of these	**48%**	**52%**

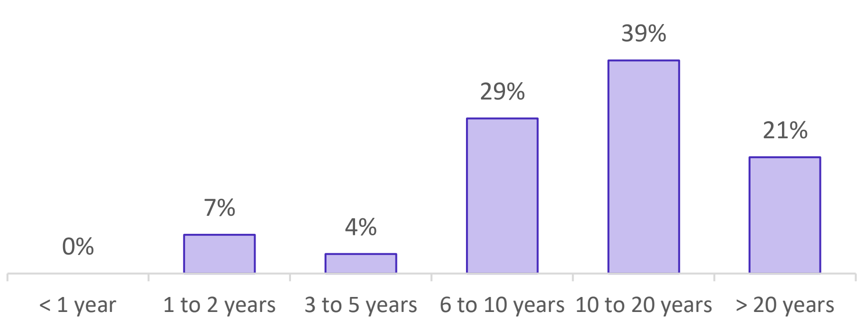
Traders

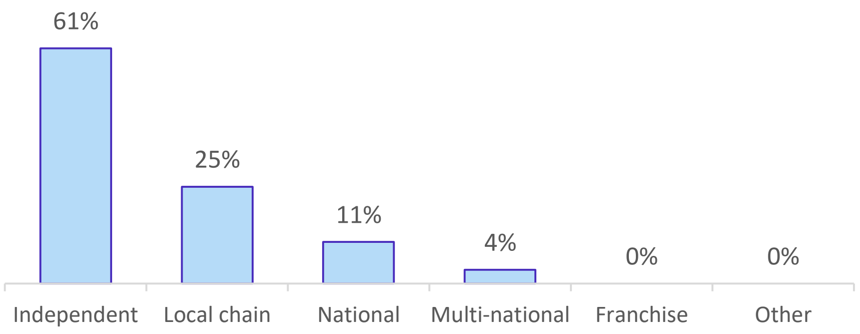
Trader Profile

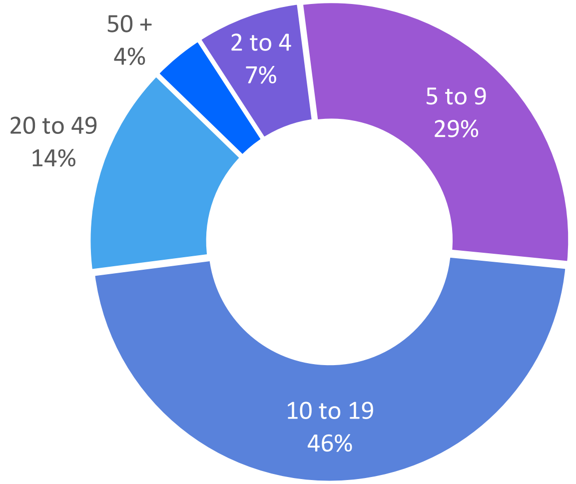


The trader profile is largely made up of mature, independent firms with fewer smaller traders.

There are 36% of traders with less than 10 employees compared to the average of 70%, indicating that traders in Portrush tend to be larger in scale.







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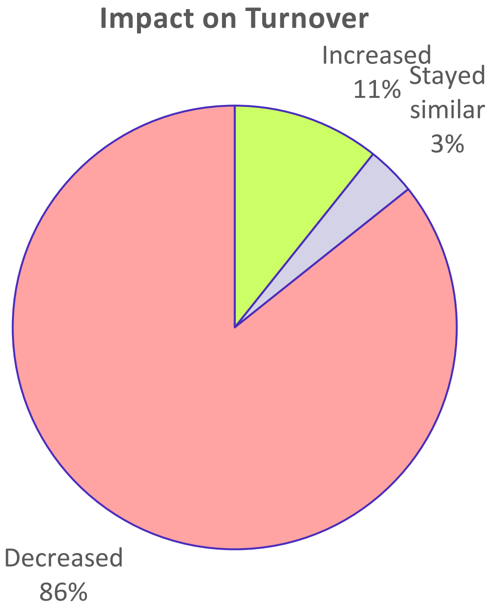
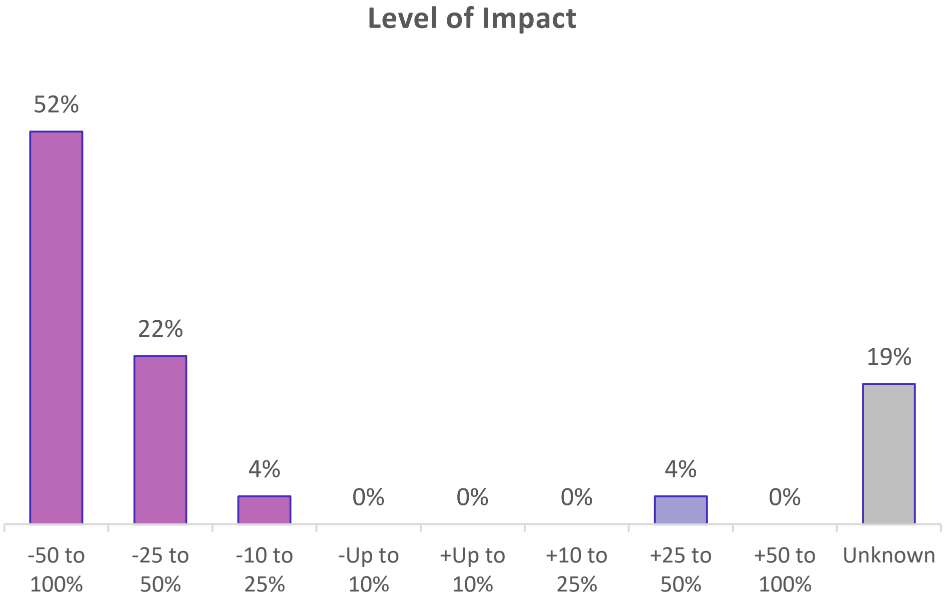
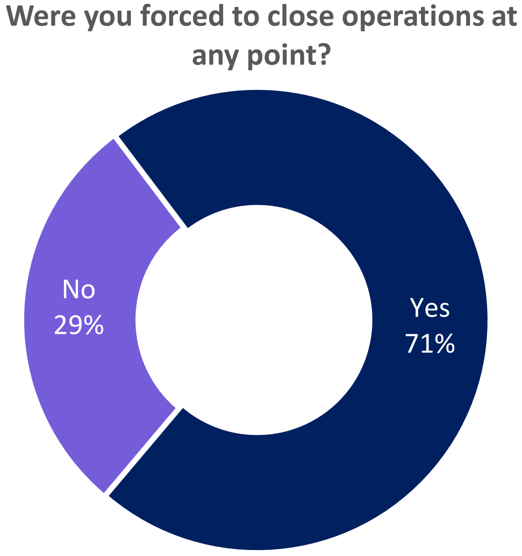






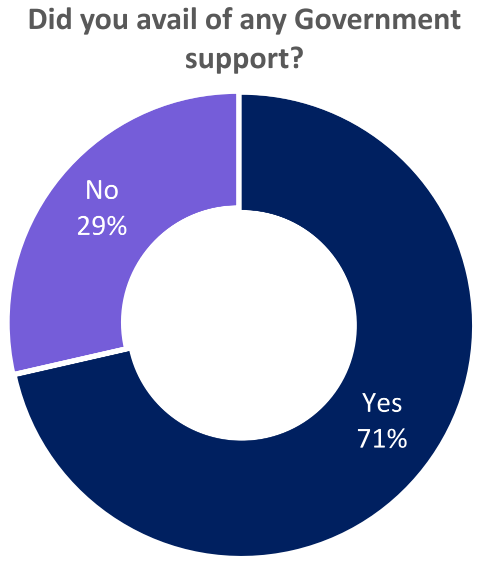
Did the business pivot to provide alternative services during the COVID lockdown …	%
No	**54%**
Yes	**46%**
Of those who said yes …	
Online selling & delivery	69%
Click & collect	23%
New services tailored to new circumstances	8%
New products tailored to new circumstances	0%

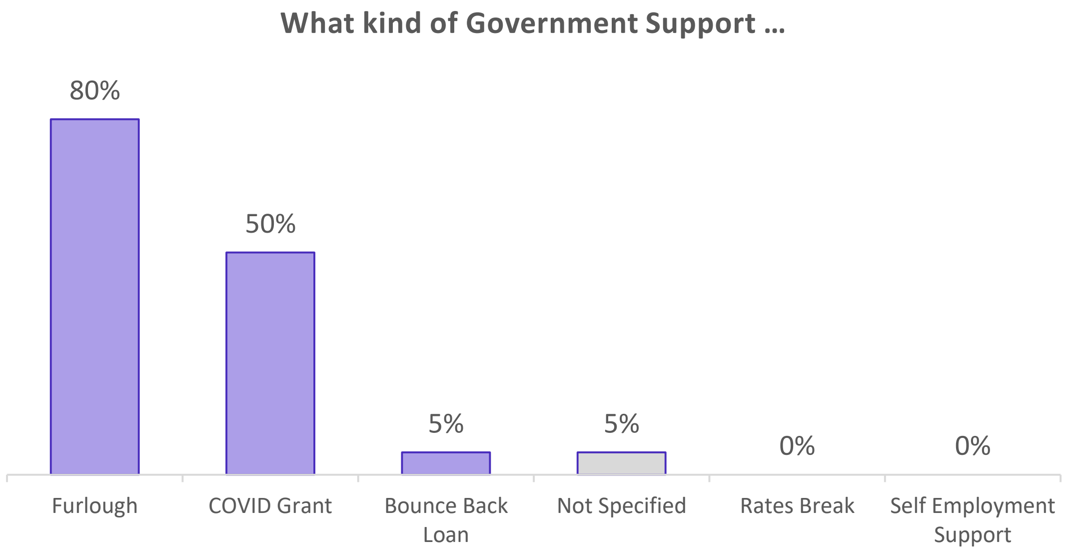
Portrush had the highest rate of decreased turnover due to COVID.

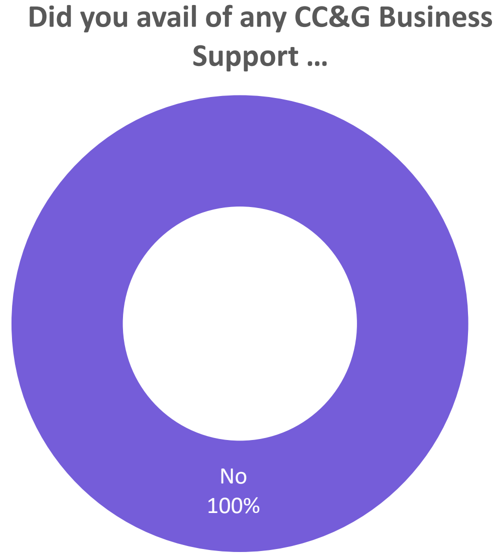
Due to the Portrush's greater reliance on the tourism / visitor economy, the town was undoubtedly going to be hit hard by lockdown restrictions and the associated restrictions on movement of people and closure of businesses which cater to visitors

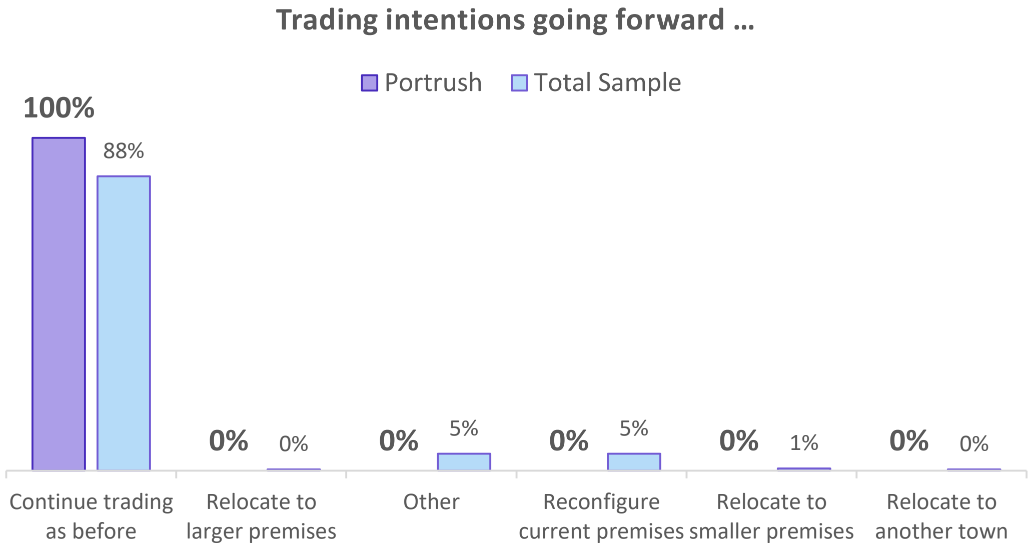
Portrush has the highest number of traders (71%) who were forced to close their operations at some point with 50% being classified as 'Non-Essential'.

card









Portrush had the second highest rate of uptake of government support of the 12 towns.

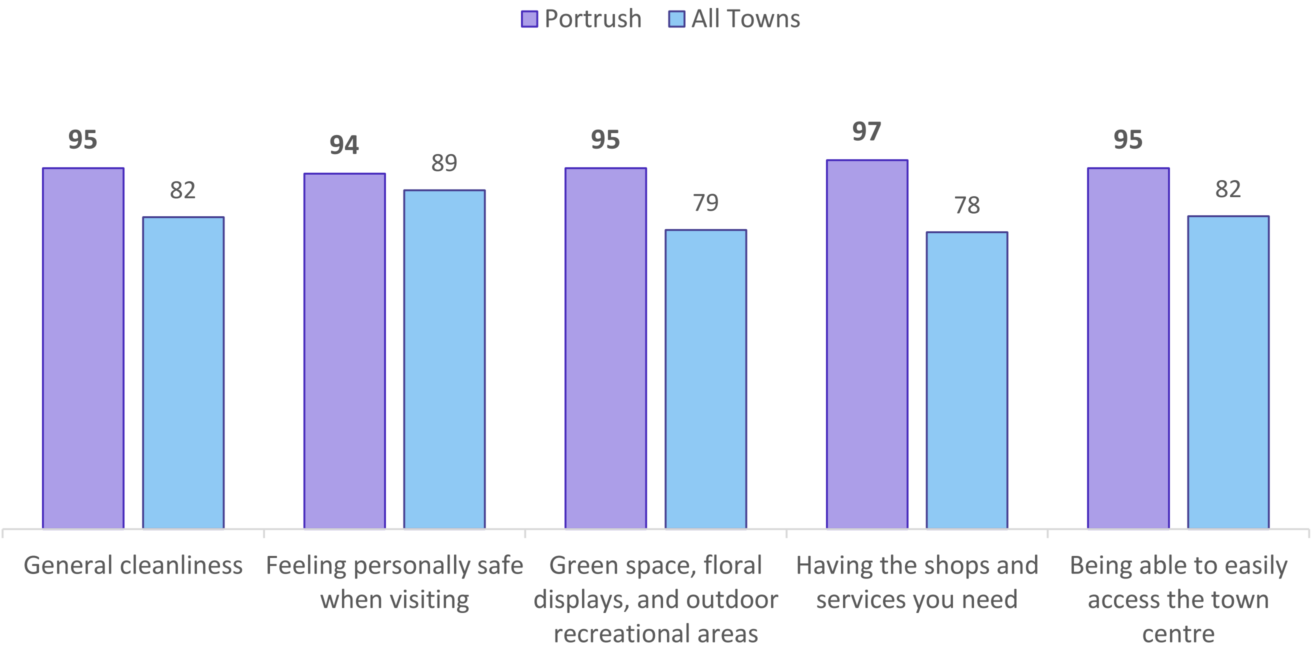
With 80% of businesses using the furlough scheme and 50% getting COVID grants, the traders did require support.

The use of council support is virtually non-existent and all traders surveyed plan to continue trading as before.

What is your opinion of the town centre?

	Portrush Traders									Score: +100
	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%	0%	7%	29%	54%	11%
Calculation	Total of 'Like' (**100**) – Total of Dislike (**0**) = **Portrush Traders Score = +100**									

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



- Portrush has the highest possible sentiment score which is consistent with the very high ratings opposite.
- In the individual sentiment scores, the majority have said they either 'Enjoy' or the town is 'One of my favourites'.
- A common theme in the feedback was:

"Hopefully we get open for the summer again"

- The same 3-4 traders gave low scores across all five categories and their feedback stated: *"need green spaces in town centre"*, *"pedestrian areas, more bins that are emptied more often, more CCTV"*

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 Portrush a sample size of 58 was achieved which provides us with a margin of error of +/- 12.9% @ 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 – 12.9% in 19 (95%) of the subsequent studies.

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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

Causeway Coast & Glens Borough Council

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.

Causeway Coast & Glens Borough Council

	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

Causeway Coast & Glens Borough Council

Appendix 3 – Results Expanded

Causeway Coast & Glens Borough Council

Detailed ACORN Results for Portrush Visitors

No.	ACORN Group	Portrush	Total Sample	Sub-Category		Portrush	Total Sample
1	Affluent Achievers	**11%**	7%	A	Lavish Lifestyles	**0%**	0%
				B	Executive Wealth	**5.4%**	4.1%
				C	Mature Money	**5.4%**	2.9%
2	Rising Prosperity	**2%**	1%	D	City Sophisticates	**0%**	0%
				E	Career Climbers	**1.8%**	0.8%
3	Comfortable Communities	**23%**	52%	F	Countryside Communities	**19.6%**	45.6%
				G	Successful Suburbs	**1.8%**	2.3%
				H	Steady Neighbourhoods	**0.0%**	1.6%
				I	Comfortable Seniors	**1.8%**	1.4%
				J	Starting Out	**0%**	1.1%
4	Financially Stretched	**23%**	28%	K	Student Life	**0%**	0.4%
				L	Modest Means	**14.3%**	8.4%
				M	Striving Families	**5.4%**	12.1%
				N	Poorer Pensioners	**3.6%**	7.7%
5	Urban Adversity	**41%**	12%	O	Young Hardship	**39.3%**	7.1%
				P	Struggling Estates	**1.8%**	3.0%
				Q	Difficult Circumstances	**0%**	1.5%

Disclaimer

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Causeway Coast & Glens Borough Council

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Ballycastle

August 2021

card
Client Analysis & Relationship Development

Introduction

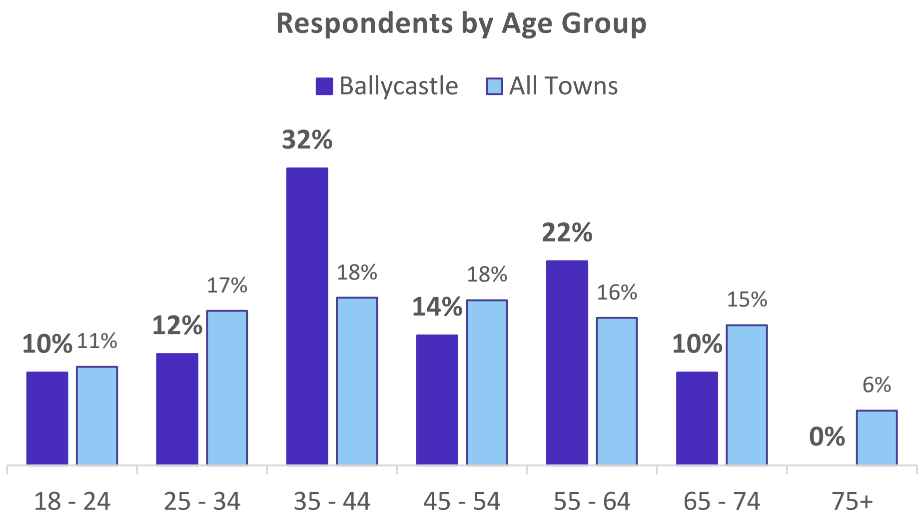
In March 2021, Causeway Coast and Glens Borough Council appointed CARD Group Ltd to carry out Perception and Opinion surveys, among people and businesses, within 12 designated town centres within the Borough. The aim of the survey is to assess how people and businesses perceive the town centres within Causeway Coast and Glens, in order to assist the Town & Village Management Team and Planning Department operations.

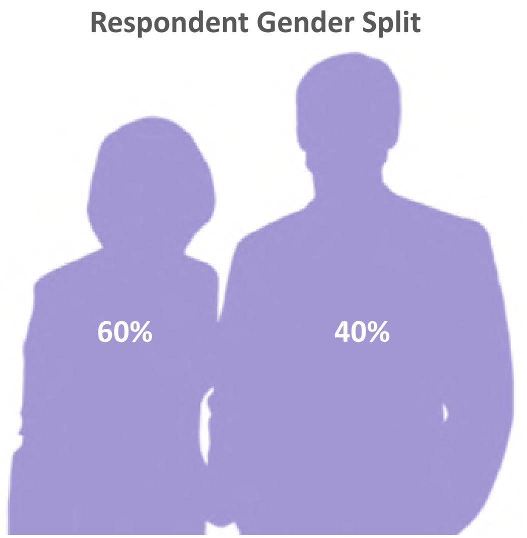
The following report is a sub-report seeking to provide a summarised snapshot of our results, emanating from the Causeway Coast & Glens visitor & traders sampling, at a **local** level. This particular sub-report provides the snapshot for sampling that took place in **Ballycastle**;

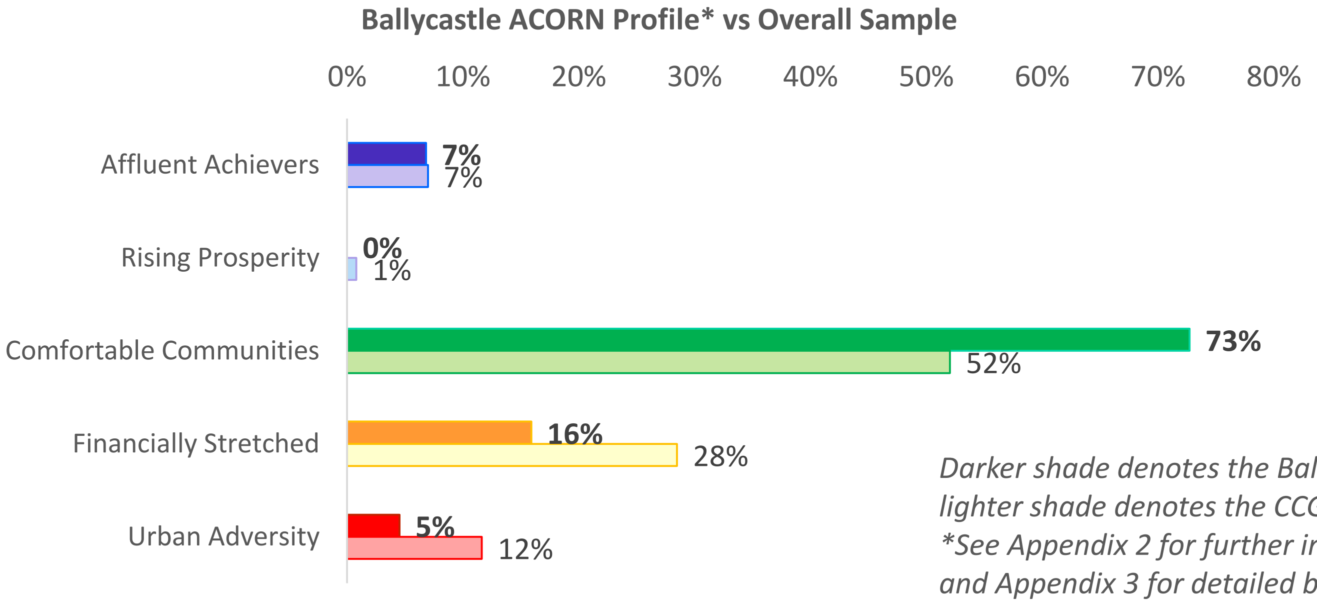
- The visitor results are based on an overall sample of **50** respondents;
- The trader's results are based on a sample of **19** traders within the town centre.

Sampling for visitors and traders in Ballycastle took place between 24th March and 24th 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



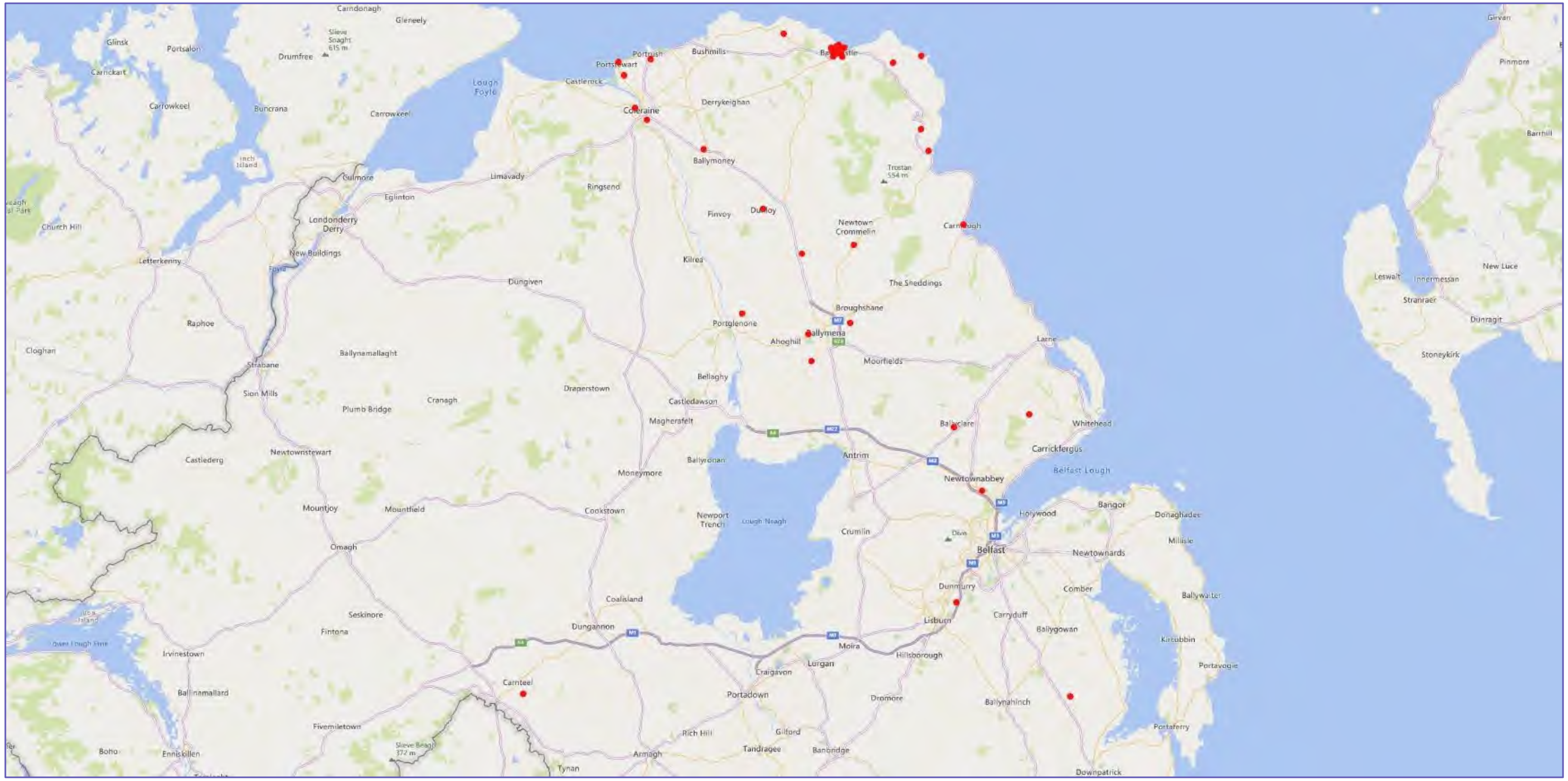




Darker shade denotes the Ballycastle respondent profile while lighter shade denotes the CCGBC baseline.
**See Appendix 2 for further information on ACORN classifications and Appendix 3 for detailed breakdown*

The visitor age profile is heavily weighted towards the 35-44 age category. Only 10% of respondents are 65 or over compared to the average of 21%. This is the second lowest across the borough.

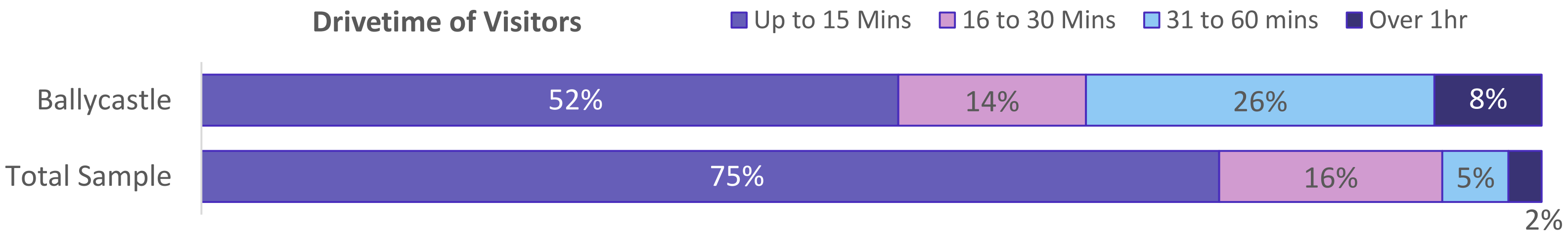
Similar to some of the other towns, Ballycastle visitors are mainly from the ‘Comfortable Communities’ ACORN sub-category. Only Cushendall has a larger proportion of visitors from this category.



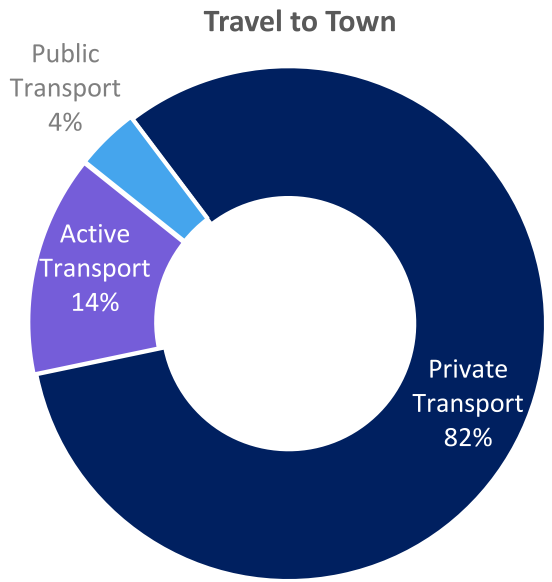
Ballycastle has visitors from across NI and only 52% are within a 15 minute drive from Ballycastle. This is the lowest of any town and has lead to the highest average drive time.

Unlike other towns, people are still travelling to Ballycastle for recreation.

This is represented in the travel breakdown: more people are using private transport to get to Ballycastle.

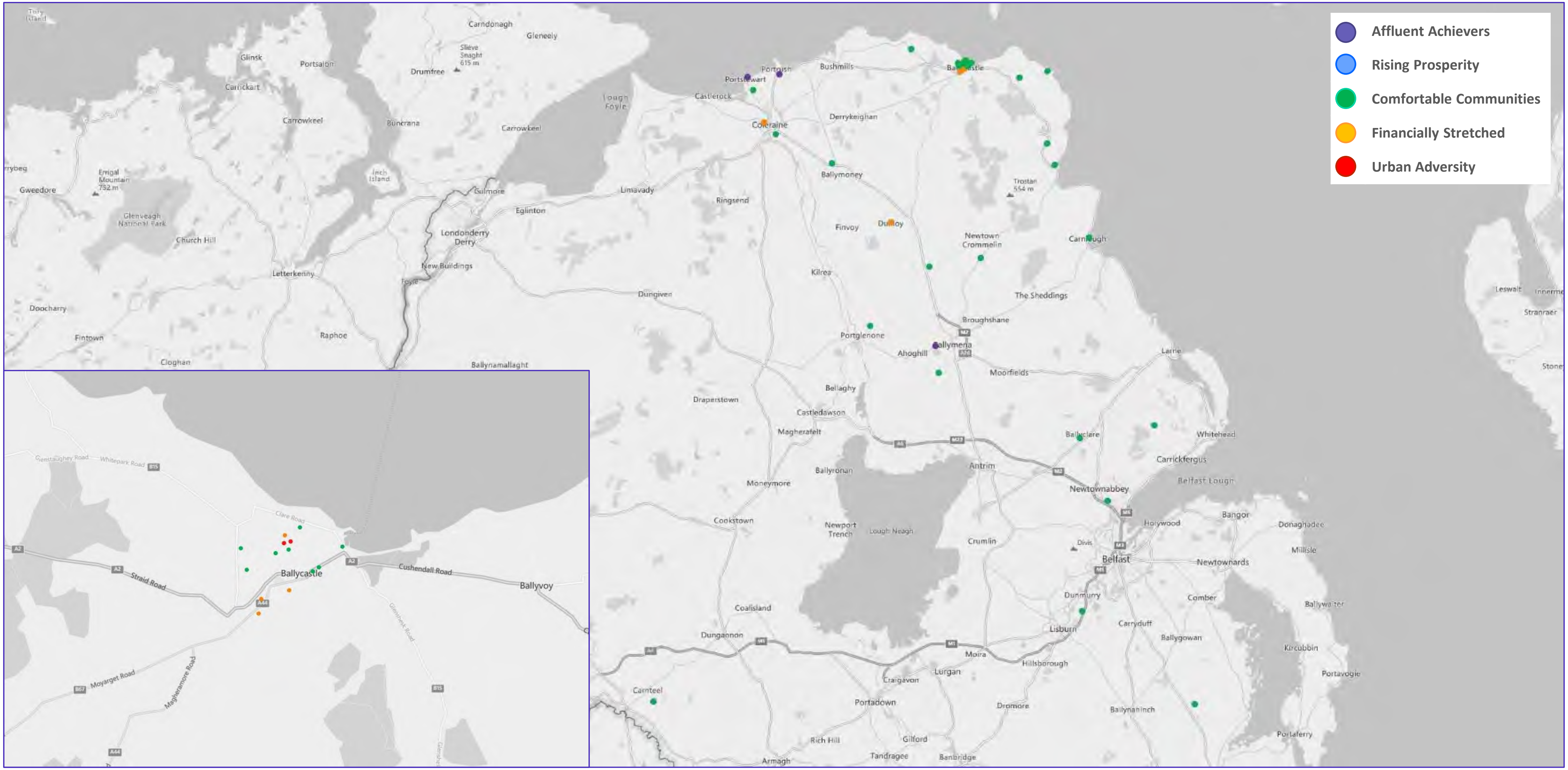


Average
23 mins
10 mins



ACORN Mapping

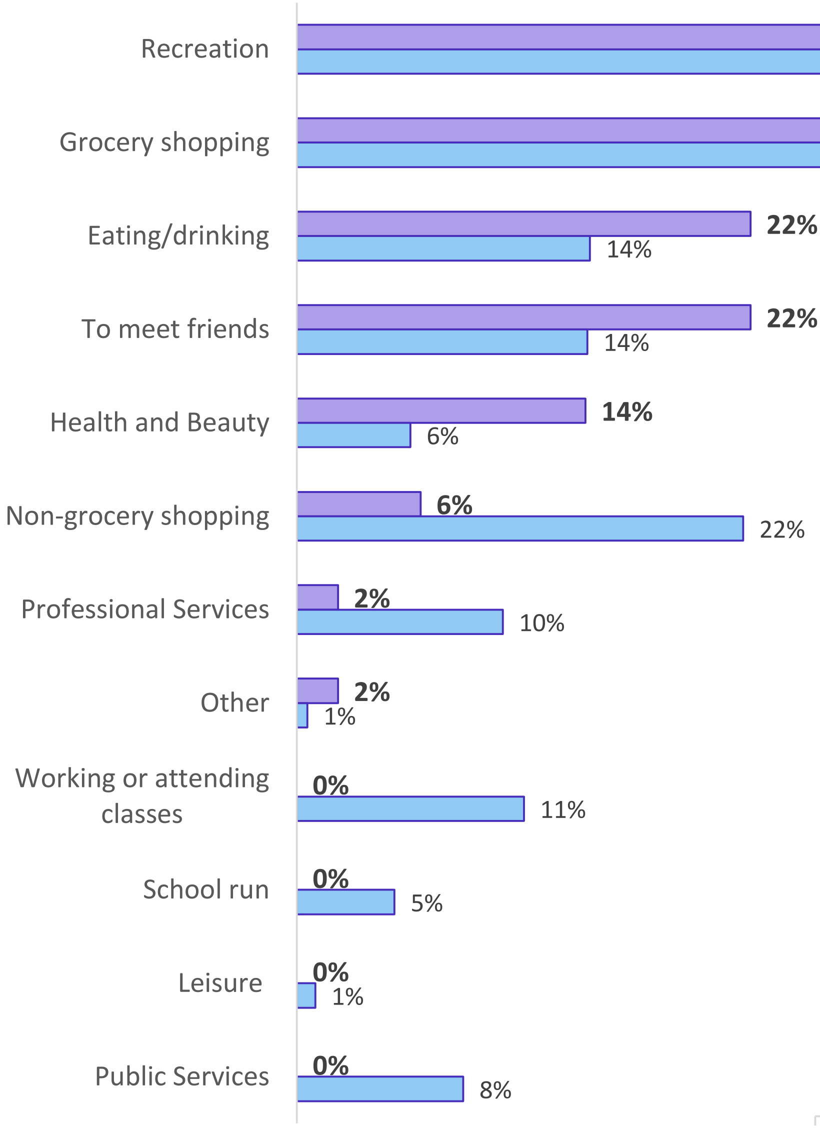
Causeway Coast & Glens Borough Council

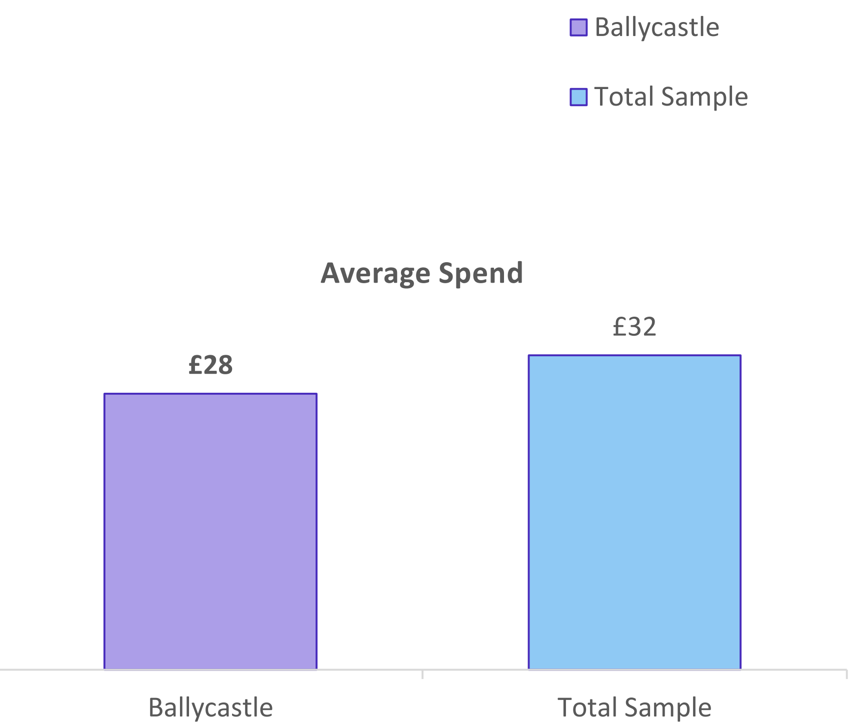


Empowering accurate consumer understanding

card

Why are people going to the town centres?





Location	Average Dwell Time	Average Spend per Minute
Ballycastle	83 mins	£0.33
Total Sample	109 mins	£0.29

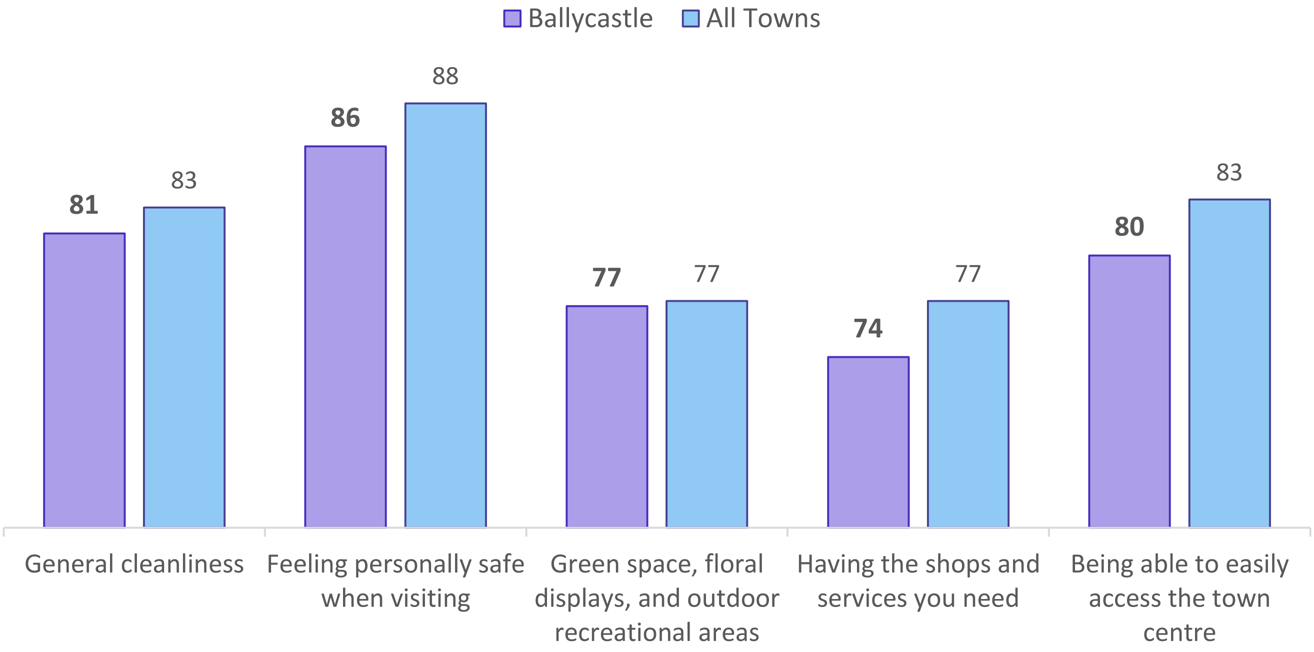
Ballycastle is second to Portrush in terms of recreation as primary purpose of visit, once again reflective of the status of both towns as hotspots for tourists / visitors.

Those who are within 15 minutes of Ballycastle are less likely to be there for recreation (42%) while those who are 16 minutes and over away are much more likely (79%).

What is your opinion of the town centre?

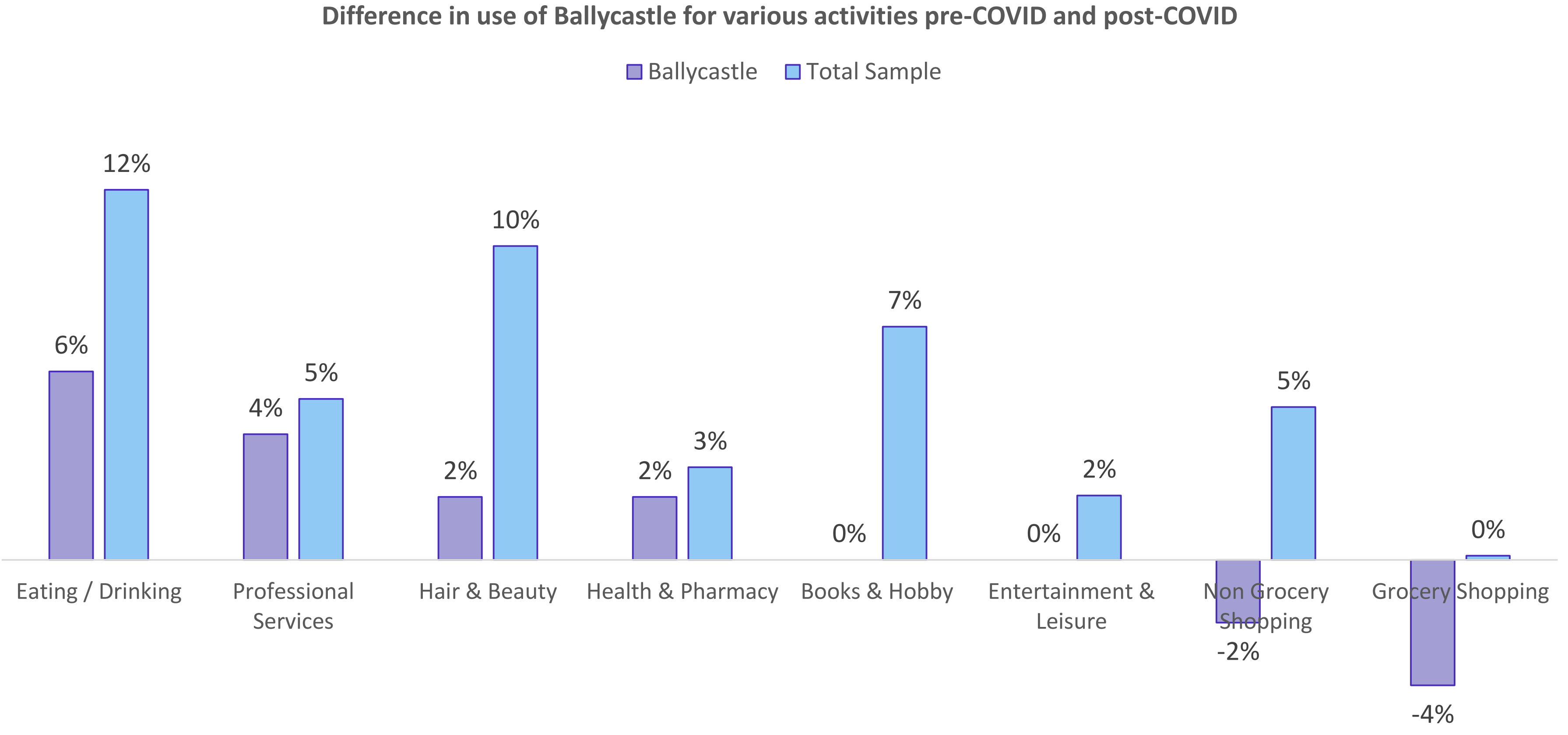
	Ballycastle Visitors									Score: +88
	Dislike				Passive		Like			
Description	Hate	Dislike	Avoid	Not ok	Not for me	Ok	Like	Enjoy	One of my favourites	My favourite town
Score	1	2	3	4	5	6	7	8	9	10
Sample	0%	0%	0%	0%	2%	10%	12%	48%	24%	4%
Calculation	Total of 'Like' (**88**) – Total of Dislike (**0**) = **+88**									

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



- Above is the combined Sentiment Score for Ballycastle (+88). 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 with no visitors disliking the town.
- The sentiment score is much higher than the average score of +71 which contrasts with the average ratings for the town. All scores are below average or average.

Pre & Post-COVID Use



Ballycastle TC Use	Eating / Drinking	Professional Services	Hair & Beauty	Health & Pharmacy	Books & Hobby	Entertainment & Leisure	Non Grocery Shopping	Grocery Shopping
Before COVID	80.0%	14.0%	44.0%	42.0%	30.0%	48.0%	38.0%	60.0%
After COVID	86.0%	18.0%	46.0%	44.0%	30.0%	48.0%	36.0%	56.0%
Difference	**6.0%**	**4.0%**	**2.0%**	**2.0%**	**0.0%**	**0.0%**	**-2.0%**	**-4.0%**

We anticipate a small decrease in the use of grocery stores which accounts for 34% of visits and a small increase for 'Eating & Drinking' which accounts for 22% of visits.

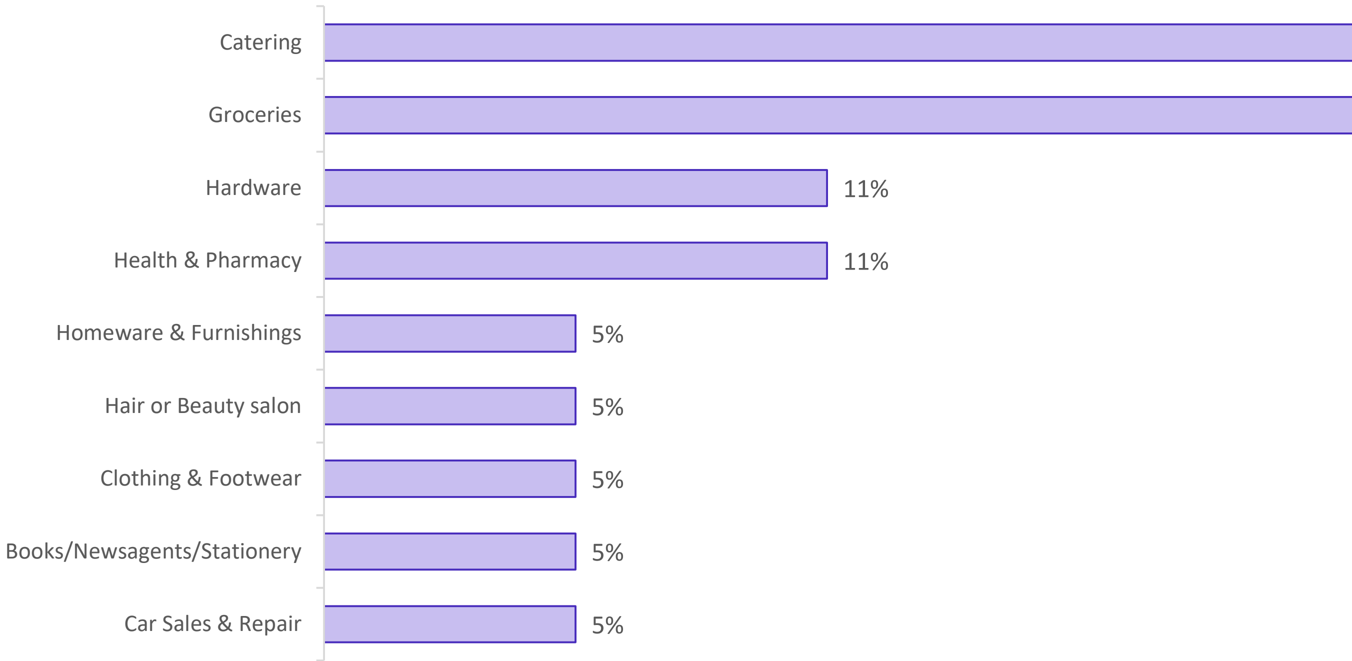
In terms of barriers to visit, 24% provided 'other' barriers. In the main these related to uncontrollable factors like distance and weather. Though some did mention poor reliability in public transport service to the town.

What prevents you from visiting the town centre more?	Ballycastle	Total Sample
Congestion & Traffic	4%	19%
Parking	8%	15%
Habit	0%	8%
Unappealing Retailers	4%	13%
Evening Economy Options	2%	7%
Visually Unappealing Area	2%	7%
Cafes & Restaurant Offer	0%	7%
Safety	0%	3%
None of these	**56%**	**52%**

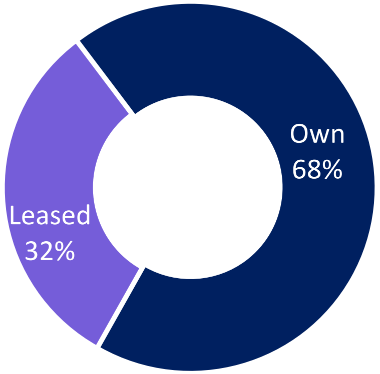
Traders

Trader Profile

Business Sector



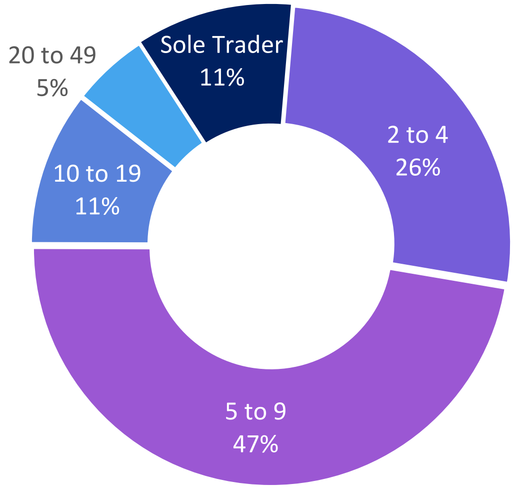
Premises



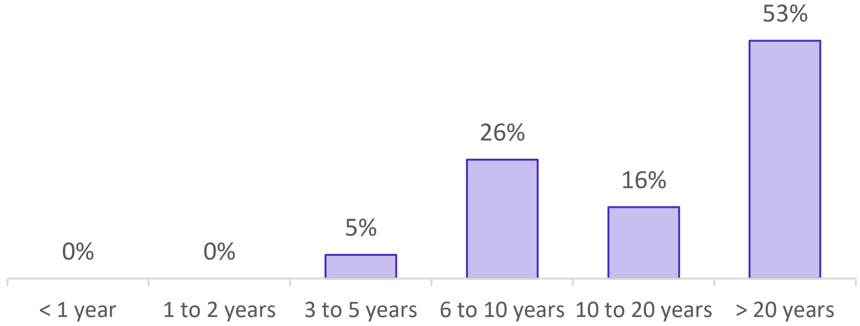
The trader profile for Ballycastle is mostly mature, independent firms. 68% of businesses are 10 years or older.

84% of traders have less than 10 employees which is the highest among all 12 towns.

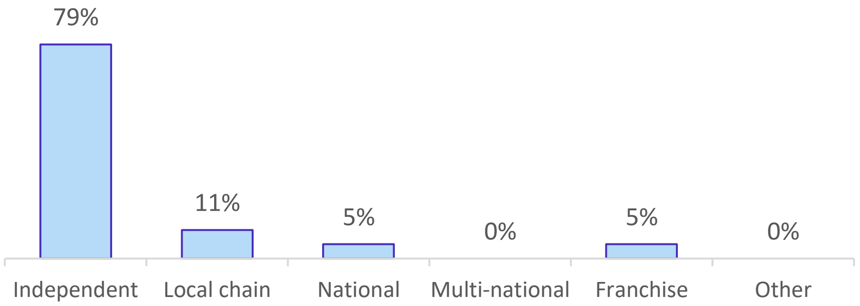
Current Staffing Levels



Business Age



Business Ownership



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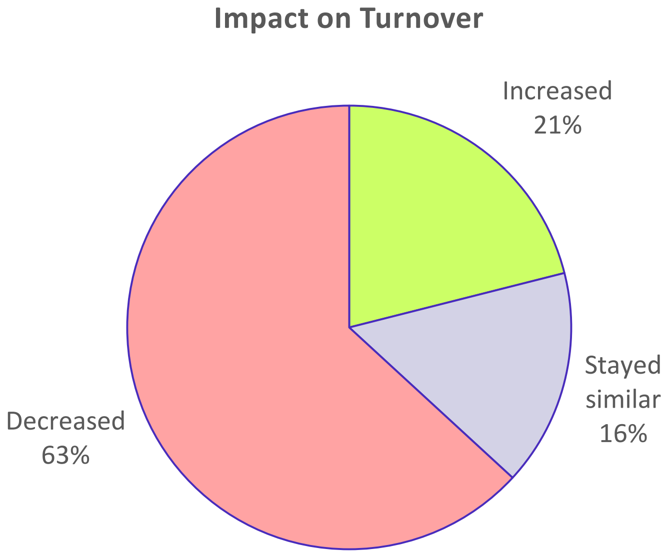
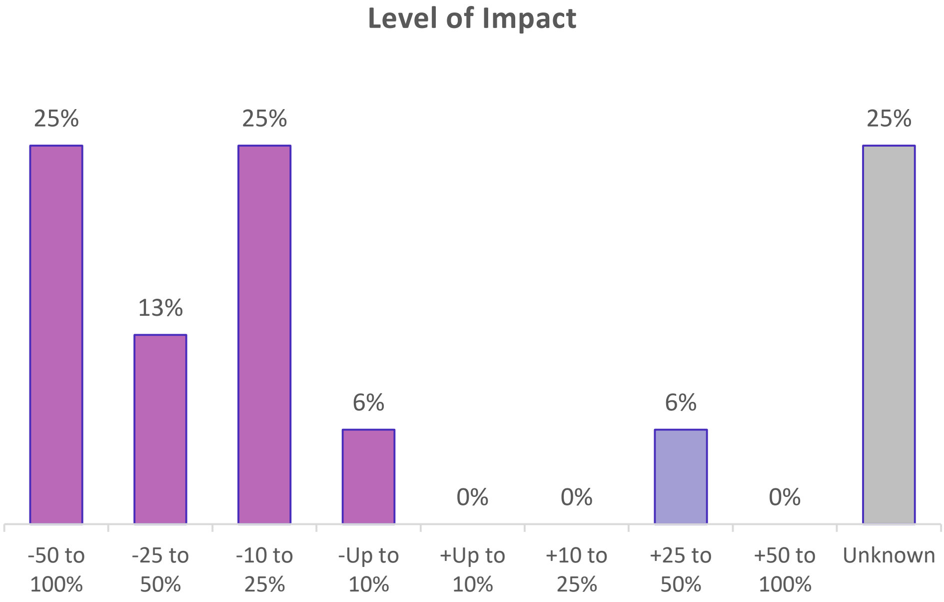
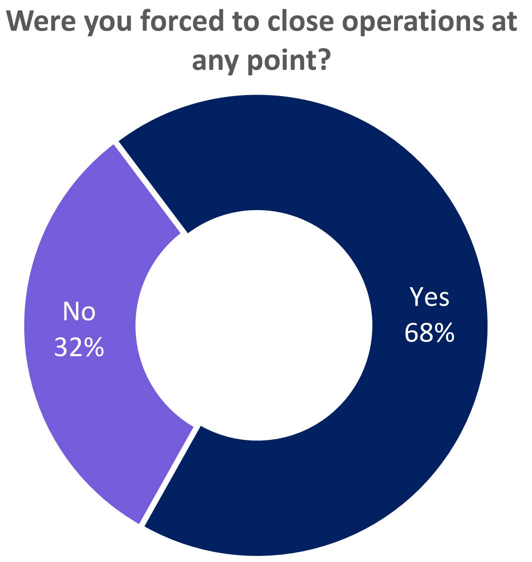






Did the business pivot to provide alternative services during the COVID lockdown …	%
No	**42%**
Yes	**58%**
Of those who said yes …	
Online selling & delivery	27%
Click & collect	27%
New services tailored to new circumstances	55%
New products tailored to new circumstances	0%

A large proportion of Ballycastle traders saw a decrease in turnover during the pandemic with 68% forced to close at some stage. The grocery sector and pharmacies/chemists are the only groups that see an increase.

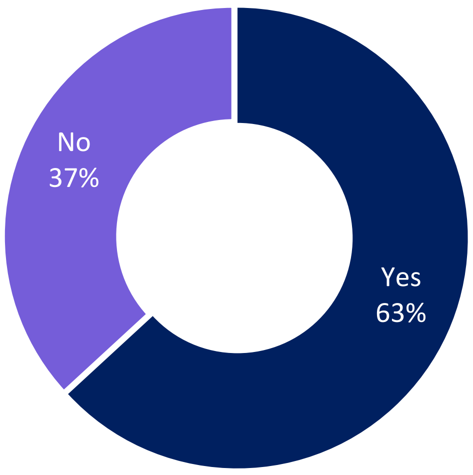
Common reasons for closing include: being classed as non-essential and reduced opening hours.

Many traders attempted to pivot using online selling and click & collect. This has not outweighed the losses due to COVID.

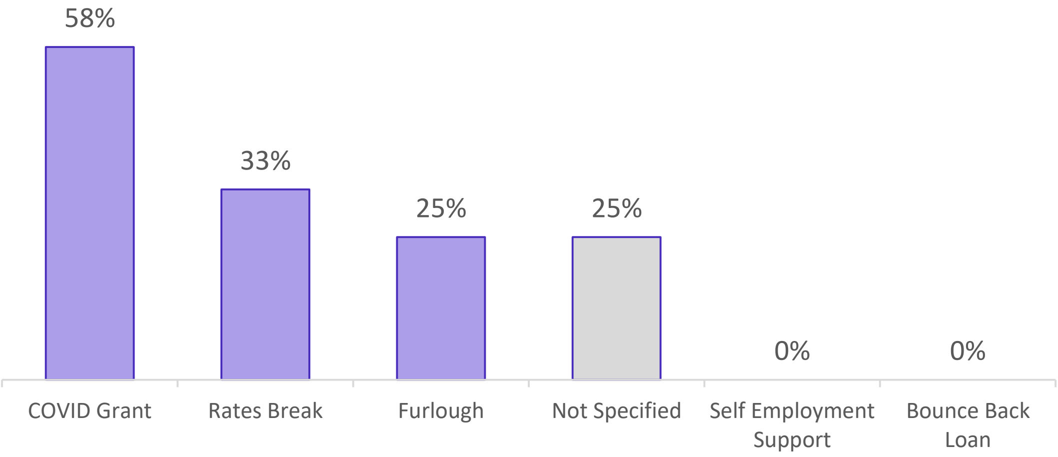
COVID Impact continued

Causeway Coast & Glens Borough Council

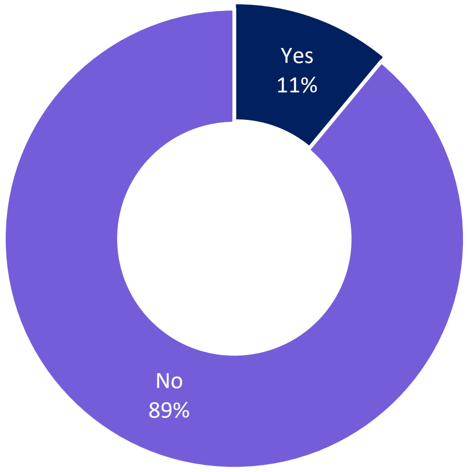
Did you avail of any Government support?



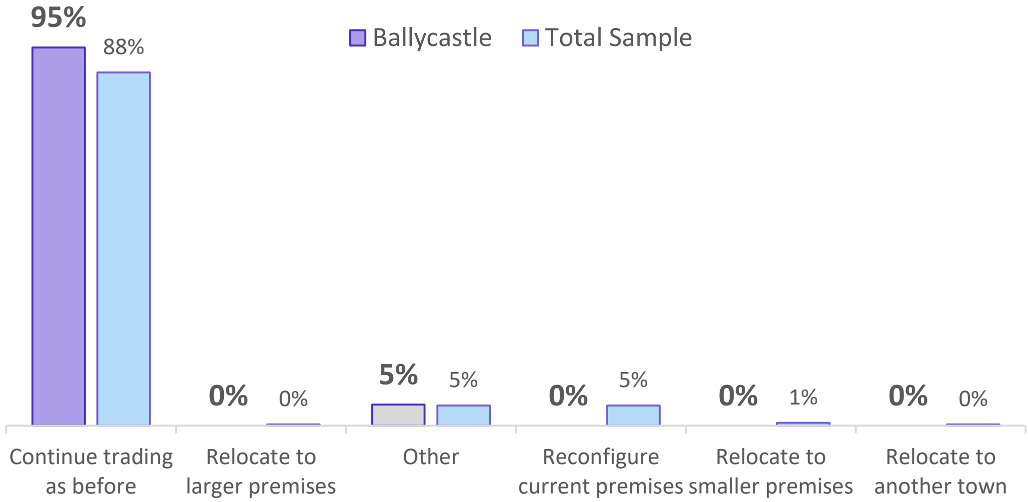
What kind of Government Support ...



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



Trading intentions going forward ...



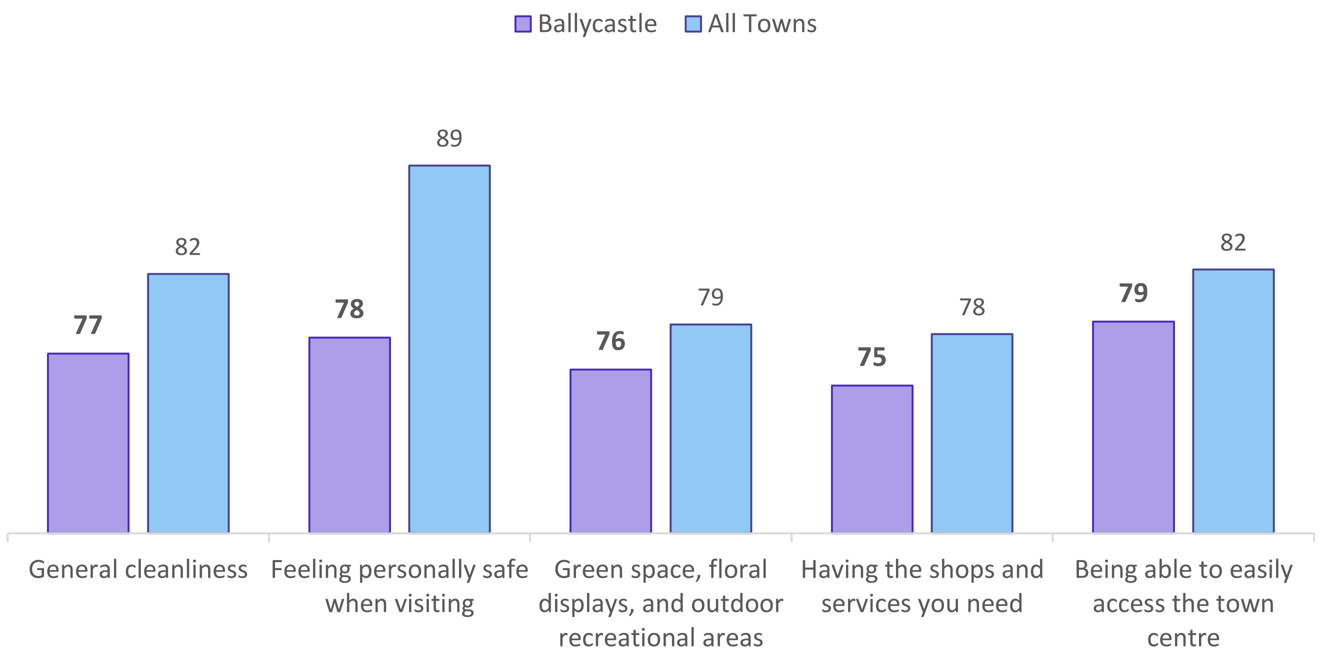
COVID grants were used in Ballycastle more than in the other 12 towns and Ballycastle had the highest uptake of council support.

More traders were given COVID grants in Ballycastle than the other 12 towns and the majority of businesses intend to continue trading as before.

What is your opinion of the town centre?

	Ballycastle Traders									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%	11%	0%	5%	0%	0%	16%	47%	21%	0%
Calculation	Total of 'Like' (**84**) – Total of Dislike (**16**) = **Ballycastle Traders Score = +68**									

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



- Ballycastle received a slightly above average sentiment score (+68) and below average on the town centre ratings.
- When looking at the individual sentiment scores, there are a number who think negatively of the town:

"needs attention and further support from local council"

"no police help, anti social behaviour prevalent, drug problems, issues with who is in charge of CCTV"

"too many empty shops"

- The score for "Feeling personally safe" is significantly lower than the average which is possibly explained by the comment above from a trader.

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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 Ballycastle a sample size of 50 was achieved which provides us with a margin of error of +/- 13.9% @ 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 – 13.9% in 19 (95%) of the subsequent studies.

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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.

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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'.

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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.

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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.

Causeway Coast & Glens Borough Council

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	ACORN Groups		Sub-Categories	
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			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

Appendix 3 – Results Expanded

Detailed ACORN Results for Ballycastle Visitors

No.	ACORN Group	Ballycastle	Total Sample	Sub-Category		Ballycastle	Total Sample
1	Affluent Achievers	**7%**	7%	A	Lavish Lifestyles	**0%**	0%
				B	Executive Wealth	**0.0%**	4.1%
				C	Mature Money	**6.8%**	2.9%
2	Rising Prosperity	**0%**	1%	D	City Sophisticates	**0%**	0%
				E	Career Climbers	**0.0%**	0.8%
3	Comfortable Communities	**73%**	52%	F	Countryside Communities	**56.8%**	45.6%
				G	Successful Suburbs	**11.4%**	2.3%
				H	Steady Neighbourhoods	**4.5%**	1.6%
				I	Comfortable Seniors	**0.0%**	1.4%
				J	Starting Out	**0.0%**	1.1%
4	Financially Stretched	**16%**	28%	K	Student Life	**0.0%**	0.4%
				L	Modest Means	**2.3%**	8.4%
				M	Striving Families	**13.6%**	12.1%
				N	Poorer Pensioners	**0.0%**	7.7%
5	Urban Adversity	**5%**	12%	O	Young Hardship	**0.0%**	7.1%
				P	Struggling Estates	**4.5%**	3.0%
				Q	Difficult Circumstances	**0.0%**	1.5%

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Causeway Coast & Glens Borough Council

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Ballykelly

August 2021

card
Client Analysis & Relationship Development

Introduction

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 **Ballykelly**;

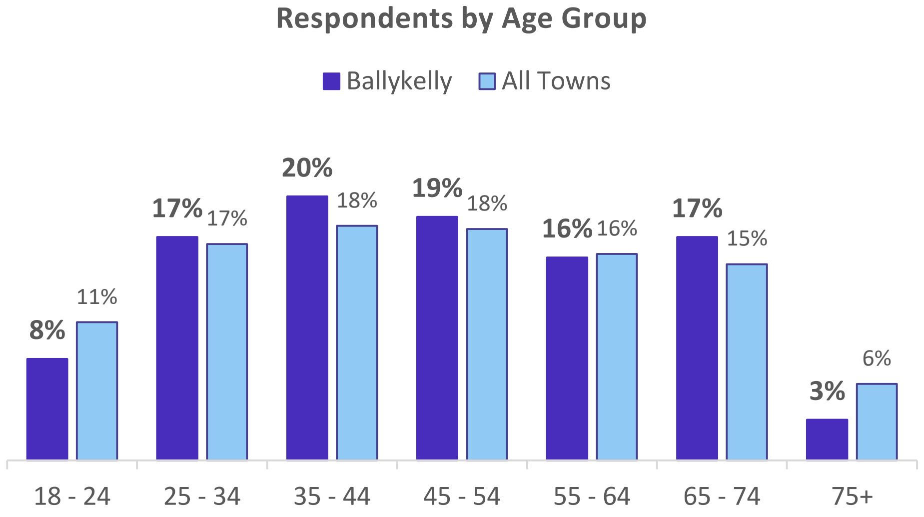
- The visitor results are based on an overall sample of **64** respondents;
- As our trader sample in this location was 5. This was not felt to be sufficient to base any analysis on and so is not included in this report.

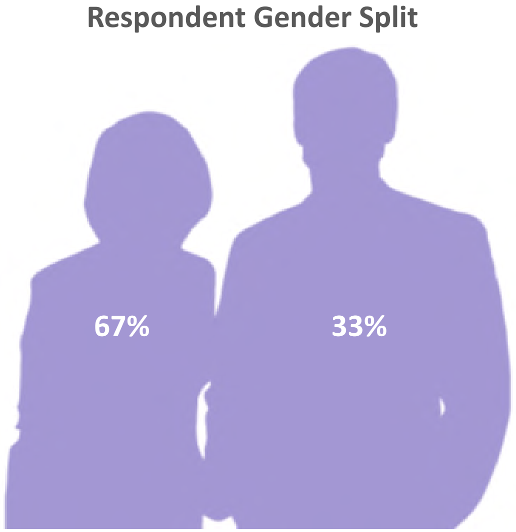
Sampling for visitors and traders in Ballykelly took place between 22nd March and 16th April 2021. It is important to note that during this period, there were a range of continuing restrictions in place owing to the ongoing Coronavirus pandemic. The specific restrictions at the time are outlined in Appendix 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.

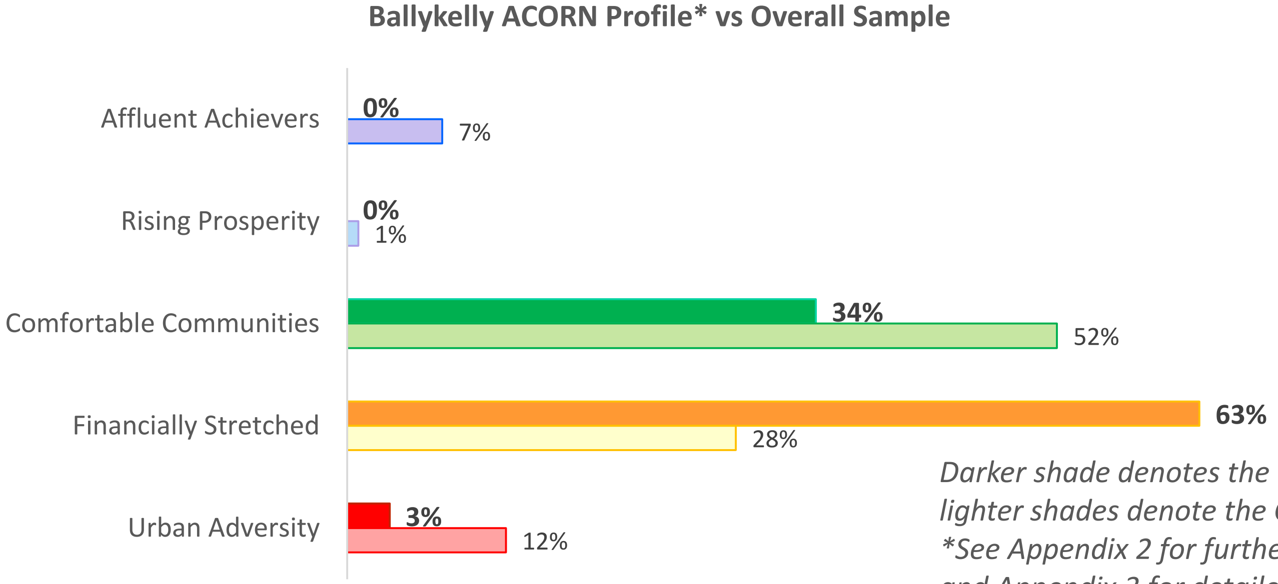
Visitors

Respondent Profile

Causeway Coast & Glens Borough Council







Darker shade denotes the Ballykelly respondent profile while lighter shades denote the CCGBC baseline.
**See Appendix 2 for further information on ACORN classifications and Appendix 3 for detailed breakdown*

Our sample of visitors within Ballykelly shows a tendency towards a younger working demographic.

This is further highlighted in the ACORN profile for the town's visitors which deviates from the general area profile significantly.

'Financially Stretched' is the predominant ACORN category in our Ballykelly sample with 'Striving Families' as the most prominent sub-category within this.

Empowering accurate consumer understanding

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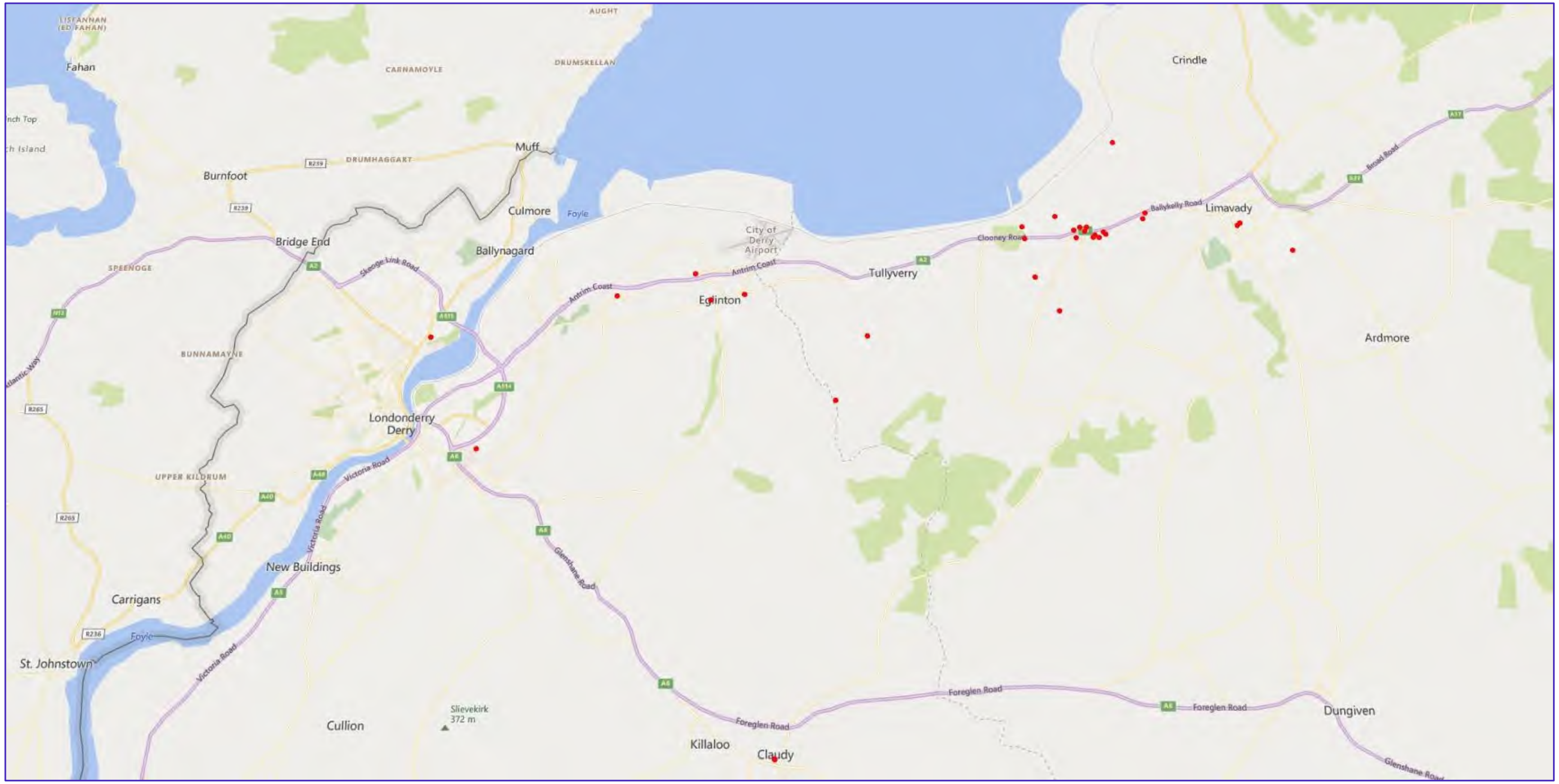
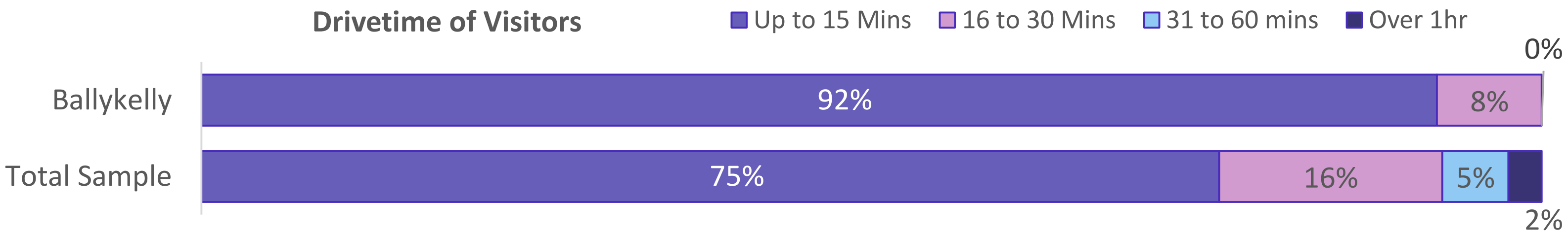
Causeway Coast & Glens Borough Council

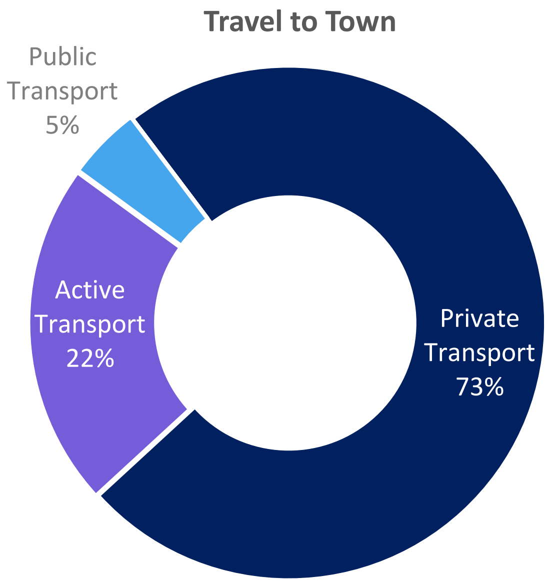


Visitors sampled in Ballykelly were heavily concentrated to within the town itself, or from along A2 corridor between the town and Derry / Londondery.

This is visible in the very low average drivetime (5 mins) which is the second lowest of all towns sampled within the Borough.



Average
5 mins
11 mins



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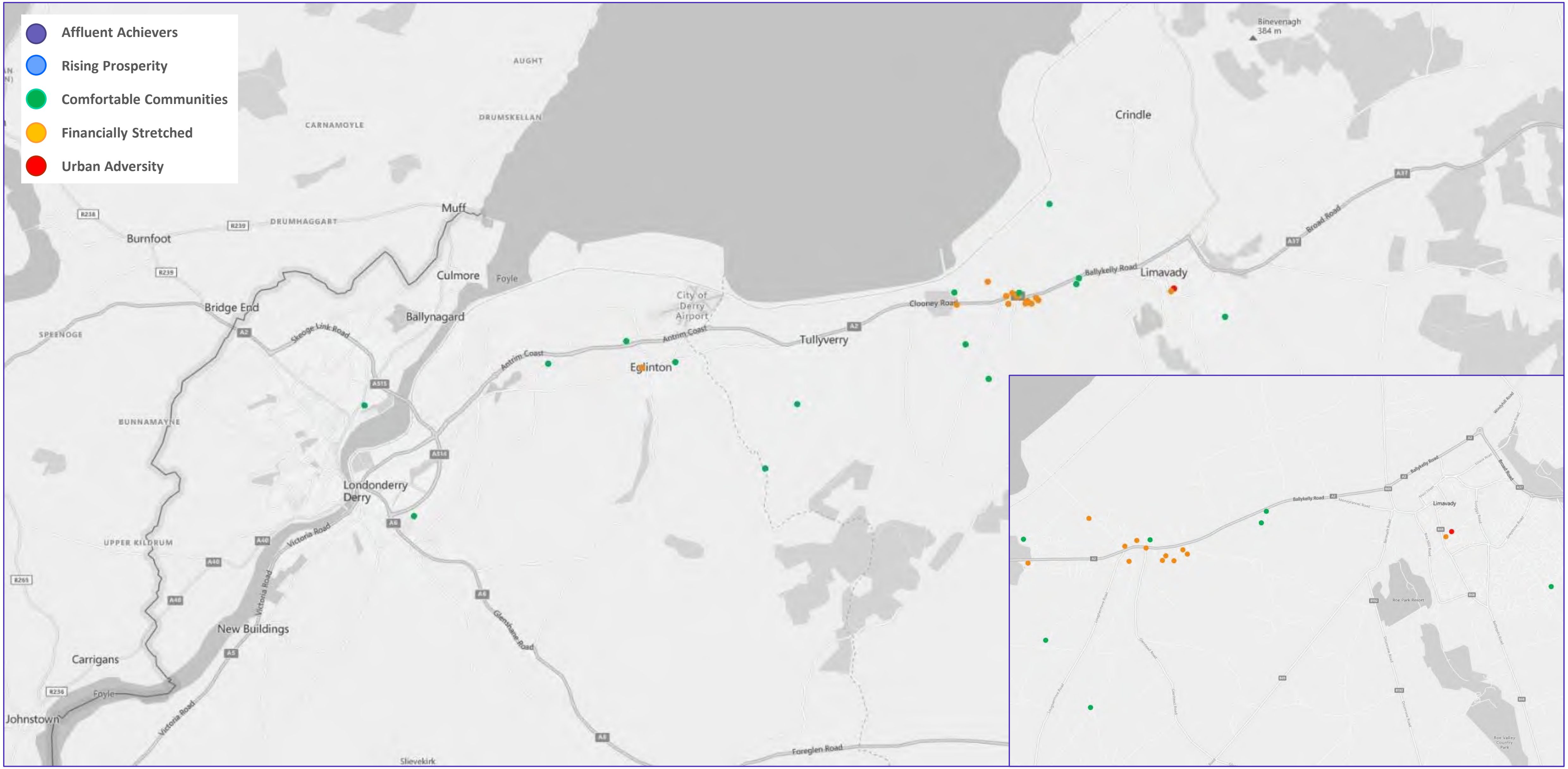
ACORN Mapping

Causeway Coast & Glens Borough Council



Empowering accurate consumer understanding

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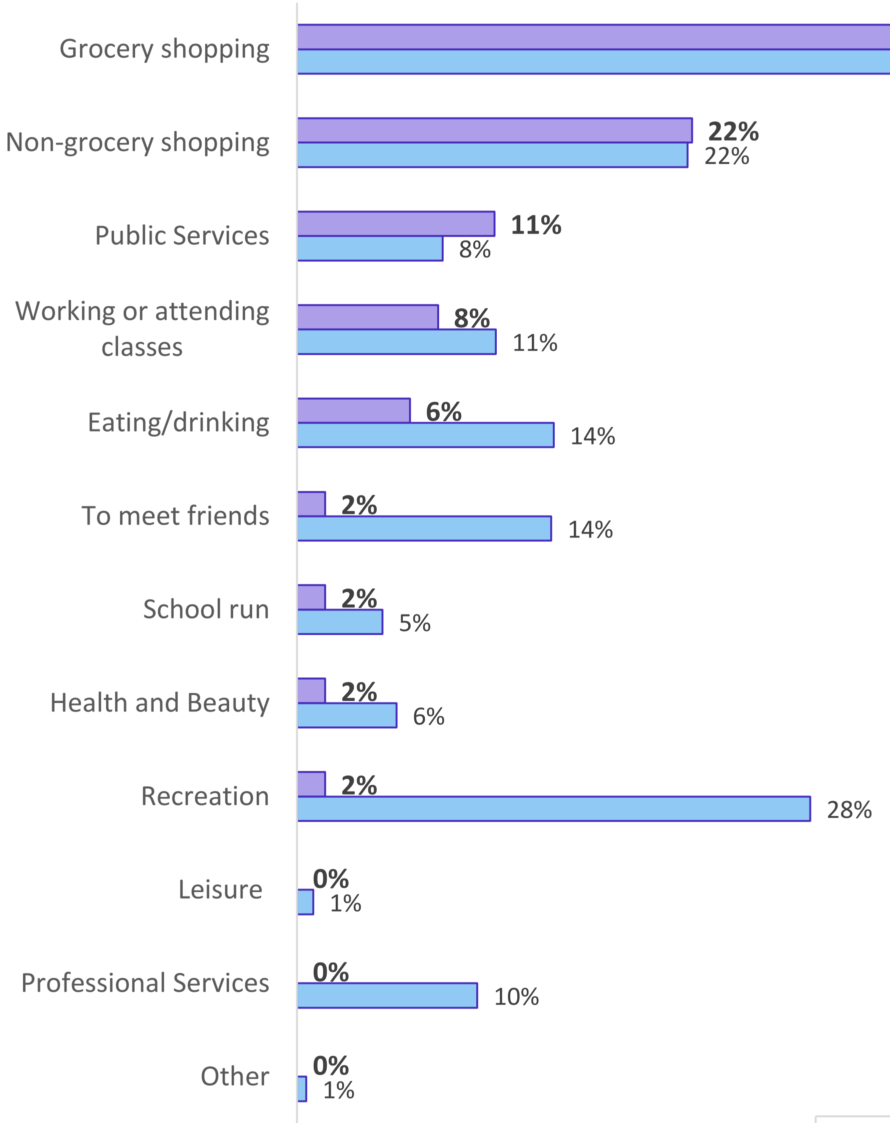
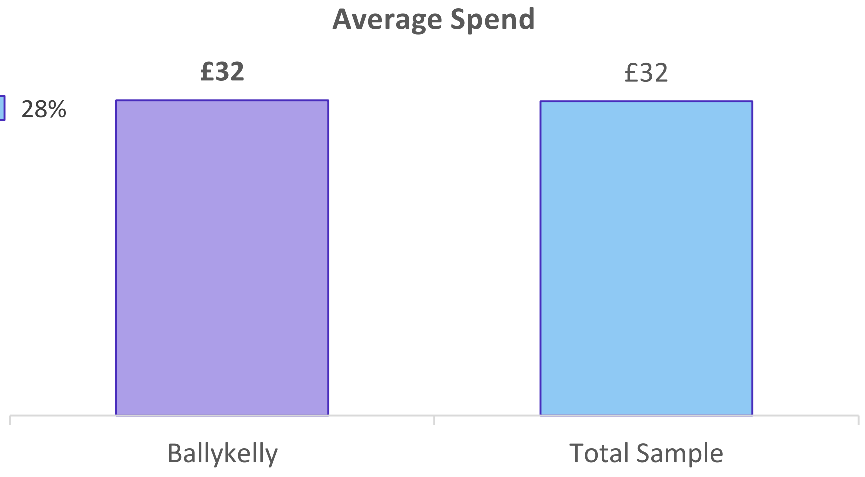
Why are people going to the town centres?





Location	Average Dwell Time	Average Spend per Minute
Ballykelly	54 mins	£0.60
Total Sample	109 mins	£0.29

The town is overwhelmingly utilised for shopping purposes, especially grocery. As average spend is in line with the borough average, this is likely to predominantly involve convenience to mid-sized shopping trips.

As these are shorter, average dwell is well below the borough average, is the lowest of all towns sampled in fact.

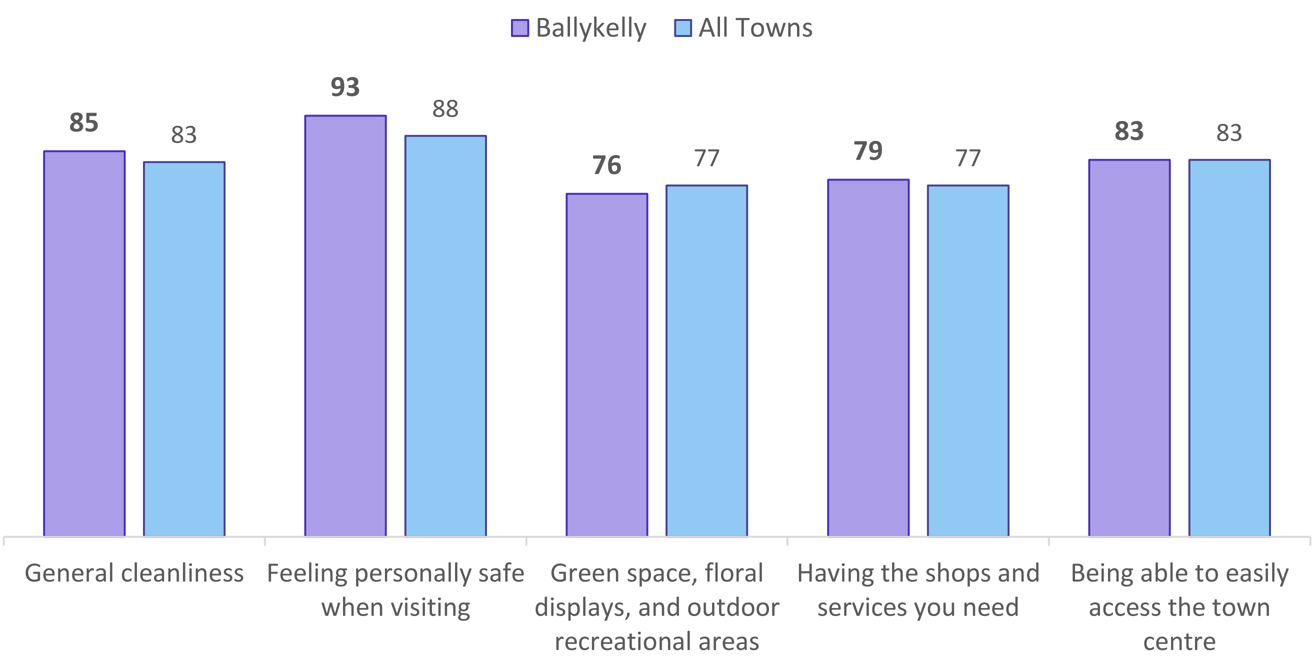
With the shorter dwell time and higher spend per minute it is evident that visitors are mostly making a trip for a shopping visit and not lingering beyond that for any other purpose.

What is your opinion of the town centre?

Causeway Coast & Glens Borough Council

	Ballykelly Visitors									Score: +39
	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	2%	2%	8%	6%	8%	19%	8%	11%	6%	31%
Calculation	Total of 'Like' (**56**) – Total of Dislike (**17**) = **+39**									

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



- Above is the combined Sentiment Score for Ballykelly. The rationale for Sentiment Scoring it outlined in Appendix 2.
- With a sentiment score of +39, Ballykelly has the lowest visitor rating of all 12 towns sampled.
- Traffic was a very common theme among those stating a dislike of the town.

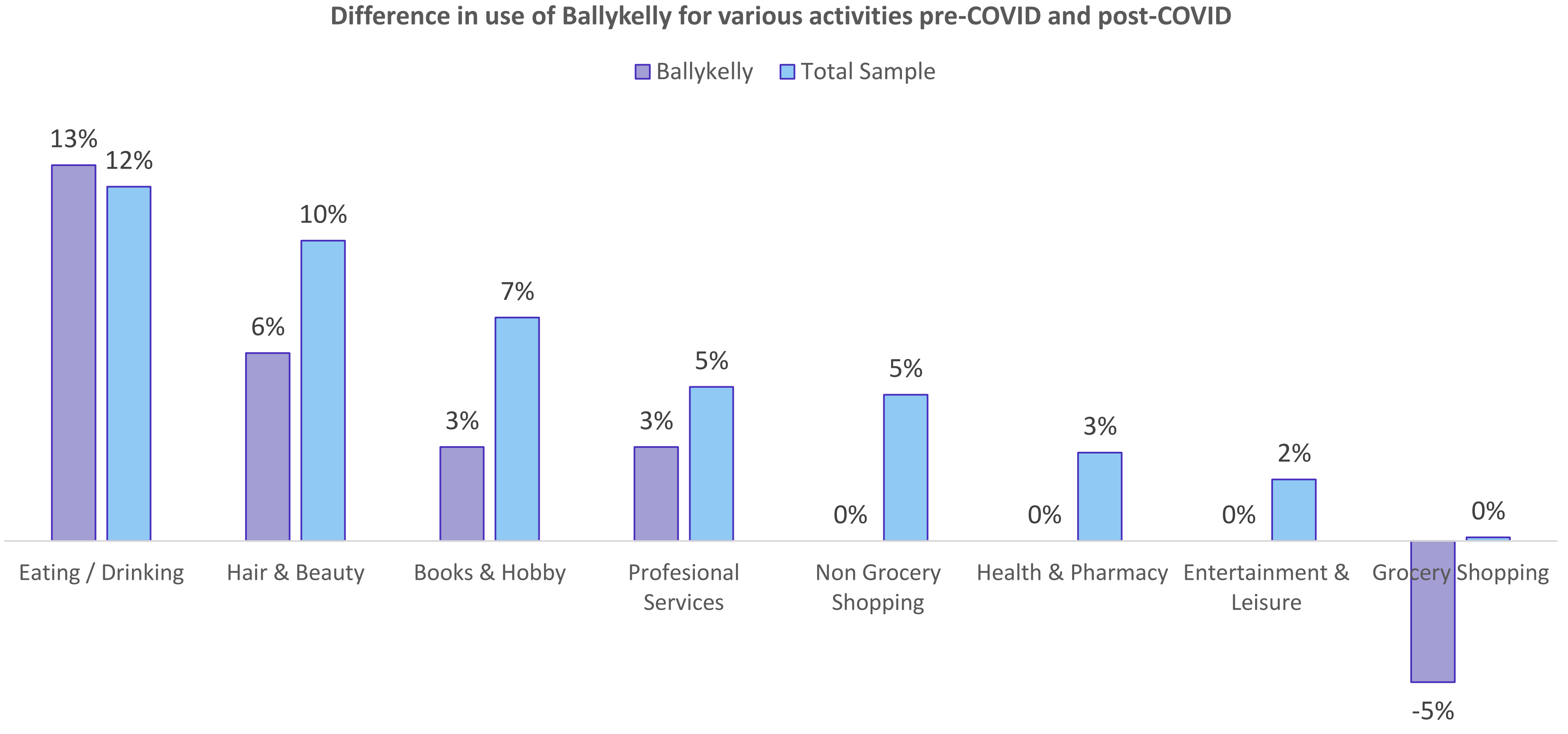
"I pass through here a lot for work and most times the traffic is awful"

"Just stop to grab something for lunch, traffic through the town is always bad"

"I live here but there isn't much to do and the traffic at times is awful"

Pre & Post-COVID Use

Causeway Coast & Glens Borough Council



Ballykelly TC Use	Eating / Drinking	Hair & Beauty	Books & Hobby	Professional Services	Non Grocery Shopping	Health & Pharmacy	Entertainment & Leisure	Grocery Shopping
Before COVID	59.4%	60.9%	1.6%	0.0%	31.3%	54.7%	45.3%	84.4%
After COVID	71.9%	67.2%	4.7%	3.1%	31.3%	54.7%	45.3%	79.7%
Difference	**+12.5%**	**+6.3%**	**+3.1%**	**+3.1%**	**0.0%**	**0.0%**	**0.0%**	**-4.7%**

As with other similarly small towns, it is Grocery Shopping that appears will take the biggest hit in a post-lockdown scenario.

It once again appears that a proportion of local visitor's tendency to shop in the immediate area has been due to the restrictions in place, where they would normally conduct this portion of their shopping elsewhere.

What prevents you from visiting the town centre more?	Ballykelly	Total Sample
Congestion & Traffic	25%	19%
Parking	0%	15%
Habit	6%	8%
Unappealing Retailers	19%	13%
Evening Economy Options	5%	7%
Visually Unappealing Area	14%	7%
Cafes & Restaurant Offer	9%	7%
Safety	3%	3%
None of these	**63%**	**52%**

Appendix 1 – Terminology & Clarifications

Causeway Coast & Glens Borough Council

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 Ballykelly a sample size of 64 was achieved which provides us with a margin of error of +/- 12.2% @ 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 – 12.2% 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

Causeway Coast & Glens Borough Council

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.

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Appendix 3 – Results Expanded

Causeway Coast & Glens Borough Council

Detailed ACORN Results for Ballykelly Visitors

No.	ACORN Group	Ballykelly	Total Sample	Sub-Category		Ballykelly	Total Sample
1	Affluent Achievers	**0%**	7%	A	Lavish Lifestyles	**0%**	0%
				B	Executive Wealth	**0%**	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	**34%**	52%	F	Countryside Communities	**23.4%**	45.6%
				G	Successful Suburbs	**1.6%**	2.3%
				H	Steady Neighbourhoods	**3.1%**	1.6%
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				L	Modest Means	**12.5%**	8.4%
				M	Striving Families	**32.8%**	12.1%
				N	Poorer Pensioners	**17.2%**	7.7%
5	Urban Adversity	**3%**	12%	O	Young Hardship	**0%**	7.1%
				P	Struggling Estates	**0%**	3.0%
				Q	Difficult Circumstances	**3.1%**	1.5%

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Causeway Coast & Glens Borough Council

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Ballymoney

August 2021

card

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 **Ballymoney**;

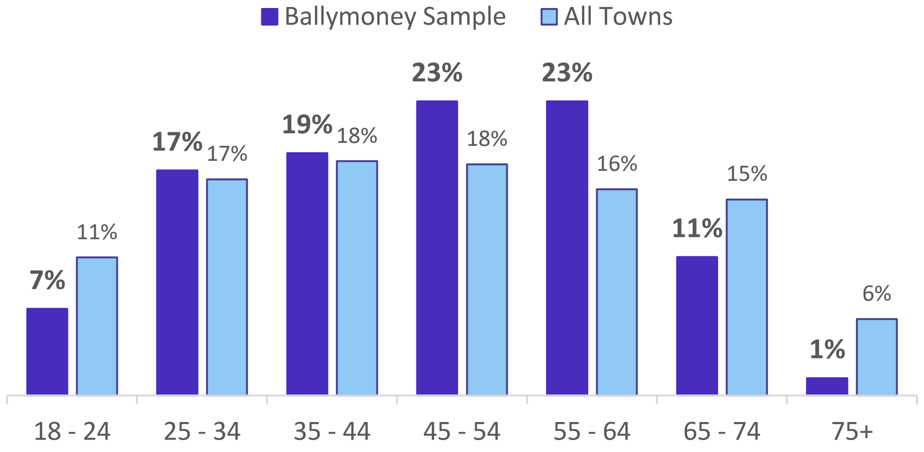
- The visitor results are based on an overall sample of **75** respondents;
- The trader's results are based on a sample of **31** traders within the town centre.

Sampling for visitors and traders in Ballymoney took place between 29th March and 19th 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.

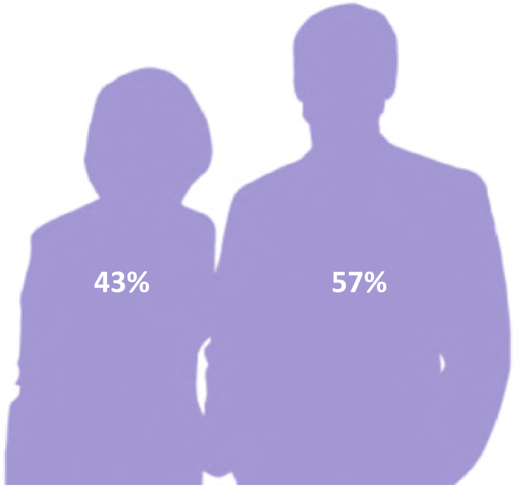
Visitors

Causeway Coast & Glens Borough Council

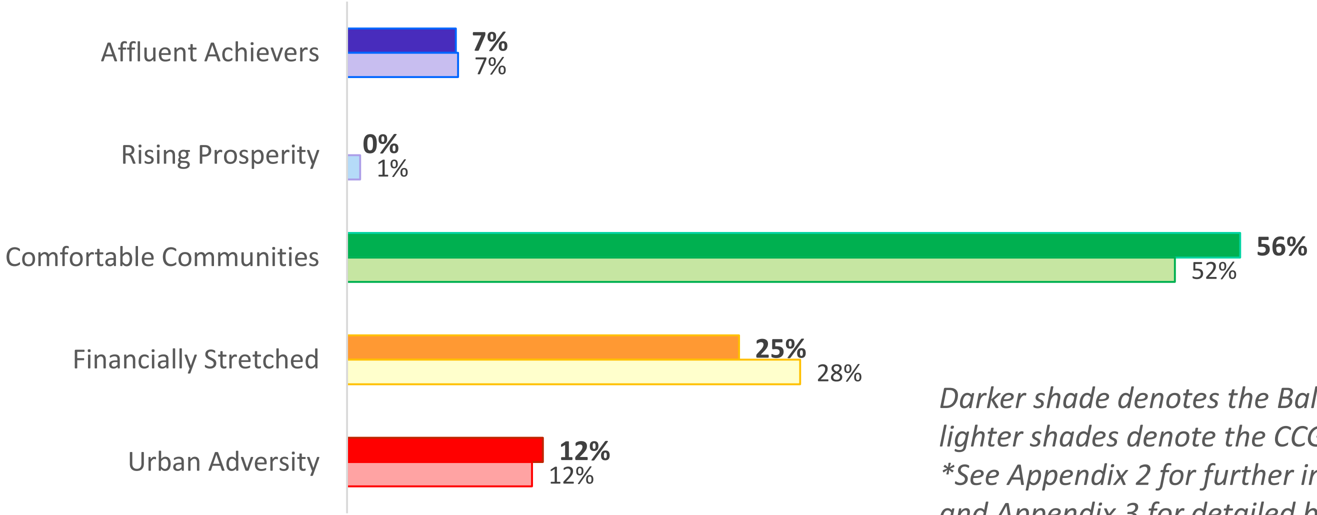
Respondents by Age Group



Respondent Gender Split



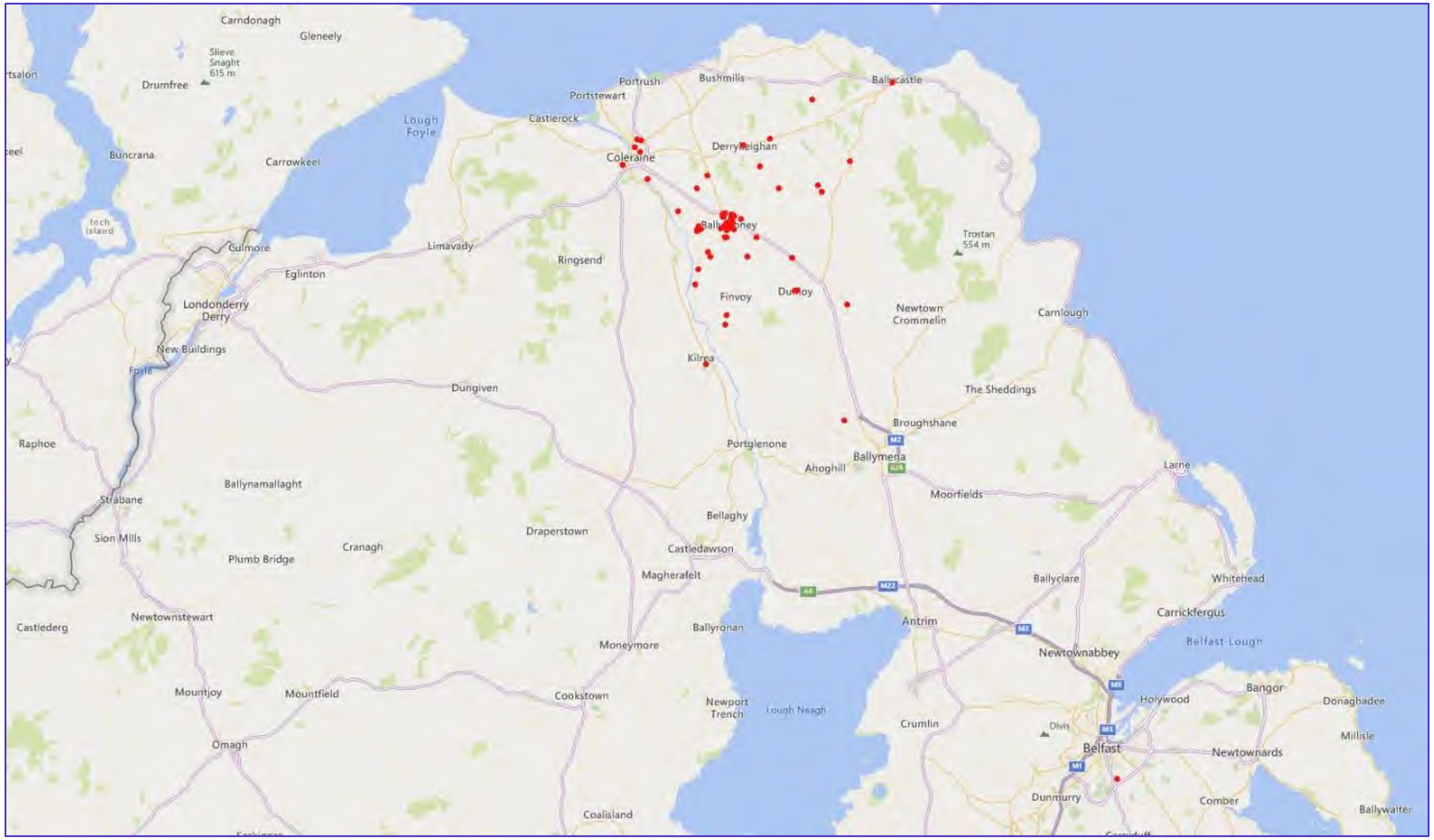
Ballymoney ACORN Profile* vs Overall Sample



Darker shade denotes the Ballymoney respondent profile while lighter shades denote the CCGBC baseline.
**See Appendix 2 for further information on ACORN classifications and Appendix 3 for detailed breakdown*

Our sample collected in Ballymoney appeared to show a greater prevalence of middle aged visitors in the town (46%) followed by younger adults (36%).

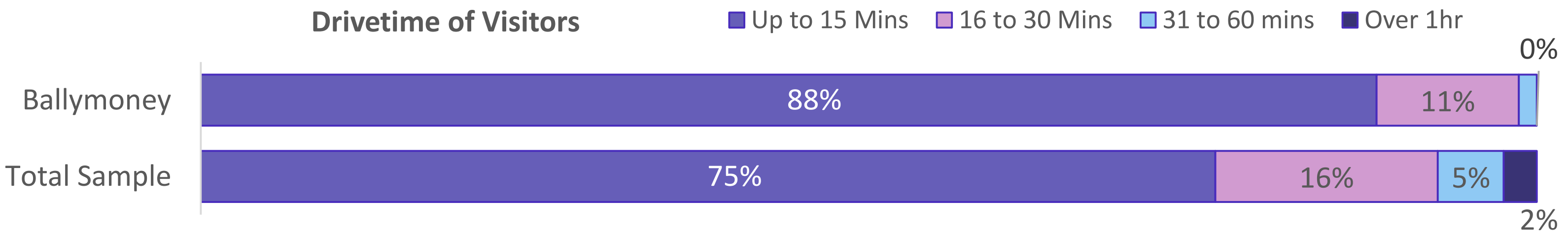
The ACORN breakdown of visitors to the town appeared to broadly reflect that of our sample of the wider borough, with a slightly greater showing of the 'Countryside Communities' sub-group, reflecting the rural nature of the town's wider catchment.



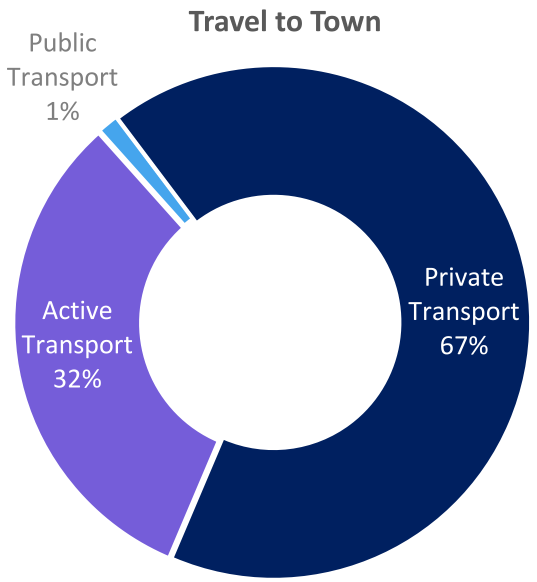
Visitors to the town are more concentrated to the immediate area, as evidenced by the lower average drivetime.

Visitors appears to come from a general triangular catchment ranging between Coleraine, Ballycastle and Kilrea.

Use of public transport is extremely low, well below the already low borough wide average of 5%.

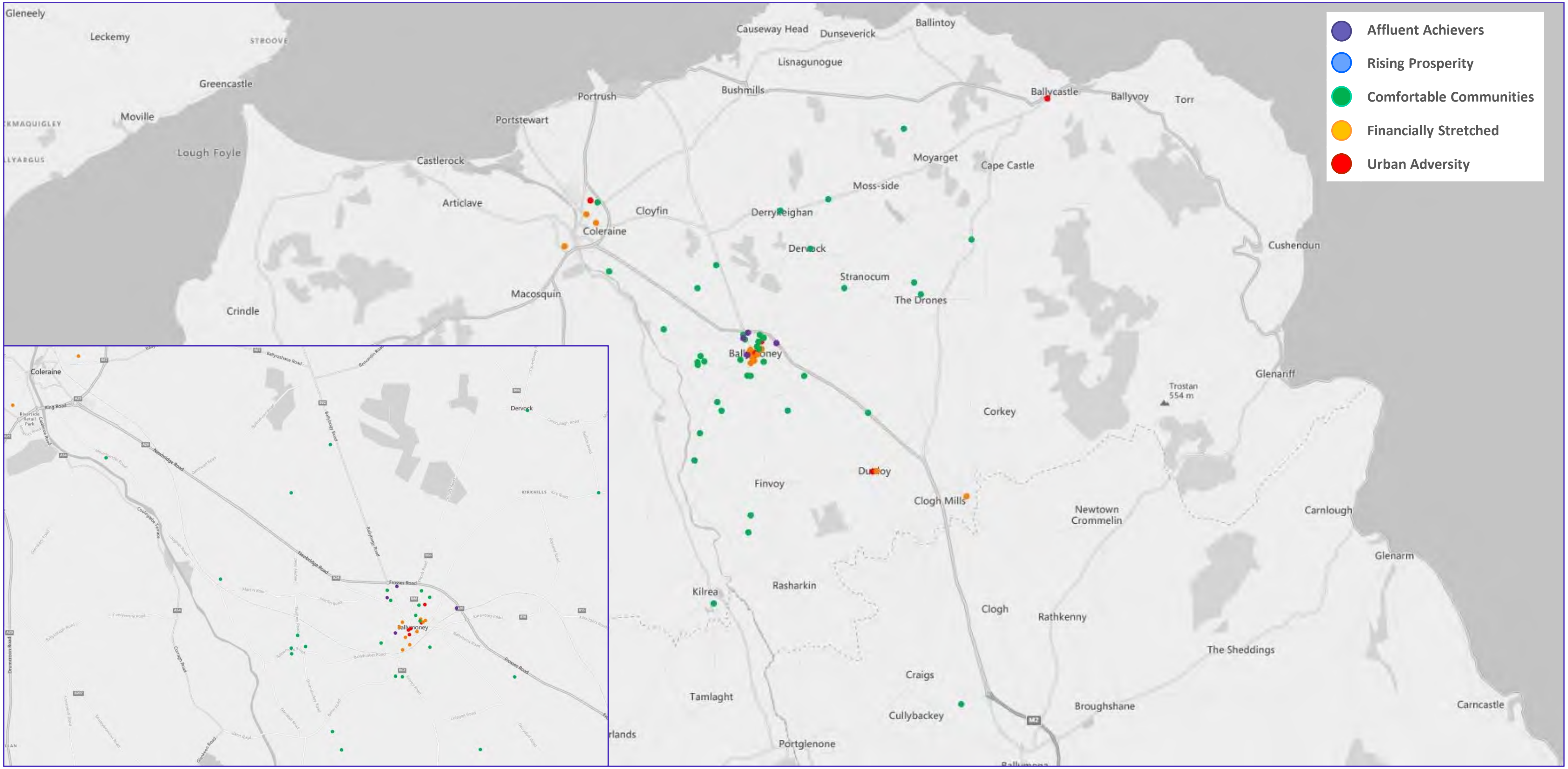


Average
8 mins
10 mins



ACORN Mapping

Causeway Coast & Glens Borough Council



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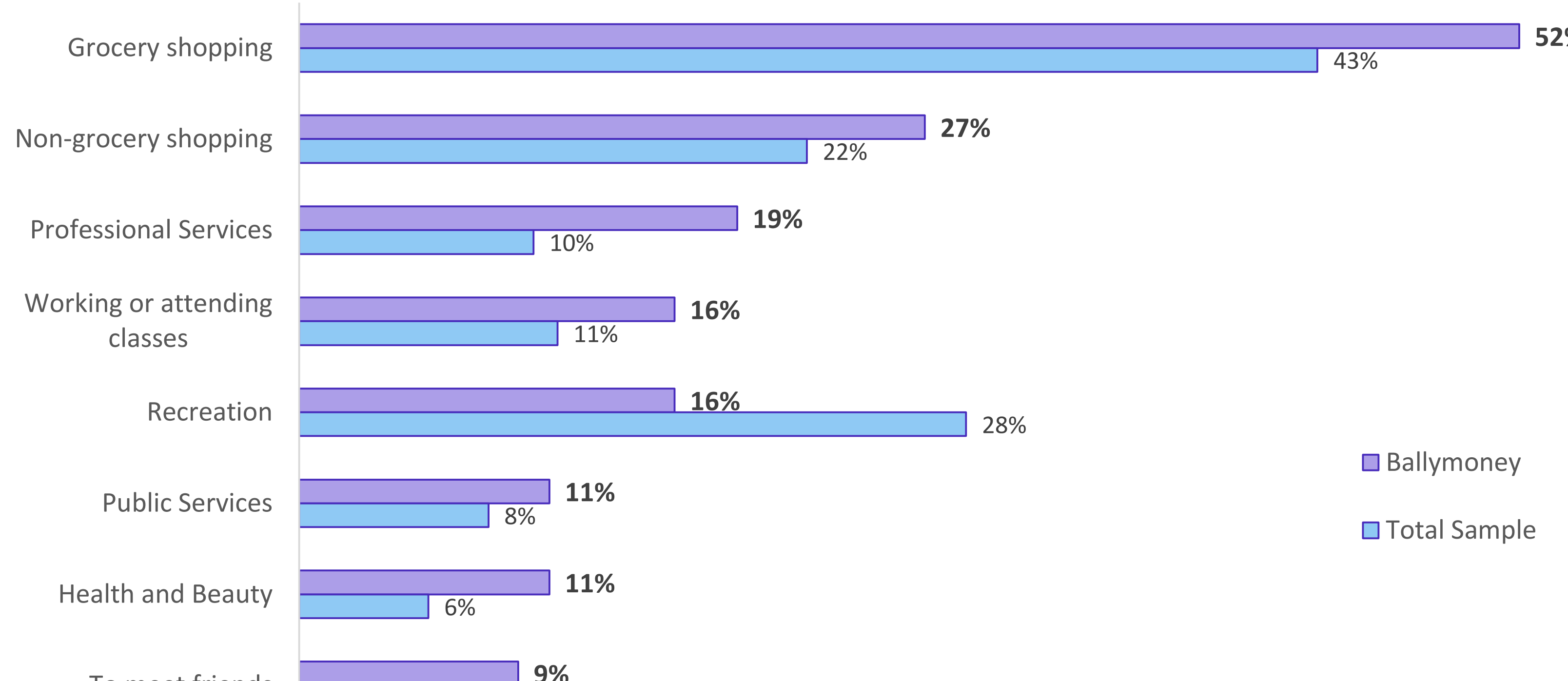
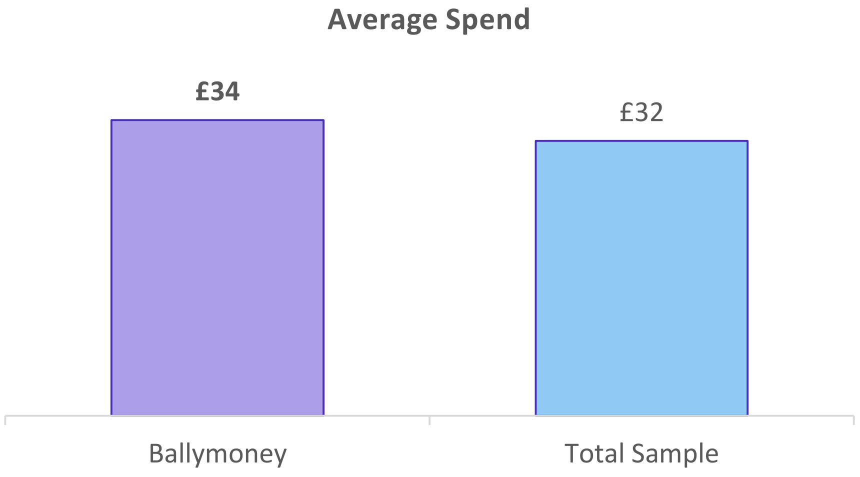
card

Why are people going to the town centres?

Causeway Coast & Glens Borough Council





Location	Average Dwell Time	Average Spend per Minute
Ballymoney	128 mins	£0.27
Total Sample	109 mins	£0.29

The town centre is primarily utilised for shopping, use of services or for work. Use for recreation purposes is relatively low.

That shopping features so prominently is likely the driving force behind a higher average spend, and higher dwell time and, subsequently, a high rate of visitors spending money *(93%, borough average = 87%).*

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What is your opinion of the town centre?

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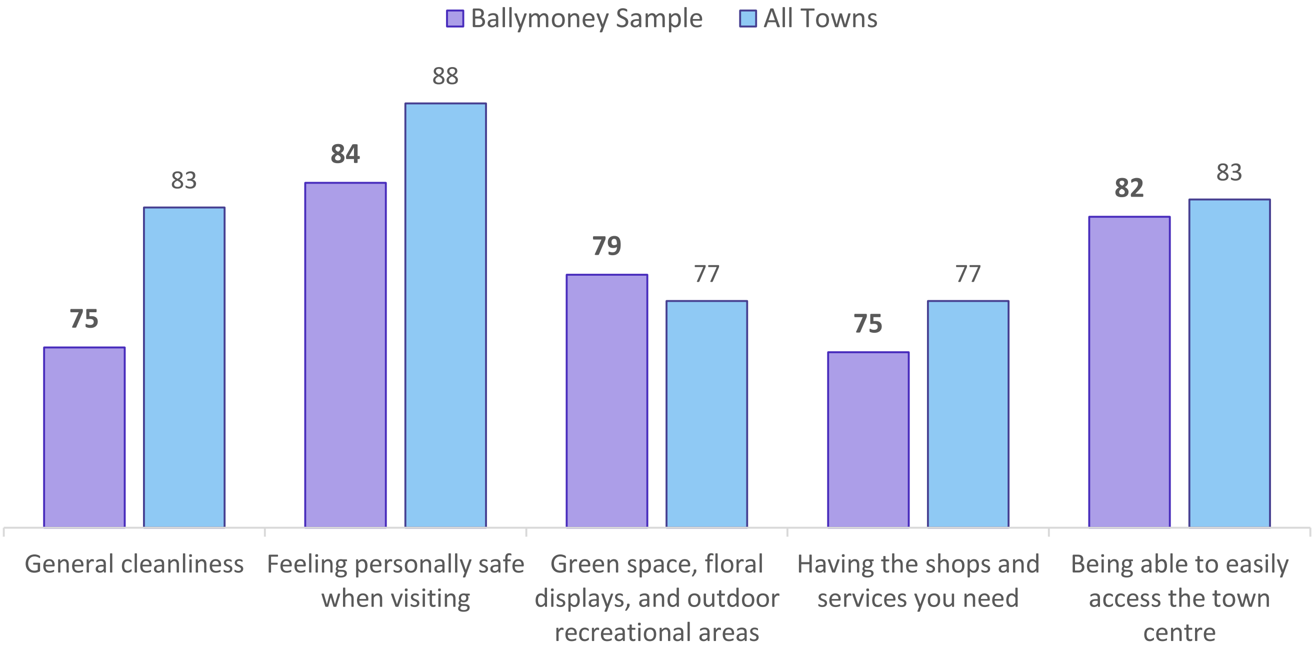
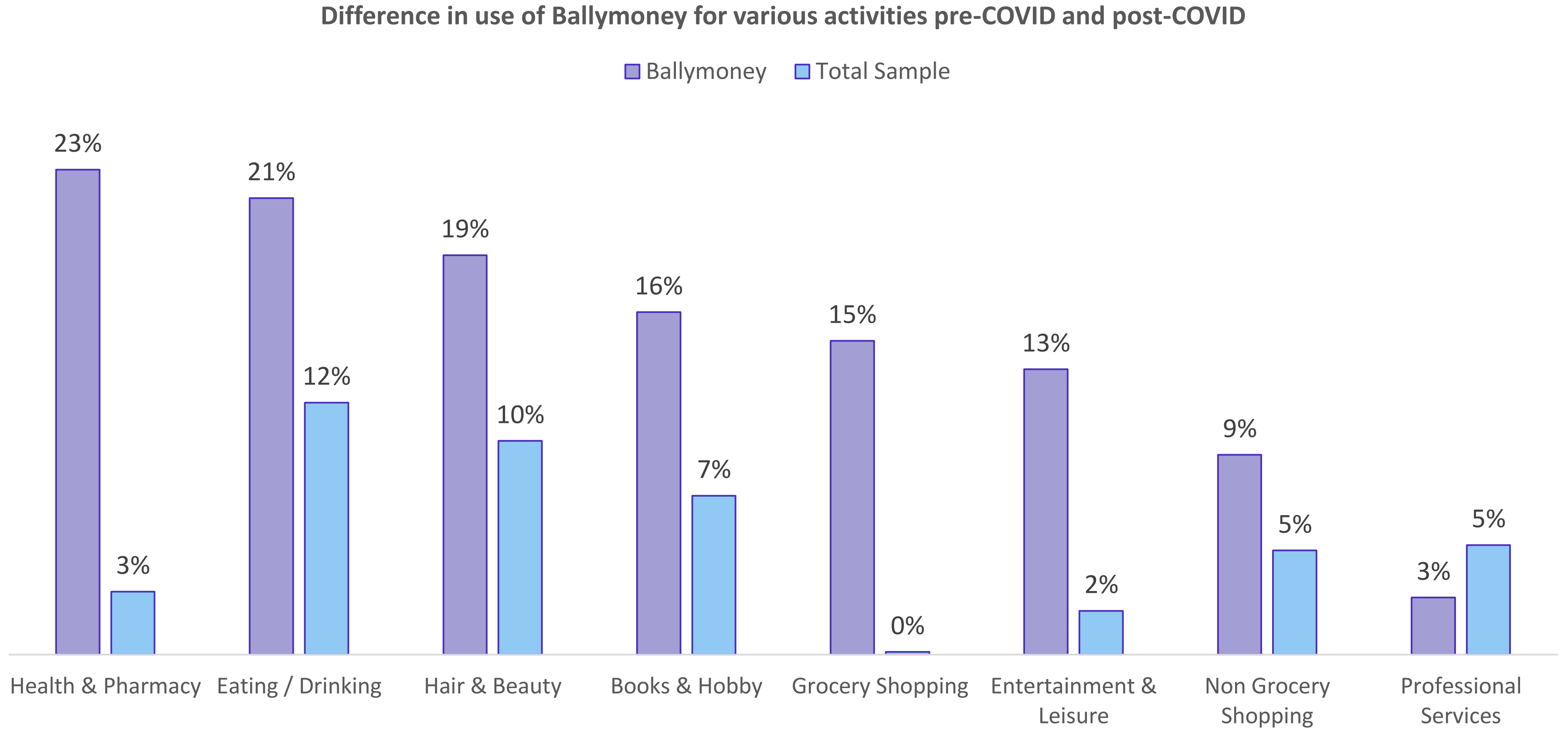
	Ballymoney Visitors									Score: +80
	Dislike				Passive		Like			
Description	Hate	Dislike	Avoid	Not ok	Not for me	Ok	Like	Enjoy	One of my favourites	My favourite town
Score	1	2	3	4	5	6	7	8	9	10
Sample	1%	0%	0%	4%	1%	7%	1%	69%	12%	4%
Calculation	Total of 'Like' (**86**) – Total of Dislike (**5**) = **+80**									

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



- Above is the combined Sentiment Score for Ballymoney. The rationale for Sentiment Scoring is outlined in Appendix 2.
- Visitors to Ballymoney exhibit a very positive degree of sentiment towards the town centre, with only 5% actively disliking the place.
- There are issues to consider however as the average rating for our town centre factors showed that its performance in regard to cleanliness and feelings of personal safety fell considerably below the overall average for the borough.

Pre & Post-COVID Use



Ballymoney TC Use	Health & Pharmacy	Eating / Drinking	Hair & Beauty	Books & Hobby	Grocery Shopping	Entertainment & Leisure	Non Grocery Shopping	Professional Services
Before COVID	62.7%	72.0%	61.3%	57.3%	70.7%	8.0%	33.3%	29.3%
After COVID	85.3%	93.3%	80.0%	73.3%	85.3%	21.3%	42.7%	32.0%
Difference	**+22.7%**	**+21.3%**	**+18.7%**	**+16.0%**	**+14.7%**	**+13.3%**	**+9.3%**	**+2.7%**

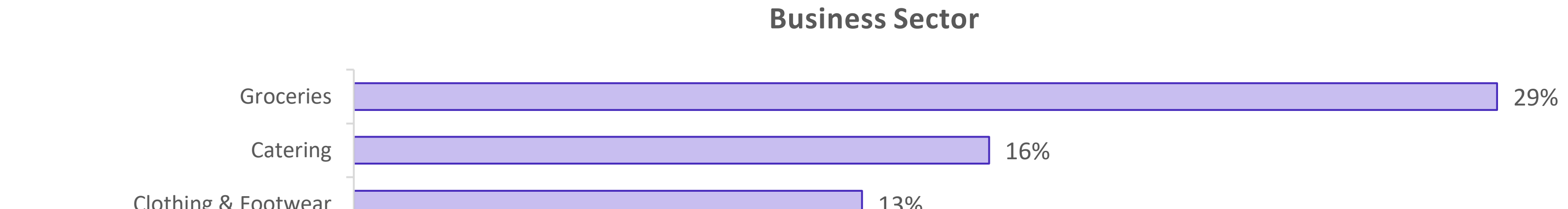
While the usual candidates (Catering and Beauty) were expected to see a strong upturn in use post-COVID, the rebound for use of most services (with the exception of Professional Services) was surprisingly high in the town.

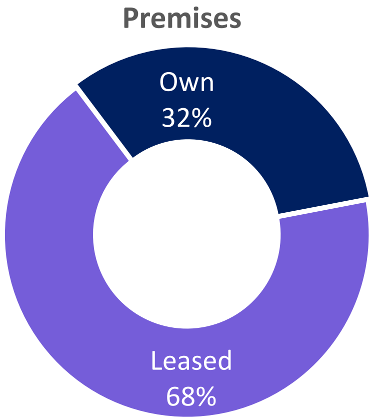
Traffic congestion and parking issues were more apparent as barriers to visiting Ballymoney, compared to the borough average.

What prevents you from visiting the town centre more?	Ballymoney	Total Sample
Congestion & Traffic	25%	19%
Parking	21%	15%
Habit	11%	8%
Unappealing Retailers	8%	13%
Evening Economy Options	5%	7%
Visually Unappealing Area	4%	7%
Cafes & Restaurant Offer	3%	7%
Safety	0%	3%
None of these	**47%**	**52%**

Traders

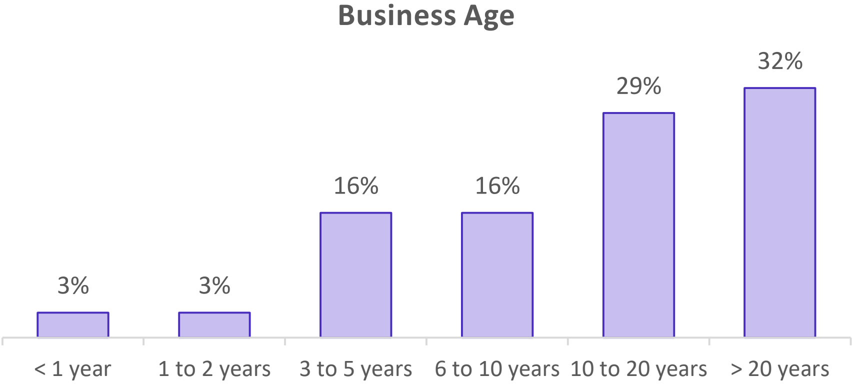
Trader Profile

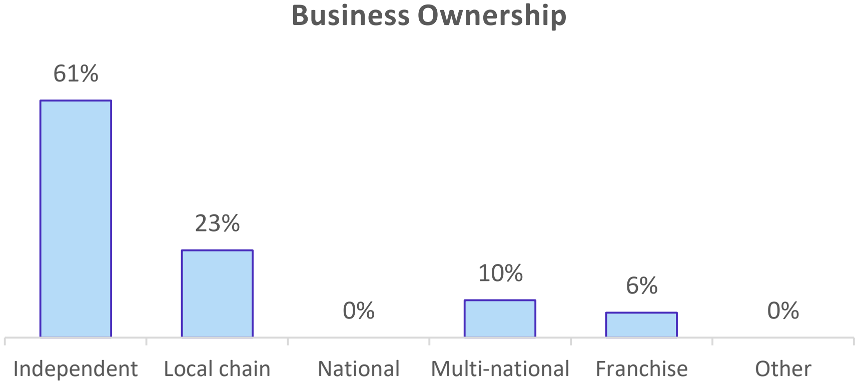


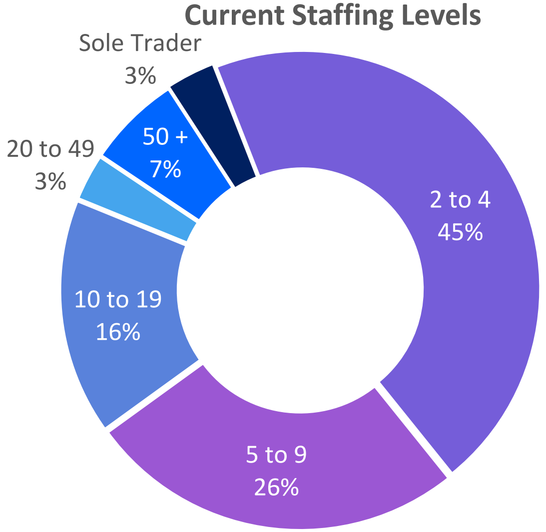


The extent of use of the town for shopping purposes is further demonstrated by the sectoral breakdown of our trader's sample, with the proportion in the grocery sector relegating catering to second, in stark contrast to the trend within the overall borough.

The businesses profile of the town seems quite mature, with almost two thirds (61%) over 10 years old.







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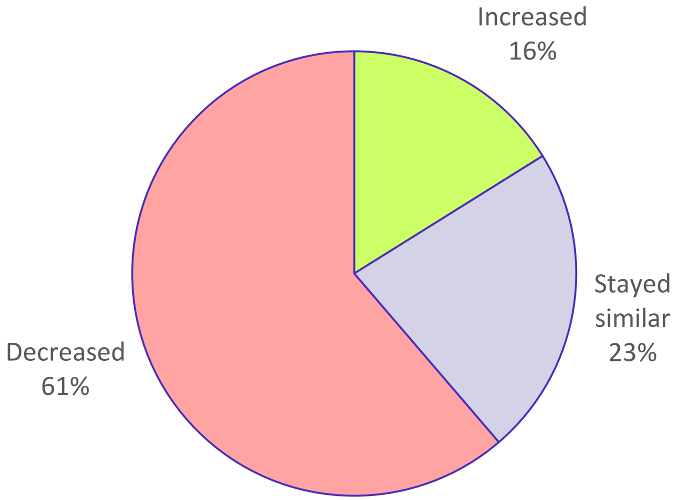
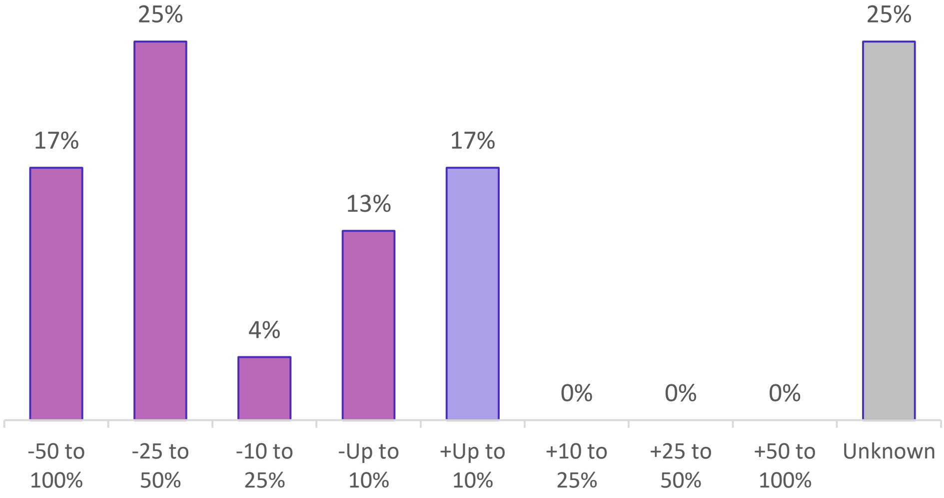
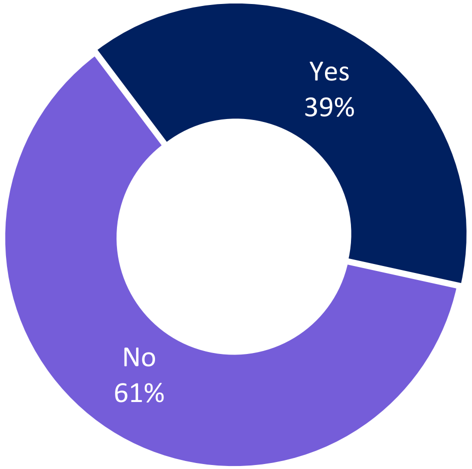
Impact on Turnover



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	**55%**
Yes	**45%**
Of those who said yes …	
Online selling & delivery	64%
Click & collect	86%
New services tailored to new circumstances	14%
New products tailored to new circumstances	0%

Ballymoney was strongly impacted by the lockdown restrictions with almost two thirds of traders noting a reduction in income.

In terms of the severity of this reduction, for the most part traders managed to avoid income losses over 50%.

Those businesses who did adjust to provide alternative services over lockdown made significant use of online methods, either via delivery or click and collect.

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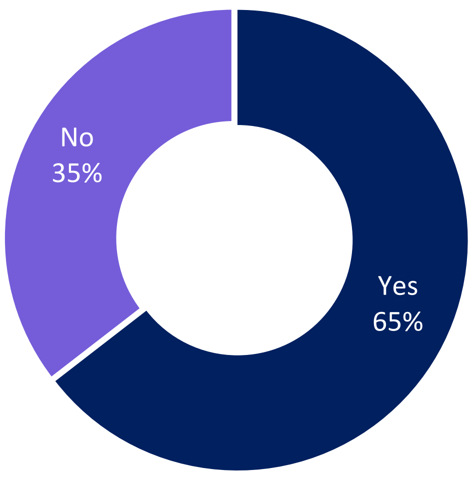
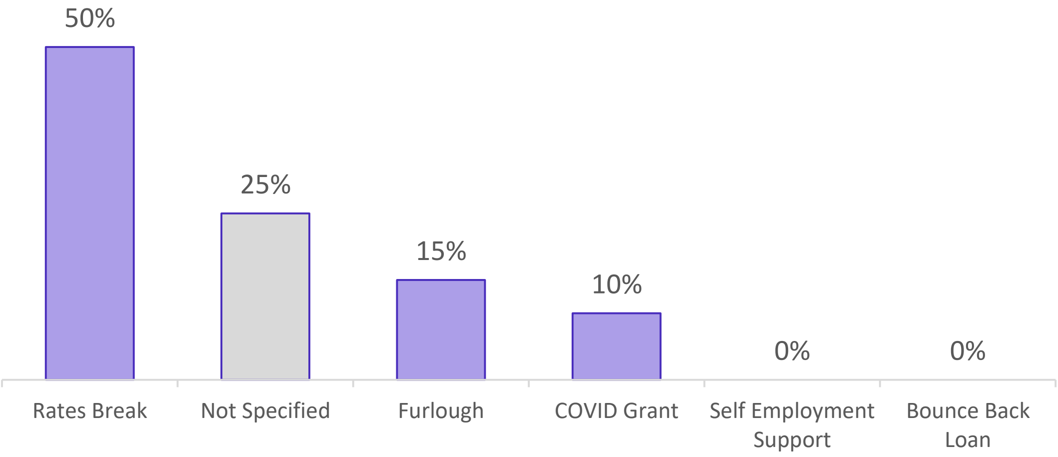
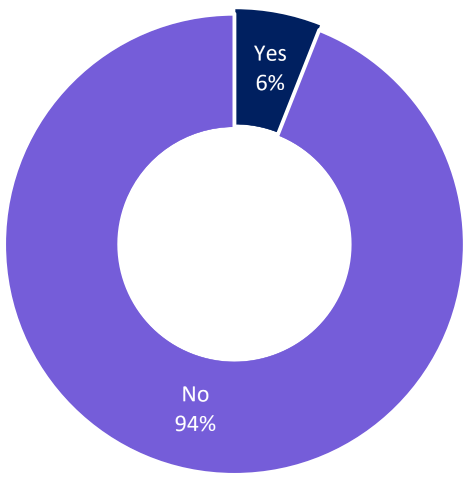
Did you avail of any Government support?



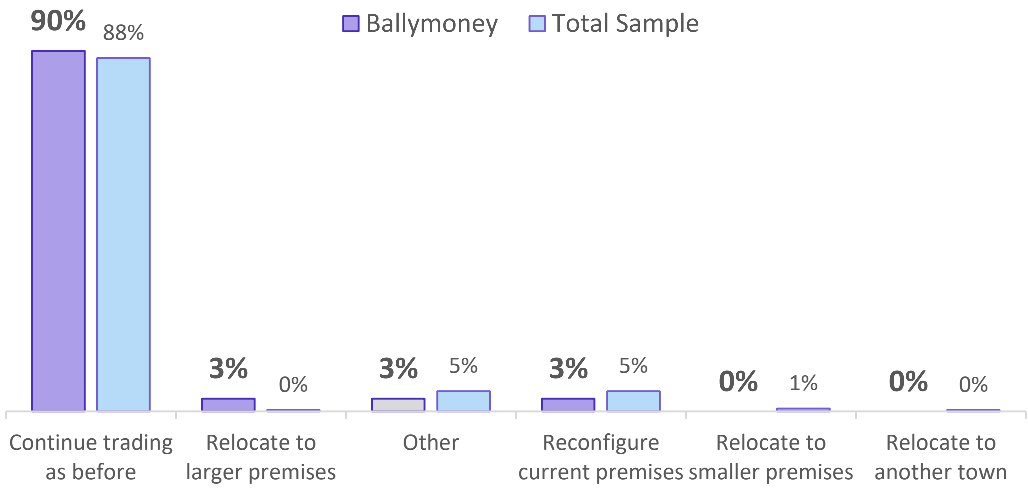
What kind of Government Support …



Did you avail of any CC&G Business Support …



Trading intentions going forward …

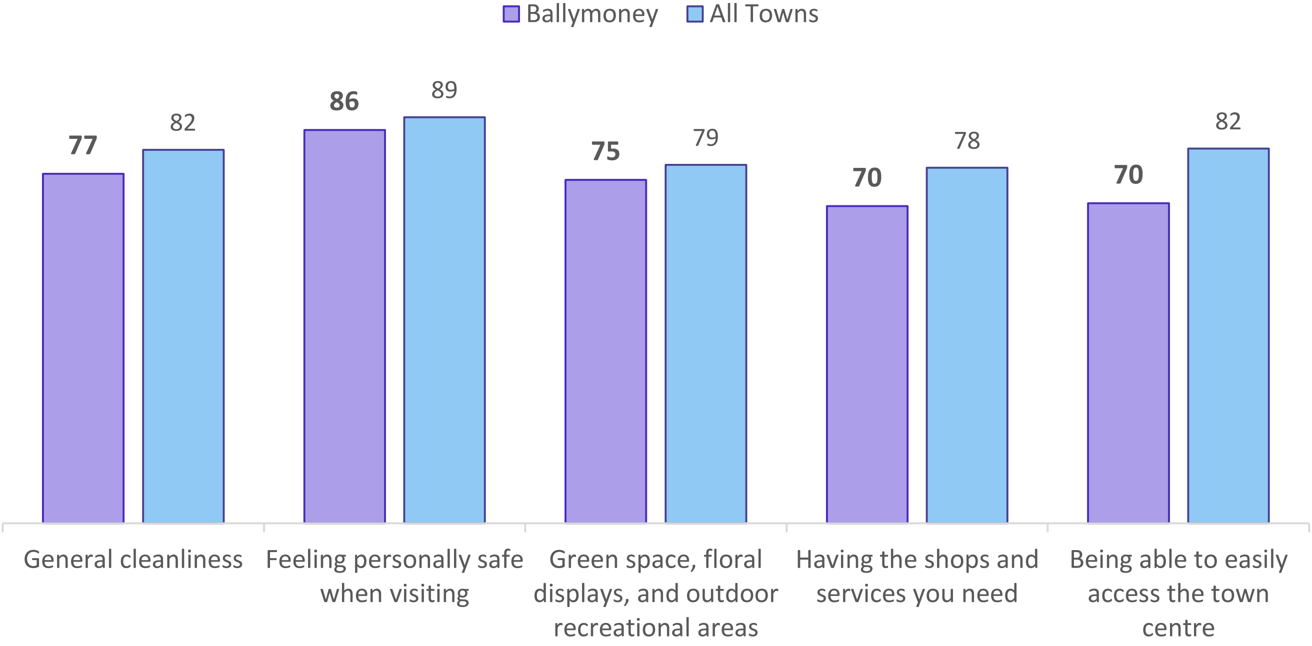


In keeping with trends across other towns, there was significant uptake of support offered by the government over the lockdown period, while uptake of support offered by the Council was much lower.

What is your opinion of the town centre?

	Ballymoney Traders									Score: +48
	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%	3%	10%	4%	10%	12%	45%	6%	3%
Calculation	Total of 'Like' (**67**) – Total of Dislike (**19**) = **Ballymoney Traders Score = 48**									

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



- Traders in Ballymoney appear to be somewhat more pessimistic in their sentiment ratings for the town when compared to the visitor score.
- A score of +48 ranks it as the third lowest trader sentiment score among the 12 towns sampled.
- There was a general theme that the town needed investment to attract businesses in, and to tidy the place up.

*"not a lot of great shops or variety, better variety needed**

"Issue with rubbish and weeds, dog fouling bad, also by one known dog and owner. Needs resolved"

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 Ballymoney a sample size of 75 was achieved which provides us with a margin of error of +/- 11.3% @ 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 – 11.3% 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.

Annex 2 – ACORN & Sentiment Explained

	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

Appendix 3 – Results Expanded

Causeway Coast & Glens Borough Council

Detailed ACORN Results for Ballymoney Visitors

No.	ACORN Group	Ballymoney	Total Sample	Sub-Category		Ballymoney	Total Sample
1	Affluent Achievers	**7%**	7%	A	Lavish Lifestyles	**0%**	0%
				B	Executive Wealth	**4.1%**	4.1%
				C	Mature Money	**2.7%**	2.9%
2	Rising Prosperity	**0%**	1%	D	City Sophisticates	**0%**	0%
				E	Career Climbers	**0.0%**	0.8%
3	Comfortable Communities	**56%**	52%	F	Countryside Communities	**47.9%**	45.6%
				G	Successful Suburbs	**4.1%**	2.3%
				H	Steady Neighbourhoods	**2.7%**	1.6%
				I	Comfortable Seniors	**0%**	1.4%
				J	Starting Out	**1.4%**	1.1%
4	Financially Stretched	**25%**	28%	K	Student Life	**0%**	0.4%
				L	Modest Means	**1.4%**	8.4%
				M	Striving Families	**8.2%**	12.1%
				N	Poorer Pensioners	**15.1%**	7.7%
5	Urban Adversity	**12%**	12%	O	Young Hardship	**5.5%**	7.1%
				P	Struggling Estates	**5.5%**	3.0%
				Q	Difficult Circumstances	**1.4%**	1.5%

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Causeway Coast & Glens Borough Council

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Coleraine

June 2021

card Client Analysis & Relationship Development

Introduction

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.

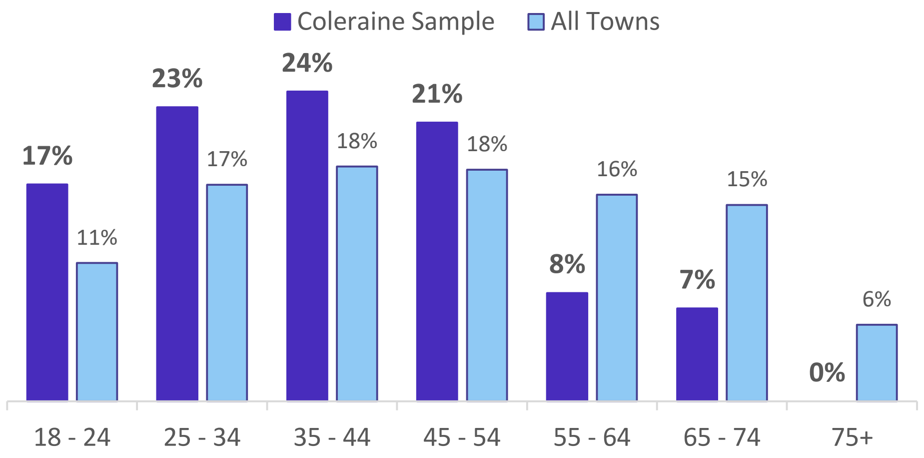
The following report is a sub-report seeking to provide a summarised snapshot of our results, emanating from the Causeway Coast & Glens visitor & traders sampling, at a **local** level. This particular sub-report provides the snapshot for sampling that took place in **Coleraine**;

- 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.

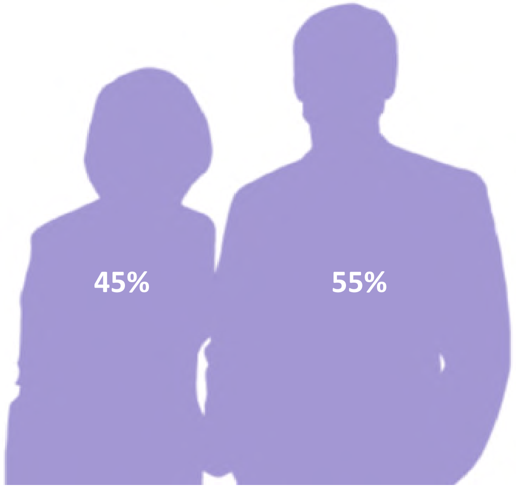
Sampling for visitors and traders in Coleraine took place between 24th March and 7th April 2021. It is important to note that during this period, there were a range of continuing restrictions in place owing to the ongoing Coronavirus pandemic. The specific restrictions at the time are outlined in Appendix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

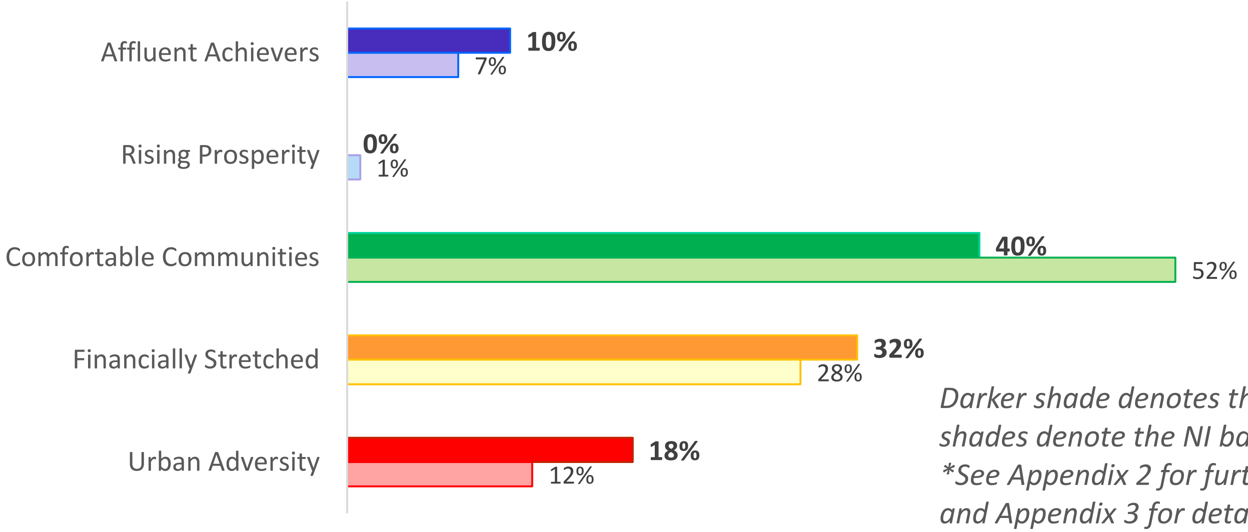


Respondent Gender Split



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.

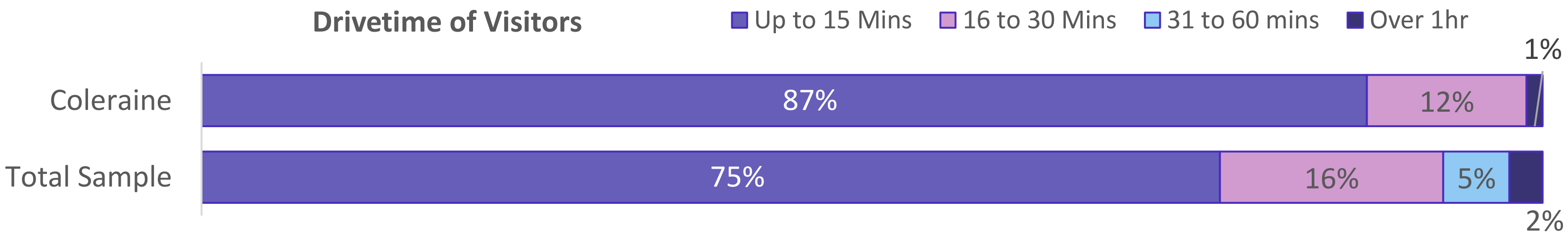
Coleraine ACORN Profile* vs Overall Sample



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.

Origins & Travel

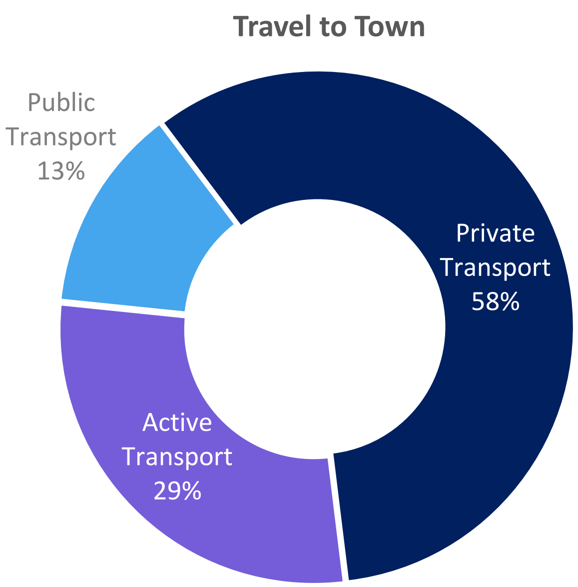


Average
10 mins
10 mins

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

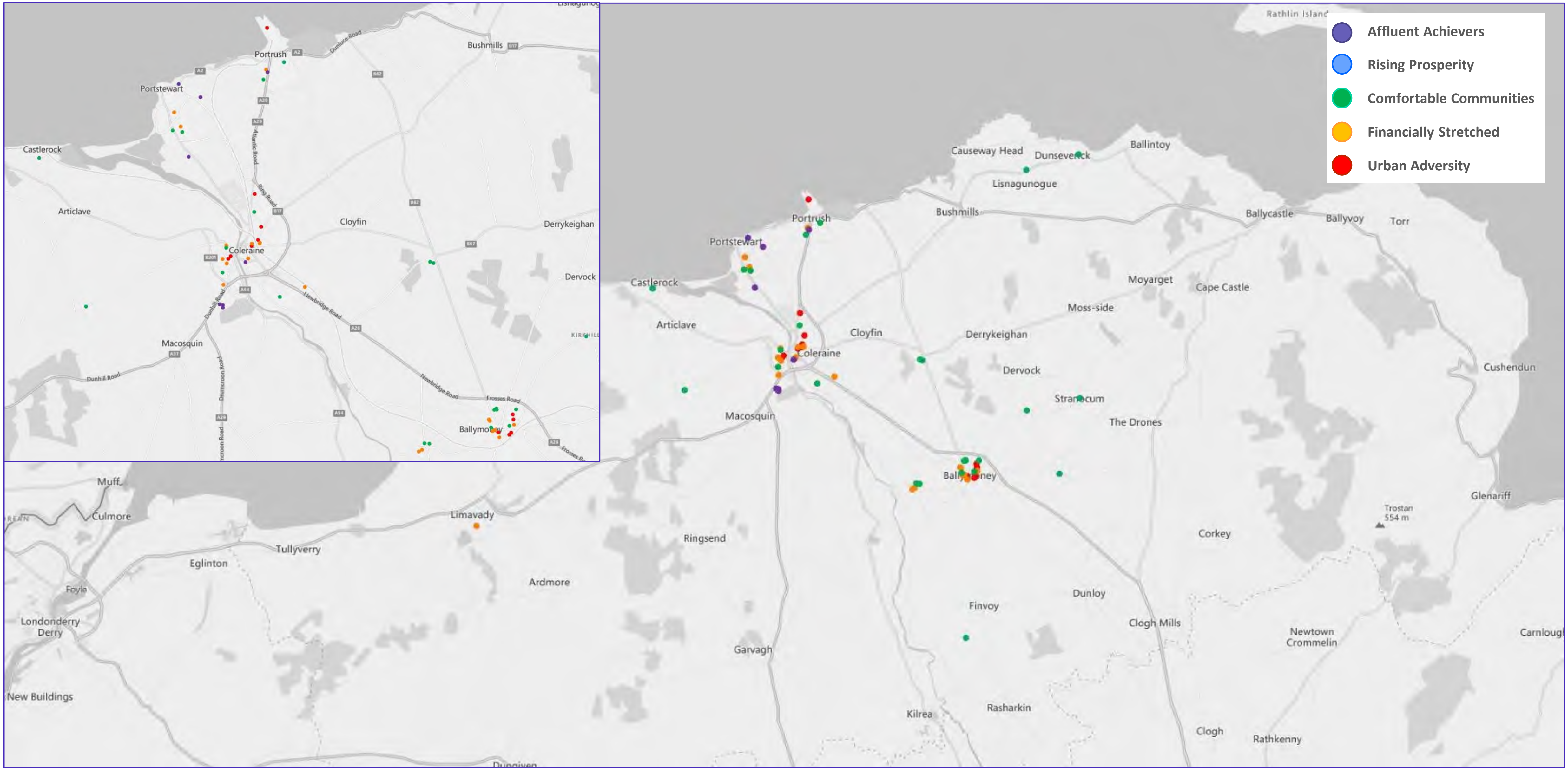
Compared to our general sample Coleraine visitors come from a tighter catchment with 87% coming from within a 15 mins drive.

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



ACORN Mapping

Causeway Coast & Glens Borough Council



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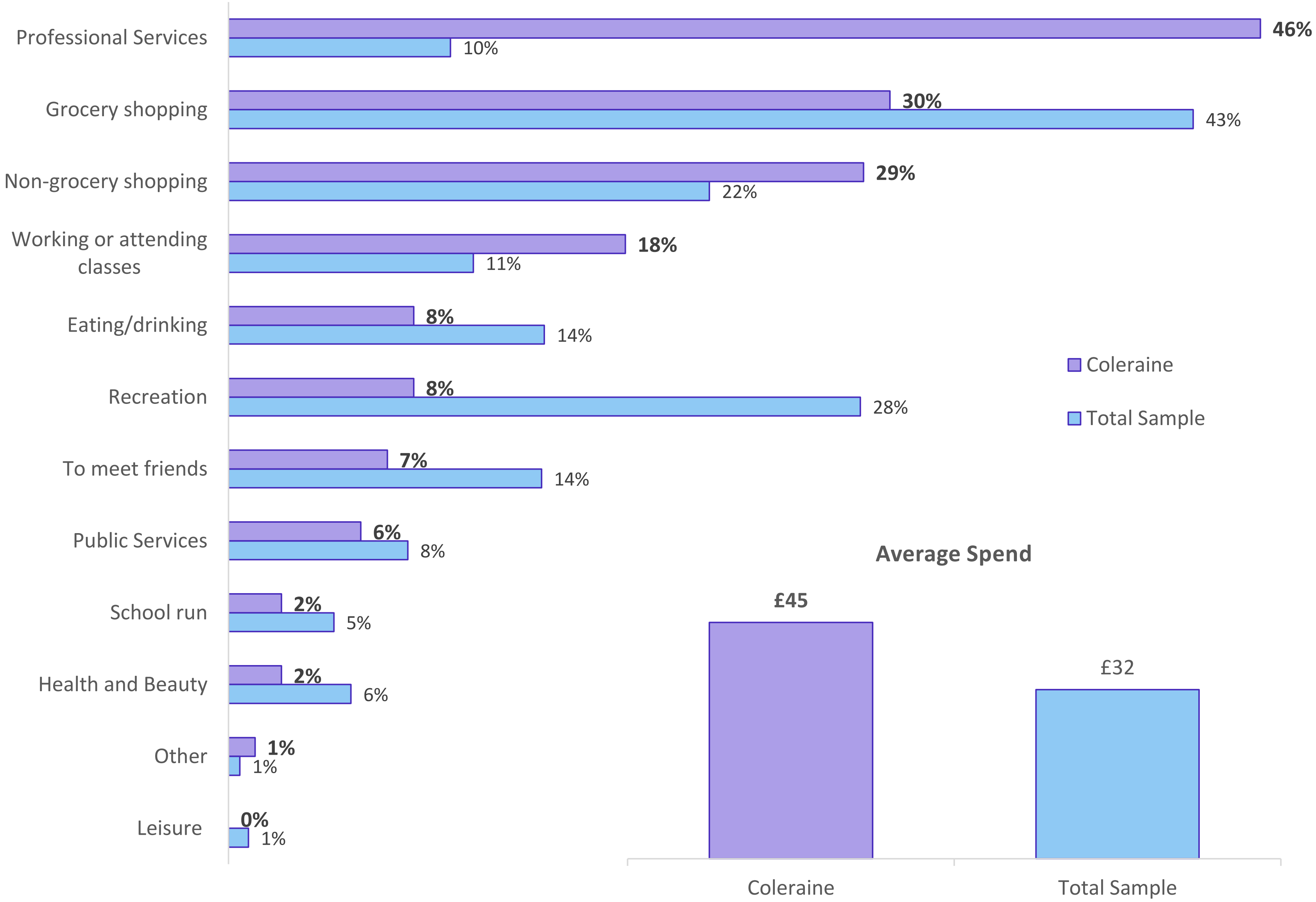
Why are people going to the town centres?

Causeway Coast & Glens Borough Council



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.

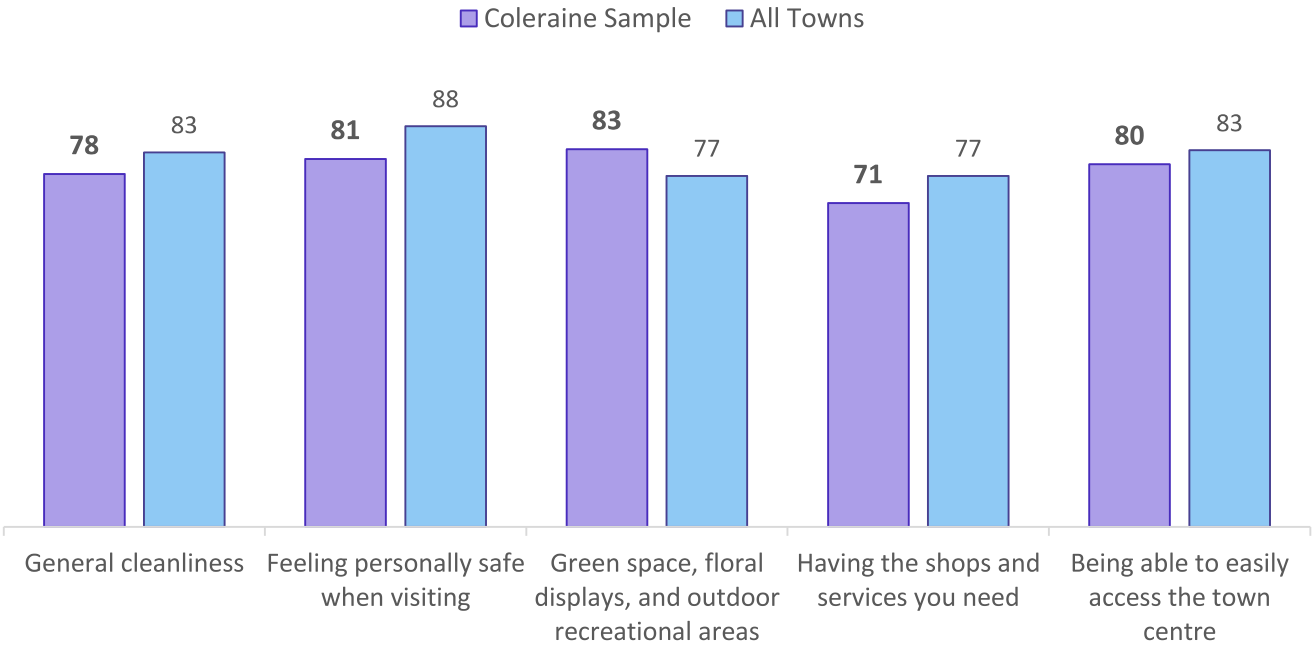
Accessing professional services, e.g. banks, mortgage brokers etc. appears to be the primary use for Coleraine among our sample.

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**									

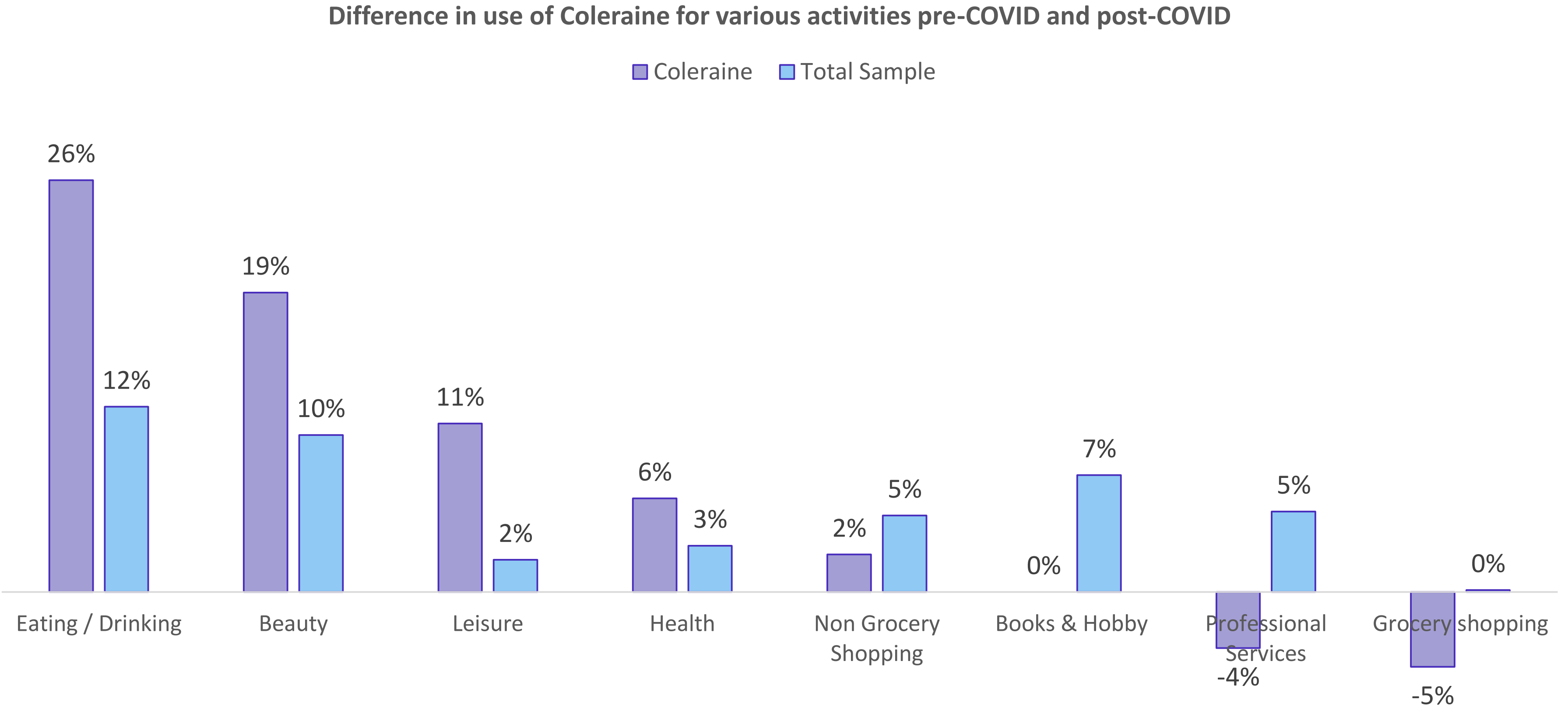
Average Rating Coleraine Town Centre *(out of 100)*



- 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.

Pre & Post-COVID Use

Causeway Coast & Glens Borough Council



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%**

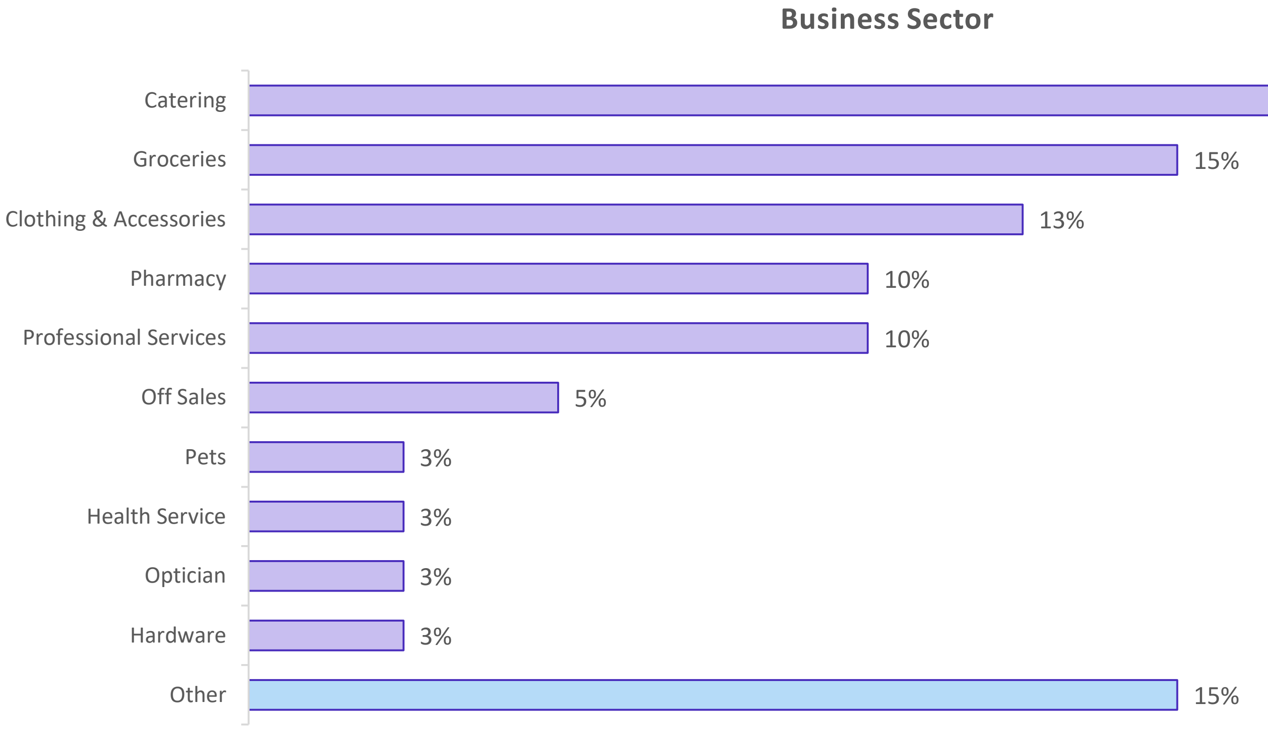
It would appear that the trends displayed on Page 6 could show significant alteration as the lockdown restrictions lift. Coleraine appears in line to see significant boost to its catering economy, while its two most utilised functions currently appear to show a decrease.

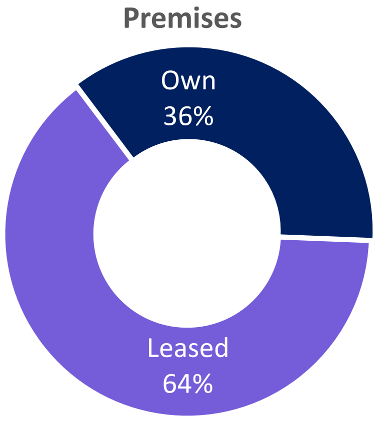
Issues of parking, as well as issues in the evening economy and catering offer, may restrict this as they have been identified as barriers to visits.

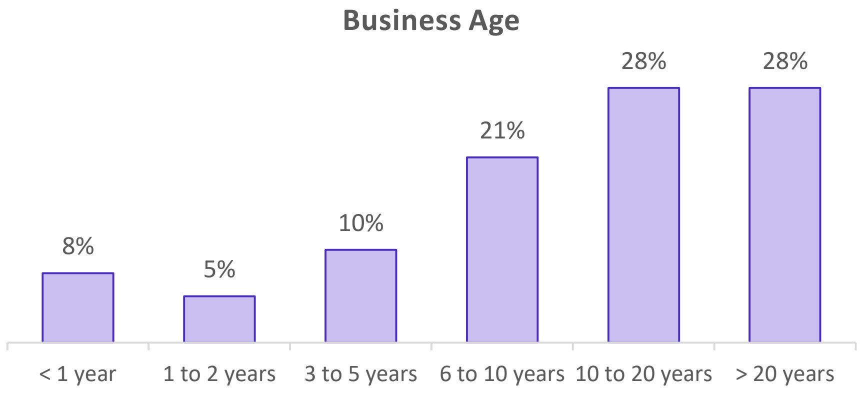
What prevents you from visiting the town centre more?	Coleraine	Total Sample
Parking	68%	15%
Unappealing retailers	34%	13%
Congestion and traffic	22%	19%
Habit	18%	8%
Evening economy options	18%	7%
Cafes and restaurant offer	14%	7%
Safety	6%	3%
Visually unappealing area	4%	7%
None of these	**9%**	**52%**

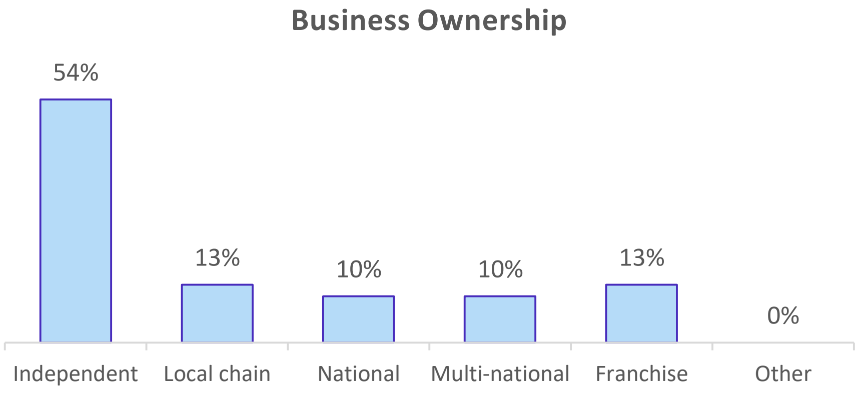
Traders

Causeway Coast & Glens Borough Council





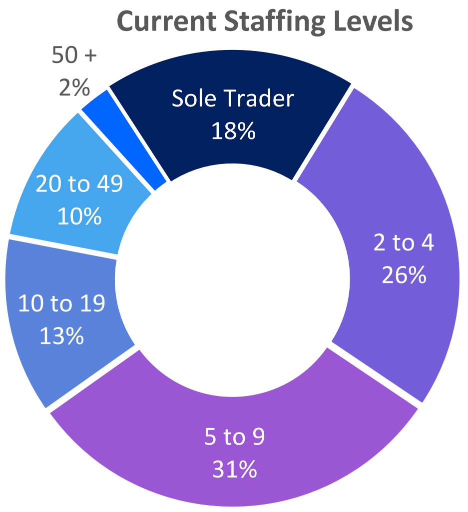


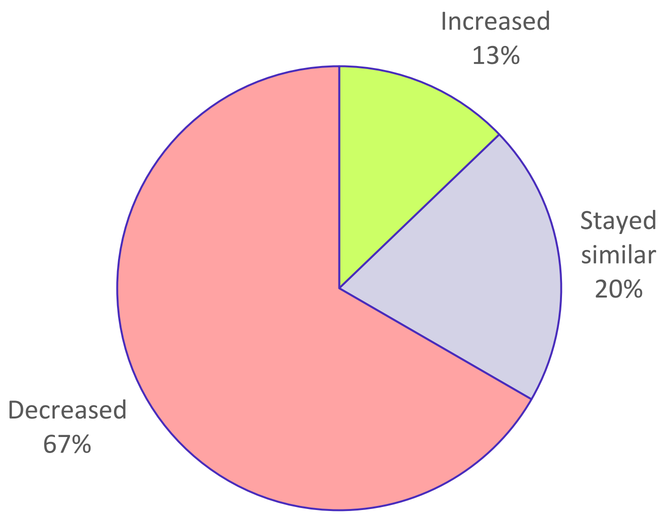


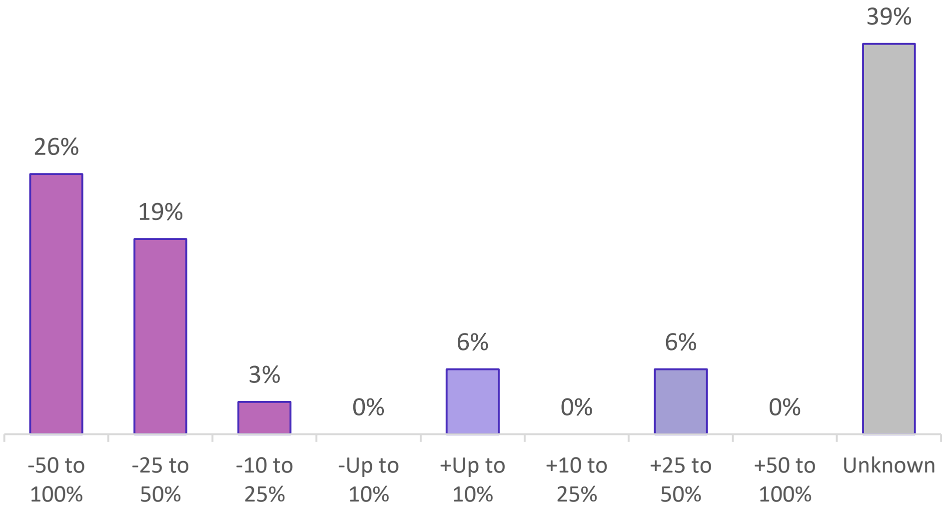
The profile of our Coleraine sample appears to be slightly younger than our overall Trader sample with 13% having operated for less than 2 years.

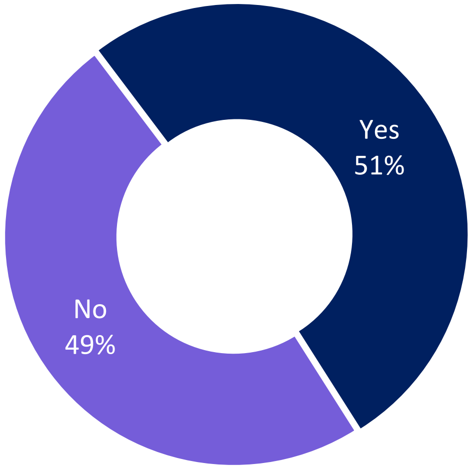
However the town shows a much lower proportion of 'independents' (54%) compared to 70% for our overall sample.

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









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

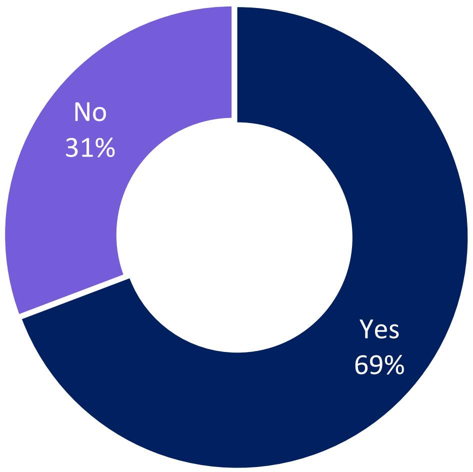
The COVID-19 crisis also appears to have hit the town harder compared to the borough wide sample, with around two thirds (67%) reporting a loss of revenue as a result.

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.

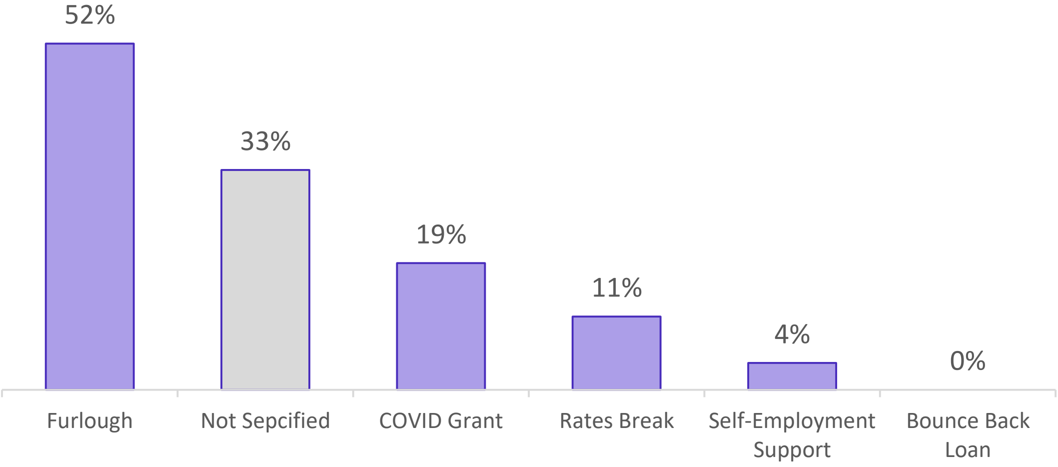
Likewise fewer felt compelled to branch out into different products/services as a result of lockdown, 33% compared to 44% for the overall sample.

COVID Impact continued

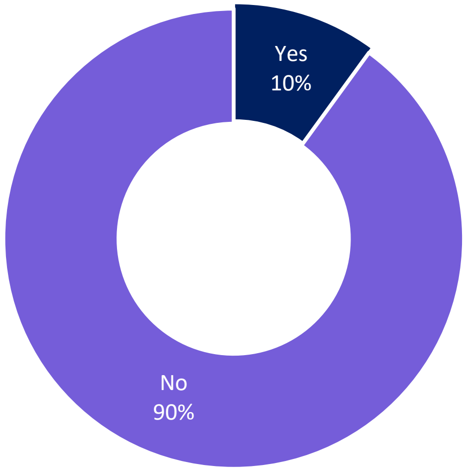
Did you avail of any Government support?



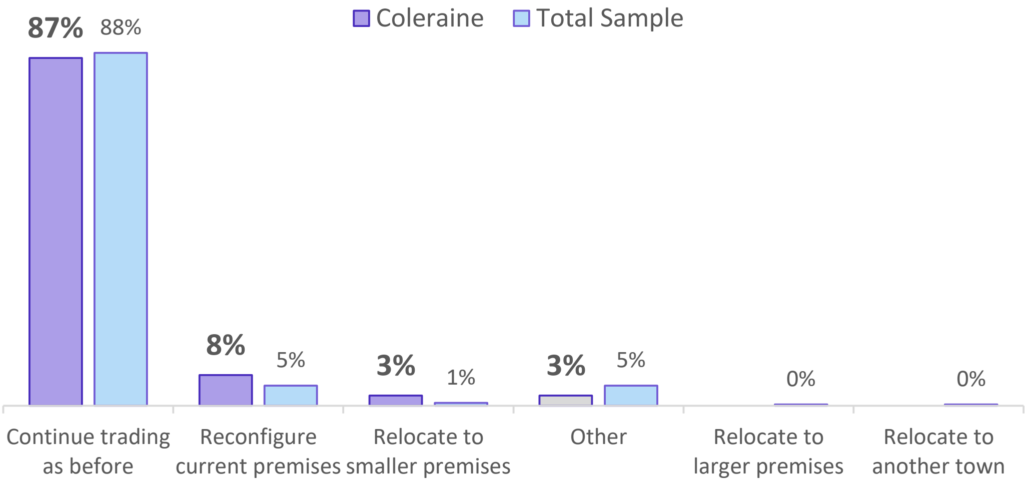
What kind of Government Support …



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%.

What is your opinion of the town centre?

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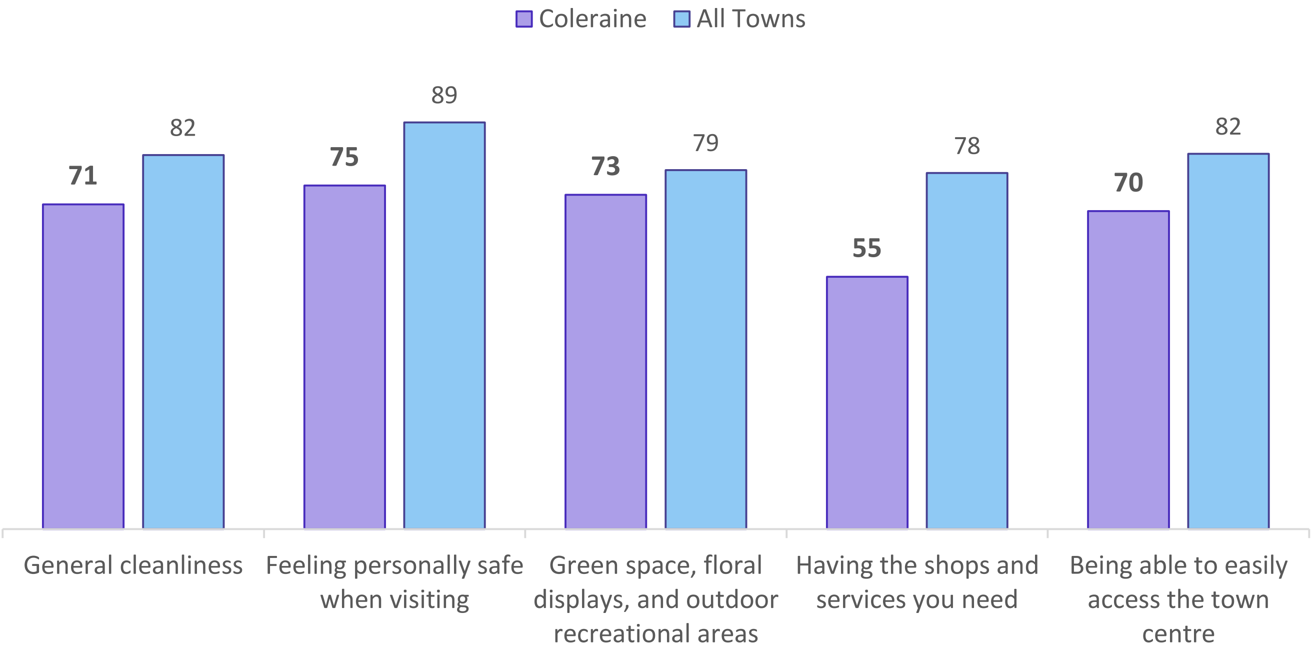
	Coleraine Traders									Score: +6
	Dislike				Passive		Like			
Description	Hate	Dislike	Avoid	Not ok	Not for me	Ok	Like	Enjoy	One of my favourites	My favourite town
Score	1	2	3	4	5	6	7	8	9	10
Sample	0%	3%	27%	3%	17%	10%	13%	23%	0%	3%
Calculation	Total of 'Like' (**39**) – Total of Dislike (**33**) = **Coleraine Traders Score = 6**									

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



- 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.

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Appendix 2 – ACORN & Sentiment Explained

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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

Appendix 3 – Results Expanded

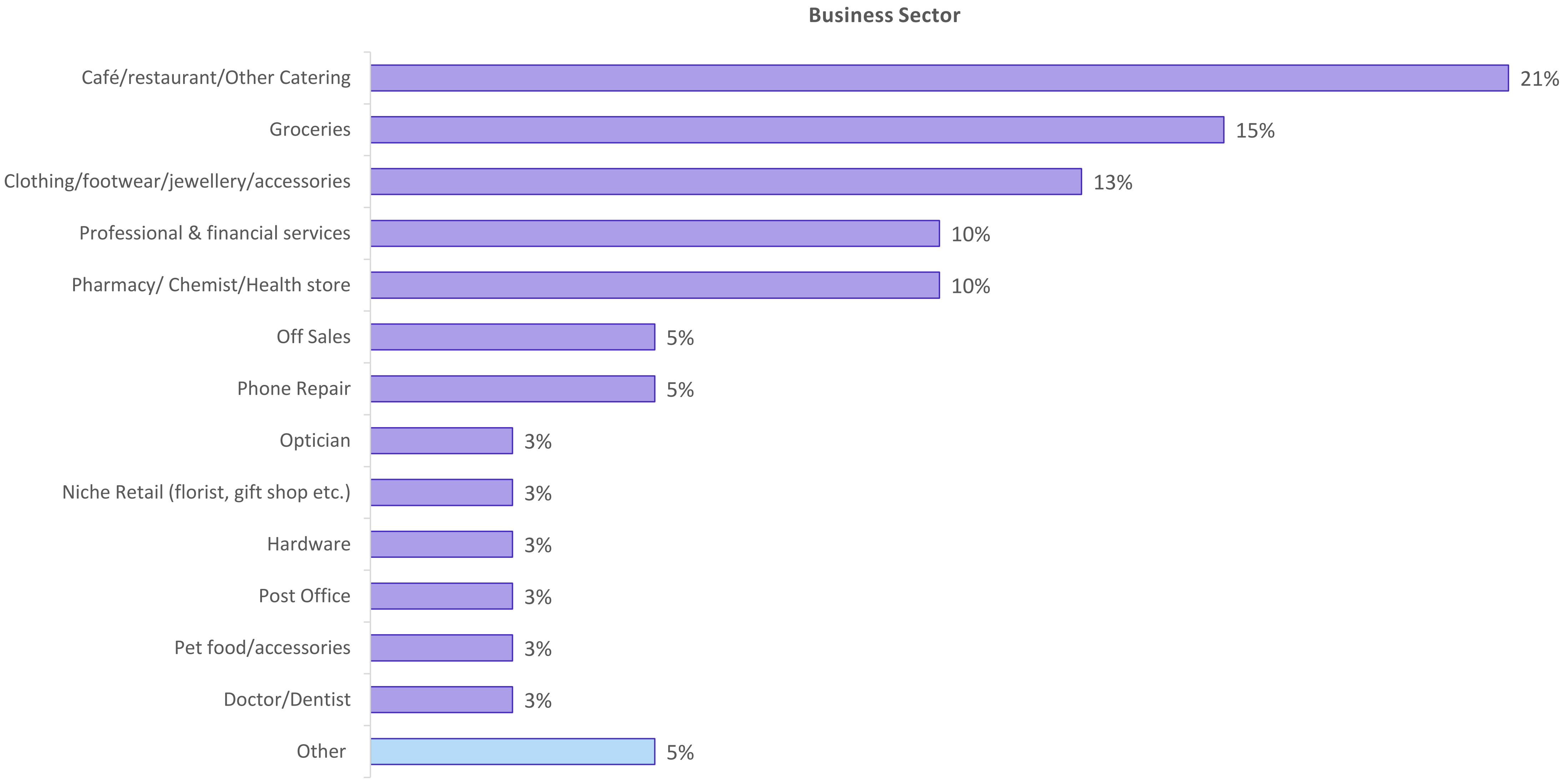
Annex 3 – Sentiment Scoring

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%

Causeway Coast & Glens Borough Council

Traders – Coleraine Business Sectors Expanded



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Causeway Coast & Glens Borough Council

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Cushendall

August 2021

card

Client Analysis & Relationship Development

Causeway Coast & Glens Borough Council

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.

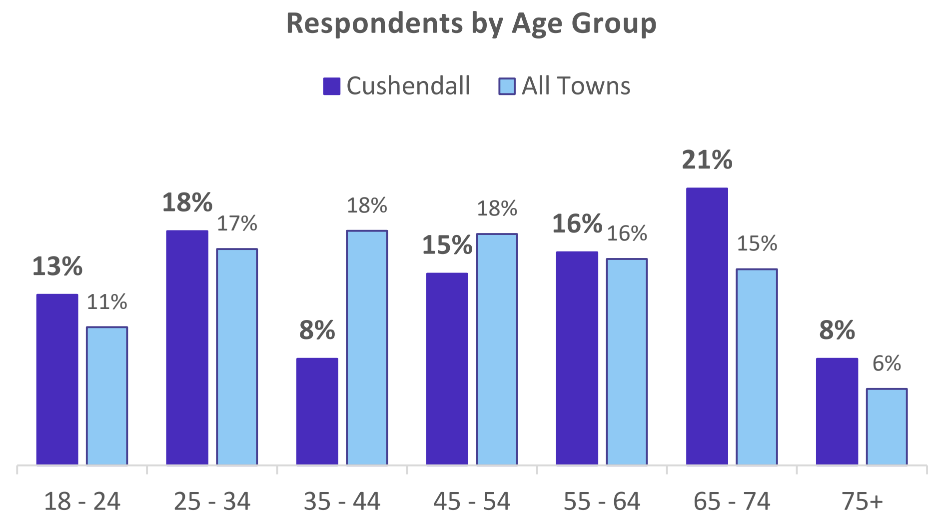
The following report is a sub-report seeking to provide a summarised snapshot of our results, emanating from the Causeway Coast & Glens visitor & traders sampling, at a **local** level. This particular sub-report provides the snapshot for sampling that took place in **Cushendall**;

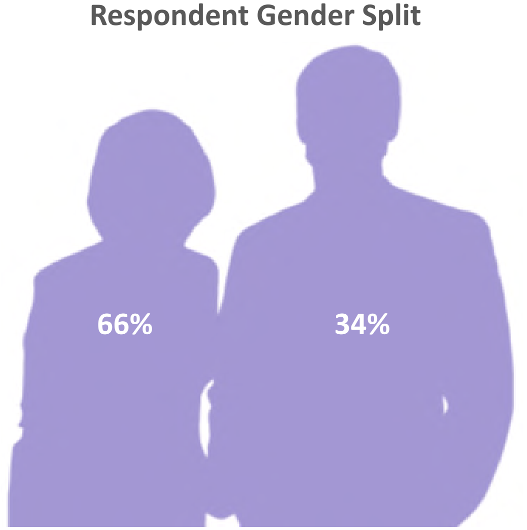
- The visitor results are based on an overall sample of **61** respondents;
- The trader's results are based on a sample of **14** traders within the town centre.

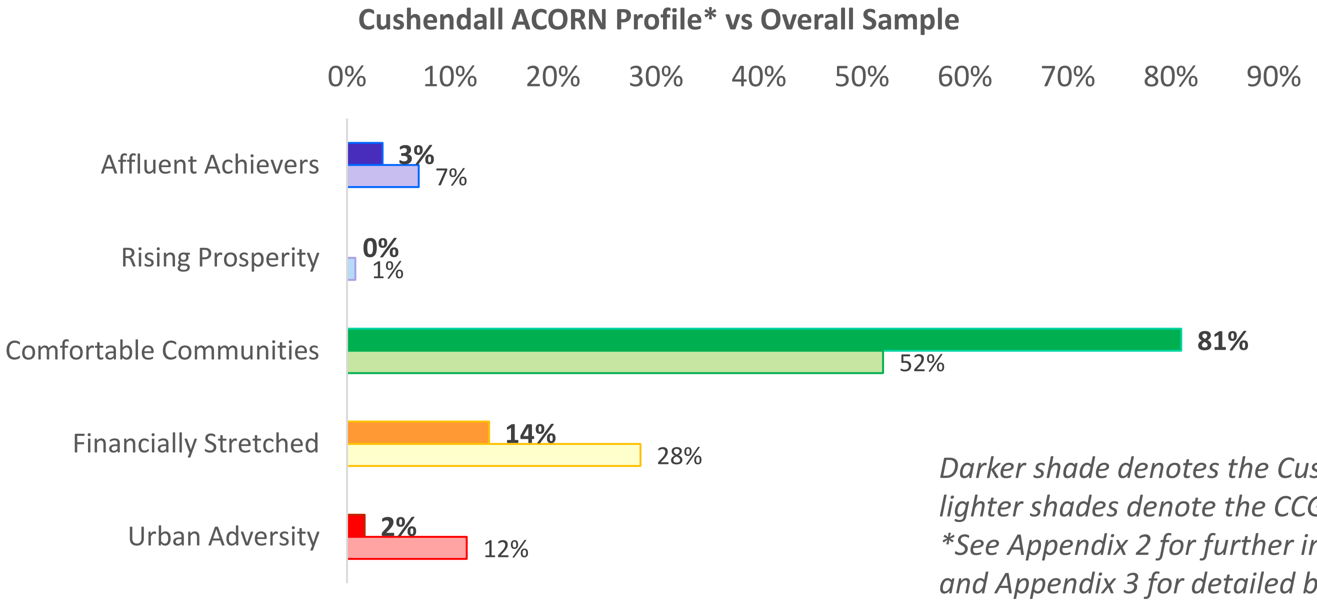
Sampling for visitors and traders in Cushendall took place between 24th March and 17th April 2021. It is important to note that during this period, there were a range of continuing restrictions in place owing to the ongoing Coronavirus pandemic. The specific restrictions at the time are outlined in Appendix 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.

Visitors

Respondent Profile



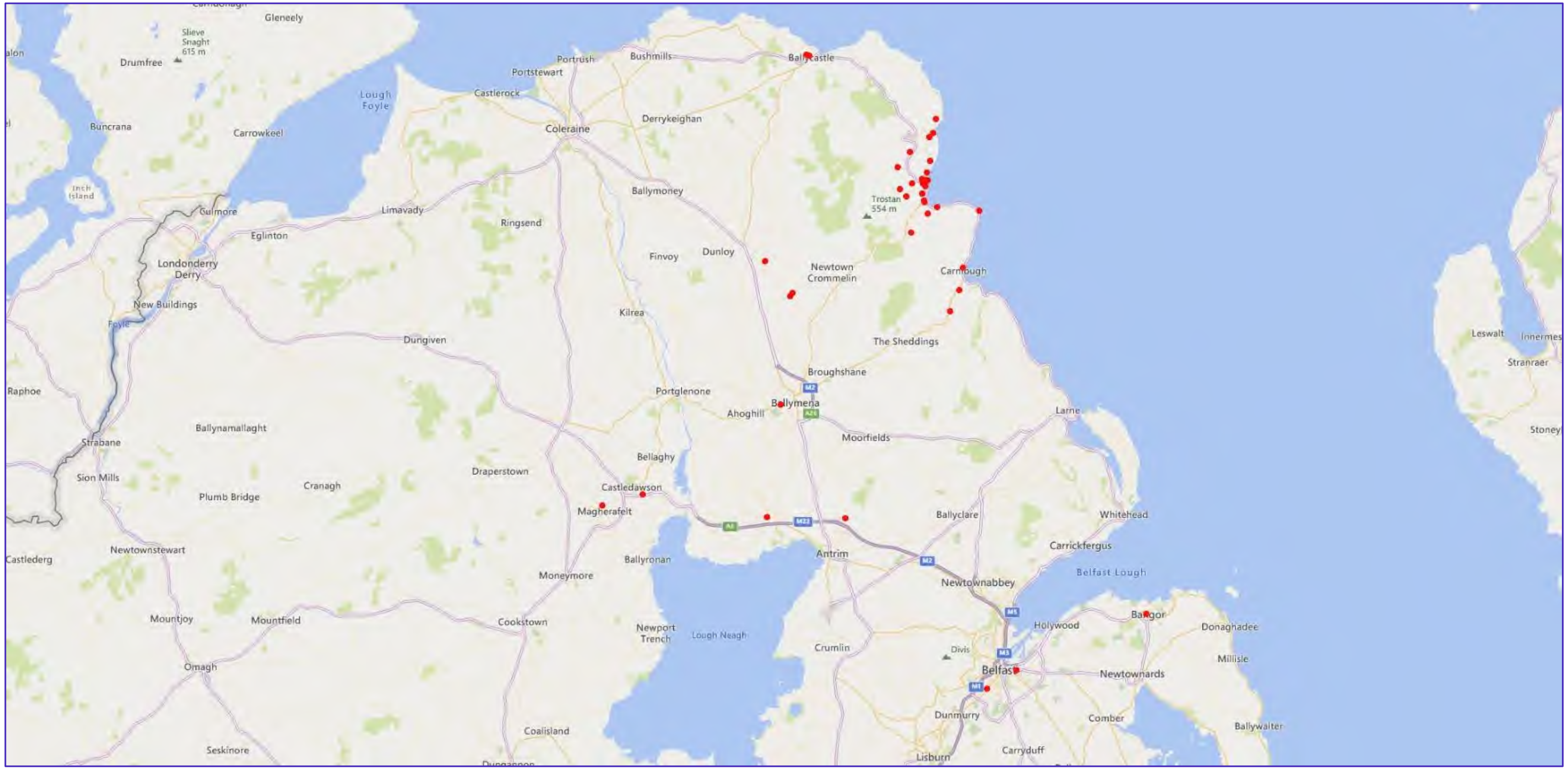




Darker shade denotes the Cushendall respondent profile while lighter shades denote the CCGBC baseline.
**See Appendix 2 for further information on ACORN classifications and Appendix 3 for detailed breakdown*

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%.

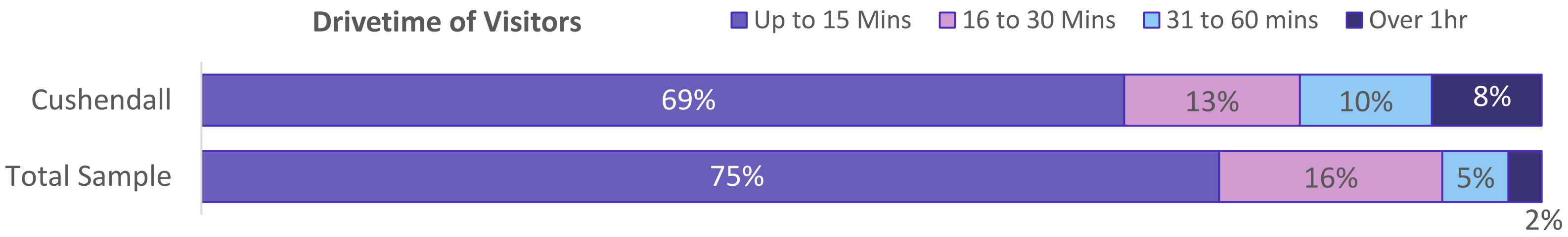
The town visitor profile is heavily dominated by those in the 'Countryside Communities' ACORN sub-category. This shouldn't be too surprising given the rural nature of the town and its wider catchment.



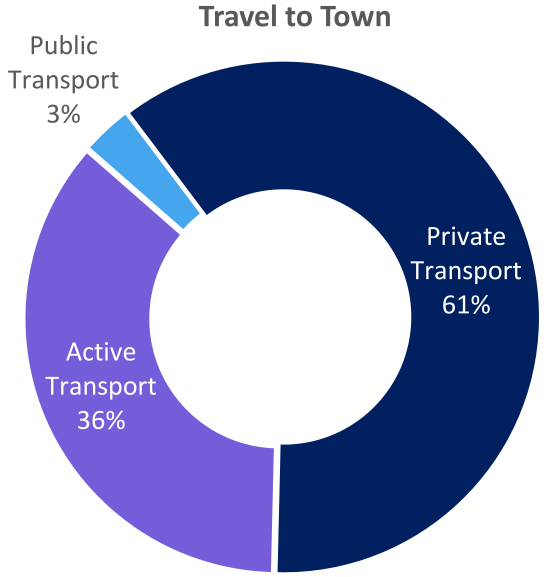
Cushendall appears to have a higher geographical spread of visitors relative to most other towns in our study. Only Ballycastle has a lower % (52%) of visitors originating from within a 15 minute drive.

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.

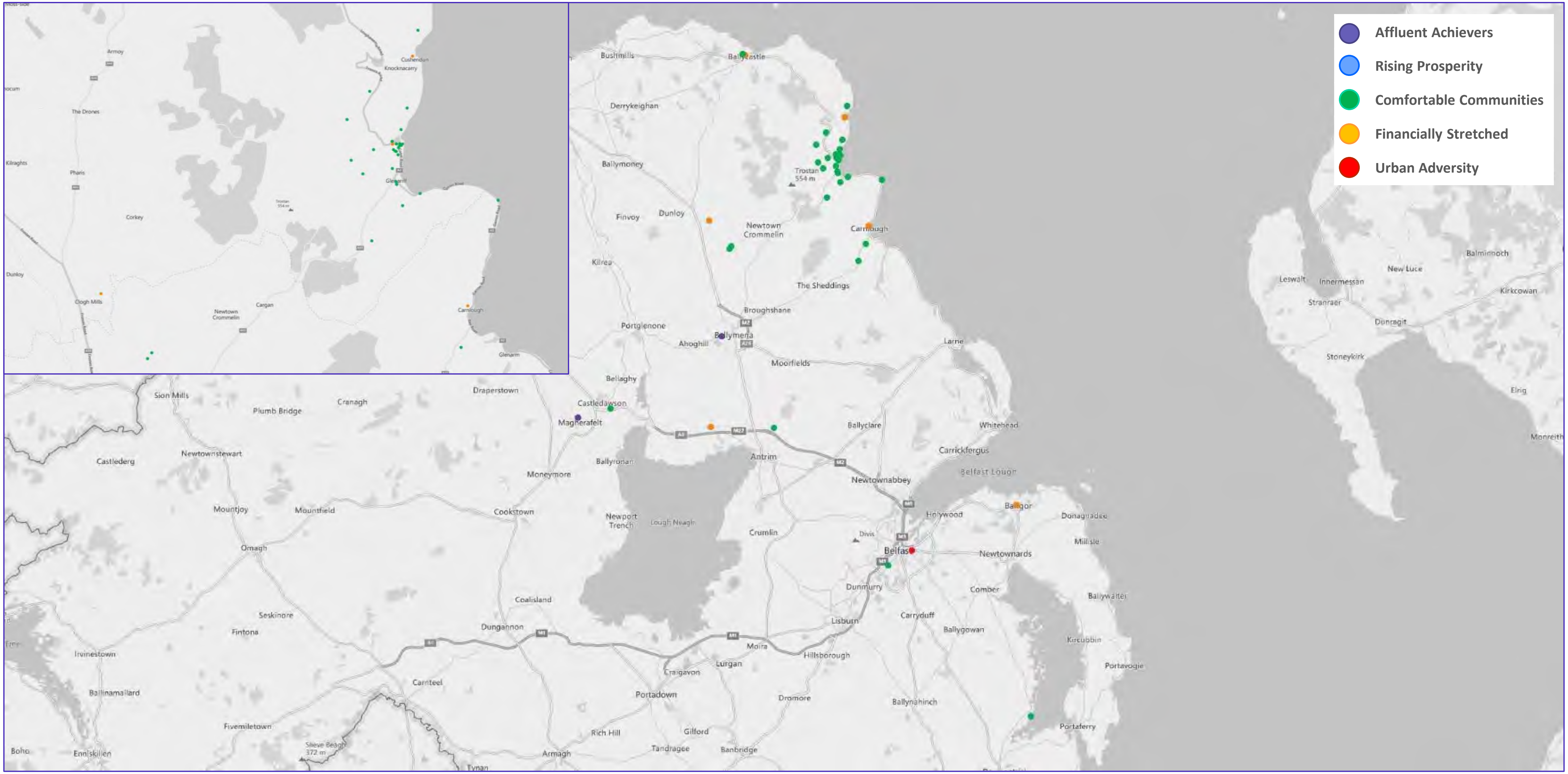


Average
16 mins
10 mins



ACORN Mapping

Causeway Coast & Glens Borough Council

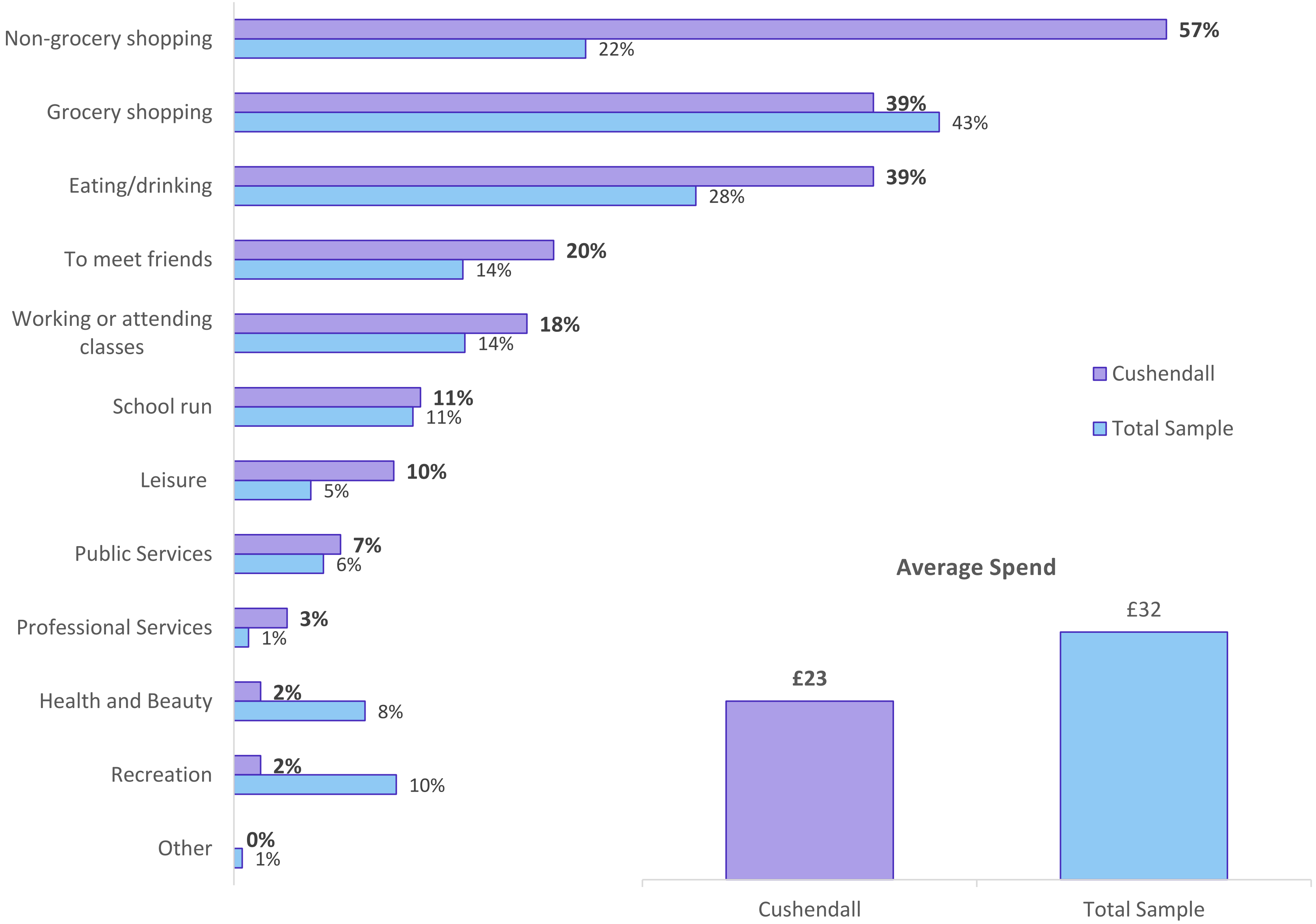


Empowering accurate consumer understanding

card

Why are people going to the town centres?

Causeway Coast & Glens Borough Council



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.

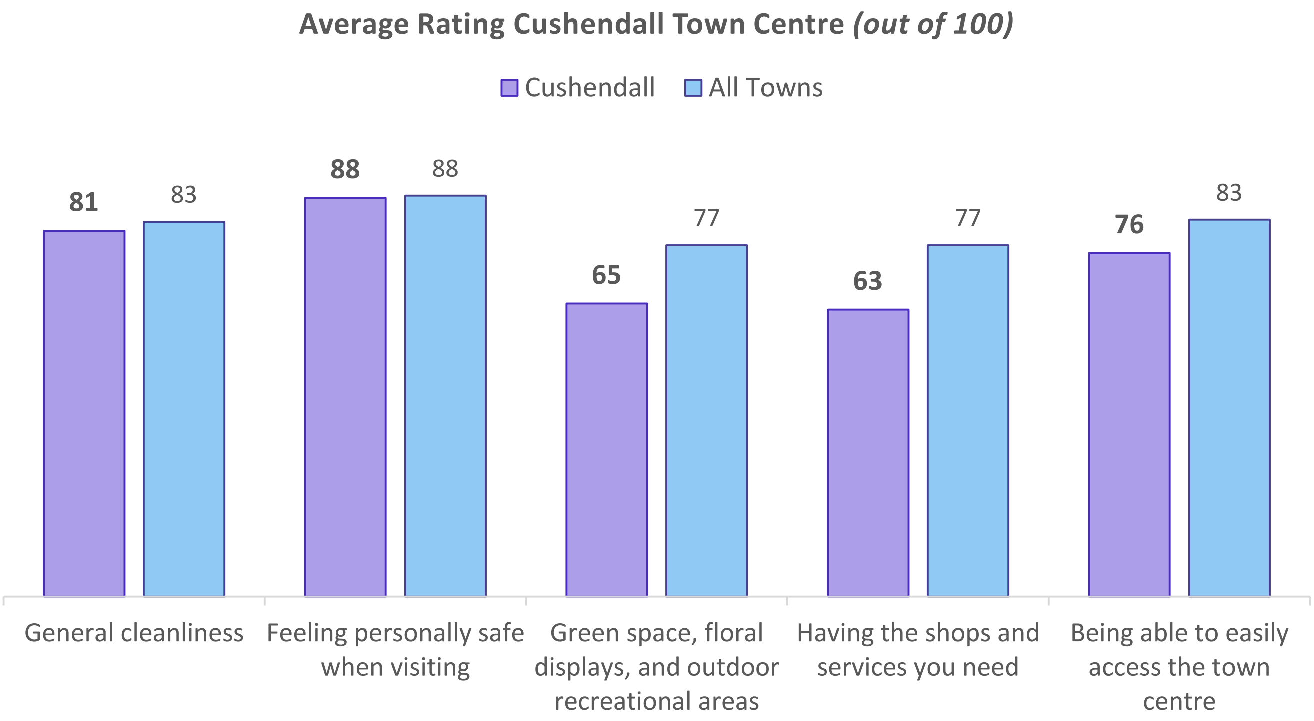
Those from within 15 mins typically have the lowest average dwell (2.6 hours) but highest average spend (£26).

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.

What is your opinion of the town centre?

	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**									



- 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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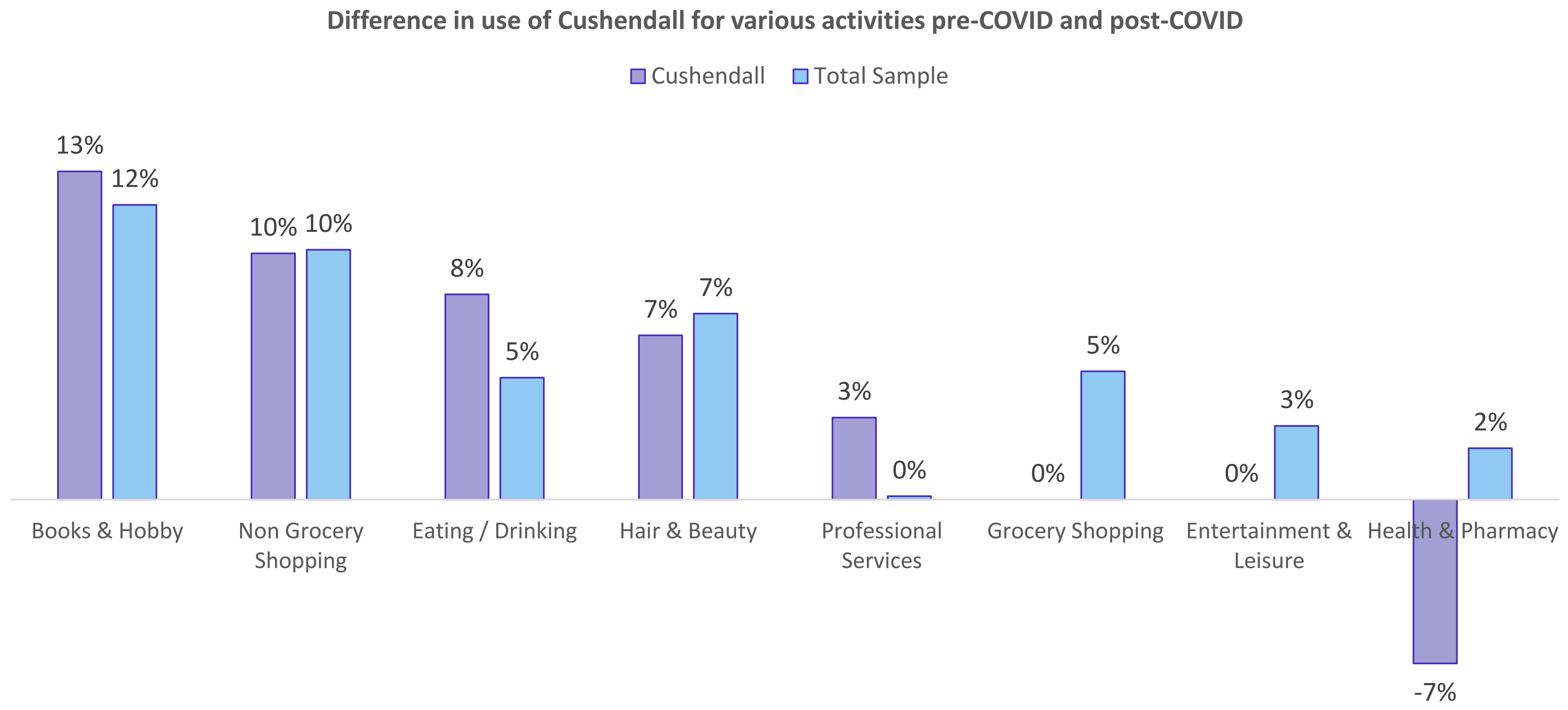

Cushendall TC Use	Books & Hobby	Non Grocery Shopping	Eating / Drinking	Hair & Beauty	Professional Services	Grocery Shopping	Entertainment & Leisure	Health & Pharmacy
Before COVID	36.1%	57.4%	73.8%	42.6%	3.3%	60.7%	6.6%	59.0%
After COVID	49.2%	67.2%	82.0%	49.2%	6.6%	60.7%	6.6%	52.5%
Difference	**+13.1%**	**+9.8%**	**+8.2%**	**+6.6%**	**+3.3%**	**0.0%**	**0.0%**	**-6.6%**

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.

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

Trader Profile

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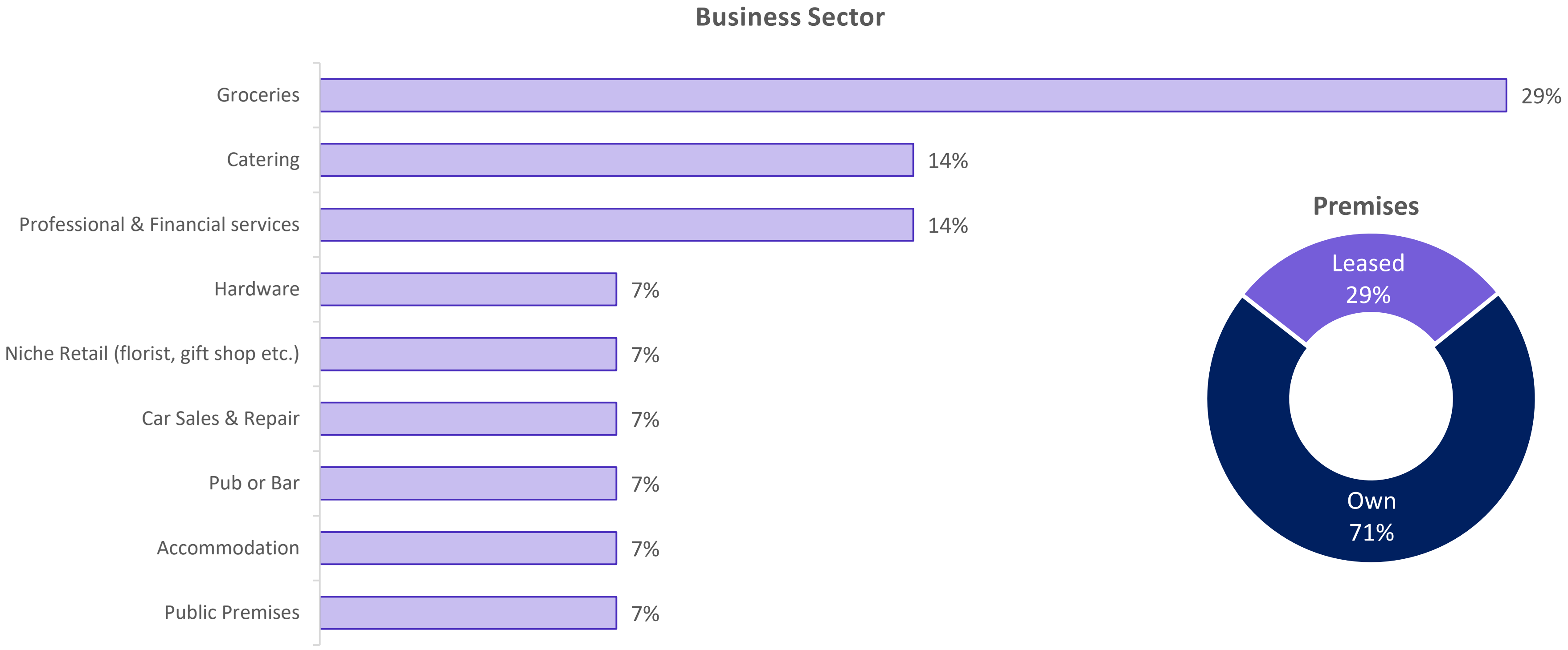
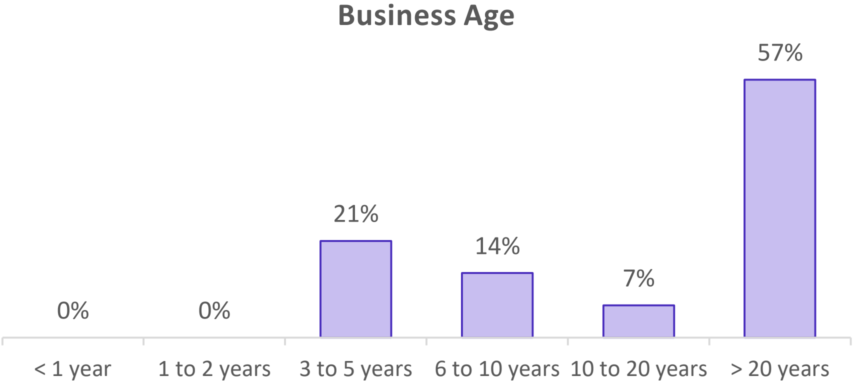
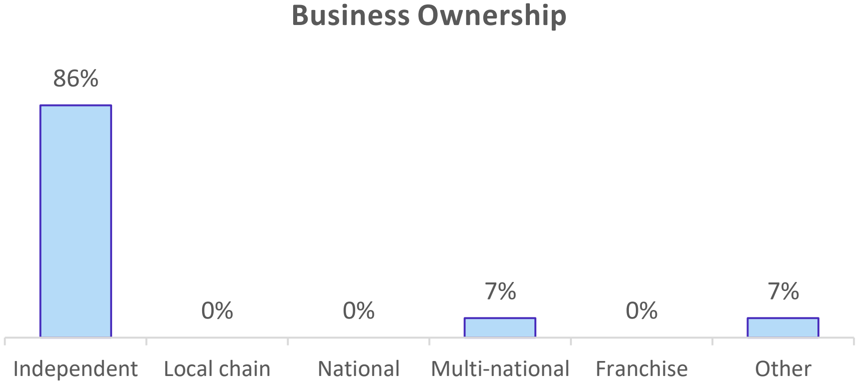




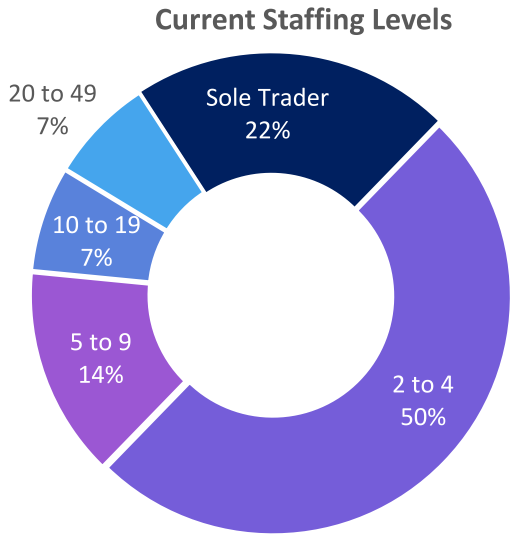


The Cushendall trader profile is dominated by smaller and older, mature businesses.

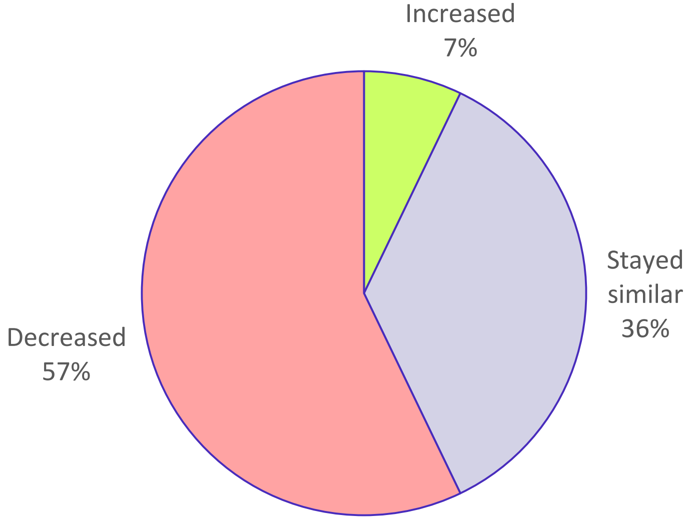
86% of traders have less than 10 employees, the highest across the borough, and the average business age is also the oldest in the borough at 36.8 years (average = 20.0).

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.

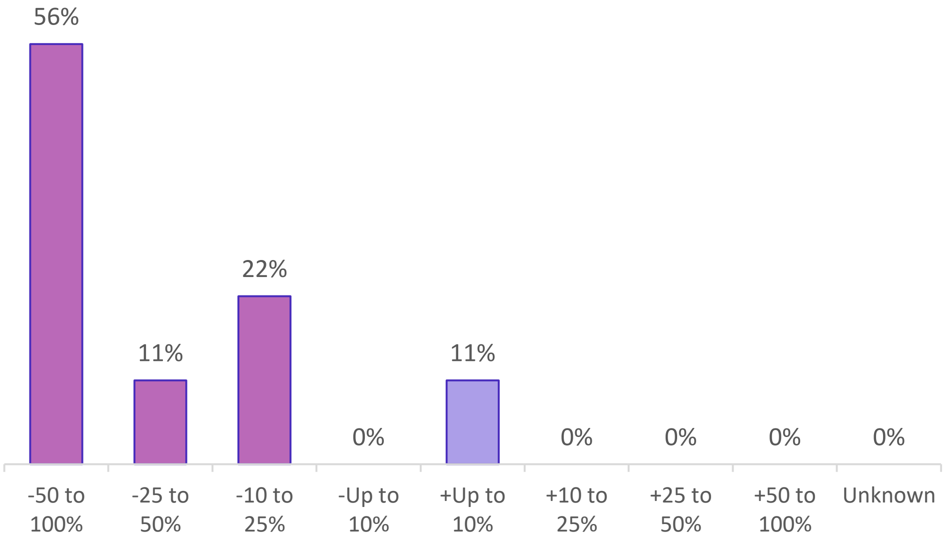
Cushendall also has the highest rate of 'sole traders' across our borough sample.



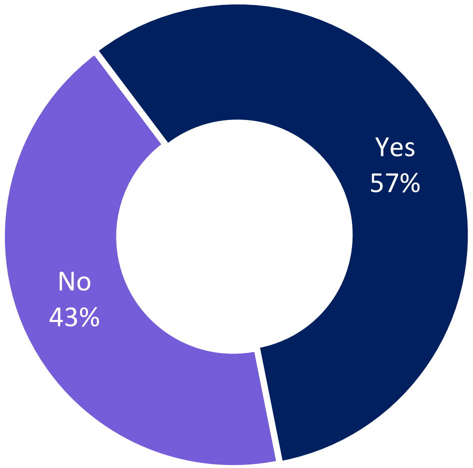
Impact on Turnover



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	**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%

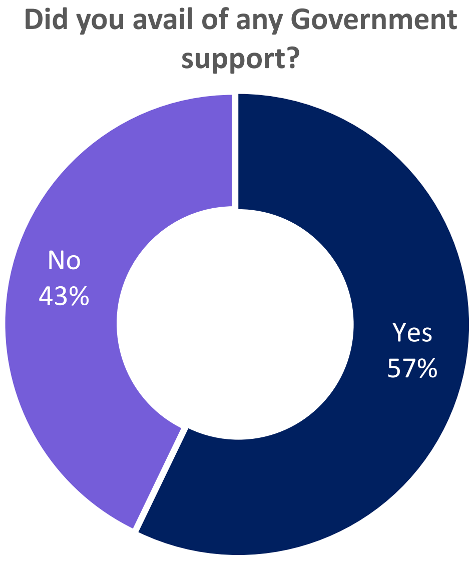
57% of Cushendall traders noted a decrease in their income over the course of the COVID crisis, in line with a borough average of 59%. However, only 7% noted an increase, matching Portstewart as the lowest rate across the borough.

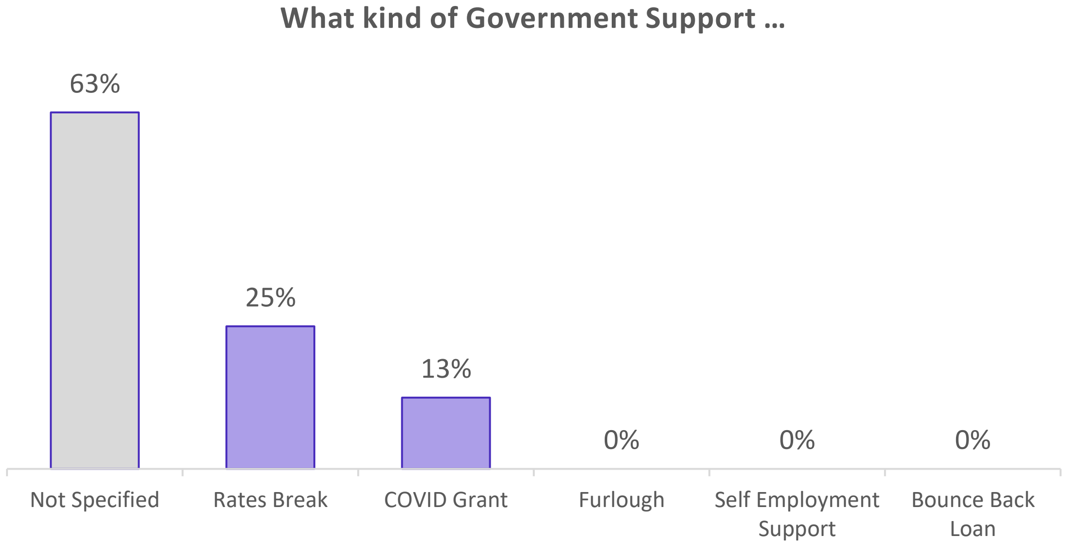
Within those that saw a decrease, over half (58%) saw it decrease by over 50%.

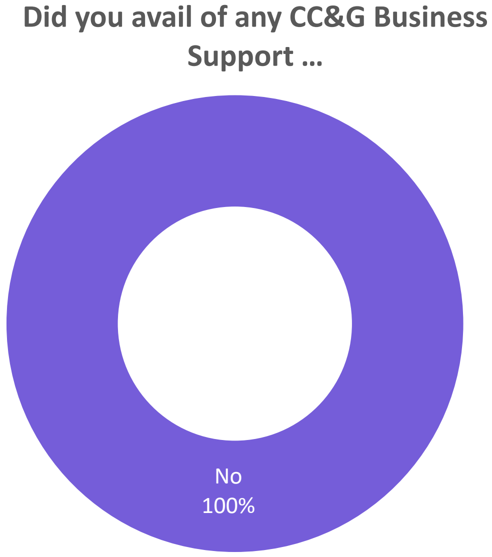
No traders saw an opportunity to pivot their business activities over the course of lockdown. It may be that as a more rural, and isolated part of the borough the businesses are more entrenched in providing their services in a 'traditional' manner, a point possibly reinforced by the relatively high age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

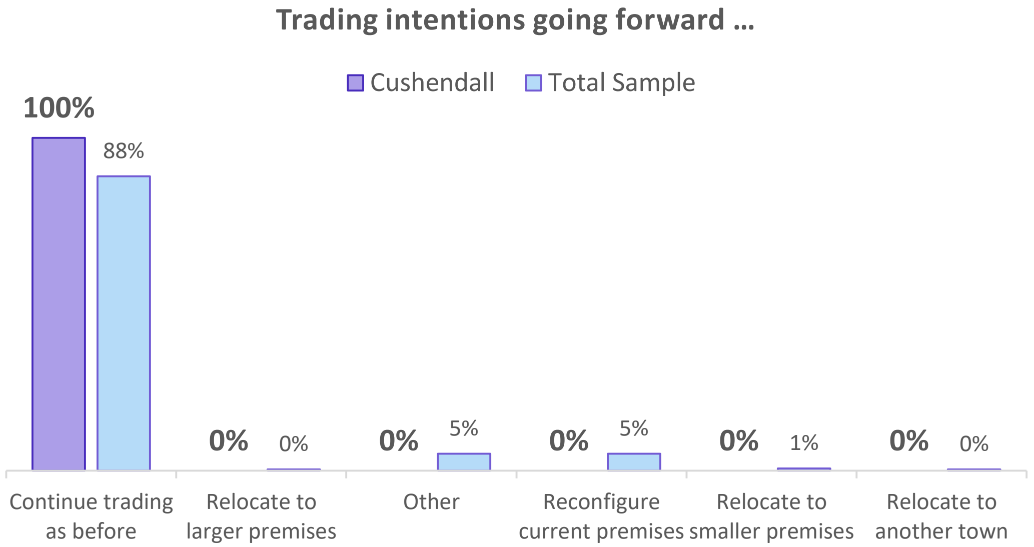
The Council wish to investigate whether there is a deficit in digital capability within the town.

Causeway Coast & Glens Borough Council









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.

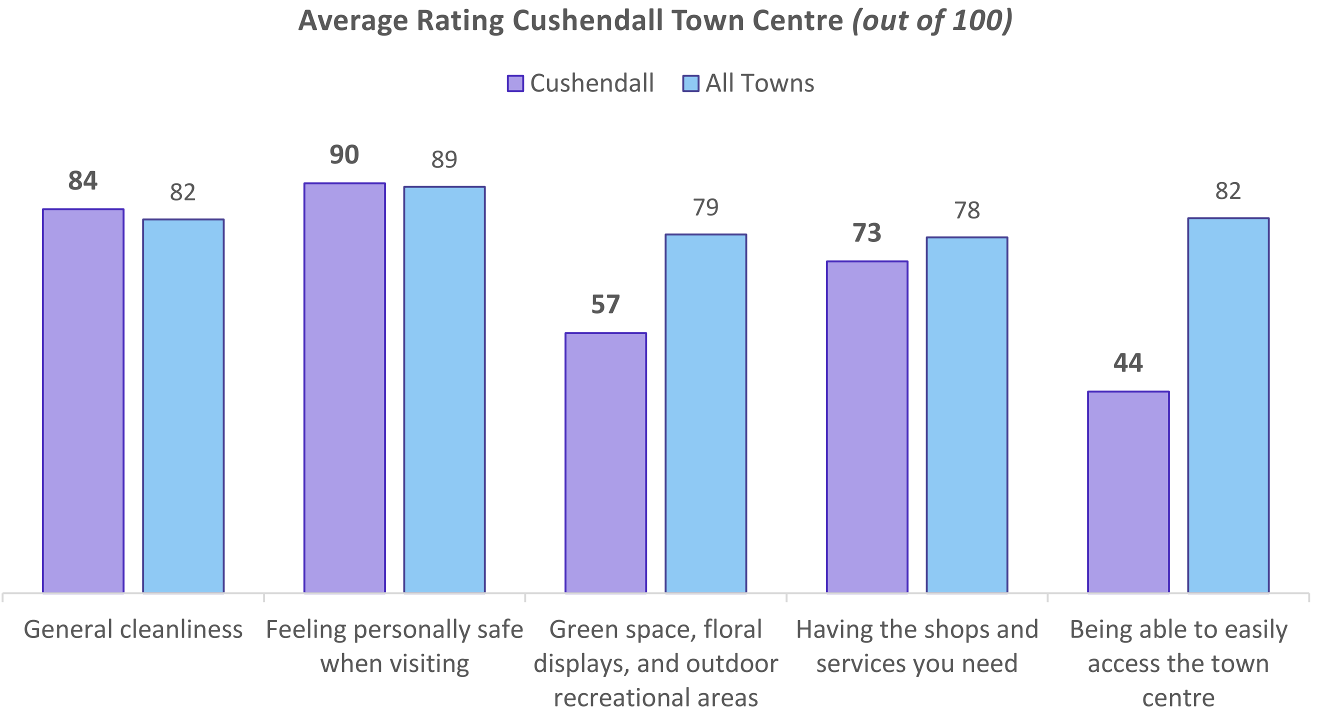
Unfortunately traders were not willing to provide much information on which government supports they had decided to utilise.

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.

What is your opinion of the town centre?

Causeway Coast & Glens Borough Council

	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**									



- 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.

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.

Appendix 2 – ACORN & Sentiment Explained

Annex 2 – ACORN & Sentiment Explained

Causeway Coast & Glens Borough Council

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

Appendix 3 – Results Expanded

Causeway Coast & Glens Borough Council

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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Causeway Coast & Glens Borough Council

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Garvagh

August 2021

card
Client Analysis & Relationship Development

Introduction

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.

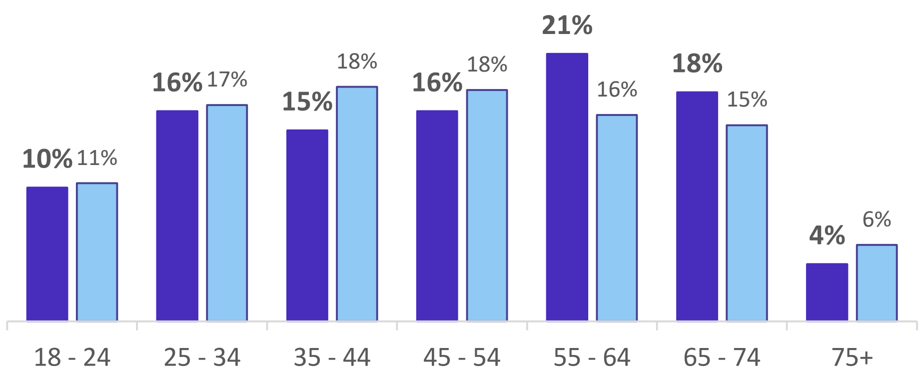
The following report is a sub-report seeking to provide a summarised snapshot of our results, emanating from the Causeway Coast & Glens visitor & traders sampling, at a **local** level. This particular sub-report provides the snapshot for sampling that took place in **Garvagh**;

- The visitor results are based on an overall sample of **68** respondents;
- The trader's results are based on a sample of **19** traders within the town centre.

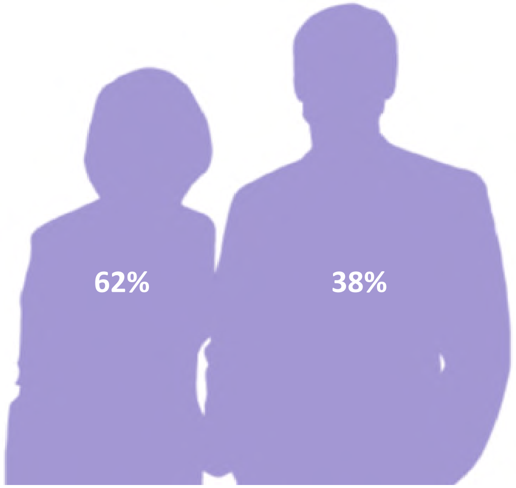
Sampling for visitors and traders in Garvagh took place between 27th March and 13th April 2021. It is important to note that during this period, there were a range of continuing restrictions in place owing to the ongoing Coronavirus pandemic. The specific restrictions at the time are outlined in Appendix 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

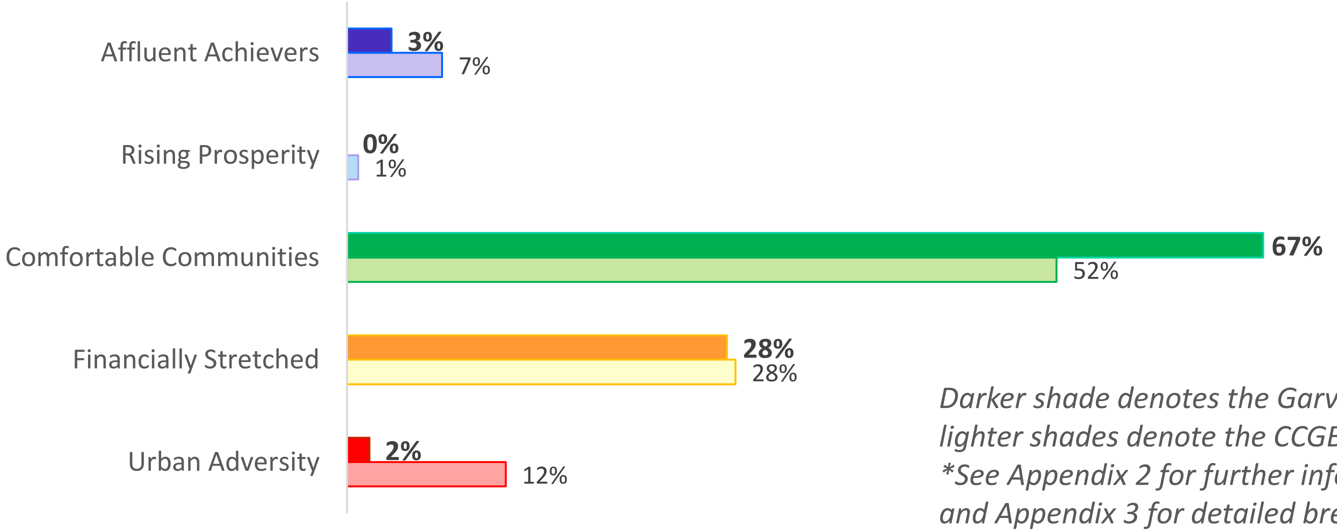
Respondents by Age Group



Respondent Gender Split



Garvagh ACORN Profile* vs Overall Sample



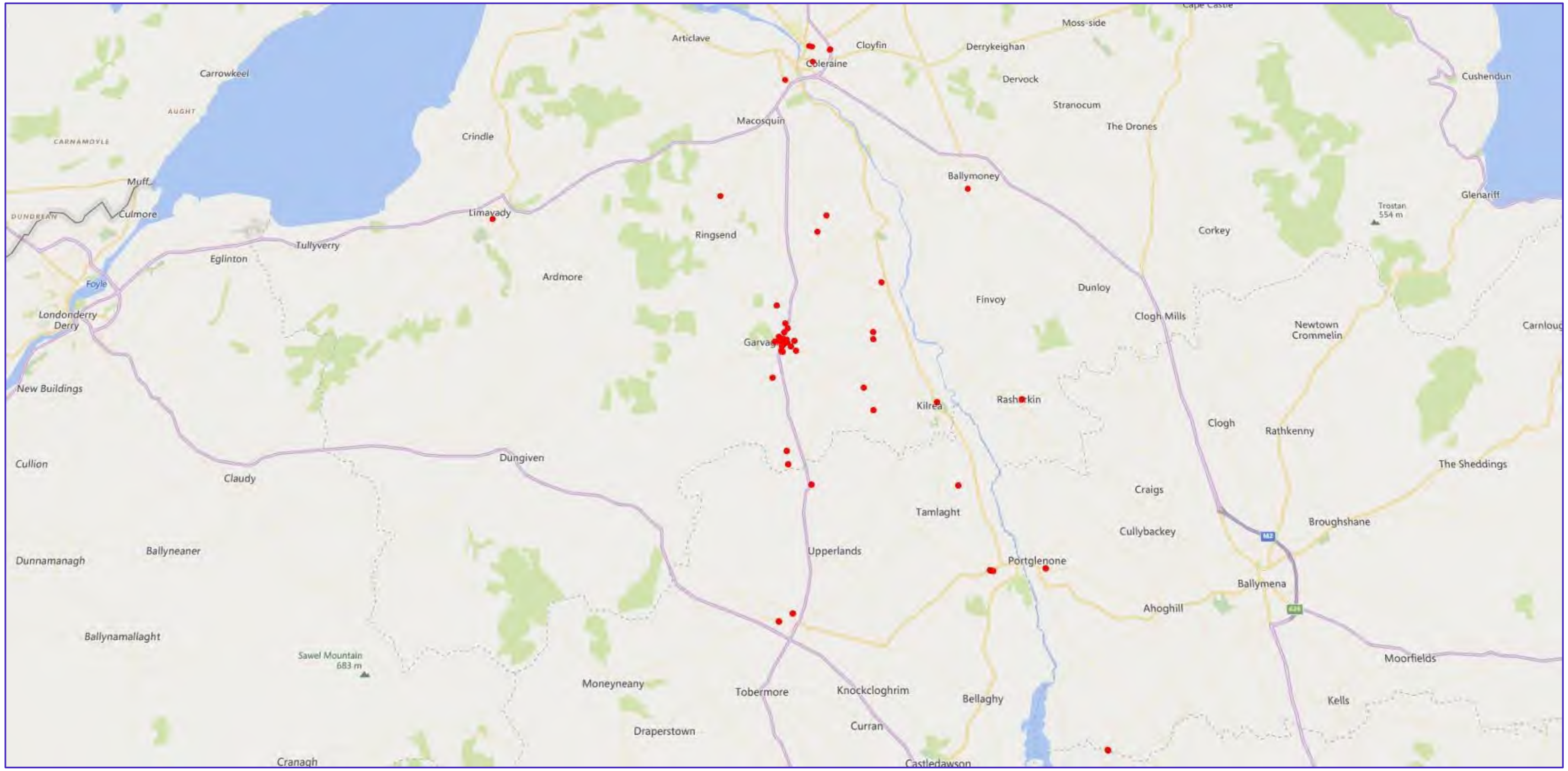
Darker shade denotes the Garvagh respondent profile while lighter shades denote the CCGBC baseline.
**See Appendix 2 for further information on ACORN classifications and Appendix 3 for detailed breakdown*

Within our Garvagh sample, female visitors saw significantly greater representation than males and the age structure was skewed towards those approaching or in early retirement.

Consistent with many of the smaller towns in the borough, the ACORN profile is dominated by the 'Comfortable Communities' category, and the 'Countryside Communities' sub-category – reflective of the area's rural nature.

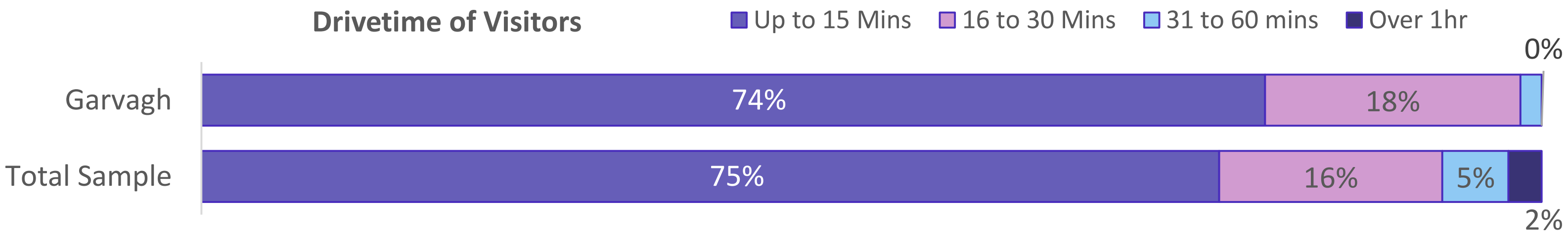
There was however significantly greater representation of the 'Comfortable Seniors' sub-category (8.2%) compared to our borough wide sample (1.4%).

Causeway Coast & Glens Borough Council

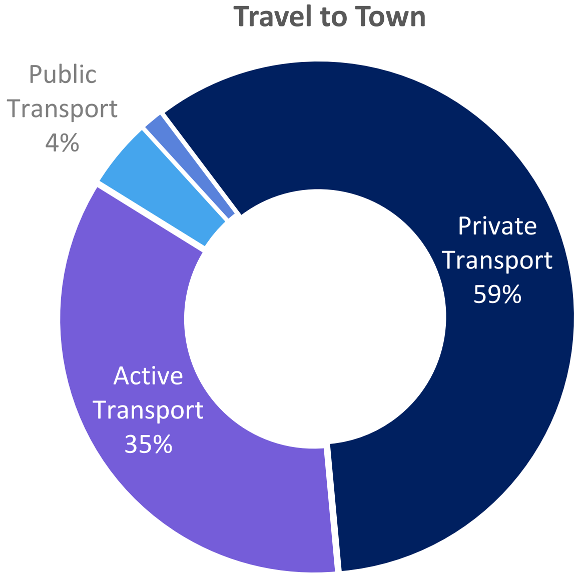


Similar to other smaller towns like Kilrea, the vast majority of sampled visitors originated from within the town themselves, with some small draw from the immediate surrounding countryside.

As most were from the very immediate area, the rate of use of 'active' transport was therefore higher.



Average
7 mins
10 mins



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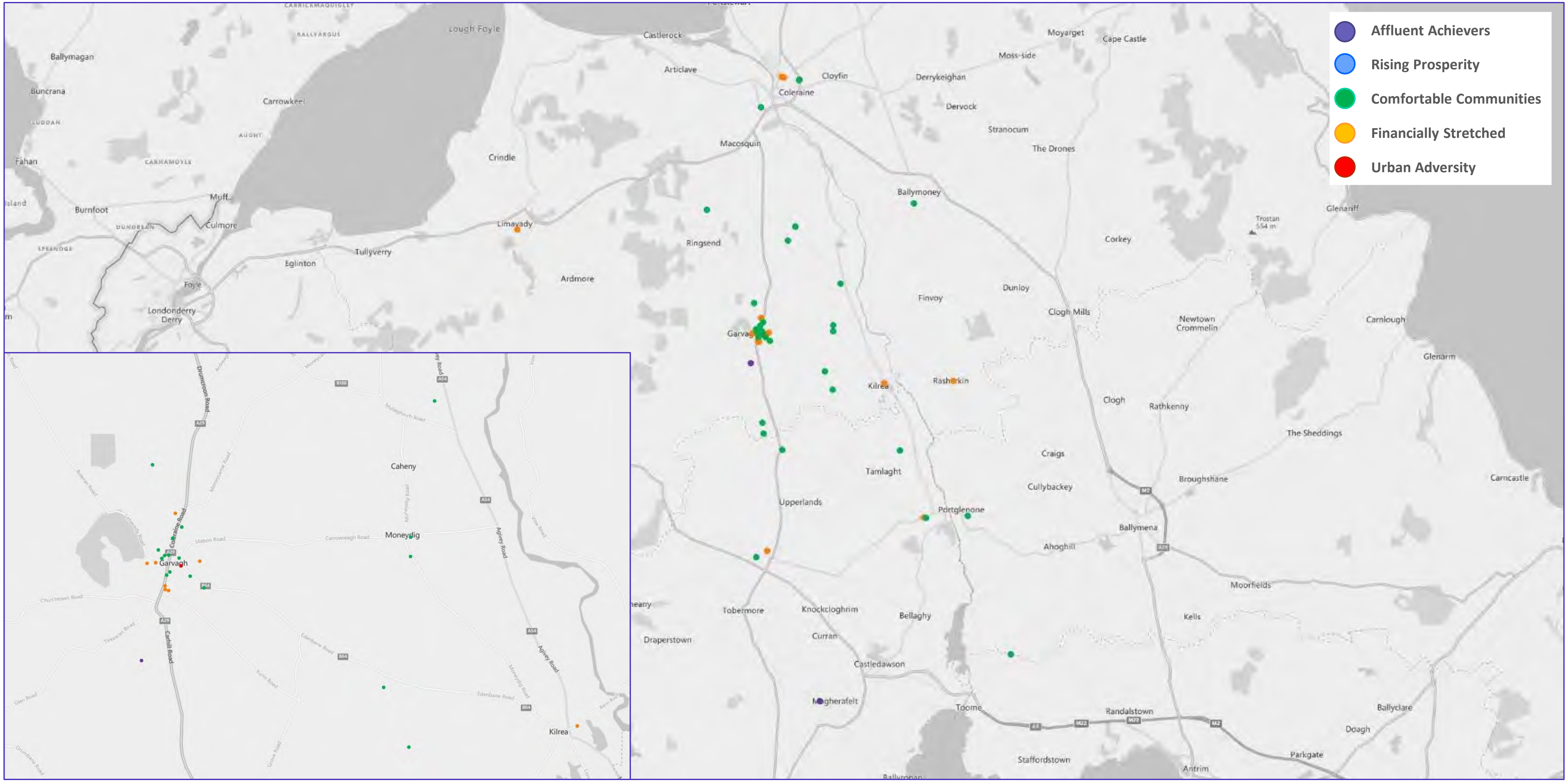
ACORN Mapping

Causeway Coast & Glens Borough Council



Empowering accurate consumer understanding

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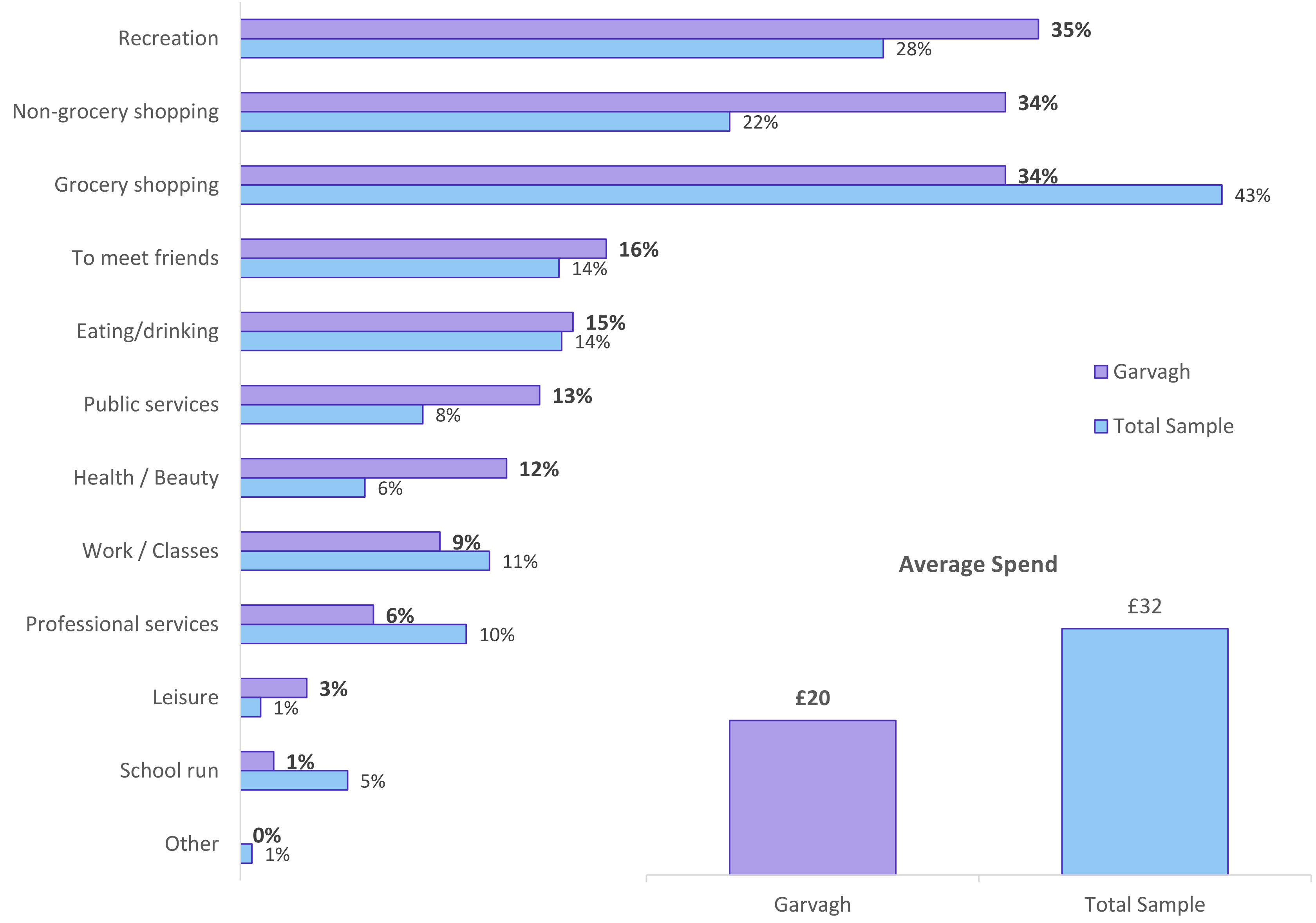
Why are people going to the town centres?



Location	Average Dwell Time	Average Spend per Minute
Garvagh	96 mins	£0.20
Total Sample	109 mins	£0.29

For a town of its size, the level of usage for non-grocery is shopping is somewhat surprising.

Usage of Garvagh is equally balanced between recreational use *(recreation, meet friends, eating/drinking, leisure sum = 68%)* and for shopping use *(grocery & non-grocery = 68%).*

Garvagh Forest is potentially a key contributor to the high rate of recreational visits.

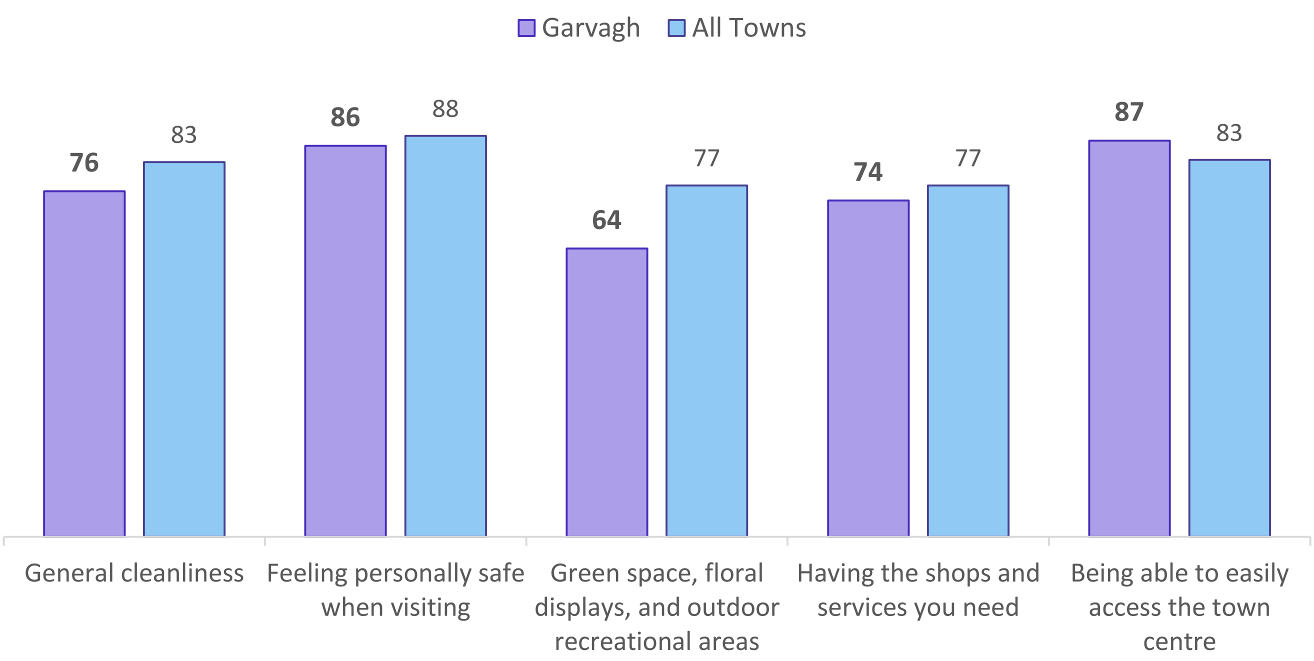
For this reason average spend, as well as average spend by dwell time, is below the borough average.

What is your opinion of the town centre?

Causeway Coast & Glens Borough Council

	Garvagh Visitors									Score: +51
	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%	7%	4%	18%	1%	51%	6%	6%
Calculation	Total of 'Like' (**65**) – Total of Dislike (**13**) = **+51**									

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



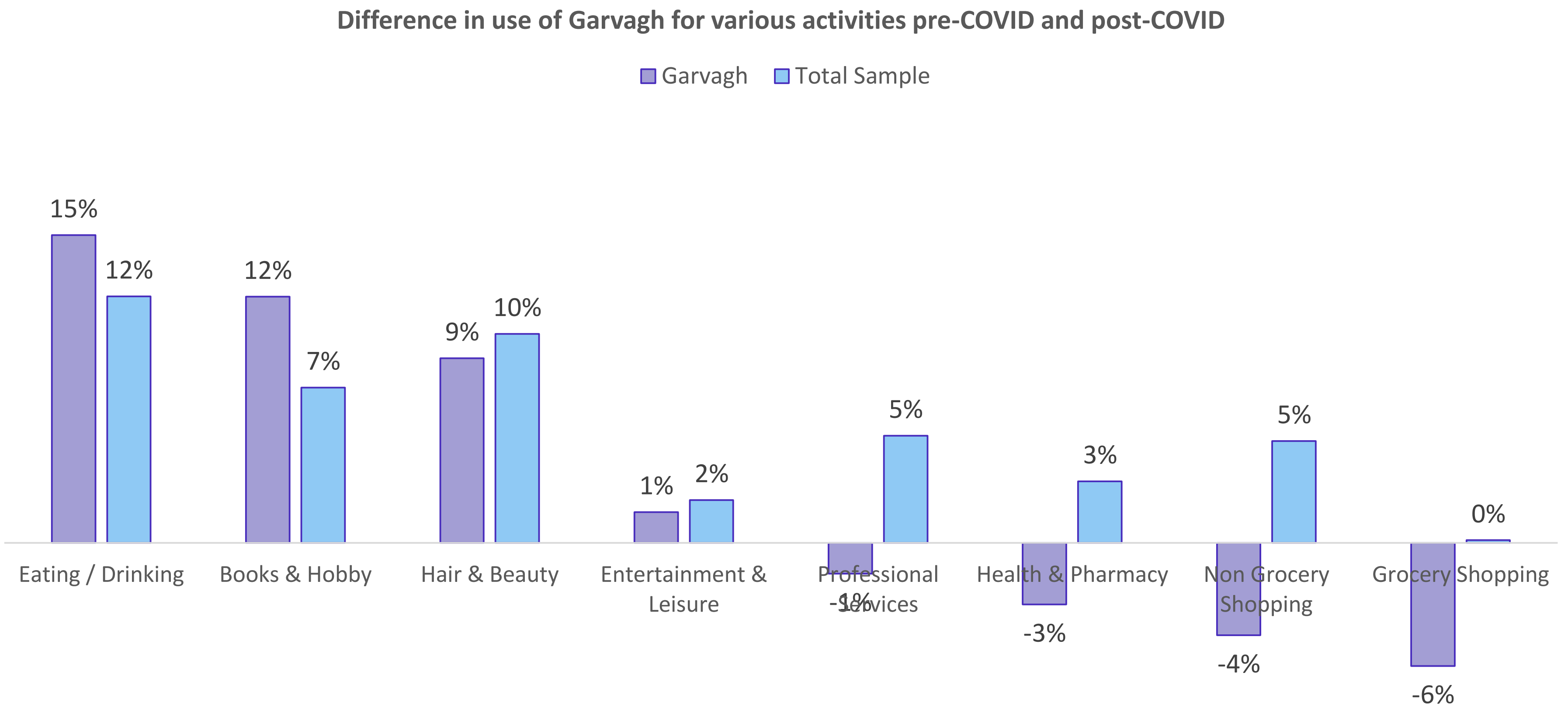
- Above is the combined Sentiment Score for Garvagh. The rationale for Sentiment Scoring it outlined in Appendix 2.
- In keeping with other towns, the sentiment score for Garvagh is generally positive but in this case does sit relatively low (ranked 10^{th}) compared to the other towns sampled.
- Around 2 thirds (64%) of visitors do 'Like' the town. However 4 out of the 5 ratings factors displayed in the graph performed worse than the borough average. Green space being rated particularly low.

"It's went downhill in recent years. More drinking in the street & litter"

"Very little to do. Need a modern playpark for kids & mothers"

"A lot of it is derelict"

Pre & Post-COVID Use



Garvagh TC Use	Eating / Drinking	Books & Hobby	Hair & Beauty	Entertainment & Leisure	Professional Services	Health & Pharmacy	Non Grocery Shopping	Grocery Shopping
Before COVID	55.9%	25.0%	44.1%	8.8%	1.5%	36.8%	33.8%	42.6%
After COVID	70.6%	36.8%	52.9%	10.3%	0.0%	33.8%	29.4%	36.8%
Difference	**+14.7%**	**+11.8%**	**+8.8%**	**+1.5%**	**-1.5%**	**-2.9%**	**-4.4%**	**-5.9%**

It appears that usage of Garvagh for recreational purposes, as identified on page 7, looks like it is only going to be furthered post-restrictions.

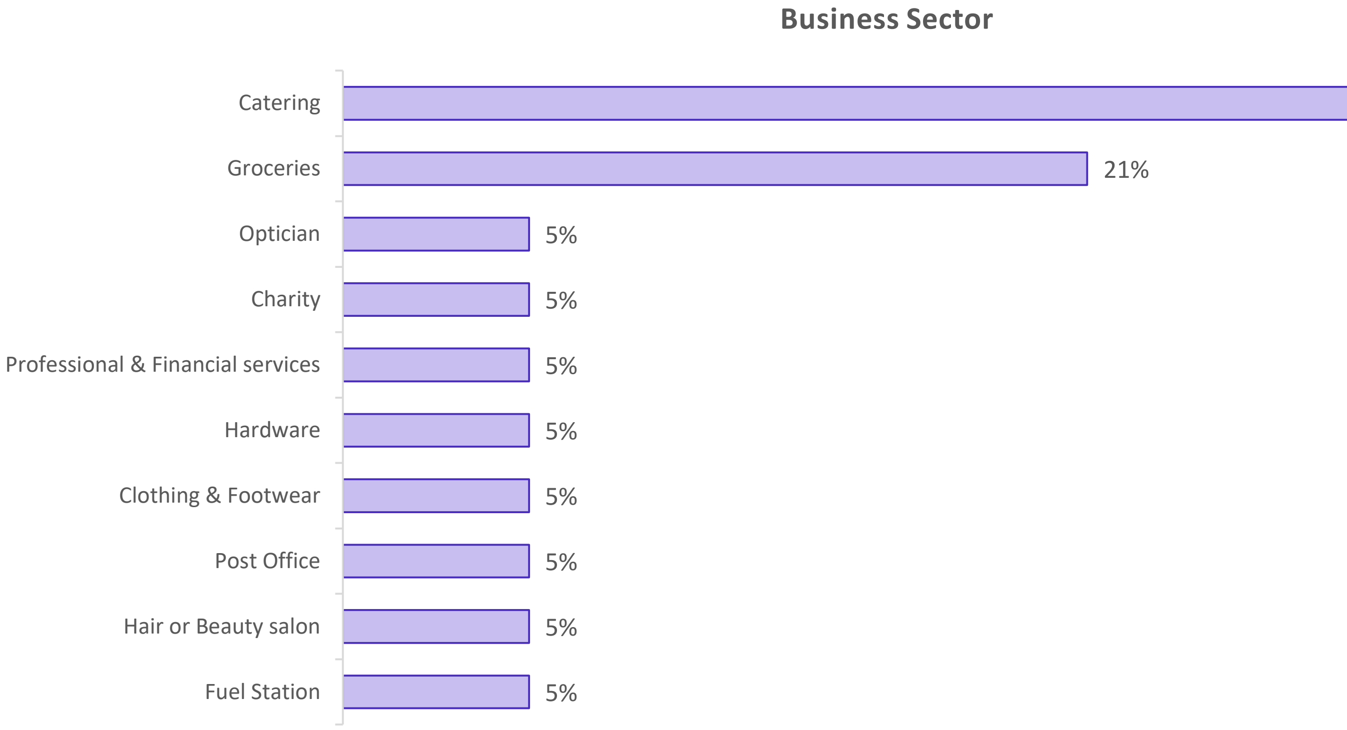
That shopping (both grocery and non-grocery) appears to potentially lose out suggests that a significant number of those currently shopping in town are only doing so as a result of the restrictions in place.

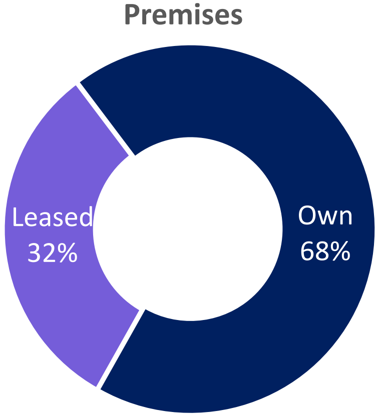
What prevents you from visiting the town centre more?	Garvagh	Total Sample
Congestion & Traffic	10%	19%
Parking	3%	15%
Habit	13%	8%
Unappealing Retailers	12%	13%
Evening Economy Options	9%	7%
Visually Unappealing Area	22%	7%
Cafes & Restaurant Offer	15%	7%
Safety	3%	3%
None of these	**47%**	**52%**

Traders

Trader Profile

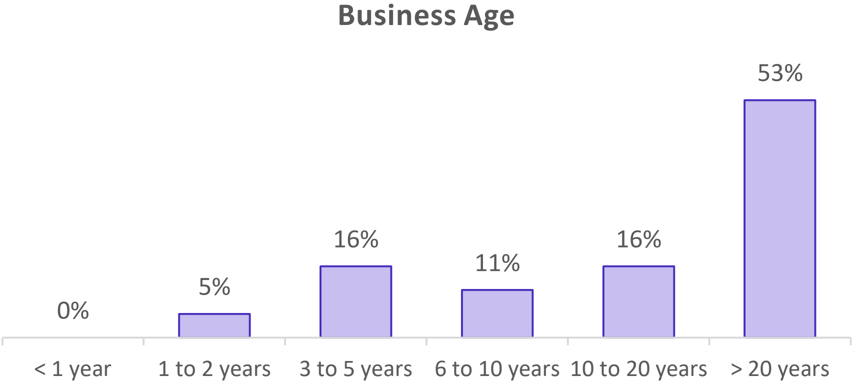
Causeway Coast & Glens Borough Council

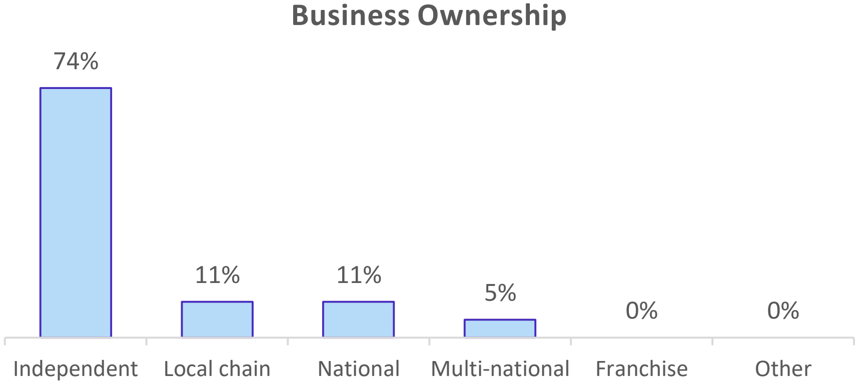


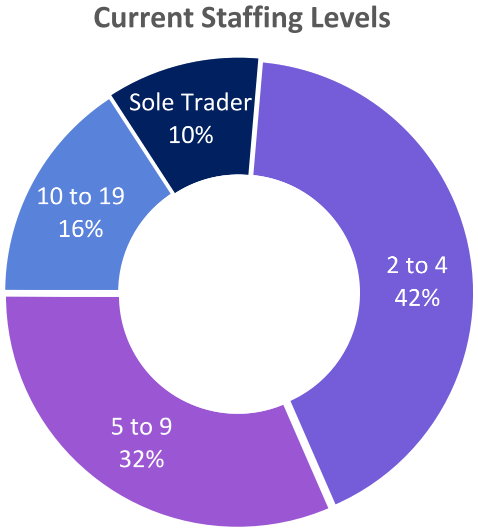


We tend to see a higher rate of owned premises vs leased in the more rural locations and Garvagh is no exception. With an ownership rate of 68%, this is well above our overall average of 51%.

Business age is also amongst the oldest in the borough with 68% over 10 years old – joint highest in the borough with Ballycastle.







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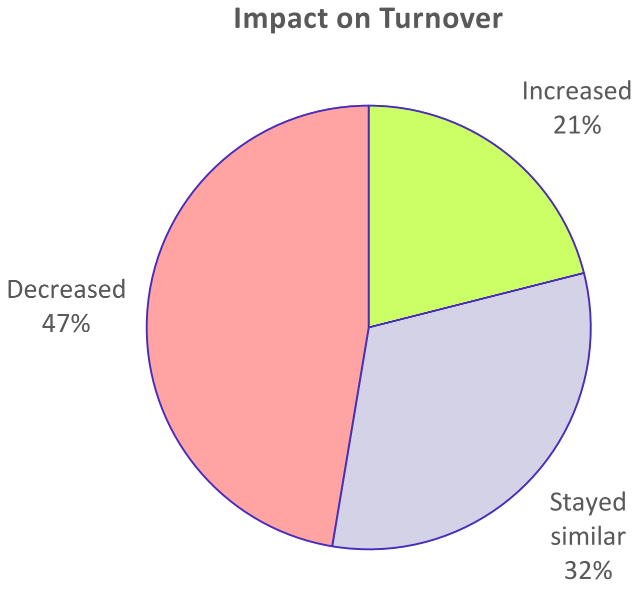
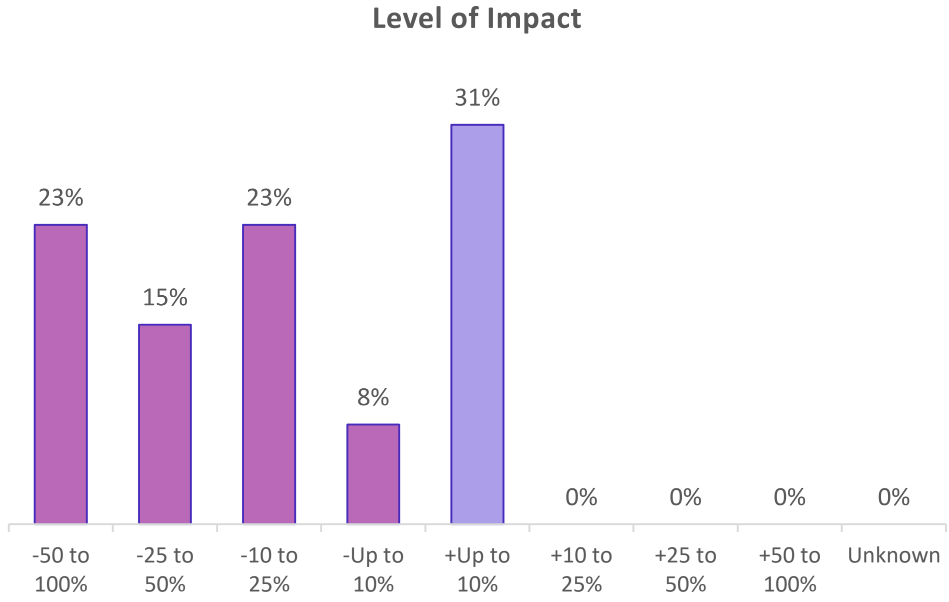
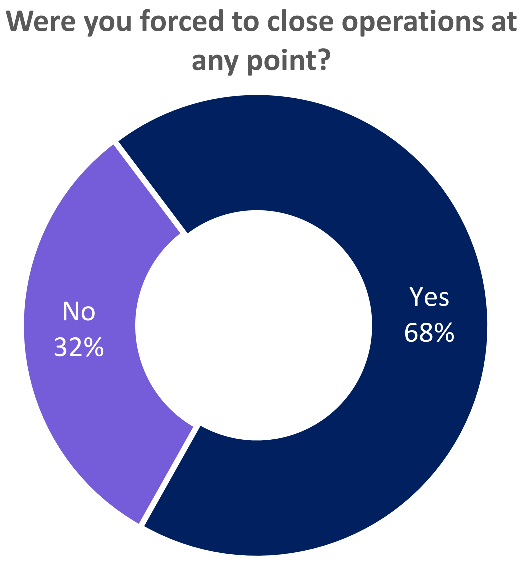






Did the business pivot to provide alternative services during the COVID lockdown …	%
No	**26%**
Yes	**74%**
Of those who said yes …	
Online selling & delivery	43%
Click & collect	43%
New services tailored to new circumstances	29%
New products tailored to new circumstances	21%

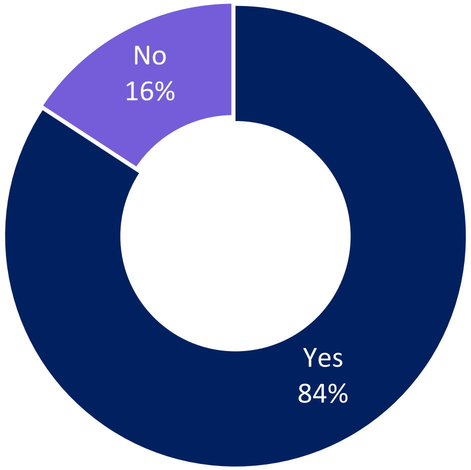
Many of the businesses in Garvagh did suffer as a result of the COVID-19 crisis. However, in the same manner as other towns that do not rely on external visitors and tourists, it was slightly more insulated in this respect.

47% stating their income decreased is the 4th lowest of the 12 towns, and well below the average of 59%.

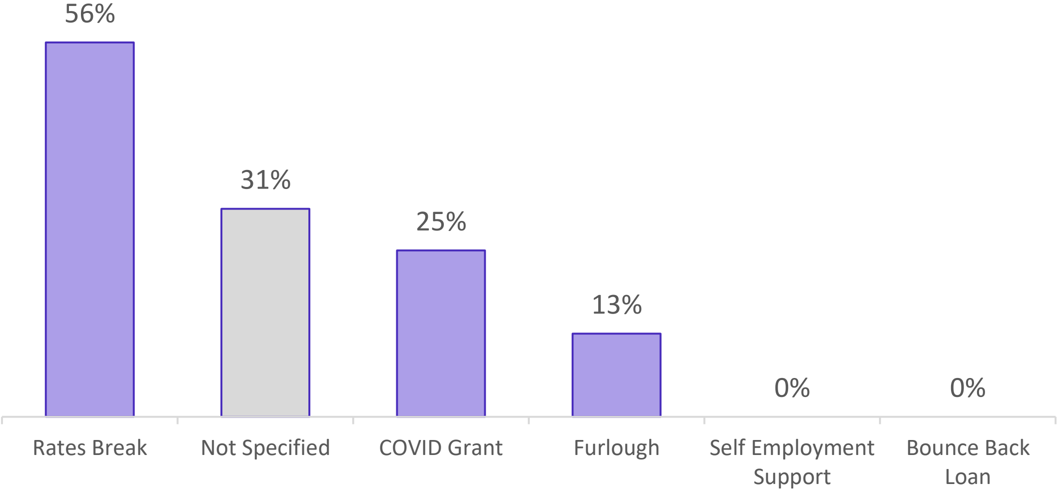
The rate of closure, however, due to the crisis was above the average for the 12 towns of 58%.

COVID Impact continued

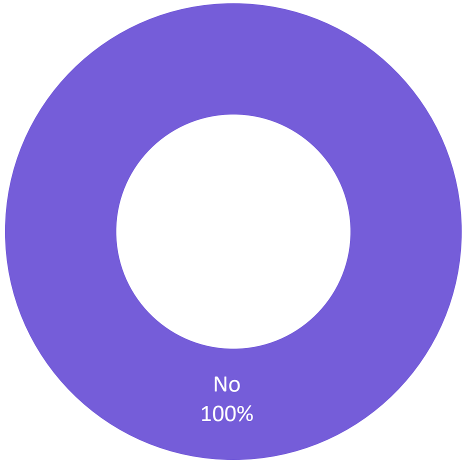
Did you avail of any Government support?



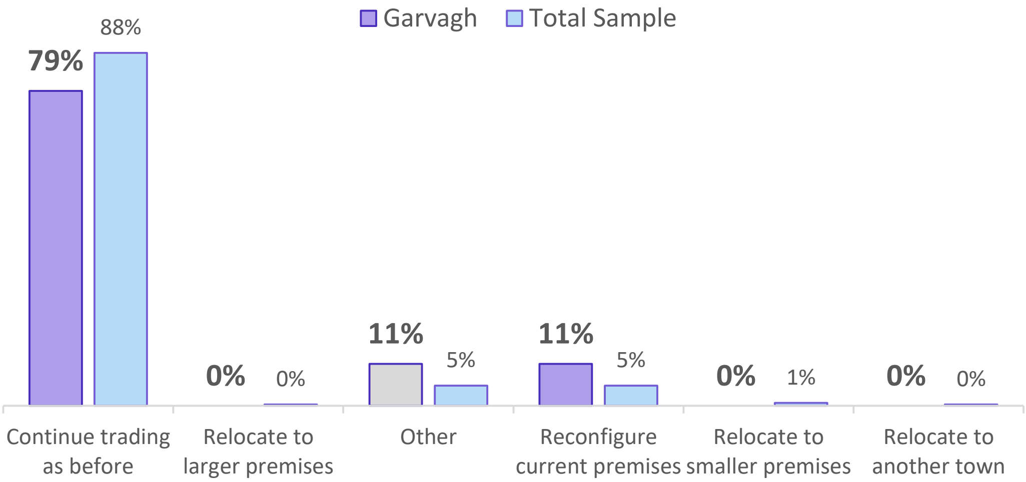
What kind of Government Support …



Did you avail of any CC&G Business Support …



Trading intentions going forward …



Consistent with other towns, uptake of government support during the crisis was high while uptake of support offered by the council was low.

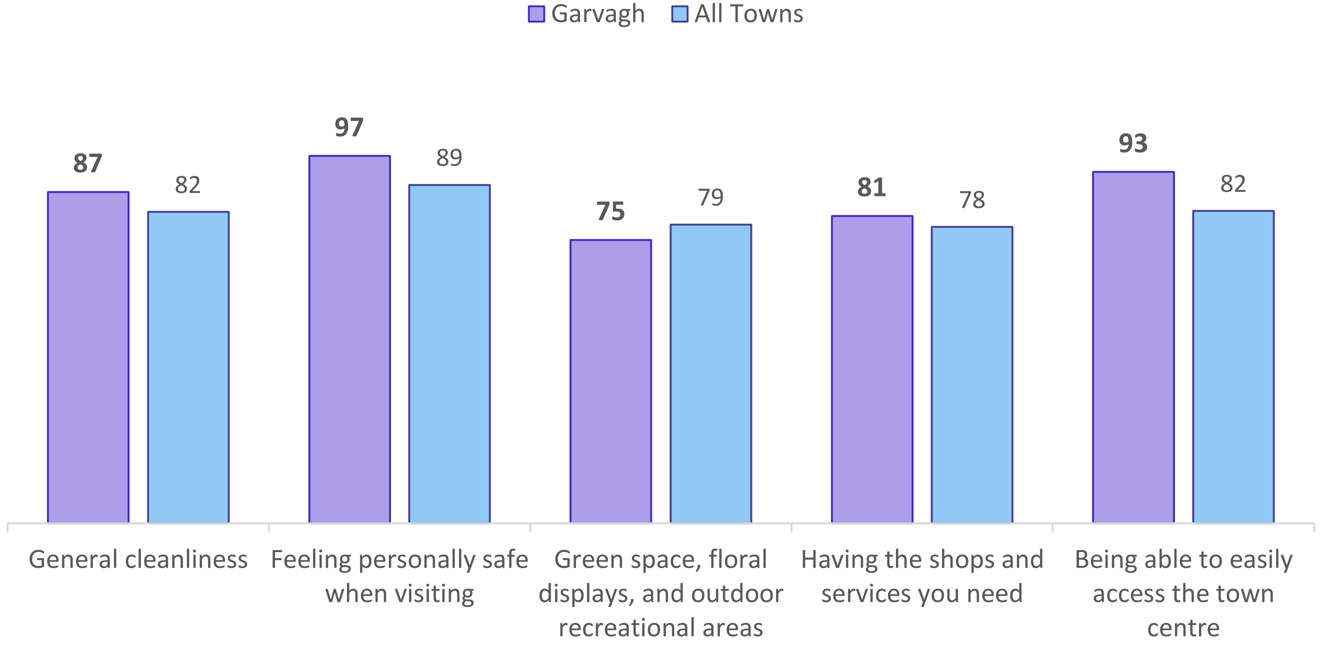
The high uptake of government support would appear to contradict slightly with the relatively lower rate of those stating their income had decreased in the previous page. 84% utilising government support is the highest of the 12 towns sampled.

It is entirely possible that the uptake of government support was the reason many of these businesses didn't report a reduction in income.

What is your opinion of the town centre?

	Garvagh Traders				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%	0%	0%	5%	26%	5%	53%	0%	11%
Calculation	Total of ‘Like’ (**68**) – Total of Dislike (**0**) = **Garvagh Traders Score = +68**									

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



- Garvagh is one of a small number of towns in our sample where the trader sentiment actually eclipses that of the visitors.
- The rate of trader respondents who ‘Like’ the town is very similar to visitors, however there were no recorded instances of traders ‘Disliking’ the town in our sample.
- The trader ratings of Garvagh town centre follow a very similar trend to the visitor’s, with green space and availability of shops and services being the lowest rated aspects in both instances.

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 Garvagh a sample size of 68 was achieved which provides us with a margin of error of +/- 11.9% @ 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 – 11.9% 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

Annex 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.

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	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.
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			Career Climbers	Younger singles and couples, some with young children, living in more urban locations.
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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

Appendix 3 – Results Expanded

Annex 3 – Sentiment Scoring

Causeway Coast & Glens Borough Council

Detailed ACORN Results for Garvagh Visitors

No.	ACORN Group	Garvagh	Total Sample	Sub-Category		Garvagh	Total Sample
1	Affluent Achievers	**3%**	7%	A	Lavish Lifestyles	**0%**	0%
				B	Executive Wealth	**3.3%**	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	**67%**	52%	F	Countryside Communities	**55.7%**	45.6%
				G	Successful Suburbs	**3.3%**	2.3%
				H	Steady Neighbourhoods	**0%**	1.6%
				I	Comfortable Seniors	**8.2%**	1.4%
				J	Starting Out	**0%**	1.1%
4	Financially Stretched	**28%**	28%	K	Student Life	**0%**	0.4%
				L	Modest Means	**13.1%**	8.4%
				M	Striving Families	**6.6%**	12.1%
				N	Poorer Pensioners	**8.2%**	7.7%
5	Urban Adversity	**2%**	12%	O	Young Hardship	**0%**	7.1%
				P	Struggling Estates	**1.6%**	3.0%
				Q	Difficult Circumstances	**0%**	1.5%

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Causeway Coast & Glens Borough Council

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Kilrea

August 2021

card
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.

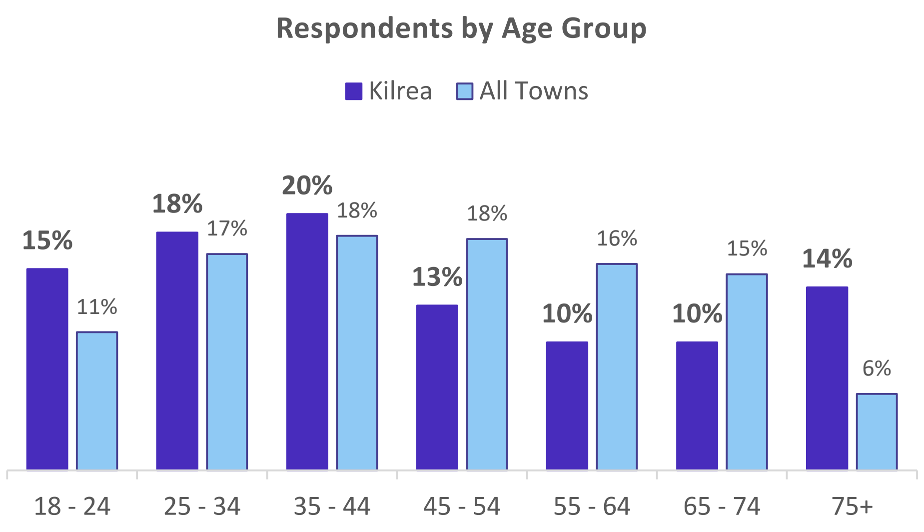
The following report is a sub-report seeking to provide a summarised snapshot of our results, emanating from the Causeway Coast & Glens visitor & traders sampling, at a **local** level. This particular sub-report provides the snapshot for sampling that took place in Kilrea;

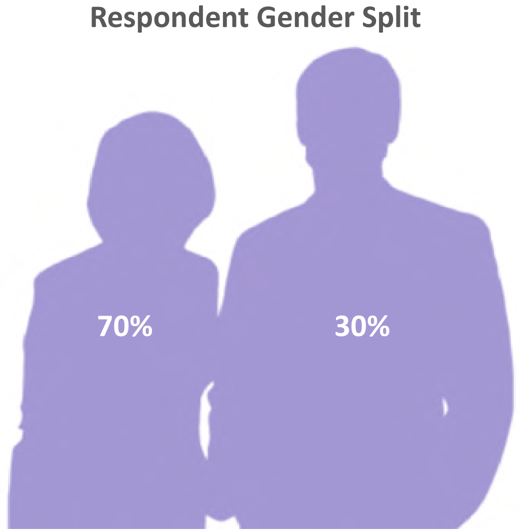
- The visitor results are based on an overall sample of 71 respondents;
- The trader's results are based on a sample of 23 traders within the town centre.

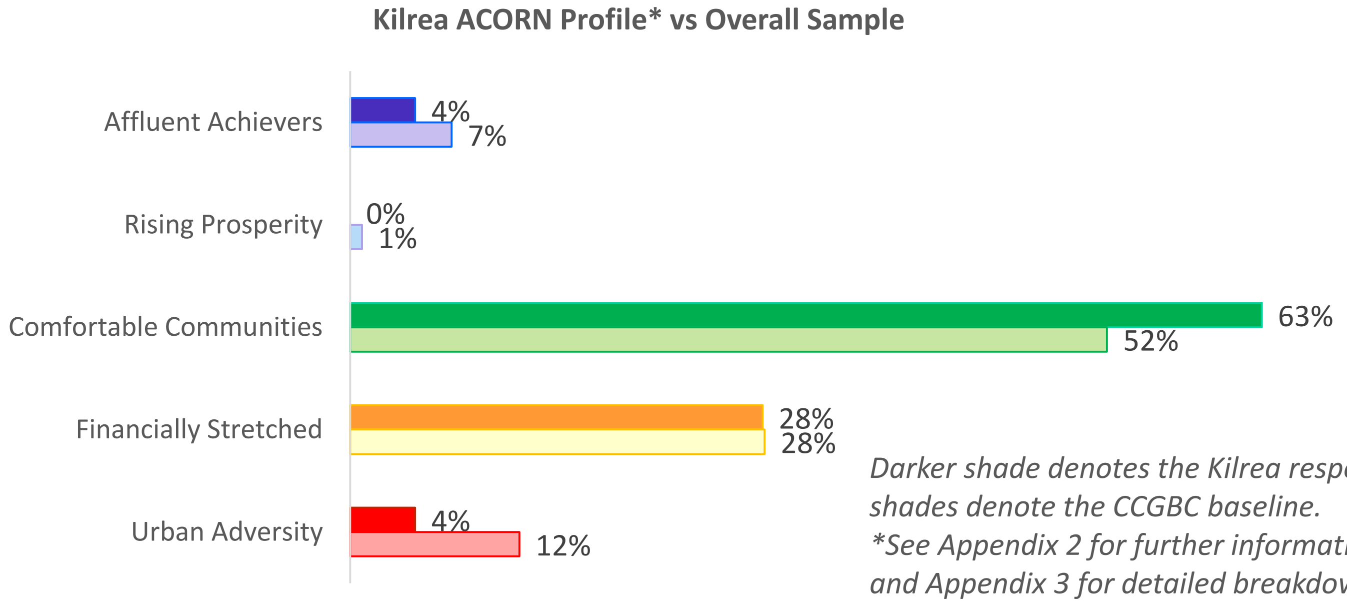
Sampling for visitors and traders in Kilrea took place between 24th March and 15th April 2021. It is important to note that during this period, there were a range of continuing restrictions in place owing to the ongoing Coronavirus pandemic. The specific restrictions at the time are outlined in Appendix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

Respondent Profile







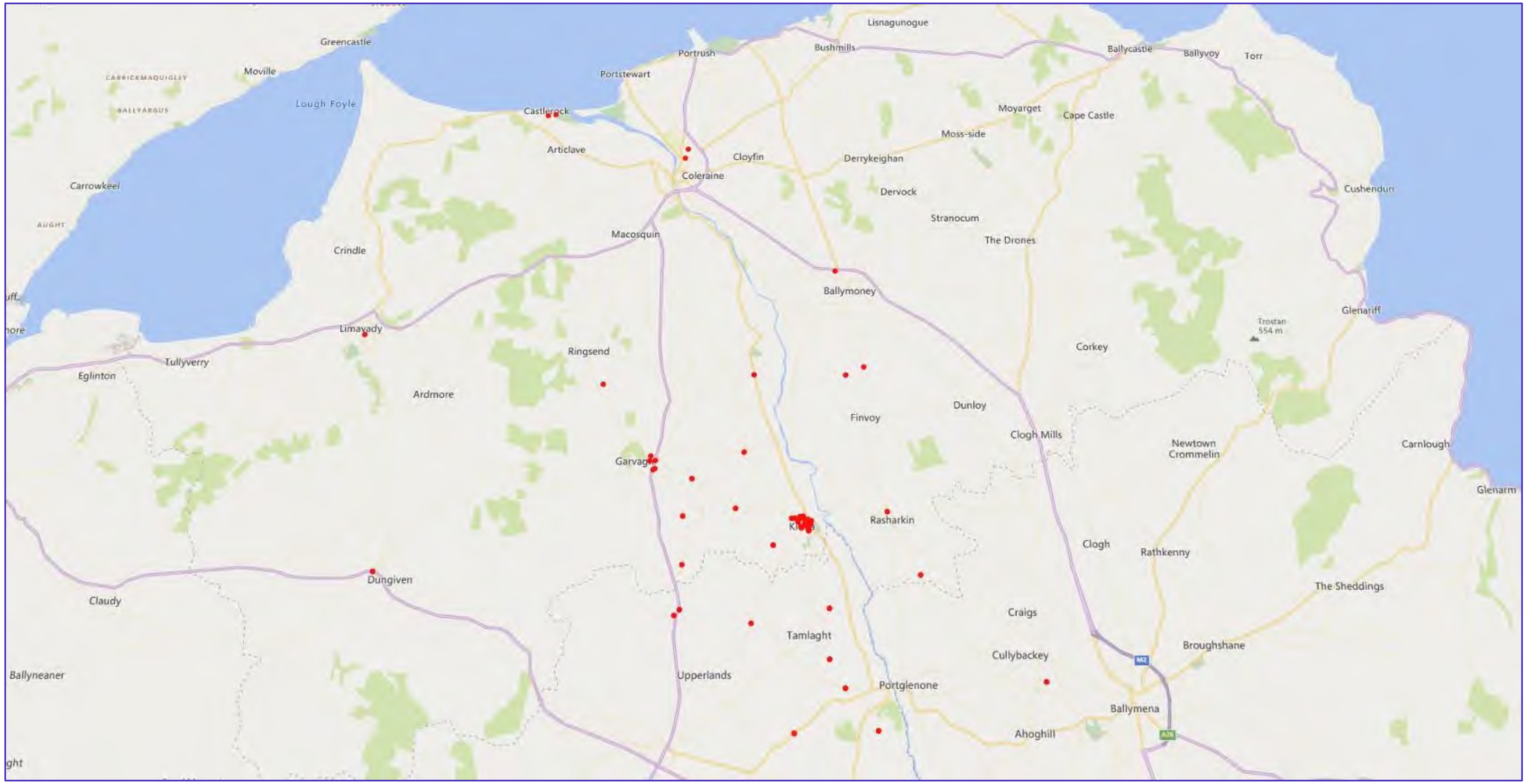
Darker shade denotes the Kilrea respondent profile while lighter shades denote the CCGBC baseline.
**See Appendix 2 for further information on ACORN classifications and Appendix 3 for detailed breakdown*

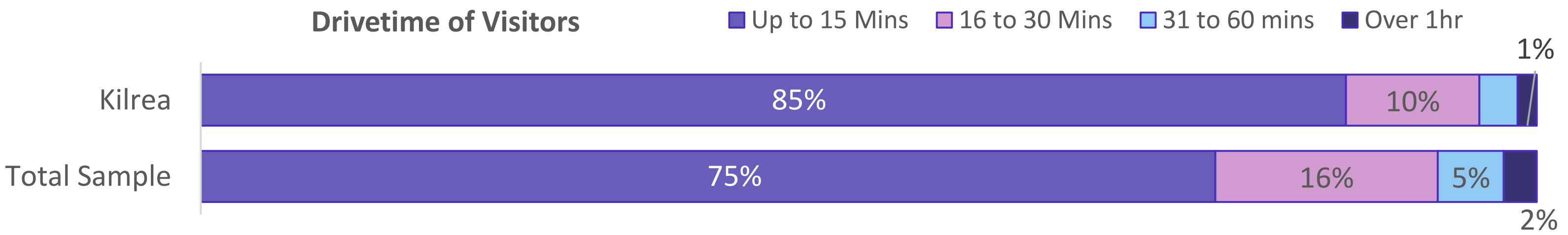
The visitor profile of Kilrea was overall younger than our overall sample. Over half (54%) were under the age of 35, giving us an average visitor age of 46.

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.*

Origins & Travel

Causeway Coast & Glens Borough Council

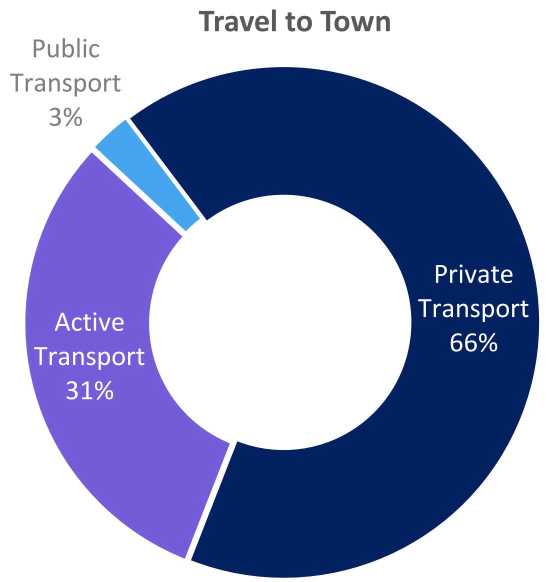




Average
9 mins
10 mins

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.



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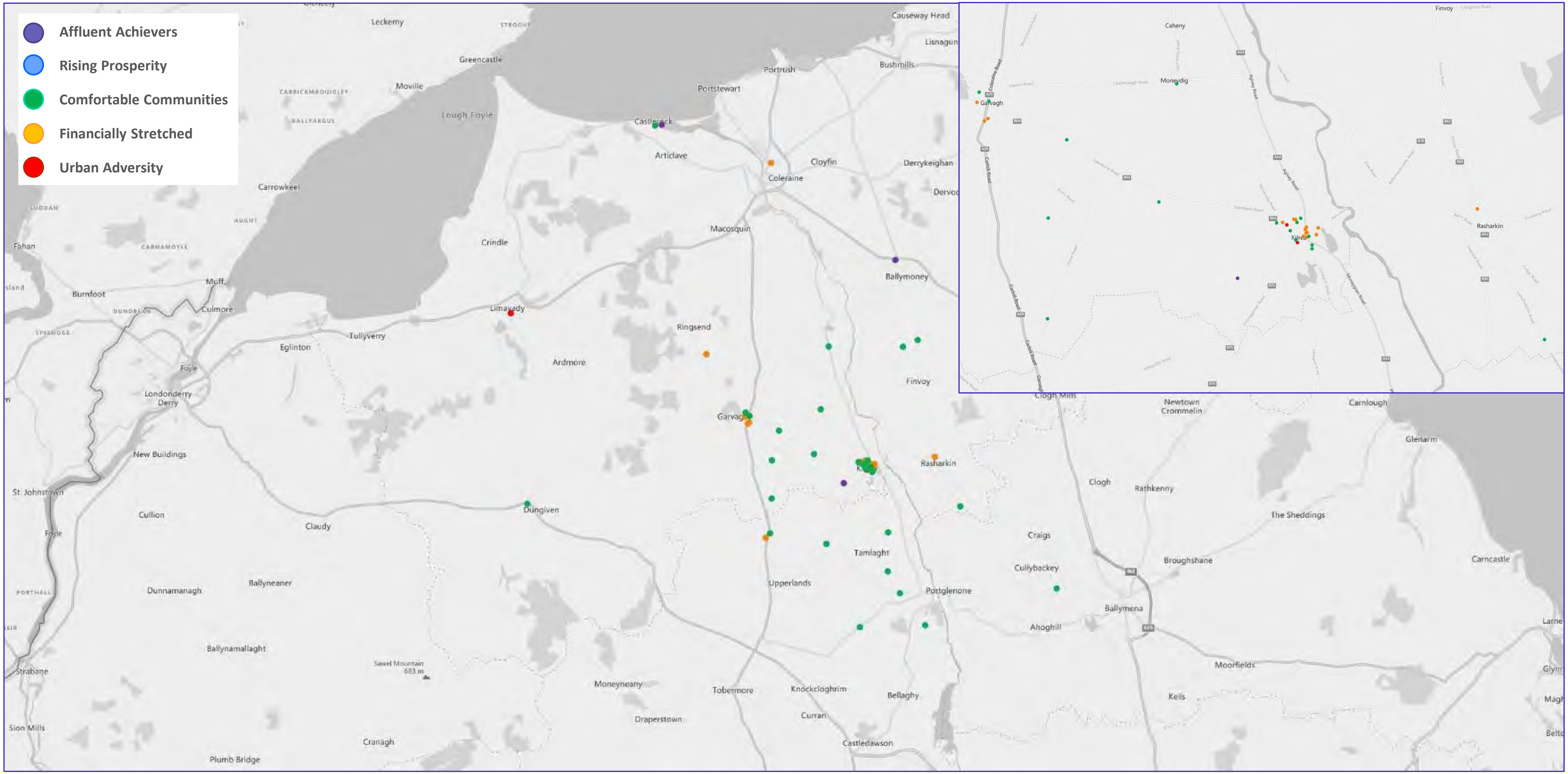
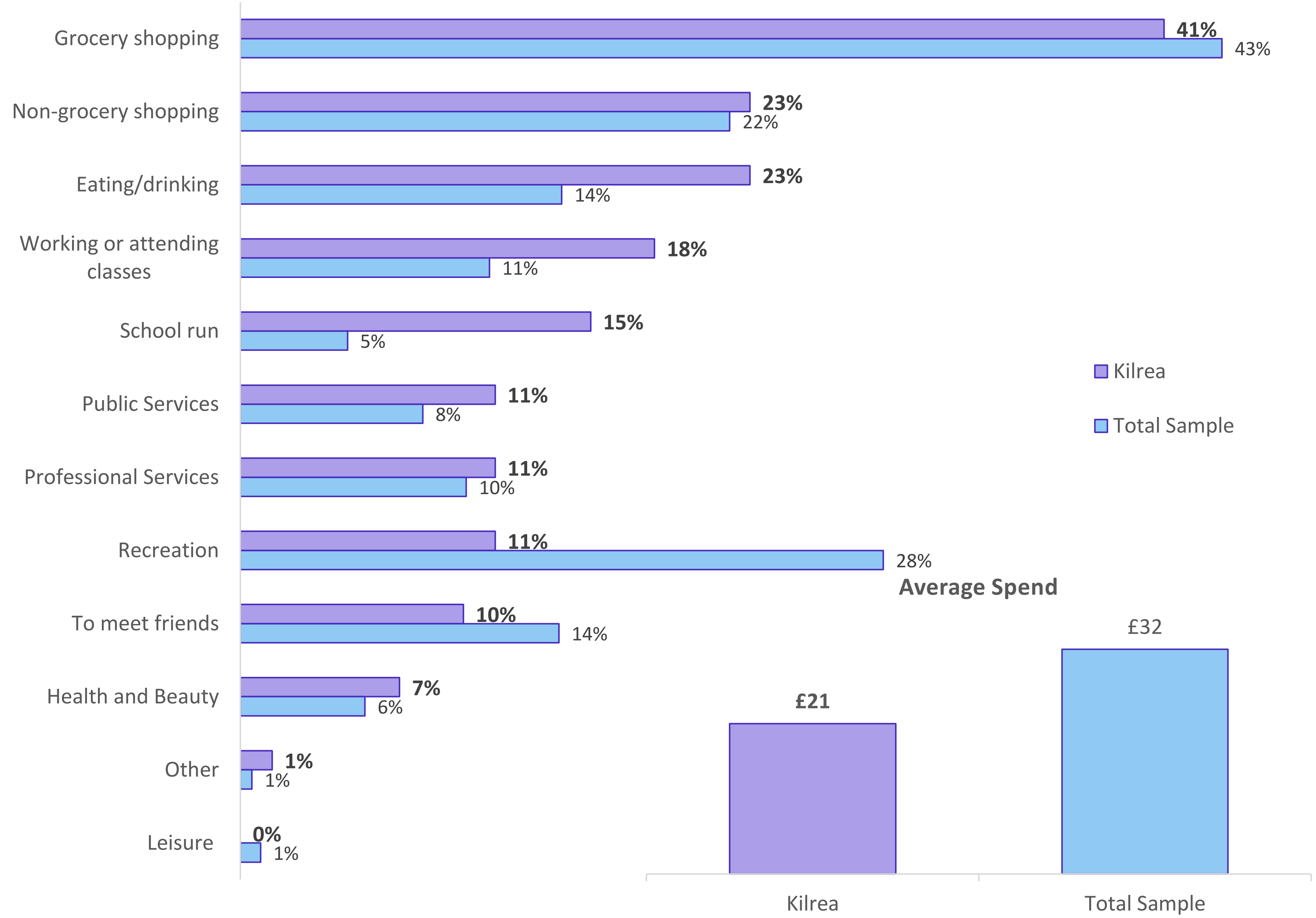
Causeway Coast & Glens Borough Council



Empowering accurate consumer understanding

card

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

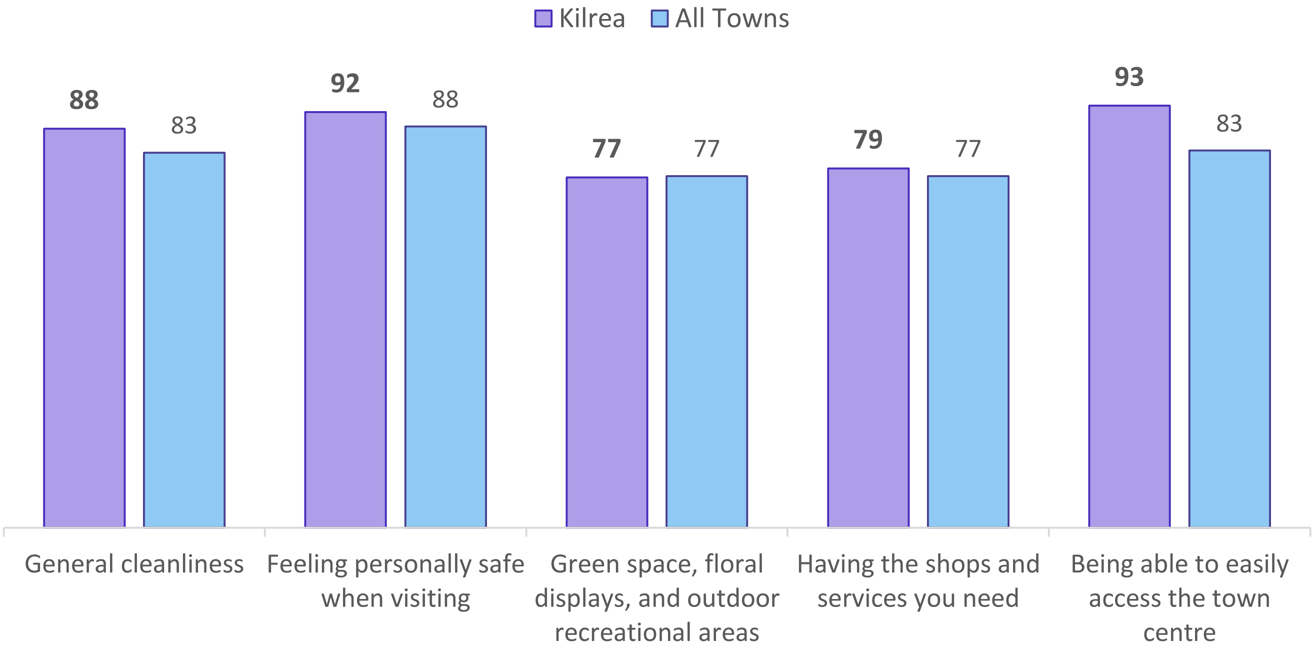
While both grocery and non-grocery shopping purposes dominate the use of Kilrea, the rate of visitor spend is the third lowest of the 12 towns sampled in (87%).

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.

What is your opinion of the town centre?

	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)*

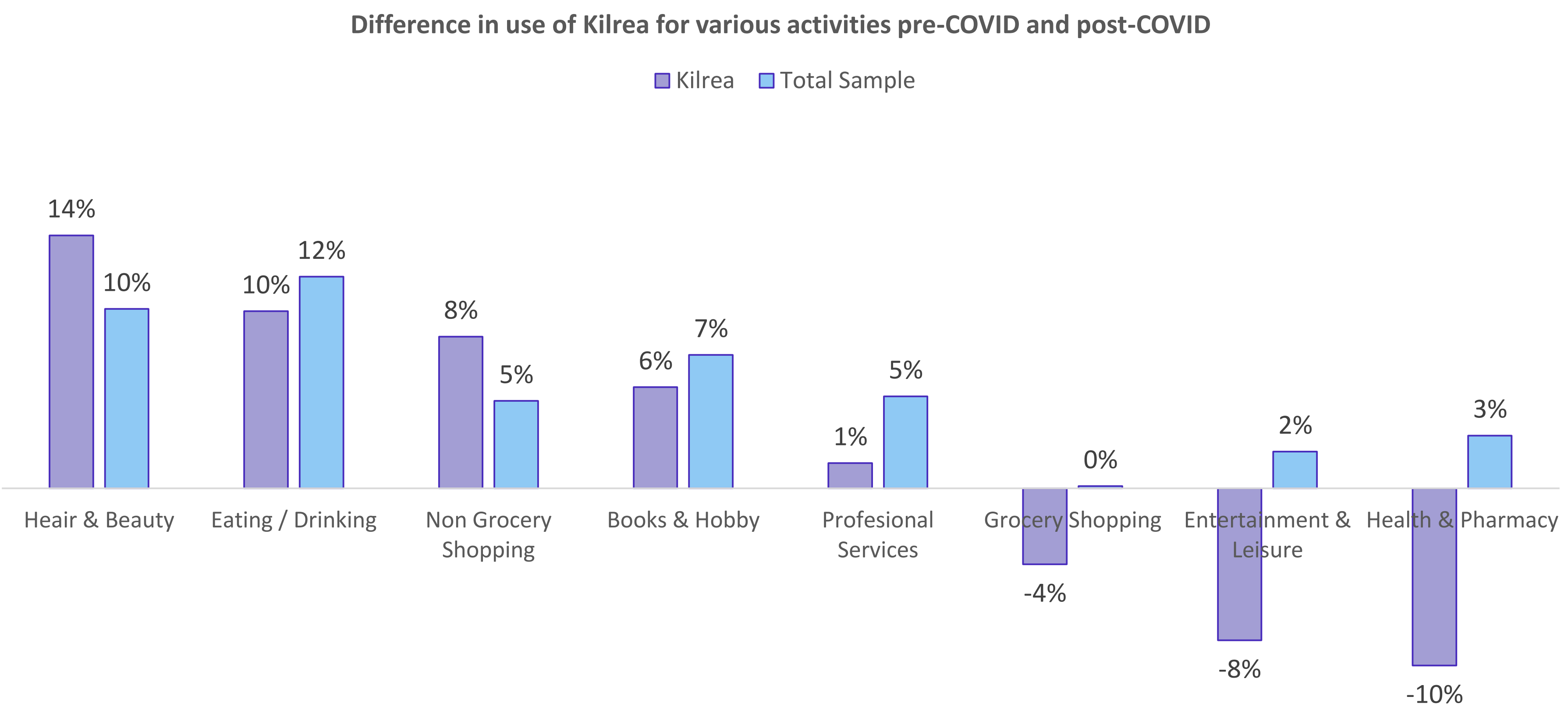


- Above is the combined Sentiment Score for Kilrea. The rationale for Sentiment Scoring it outlined in Appendix 2.
- In keeping with other towns, the sentiment score for Kilrea is generally positive but in this case does sit relatively low (ranked 9th) compared to the rest.
- As we can see from the table, 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"

Pre & Post-COVID Use



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%**

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

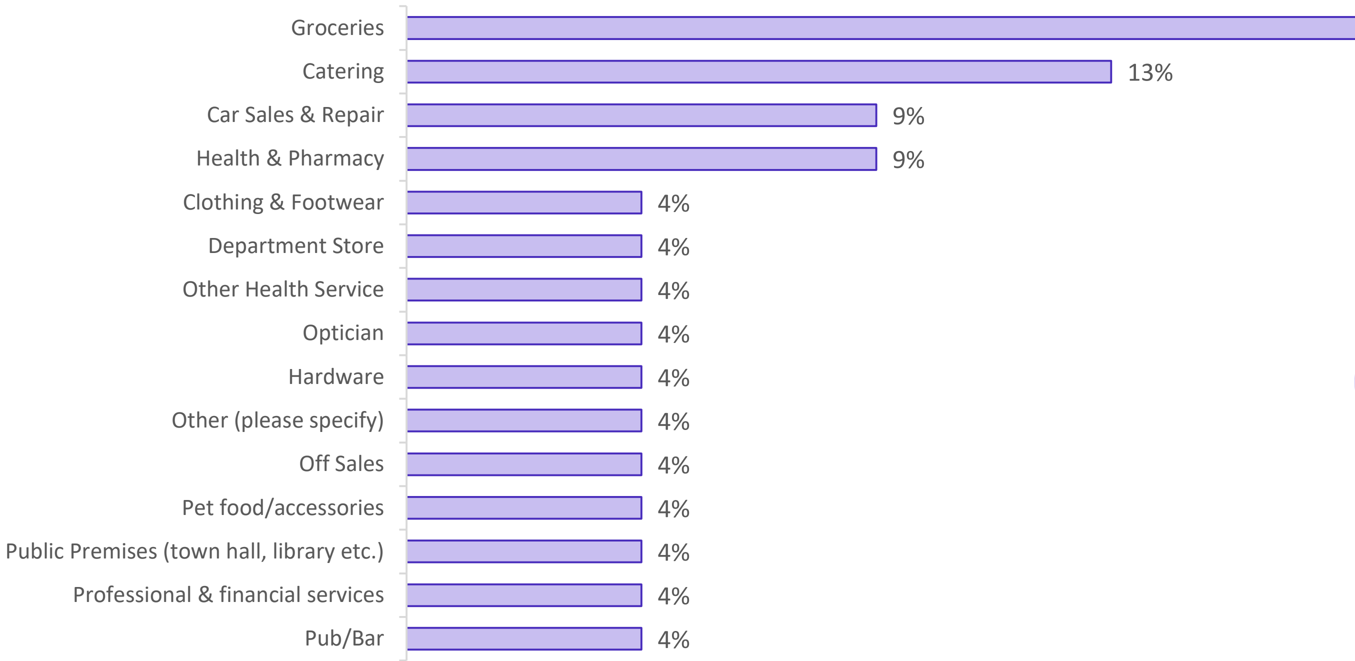
Similar to much of the borough, Hair & Beauty and Eating / Drinking are likely to see the biggest benefit of restrictions lifting in the town.

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%**

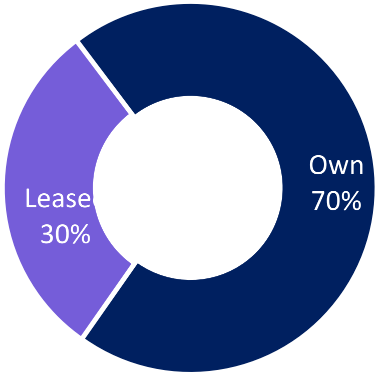
Traders

Trader Profile

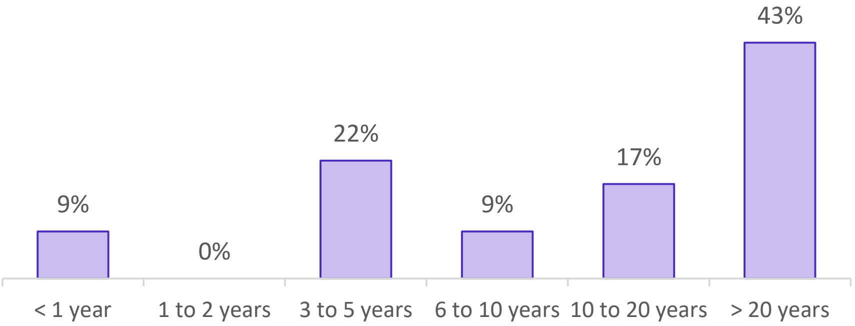
Business Sector



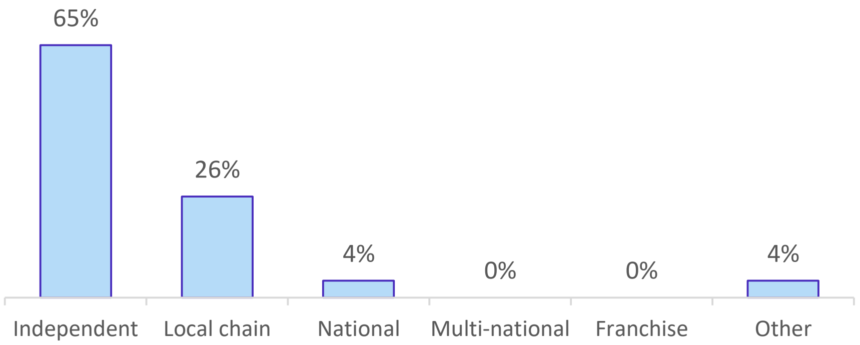
Premises



Business Age



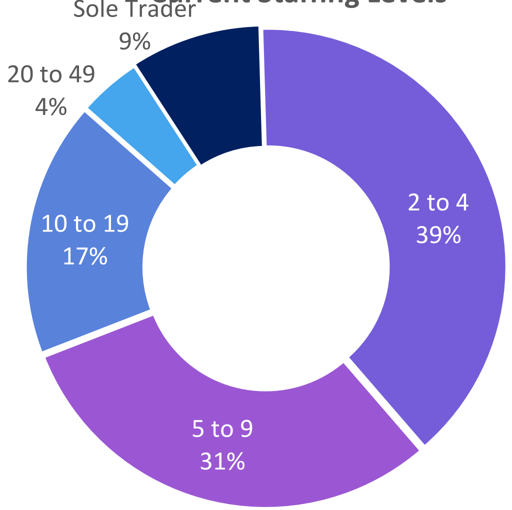
Business Ownership



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%.

Current Staffing Levels



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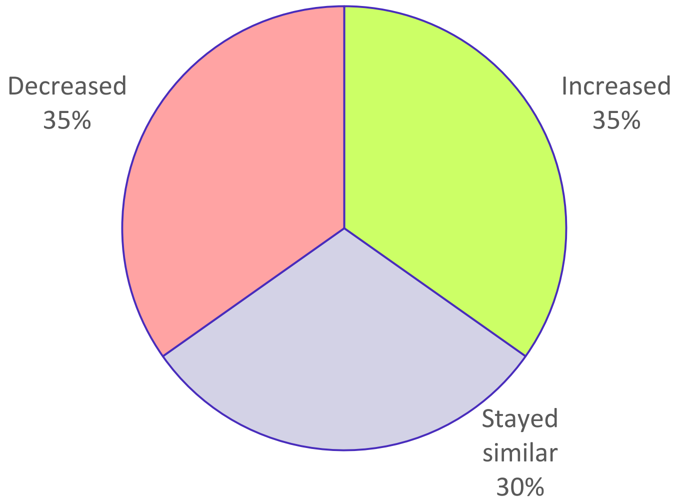
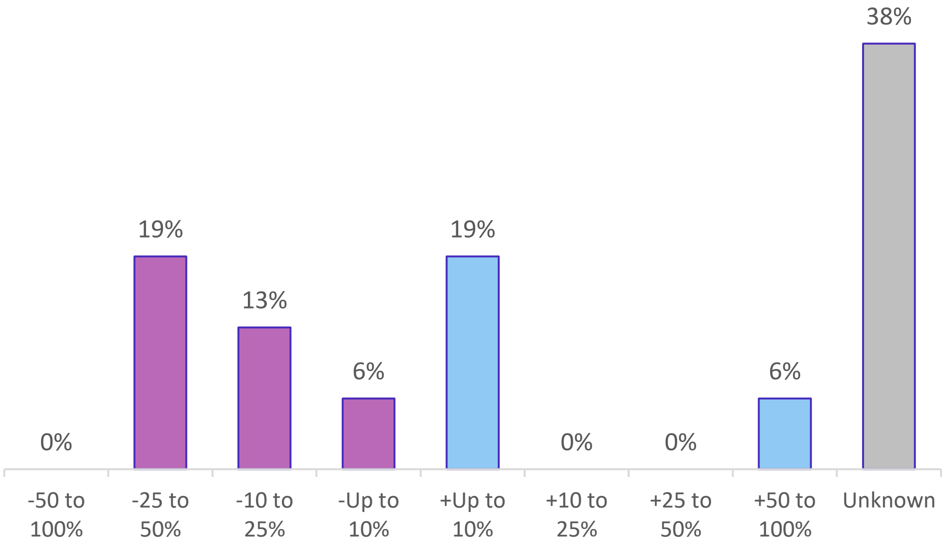
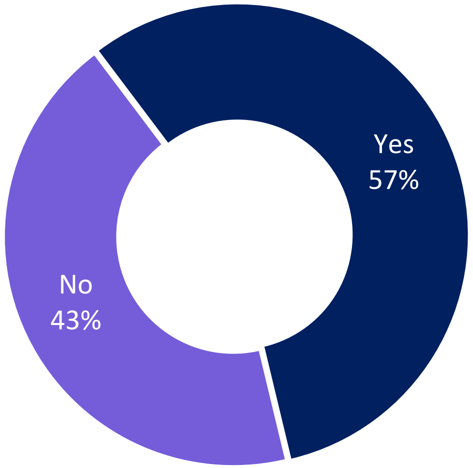
Impact on Turnover



Level of Impact



Were you forced to close operations at any point?

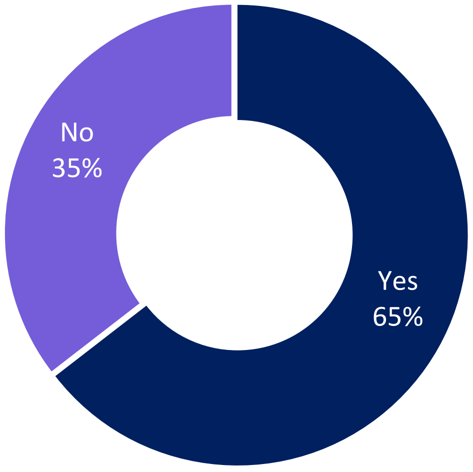


Did the business pivot to provide alternative services during the COVID lockdown …	%
No	**52%**
Yes	**48%**
Of those who said yes …	
Online selling & delivery	55%
Click & collect	64%
New services tailored to new circumstances	55%
New products tailored to new circumstances	18%

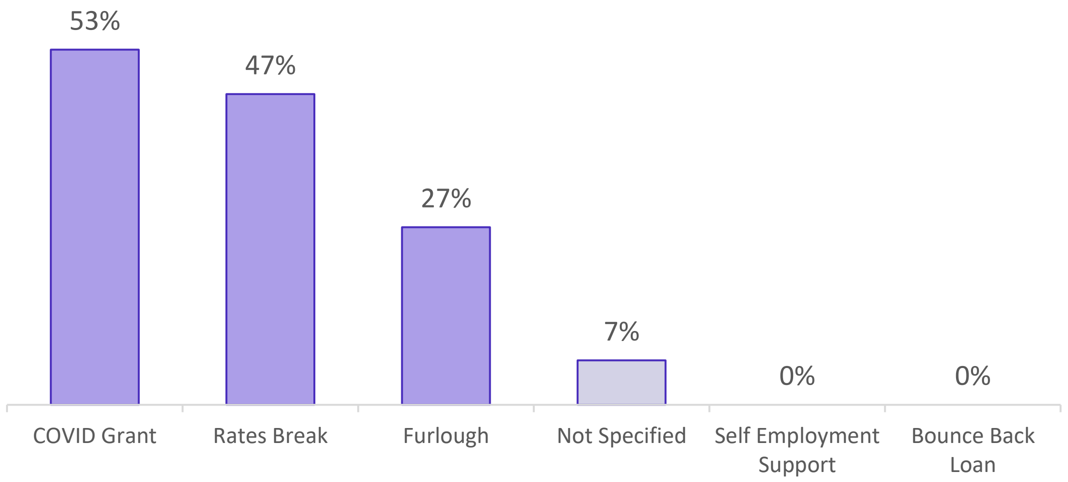
Kilrea appeared to suffer from the Coronavirus pandemic to a much lesser degree compared to other towns sampled.

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).

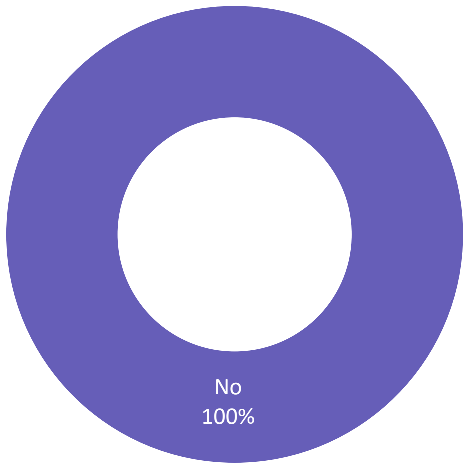
Did you avail of any Government support?



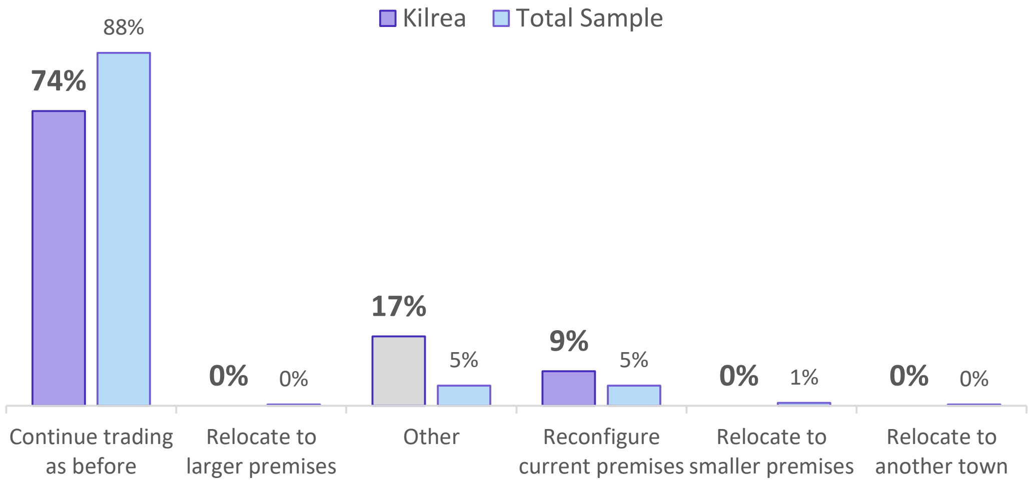
What kind of Government Support …



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.

What is your opinion of the town centre?

Causeway Coast & Glens Borough 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
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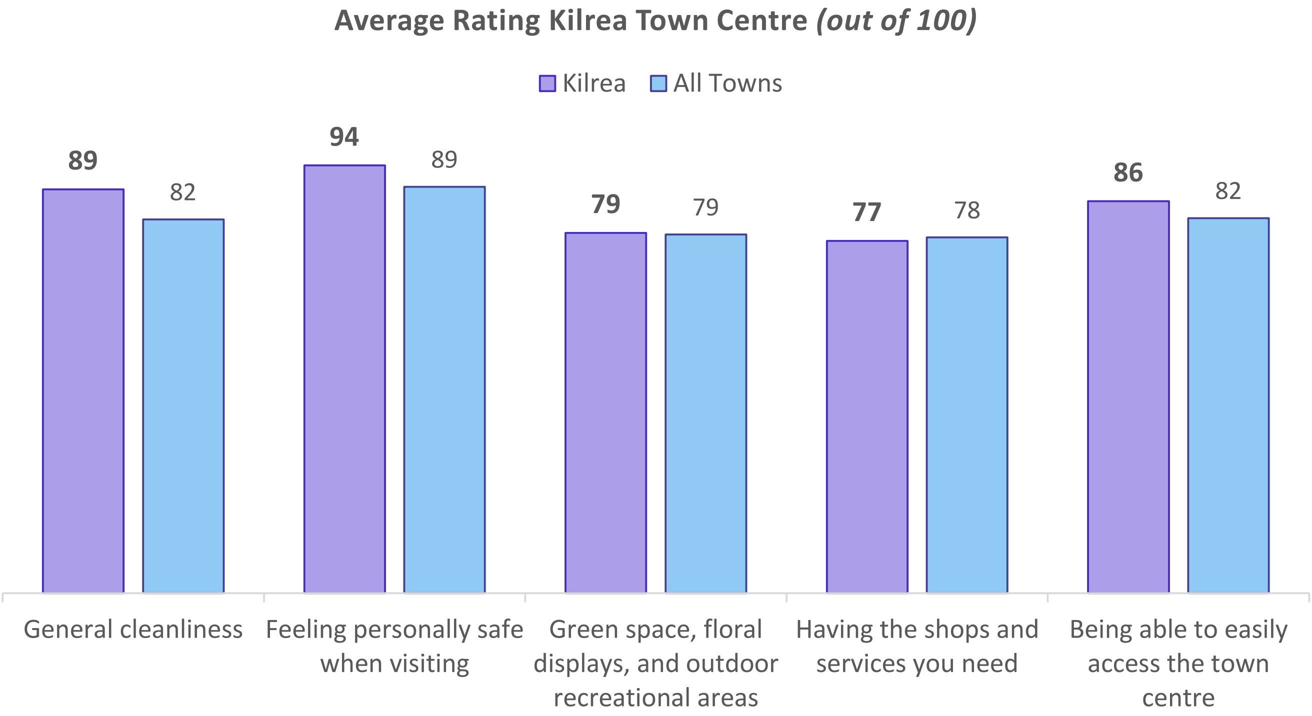
Sample	0%	0%	0%	0%	13%	9%	9%	52%	9%	9%
Calculation	Total of 'Like' (78) – Total of Dislike (0) = **Kilrea Traders Score = +78**									



- 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.

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-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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