Sproule Consulting

FINAL REPORT:

21st April 2017

Causeway Coast & Glens Borough Council

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EXECUTIVE SUMMARY

- 54% of business owners / managers described their main business type as 'other' – these included: (florist n=2); café (n=2); café / bakery (n=2); bar / restaurant (n=2); self-catering / accommodation (n=2) etc; 13% described their main type of business as hairdressing.
- 50% had traded in their current premises for between 1-10 years; 15% had been trading in their current premises for between 11-20 years; 7% had been trading in Ballycastle town centre between 41-50 years; 6% had traded for 50+ years in the town.
- 83% described their business ownership as being an independent trader / retailer; 6% were part of a local chain; 5% described their ownership as "other".
- 57% described their turnover in the last business year as average (normal); 24% reported that their turnover was below average; 7% described their turnover as above average, 4% confirmed that their turnover was well below average.
- Independent traders / retailers were statistically significantly more likely to describe their turnover as average (normal).
- 63% confirmed that they had invested money in improvements to their business in the last year.
- 41% had invested in technology, 52% in building works and 30% in staff development.
- 85% had full-time staff, 64% had part-time staff, 4% had volunteers working more than 16 hours per week and 10% had volunteers working less than 16 hours per week.
- 172 staff were employed on a full-time basis, 140 were employed on a part-time basis, giving total of 312 staff employed in either a full-time or part-time capacity; 3 people were involved as volunteers for 16+ hours per week, whilst a further 34 volunteered for less than 16 hours.
- 78% employed between 1-10 full-time staff and 7% of businesses employed between 11-20 full-time staff.
- 57% employed between 1-10 part-time staff and 6% employed between 11-20).
- 4% reported having between 1-10 people volunteer 16+ hours per week.
- 6% of businesses reported having between 1-10 volunteers involved for less than 16 hours each per week and 4% of businesses reported having volunteers for 11-20 hours per week.
- 48% described their overall perception of Ballycastle town centre as good/very good; 35% reported that their perception of the town centre was average, whilst 14% stated that it was poor/very poor.
- Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Ballycastle town centre (1 very poor and 10 very good).

- As shown, the highest level of 'good' scores were for the following aspects:
  - Friendliness of staff / people (94%);
  - Good atmosphere (88%);
  - Cafes (82%); and,
  - Value for money (76%).

- The highest level of 'average' scores were for the following aspects:
    - Parking (32%);
    - On-street entertainment (30%);
    - Vandalism (28%);
    - Ease of moving around the town centre (24%); and,
    - Vacant shops (24%).
- The highest level of 'poor' scores were for the following aspects:
    - Vacant shops (43%);
    - On-street entertainment (42%);
    - Ease of moving around the town centre (35%); and
    - Amount of dereliction (35%).

- Respondents who described the number of parking spaces as poor / very poor were statistically significantly more likely to be aged between 25-64 years.
- Male respondents were statistically significantly more likely to describe pedestrian access as good / very good.
- Male respondents were statistically significantly more likely to describe safety as good / very good.
- Male respondents were statistically significantly more likely to describe vandalism as good / very good.
- Male respondents were statistically significantly more likely to describe levels of anti-social behaviour as good / very good.

- Respondents were asked to rank their top three priorities for improvement in Ballycastle. These included:

  1st PRIORITY: Wider variety of shops (13%);
  More recreation facilities (13%);
  Better parking – cost (11%);
  Better parking – number of spaces (9%); and,
  More public toilets (9%).

  2nd PRIORITY: More recreation facilities (13%);
  Better parking – number of spaces (11%);
  More shops (9%); and
  More for children/teenagers (7%).

  3rd PRIORITY: More for children/teenagers (13%);
  More public toilets (9%);
  Better quality shops (6%);
  More shops (6%);
  Better maintained buildings (6%);
  Better parking – cost (6%);
  Better parking – number of spaces (6%); and,
  More recreation facilities (6%).

- The combined highest (1st, 2nd and 3rd) priority included: more recreation facilities (32); better parking – number of spaces (26); and, more for children/teenagers (24).

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***PLEASE NOTE THAT DUE TO ROUNDING SOME TABLES MAY NOT TOTAL 100.**

1. INTRODUCTION

Causeway Coast and Glens Borough Council (CCGBC) commissioned Sproule Consulting to conduct business and general public surveys in each of the six main towns within the Borough. Table 1 provides a comprehensive breakdown of the number of surveys completed.

TABLE 1: Completed Surveys

	On-Street (General Public)	Business
Coleraine	100	100
Ballymoney	100	90
Portrush	100	40
Portstewart	100	40
Limavady	100	78
Ballycastle	100	54
TOTAL	600	402

The purpose of this Report is to provide empirical data to inform CCGBC's Local Development Plan for the Ballycastle area. The survey findings set out in this Business Report, together with the data collated from the general public, will be instrumental in establishing stakeholders' and users' attitudes and perceptions of Ballycastle town centre.

2. RESEARCH: KEY OBJECTIVES

The key objectives of this research are shown in Figure 1.

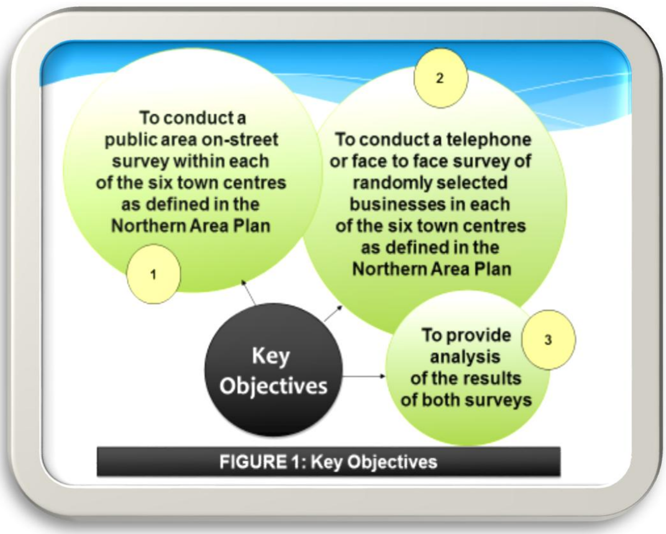


FIGURE 1: Key Objectives

3. DEMOGRAPHIC PROFILE OF BUSINESS OWNERS / MANAGERS SURVEYED

Forty-three per cent of the business owners / managers surveyed were male, 28% were female; the remaining 27% made no comment (Table 2).

TABLE 2: Gender (n=54)

Male	43
Female	30
No Comment	28

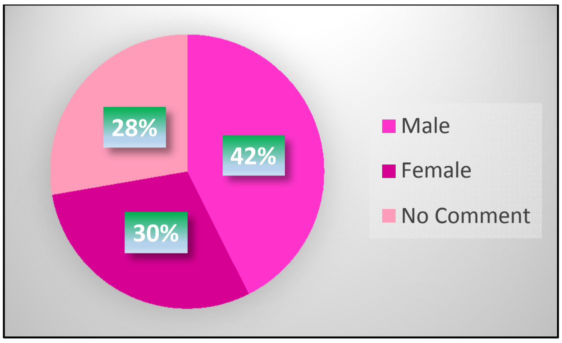
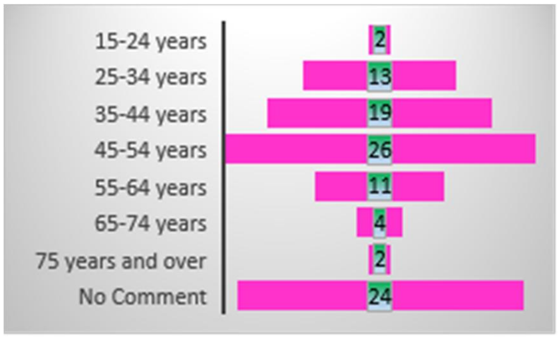
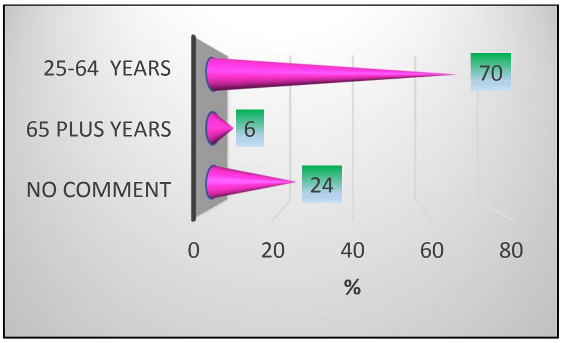


Table 3 sets out the achieved age profile.





4. BUSINESS SURVEY FINDINGS - BALLYCASTLE TOWN CENTRE

4.1 TYPE OF MAIN BUSINESS?

Over half of business owners / managers (54%) described their main business type as 'other'; 13% of respondents described their main type of business as hairdressing (Table 3).

TABLE 3: Type of Main Business (n=54)	
Clothing / footwear / jewellery / accessories	6
Health & beauty	4
Hairdressing	13
Homeware	2
Books/newsagent/stationery	2
Pharmacy	4
Optician	4
Entertainment or leisure (gym, arcade, etc.)	2
Charity	4
Department store	2
Groceries	6
Other: Please Specify	54

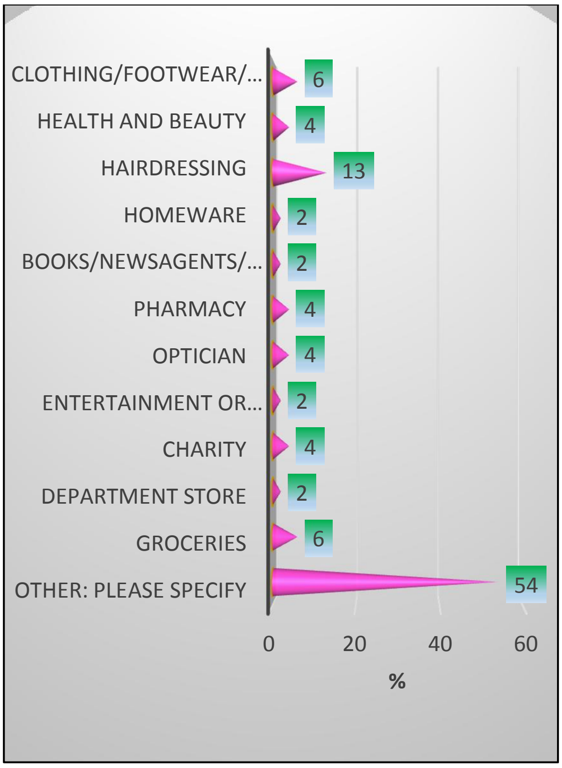


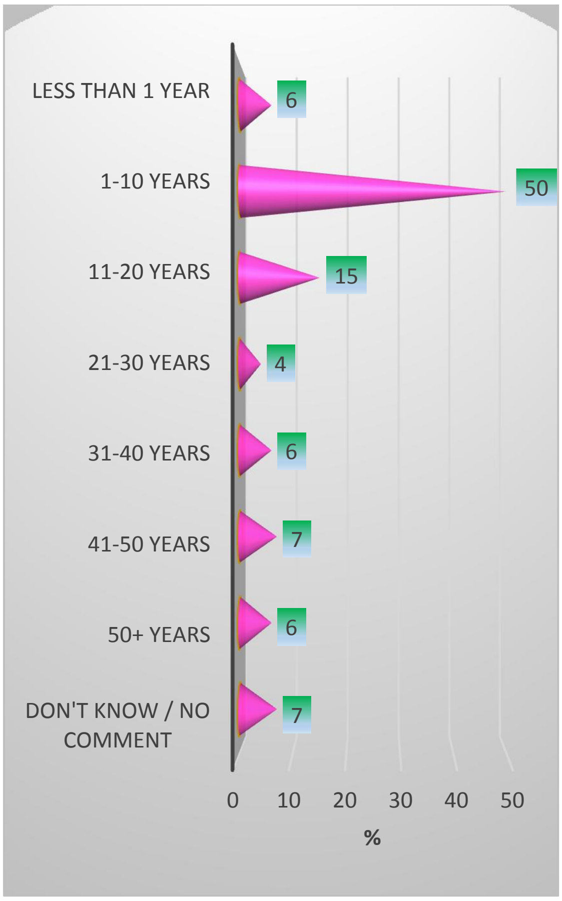
Table 4 provides a comprehensive breakdown of the range of 'other' businesses types included.

TABLE 4: Type - Other (n=29)	
Craft + household + souvenirs + gifts	3
Florist	7
Café	7
Ice cream/coffee	3
Café/bakery	7
Paint shop	3
Technology retail	3
Financial co-operative	3
Butcher	3
Antiques	3
Fruit + veg	3
Bar + restaurant/restaurant	7
Electrical	3
Hotel	3
Est Agent + insurance	3
Legal services	3
Self-catering/accommodation	7
Motorbike sales	3
Veterinary practice	3
Solar installation	3
Diving	3
Plumbing supplies	3
Gift shop	3
No comment	11

4.2 HOW MANY YEARS HAVE YOU TRADED IN THESE PREMISES?

Half of the business respondents (50%) reported that they had traded in their current premises for between 1-10 years (Table 5). Fifteen per cent stated that they had been trading in their current premises for between 11-20 years. Seven percent of businesses had been trading in Ballycastle town centre between 41-50 years; a further 6% had traded for 50+ years in the town.

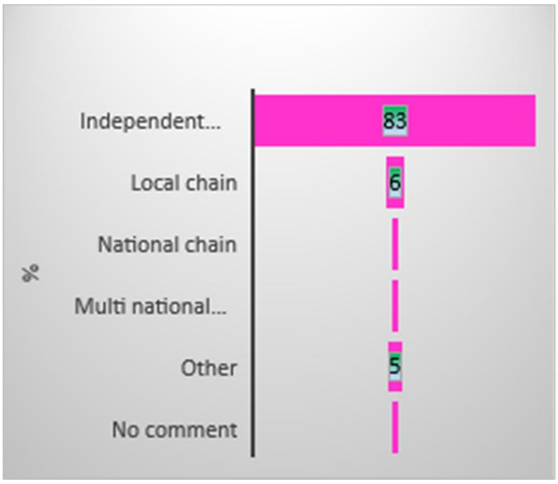
TABLE 5: How many years have you traded in these premises – Grouped (N=54)	
Less than 1 year	6
1-10 years	50
11-20 years	15
21-30 years	4
31-40 years	6
41-50 years	7
50+ years	6
Don't Know / No Comment	7



4.3 WHAT IS THE OWNERSHIP OF YOUR BUSINESS

Over four fifths of business respondents (83%) described their business ownership as being an independent trader / retailer; 6% were part of a local chain (Table 6). Five percent of respondents described their ownership as "other".

TABLE 6: What is the ownership of your business? (n=54)	
Independent trader/retailer	83
Local chain	6
National chain	2
Multinational chain	2
Other: Please Specify	5
No comment	2



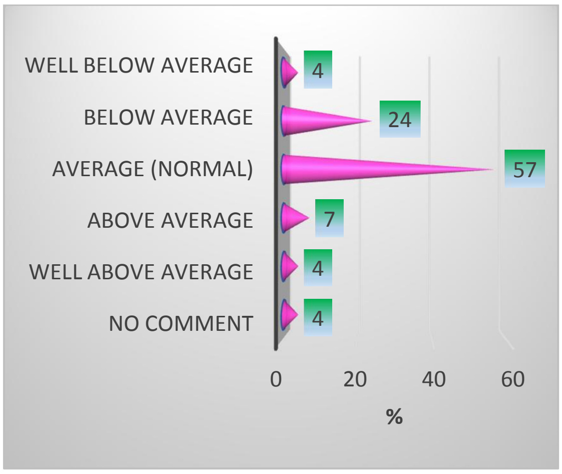
The 'other' forms of ownership described are listed in Table 7.

TABLE 7: Type of Ownership – Other (n=3)	
Registered charity	2
Co operative	1

4.4 HOW WOULD YOU DESCRIBE YOUR TURNOVER IN THE LAST BUSINESS YEAR?

Fifty-seven percent of the respondents described their turnover in the last business year as average (normal); just under a quarter (24%) reported that their turnover was below average. Seven per cent described their turnover as above average, whilst 4% confirmed that their turnover was well below average (Table 8).

TABLE 8: How would you describe your turnover in the last business year? (n=54)	
Well below average	4
Below average	24
Average (normal)	57
Above average	7
Well above average	4
No Comment	4



Independent traders / retailers were statistically significantly more likely to describe their turnover as average (normal).

4.5 HAVE YOU INVESTED MONEY IN IMPROVEMENTS TO YOUR BUSINESS IN THE LAST YEAR?

Sixty-three per cent of respondents confirmed that they had invested money in improvements to their business in the last year (Table 9).

Some 41% confirmed that they had invested in technology, 52% in building works and 30% in staff development (Table 10).

TABLE 9: Have you invested money in improvements to your business in the last year? (n=54)	
Yes	63
No	31
No Comment	6

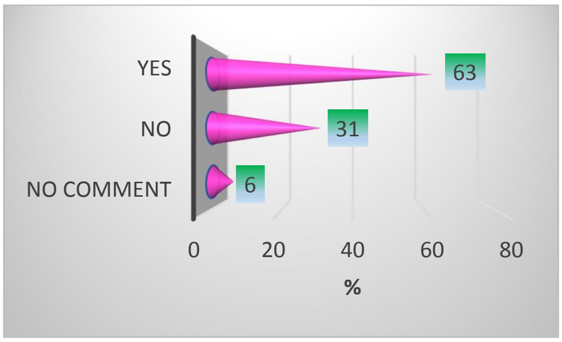
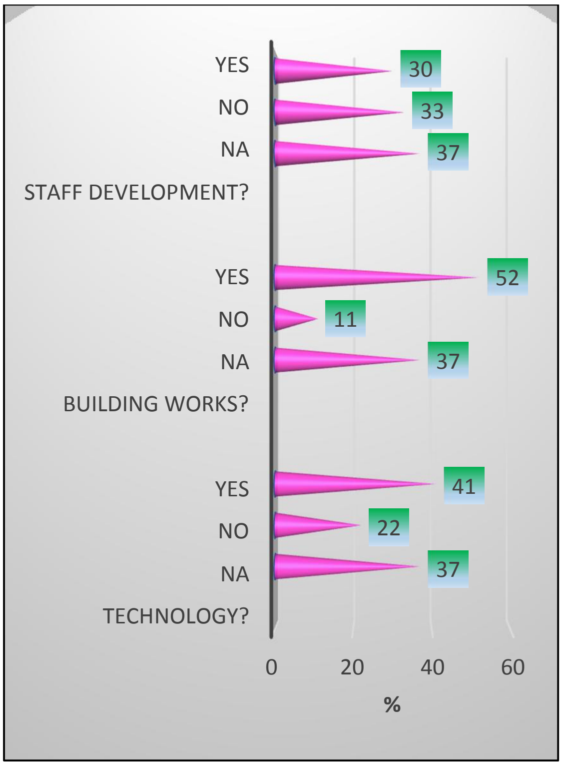


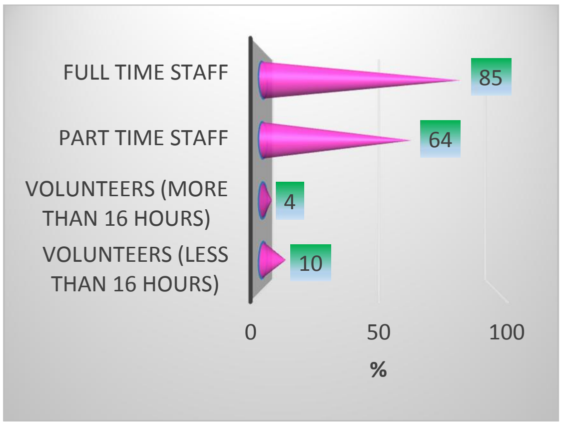
TABLE 10: Invested in…? (n=54)	
Technology	41
Building Works	52
Staff Development	30



4.6 HOW MANY PEOPLE ARE CURRENTLY INVOLVED IN YOUR BUSINESS (INCLUDING ANY WORKING OWNERS)?

Eighty-five percent of businesses had full-time staff, 64% had part-time staff, 4% had volunteers working more than 16 hours per week and 10% had volunteers working less than 16 hours per week.

TABLE 11: Number of businesses with... (n=54)	
Full time staff	85
Part time staff	64
Volunteers (more than 16 hours)	4
Volunteers (less than 16 hours)	10



As shown in Table 12, 172 staff were employed on a full-time basis, 140 were employed on a part-time basis, giving total of 312 staff employed in either a full-time or part-time capacity; 3 people were involved as volunteers for 16+ hours per week, whilst a further 34 volunteered for less than 16 hours.

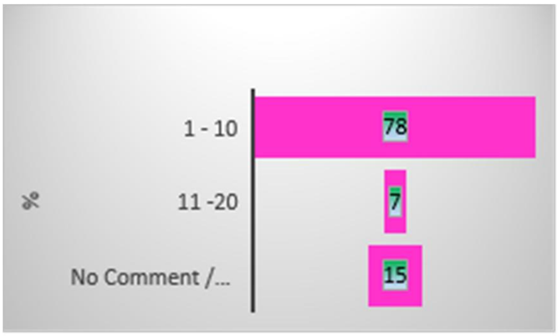
TABLE 12: *How many people are currently involved in your business (including any working owners) (n=54)*

		Total
Full time (more than 30 hours)	172	312
Part time (up to 30 hours)	140	
Volunteers (more than 16 hours)	3	37
Volunteers (less than 16 hours)	34	
		349

4.6.1 FULL TIME (MORE THAN 30 HOURS)

Almost four-fifths of businesses (78%) employed between 1-10 full-time staff and 7% of businesses employed between 11-20 full-time staff (Table 13).

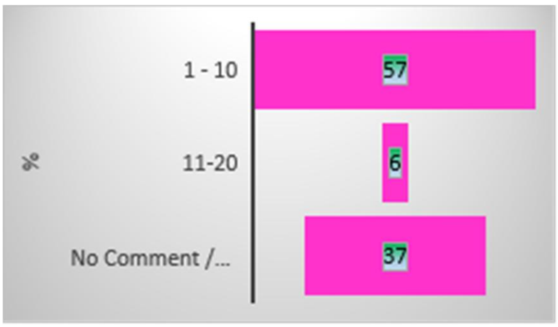
TABLE 13: How many people are currently involved in your business (Full-Time) (including any working owners) (n=54)	
1 - 10	78
11 -20	7
No Comment / NA	15



4.6.2 PART TIME (UP TO 30 HOURS)

Fifty-seven per cent of businesses employed between 1-10 part-time staff and 6% employed between 11-20 (Table 14).

TABLE 14: How many people are currently involved in your business (Part-Time) (including any working owners) (n=54)	
1 - 10	57
11 - 20	6
No Comment / NA	37



4.6.3 VOLUNTEERS (MORE THAN 16 HOURS PER WEEK)

As shown in Table 15, 4% of businesses reported having between 1-10 people volunteer 16+ hours per week.

TABLE 15: How many people are currently involved in your business (volunteers 16+ hours) (including any working owners) (n=54)	
1 - 10	4
No Comment / NA	96

4.6.4 VOLUNTEERS (LESS THAN 16 HOURS PER WEEK)

Six percent of businesses reported having between 1-10 volunteers involved for less than 16 hours each per week and 4% of businesses reported having volunteers for 11-20 hours per week (Table 16).

TABLE 16: How many people are currently involved in your business (volunteers less than 16 hours) (including any working owners) (n=54)	
1 - 10	6
11 - 20	4
No Comment / NA	90

4.7 OVERALL, WHAT IS YOUR PERCEPTION OF THE TOWN CENTRE?

Almost half of respondents (48%) described their overall perception of Ballycastle town centre as good/very good (Tables 17 and 18). Just over a third (35%) reported that their perception of the town centre was average, whilst 14% stated that it was poor/very poor.

TABLE 17: Overall, what is your perception of the town centre? (n=54)	
Very poor	7
Poor	7
Average	35
Good	37
Very good	11
No Comment	2

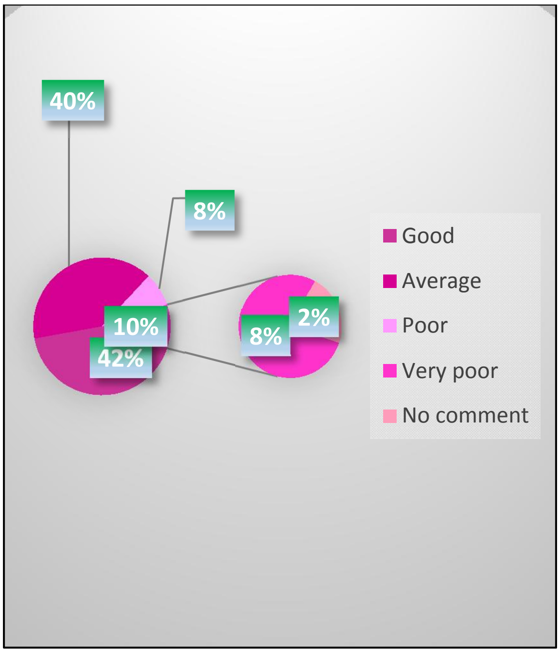
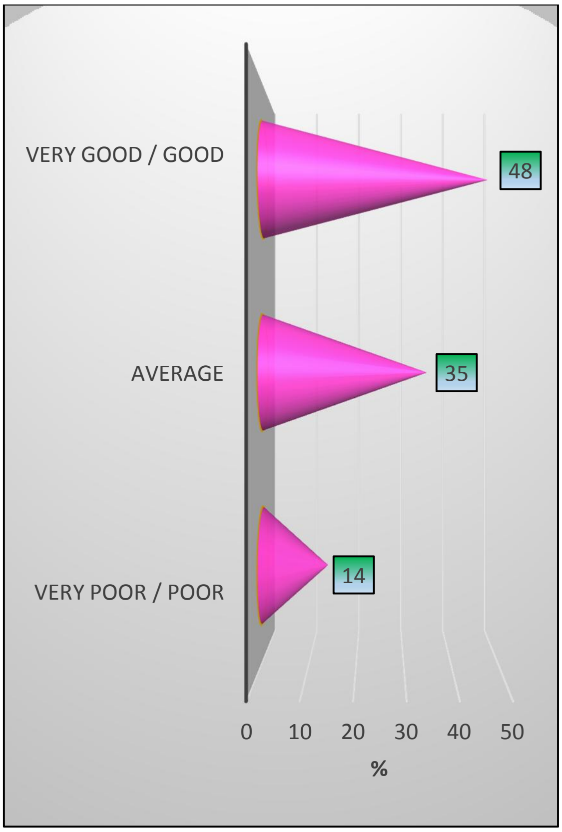


TABLE 18: Overall, what is your perception of the town centre? (n=54)	
Very poor / poor	14
Average	35
Very good / good	48
No Comment	2



4.8 OTHER COMMENTS - PERCEPTION

Table 19 sets out a comprehensive breakdown of other comments relating to perception.

TABLE 19: Perception town centre - Other (n=16)	
Diamond and Quay good area	6
Very tired	6
Everyone seems to head out of town on a Sat for food shopping	6
Re-vitalise was excellent	6
Castle Street can feel neglected	6
Limited shopping options	6
Could do more weeds growing everywhere	6
General presentation of town is good overall	6
V low footfall	6
Clean and tidy but lacking facilities for tourism	6
On the edge	6
With many buildings closed it gives a negative view to travellers	6
Empty buildings	6
Lots of bus - have closed	6
Castle St derelict	6
Improvement needed	6

4.9 PLEASE SCORE YOUR CURRENT OPINION OF THE FOLLOWING ASPECTS OF THE TOWN CENTRE (SCALE 1 – 10, 1 VERY POOR, 5 AVERAGE, 10 - VERY GOOD)

Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Ballycastle town centre (1 very poor and 10 very good).

As shown, the highest level of ‘good’ scores were for the following aspects:

- Friendliness of staff / people (94%);
- Good atmosphere (88%);
- Cafes (82%); and,
- Value for money (76%).

The highest level of ‘average’ scores were for the following aspects:

- Parking (32%);
- On-street entertainment (30%);
- Vandalism (28%);
- Ease of moving around the town centre (24%); and,
- Vacant shops (24%).

The highest level of ‘poor’ scores were for the following aspects:

- Vacant shops (43%);
- On-street entertainment (42%);
- Ease of moving around the town centre (35%); and
- Amount of dereliction (35%).

TABLE 20: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Scores (n=54)

	0	1	2	3	4	5	6	7	8	9	10	No Comment	*Rounded to 100
Condition of streets/public realm – clean, well maintained, attractive	0	4	0	0	2	11	7	17	32	4	15	10	100
Flower arrangements, street banners	0	4	4	4	7	22	7	15	19	4	13	2	100
Lighting	0	4	2	0	2	15	13	26	20	6	9	4	100
Parking	0	7	11	6	8	32	9	11	9	2	2	4	100
Number of public car park spaces	0	13	6	6	6	19	13	15	15	2	2	4	100
Price of public car park spaces	0	6	2	11	9	17	8	11	19	7	6	4	100
Ease of moving around town centre	0	7	6	13	9	24	6	11	17	3	0	6	100
Pedestrian access	0	0	4	4	2	19	19	13	30	2	6	4	100
Variety of shops	0	2	4	6	6	17	13	19	22	5	4	4	100
Quality of shops	0	0	4	2	4	17	5	15	30	15	6	4	100
Range of goods and services available	0	2	6	7	4	13	15	15	26	9	4	4	100
Cafes	0	2	0	0	5	8	4	8	30	13	26	4	100
Value for money	0	2	4	0	2	13	6	13	32	13	13	4	100
Friendliness of staff/people	0	2	0	0	0	2	2	5	20	24	43	2	100
Good atmosphere	0	2	0	2	0	6	4	13	35	9	28	2	100
On-street entertainment	2	17	9	8	8	30	6	4	2	4	0	13	100
Safety	0	4	2	4	6	20	7	22	19	9	6	2	100
Condition of buildings	0	7	7	4	5	11	22	28	7	2	2	2	100
Vacant shops (if a lot = poor score)	0	9	7	15	11	24	13	9	6	0	2	4	100
Amount of dereliction (if a lot = poor score)	0	6	6	17	6	15	15	15	9	0	4	7	100
Vandalism (if a lot = poor score)	0	2	3	2	9	22	15	15	22	2	4	4	100
Children's play areas	0	4	2	9	5	20	22	17	11	2	4	4	100
Levels of anti-social behaviour (if a lot = poor score)	0	0	6	4	6	11	15	19	22	4	7	7	100
	2	106	95	124	122	388	246	336	454	141	206	105	-

TABLE 21: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Grouped Scores (n=54)	**0 to 4**	**5**	**6 to 10**	**No Comment**	***Rounded to 100**
Condition of streets/public realm – clean, well maintained, attractive	*6*	*11*	74	*10*	100
Flower arrangements, street banners	*18*	*22*	57	*2*	100
Lighting	*7*	*15*	74	*4*	100
Parking	*32*	*32*	33	*4*	100
Number of public car park spaces	*30*	*18*	48	*4*	100
Price of public car park spaces	*30*	*17*	50	*4*	100
Ease of moving around town centre	*35*	*24*	35	*6*	100
Pedestrian access	*9*	*19*	68	*4*	100
Variety of shops	*17*	*17*	63	*4*	100
Quality of shops	*9*	*17*	70	*4*	100
Range of goods and services available	*15*	*13*	69	*4*	100
Cafes	*7*	*7*	82	*4*	100
Value for money	*7*	*13*	76	*4*	100
Friendliness of staff/people	*2*	*2*	94	*2*	100
Good atmosphere	*4*	*6*	88	*2*	100
On-street entertainment	*42*	*30*	15	*13*	100
Safety	*15*	*20*	63	*2*	100
Condition of buildings	*24*	*13*	61	*2*	100
Vacant shops (if a lot = poor score)	*43*	*24*	30	*4*	100
Amount of dereliction (if a lot = poor score)	*35*	*15*	43	*7*	100
Vandalism (if a lot = poor score)	*17*	*22*	57	*4*	100
Levels of anti-social behaviour (if a lot = poor score)	*20*	*20*	56	*4*	100
Children's play areas	*15*	*11*	67	*7*	100
TOTAL	439	388	1373	105	-

Respondents who described the number of parking spaces as poor / very poor were statistically significantly more likely to be aged between 25-64 years.

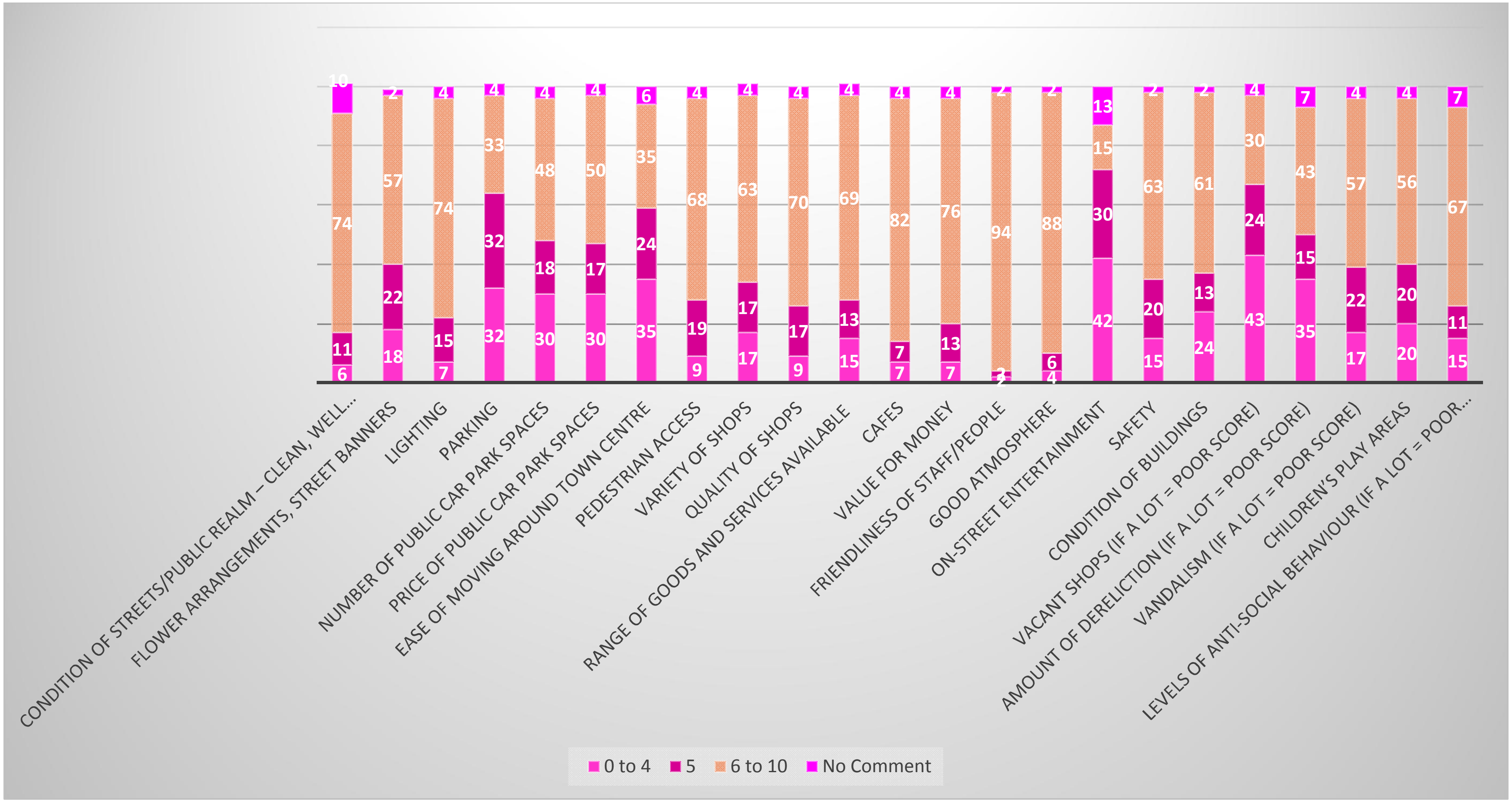
Male respondents were statistically significantly more likely to describe pedestrian access as good / very good.

Male respondents were statistically significantly more likely to describe safety as good / very good.

Male respondents were statistically significantly more likely to describe vandalism as good / very good.

Male respondents were statistically significantly more likely to describe levels of anti-social behaviour as good / very good.

Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Scores (n=54)



4.10 WHAT THREE ASPECTS OF THE TOWN COULD BE IMPROVED?

Respondents were asked to rank their top three priorities for improvement in Ballycastle. Table 22 provides a comprehensive breakdown of the findings. These included:

4.10.1 FIRST PRIORITY – IMPROVEMENT

- Wider variety of shops (13%);
- More recreation facilities (13%);
- Better parking – cost (11%);
- Better parking – number of spaces (9%); and,
- More public toilets (9%).

4.10.2 SECOND PRIORITY - IMPROVEMENT

- More recreation facilities (13%);
- Better parking – number of spaces (11%);
- More shops (9%); and
- More for children/teenagers (7%).

4.10.3 THIRD PRIORITY - IMPROVEMENT

- More for children/teenagers (13%);
- More public toilets (9%);
- Better quality shops (6%);
- More shops (6%);
- Better maintained buildings (6%);
- Better parking – cost (6%);
- Better parking – number of spaces (6%); and,
- More recreation facilities (6%).

The combined highest (1st, 2nd and 3rd) priority included: more recreation facilities (32); better parking – number of spaces (26); and, more for children/teenagers (24).

TABLE 22: What three aspects of the town could be improved? (n=54)

	1st	2nd	3rd	TOTAL
Wider variety of shops	13	7	0	20
More shops	0	9	6	15
Better quality of shops	0	0	6	6
Better maintained buildings	4	2	6	12
Better maintained public spaces	2	2	2	6
Better parking – cost	11	6	6	23
Better parking – number of spaces	9	11	6	26
More for children/teenagers	4	7	13	24
More recreation facilities	13	13	6	32
More Public toilets	9	2	9	20
Better bus service	4	6	2	12
Improved safety	0	0	4	4
Improved street lighting	2	4	2	8
Improved signage	0	2	2	4
NA/No Comment	30	30	33	93
TOTAL	100	100	100	-

4.11 OTHER COMMENTS

Other comments are set out in Table 23.

What three aspects of the town could be improved? (n=54)

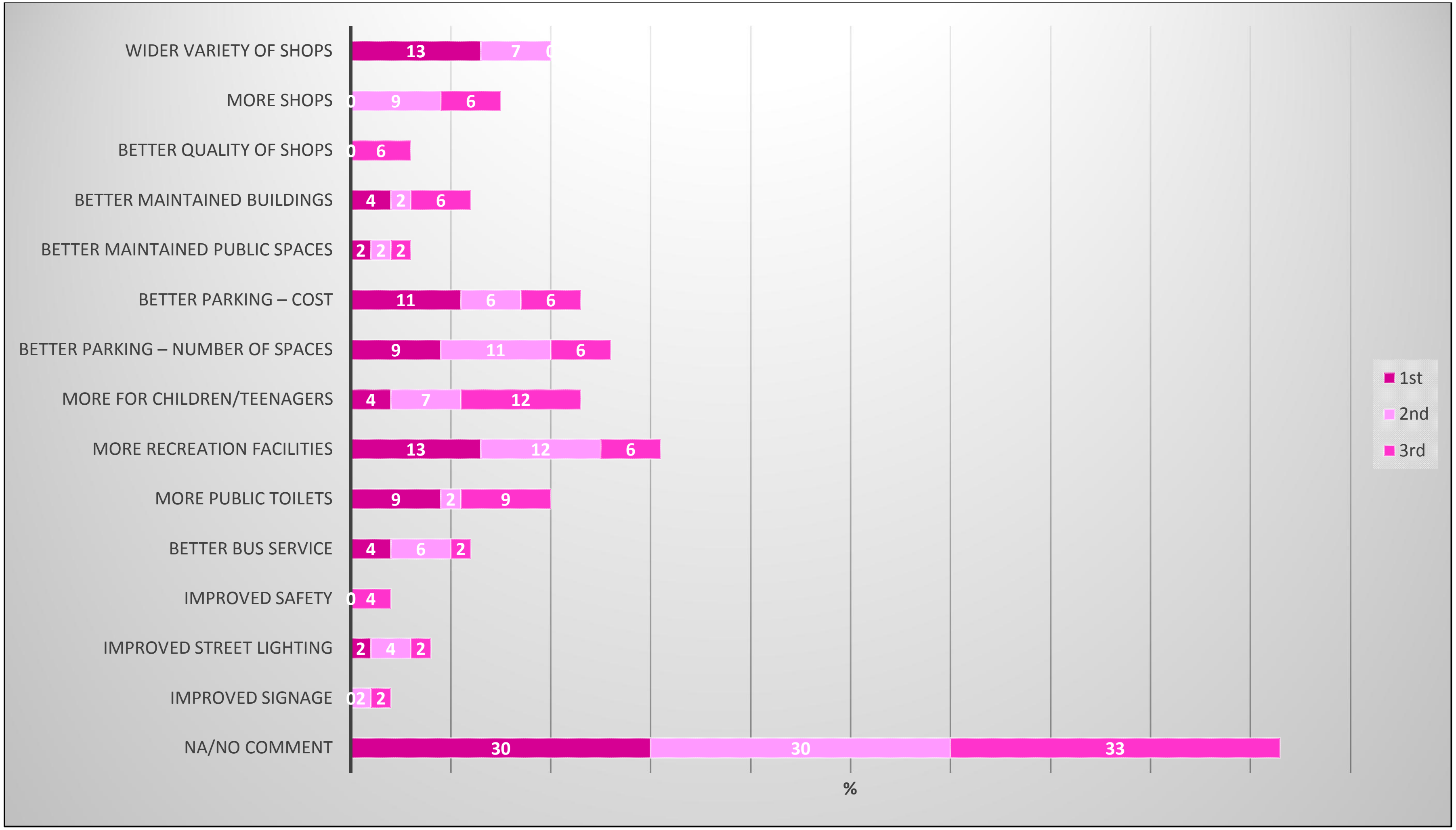


TABLE 23: Any other comments (n=16)	
Diamond area of Ballycastle treacherous for pedestrians. Move taxi rank if possible. Ped access to free car park poor too. Disabled parking at Diamond Bar ok. Other parking at Diamond stopped?	1
Reeling spaces @ seafront + add spaces	1
Ballycastle is great needs to be maintained not changed	1
As above Castle Street feels neglected	1
Municipal pool	1
Poor lighting Castle St	1
Christmas lights Castle Street	1
Charge for Castle St car park	1
Council and traders scheme to promote Ballycastle as a destination through a media/TV campaign. To highlight business opportunities + holidays + Sunday Times Best Place to Live Award	1
No police presence	1
The joy riders are a disgrace and somebody will be killed. Better policing needed.	1
Empty derelict buildings let down the whole business community i.e. Antrim Arms Hotel	1
Takes a while to get	1
Car parks - extra lighting for safety	1
Traffic congestion needs addressed	1
Lorries take up spaces - no loading bays - lorries	1

APPENDIX 1: Business Questionnaire Ballycastle and Map of Town Centre Area

BUSINESS SURVEY

February 2017

Causeway Coast and Glens Borough Council would like to invite you to participate in a Business Survey to enable it to better understand business owners'/managers' perceptions of the town centre.

The findings from this research will be used by the Council to inform its Local Development Plan and may include the identification of lands for future retail development and the production of land use policies to guide development proposals.

The Business Survey will take approximately 4 minutes to complete. All responses will be treated with strict confidentiality.

The town centre area is shown on the map attached.

If you have any queries, please contact Sharon Mulhern from Causeway Coast & Glens Borough Council using telephone number 028 70347244 or Dr Jenny Sproule from *Sproule Consulting* on 07860 342493.

Yours Faithfully

Sharon Mulhern

Local Development Plan Manager

Causeway Coast & Glens Borough Council

Date: ________

Business Profile

1. Business Name: ___________________________
2. Business Address: __________________________
3. Type of Main Business: **[PLEASE CIRCLE ONE ONLY]**

Clothing/footwear/jewellery/accessories	1
Health & beauty	2
Hairdressing	3
Homeware	4
Pet food/accessories	5
Books/newsagent/stationery	6
Pharmacy	7
Optician	8
Doctor/Dentist	9
Entertainment or leisure (gym, arcade, etc)	10
Charity	11
Department store	12
Groceries	13
Other: **Please Specify**	14

4. How many years have you traded in these premises? _________________________________
5. What is the ownership of your business? **[PLEASE CIRCLE ONE ONLY]**

Independent trader/retailer	1
Local chain	2
National chain	3
Multi national chain	4
Franchise	5
Other: **Please Specify**	6

6. How would you describe your current turnover / turnover in last year? **[PLEASE CIRCLE ONE ONLY]**

Well below average	1
Below average	2
Average (normal)	3
Above average	4
Well above average	5

7. Have you/the business owner invested capital in improvements to your business in the last year? **[PLEASE CIRCLE ONE ONLY]**

Yes	1
No	2

8. How many people are currently involved in running your business (including any working owners)? **[PLEASE INSERT FOR EACH]**

Full time (more than 30 hours)	
Part time (up to 30 hours)	
Volunteers (16 hours+)	
Volunteers (16 hours or less)	

Town Centre Perceptions

9. Overall, what is your perception of the town centre? **[PLEASE CIRCLE ONE ONLY]**

Very poor	1
Poor	2
Average	3
Good	4
Very good	5

Please comment: ______________________________

10. Please score your current opinion of the following aspects of the town centre (Scale 1 – 10, 1 very poor, 5 average, 10 – very good) **[PLEASE INSERT FOR EACH]**

Range of goods and services available	
Condition of buildings	
Condition of streets/public realm – clean, well maintained, attractive	
Number of public car park spaces	
Price of public car park spaces	
Safety	
Lighting	
On-street entertainment	
Levels of anti-social behaviour	
Vandalism	
Vacant shops	
Amount of dereliction	
Convenience	
Friendliness of staff/people	
Variety of shops	
Good atmosphere	
Quality of shops	
Cafes	
Children's play areas	
Parking	
Value for money	
Presence of pedestrian area	
Flower arrangements, street banners	

11. What three aspects of the town could be improved? **[PLEASE RANK 1,2,3]**

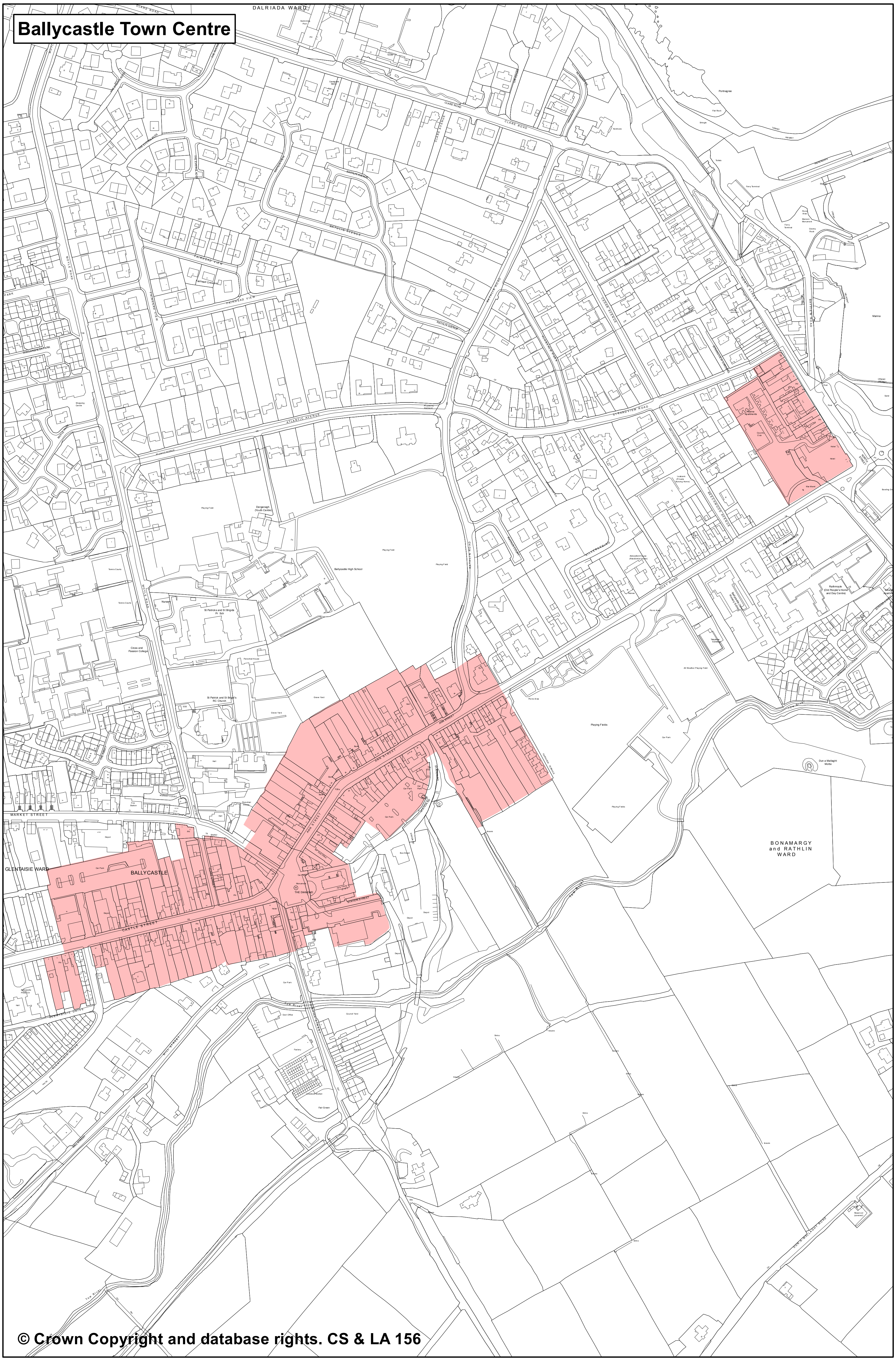
Wider variety of shops	
More shops	
Better quality of shops	
Better maintained buildings	
Better maintained public spaces	
Better parking – cost	
Better parking – number of spaces	
More for children/teenagers	
More recreation facilities	
More Public toilets	
Better bus service	
Improved safety	
Improved street lighting	
Improved signage	

Background Information

Male	1	Female	2
Age (Years)			

Thank you for your participation.

Ballycastle Town Centre



Sproule Consulting

FINAL REPORT:

21st April 2017

Causeway
Coast & Glens
Borough Council

Dr Jenny Sproule

EMAIL: jenny.sproule@btinternet.com

EXECUTIVE SUMMARY

- Almost three-quarters of respondents (72%) were residents of Ballycastle, 27% were visitors to the town.

- Forty-five per cent of respondents reported that they visited Ballycastle town centre at least once a week; 36% stated that they visited the town centre daily; 7% visited the town centre less often than once a fortnight, a further 1% visited at least once a month, whilst 9% visited at less often.

- Thirty-nine per cent of respondents stated that they had visited Ballycastle to eat / drink at local cafes, restaurants and pubs; 27% were grocery shopping and 125 were at work / school in the area. A further 9% were purchasing Books, newsagent, stationery in Ballycastle town centre.

- Residents were statistically significantly more likely than visitors to report being in the town centre for groceries.

- Residents were statistically significantly more likely than visitors to report being in the town centre to eat.

- Almost half the respondents (48%) confirmed that they intended to stay two hours or more in the town; just over ra fifth (21%) intended staying for at least one hour but less than two hours; 17% planned staying for at least thirty minutes but less than one hour; 10% planned staying between 10 and 30 minutes and a further 2% intended to stay less than 10 minutes.

- Visitors were statistically significantly more likely than residents to report being in the town centre for two hours or more.

- 68% of respondents stated that they had travelled from the Ballycastle area to visit the town centre; this was followed by 5% from Ballymoney and 3% from Portrush.

- Almost two-thirds of respondents (64%) travelled by car to Ballycastle town centre; 31% walked to the area; 2% travelled by bus and 1% by train.

- Ten percent of respondents reported that they spent nothing during their visit. Just over a fifth (22%) of respondents reported that they spent between £0.01 and £10; a further 26% spent between £10.01 and £20; 10% spent between £20.01 and £30, whilst 13% spent between £30.01 and £40. Seven per cent spent between spent £40.01 and £50; 10% spent over £50.

- The majority of respondents (89%) confirmed they had been visiting the town for more than 5 years.

- Just over half of respondents (54%) stated that their overall perception of Ballycastle town centre was average; two fifths (41%) described their perception as very good/good, whilst 5% described it as very poor/poor.

- Residents were statistically significantly more likely than visitors to describe the town centre as poor.

- Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Ballycastle town centre (1 very poor and 10 very good); the highest level of 'good' scores were for the following aspects:

- Friendliness of staff / people (97%);
- Safety (95%);
- Pedestrian access (94%); and
- Street lighting (93%).

The highest level of 'average' scores were for the following aspects:

- On-street entertainment (26%);
- Dereliction (20%); and
- Vacant shops (19%).

The highest level of 'poor' scores were for the following aspects:

- On-street entertainment (47%);
- Range of goods/services (29%);
- Variety of shops (29%); and
- Dereliction (22%).

- Males were statistically significantly more likely than females to describe the quality of goods / services as good.

- Visitors were statistically significantly more likely than residents to describe the condition of buildings in the town centre as good.

- Respondents were asked to rank their top three priorities for improvement in Ballycastle. These included:

➢ FIRST PRIORITY – IMPROVEMENT

- Wider variety of shops (33%);
- More for children/teenagers (15%); and,
- More recreation facilities (10%).

➢ SECOND PRIORITY - IMPROVEMENT

- More shops (25%);
- More recreation facilities (22%);
- Wider variety of shops (11%); and,
- Better bus service (11%).

➢ THIRD PRIORITY - IMPROVEMENT

- More recreation facilities (22%);
- Wider variety of shops (18%); and
- More public toilets (16%).

The combined highest (1^{st}, 2^{nd} and 3^{rd}) priority included: wider variety of shops - 62%; more recreation facilities – 54% and, more for shops – 37%.

TABLE OF CONTENTS

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1. INTRODUCTION

Causeway Coast and Glens Borough Council (CCGBC) commissioned Sproule Consulting to conduct general public and business surveys in the six main towns within the Borough. Table 1 provides a comprehensive breakdown of the number of surveys completed.

TABLE 1: Completed Surveys		
	On-Street (General Public)	Business
Coleraine	100	100
Ballymoney	100	90
Portrush	100	40
Portstewart	100	40
Limavady	100	78
Ballycastle	100	54
TOTAL	600	402

The purpose of this Report is to provide empirical data to inform CCGBC's Local Development Plan for the Ballycastle area.

The survey findings set out in this General Public Report, together with the data collated from the Business Report, will therefore be instrumental in establishing users' and stakeholders' attitudes and perceptions of Ballycastle town centre.

2. RESEARCH: KEY OBJECTIVES

The key objectives of this research are shown in Figure 1.

3. DEMOGRAPHIC PROFILE

Fifty-two per cent of respondents were female, 48% were male (Table 2).

TABLE 2: Gender (n=100)	
Male	48
Female	52

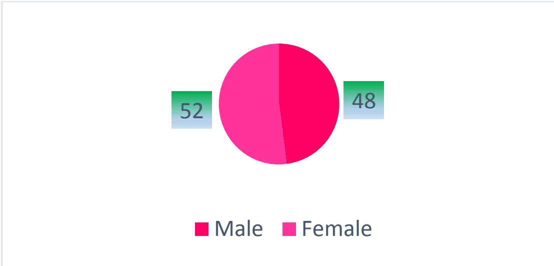
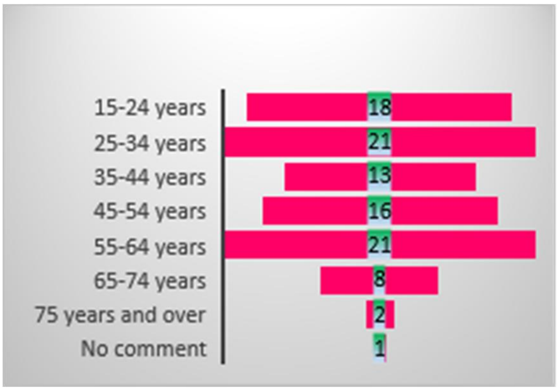
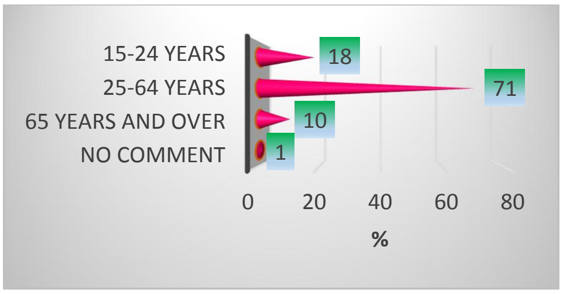


Table 3 sets out the achieved age profile.

TABLE 3: Age (n=100)	
15-24 years	18
25-34 years	21
35-44 years	13
45-54 years	16
55-64 years	21
+65-74 years	8
75 years and over	2
No comment	1





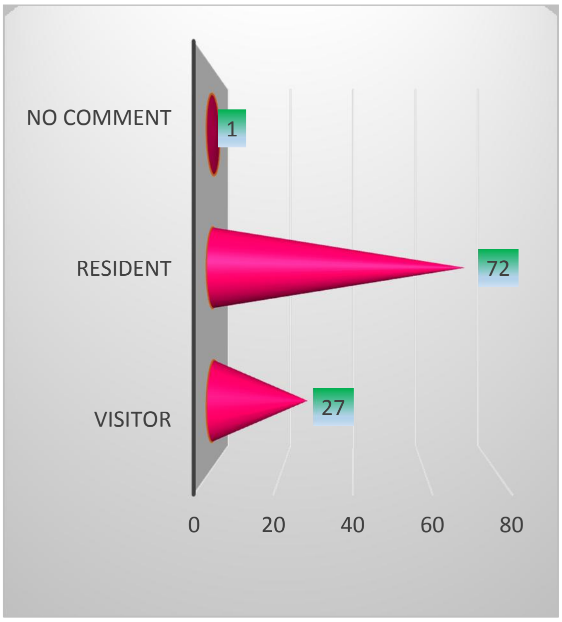
4. GENERAL PUBLIC SURVEY FINDINGS - BALLYCASTLE TOWN CENTRE

4.1 ARE YOU A RESIDENT OF BALLYCASTLE OR VISITOR TODAY?

As shown in Table 4, almost three-quarters of respondents (72%) were residents of Ballycastle, 27% were visitors to the town.

TABLE 4: Are you a resident of Ballycastle or visitor today? (n=100)

	%
Resident	72
Visitor	27
No comment	1

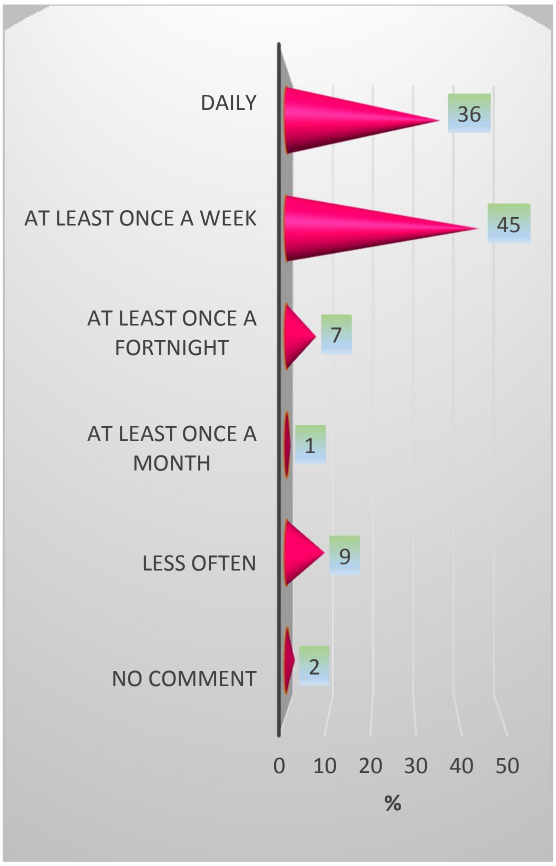


4.2 HOW OFTEN DO YOU VISIT THE TOWN CENTRE?

Forty-five per cent of respondents reported that they visited Ballycastle town centre at least once a week (Table 5); 36% stated that they visited the town centre daily; 7% visited the town centre less often than once a fortnight, a further 1% visited at least once a month, whilst 9% visited at less often.

TABLE 5: How often do you visit the town centre? (n=100)

	%
Daily	36
At least once a week	45
At least once a fortnight	7
At least once a month	1
Less often	9
No comment	2

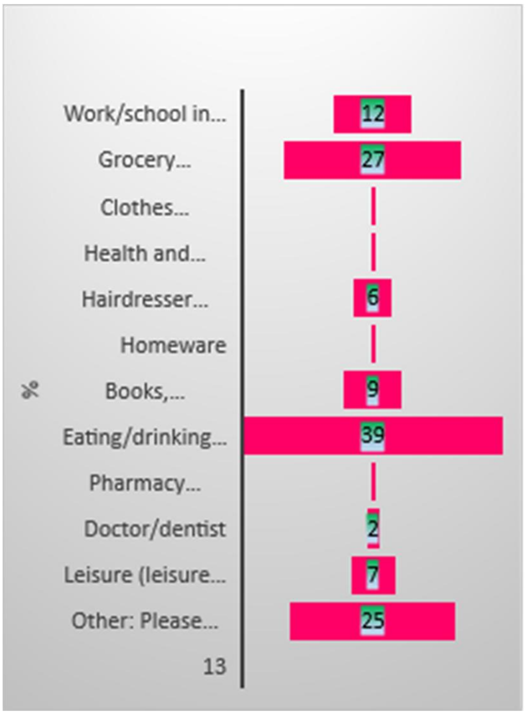


4.3 WHY HAVE YOU COME TO THE TOWN TODAY?

Thirty-nine per cent of respondents stated that they had visited Ballycastle to eat / drink at local cafes, restaurants and pubs (Table 6); 27% were grocery shopping and 125 were at work / school in the area. A further 9% were purchasing Books, newsagent, stationery in Ballycastle town centre.

TABLE 6: Why have you come to the town today? (multiple responses)

	%
Work/school in the area	12
Grocery shopping	27
Clothes shopping	1
Health and beauty	1
Hairdresser/barber	6
Homeware	1
Books, newsagent, stationery	9
Eating/drinking (cafes, restaurants, pubs)	39
Pharmacy/optician	1
Doctor/dentist	2
Leisure (leisure centre, park)	7
Other: **Please Specify**	25



Residents were statistically significantly more likely than visitors to report being in the town centre for groceries.

Residents were statistically significantly more likely than visitors to report being in the town centre to eat.

A quarter (25%) of respondents were in Ballycastle town centre for other reasons (Table 7).

TABLE 7: Other Reason for Coming to Town - Please Specify (n=25)

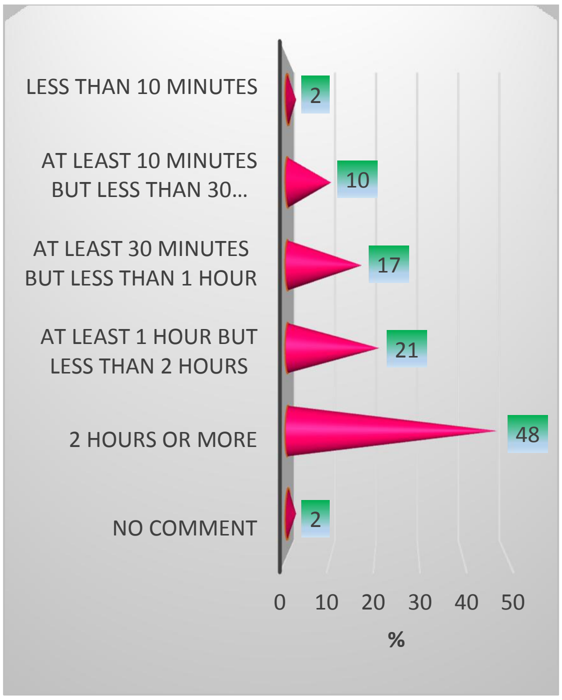
Walking my dog/walk/walk with friend	10
Visiting relatives/see friends	4
Tourism, sight-seeing	2
Mortons	1
Coffee in Marine and walk	1
Get paper and walk dog	1
Getting fry	1
Lunch	2
Coffee at bay café	1
Get paper	1
Wifi	1
TOTAL:	25

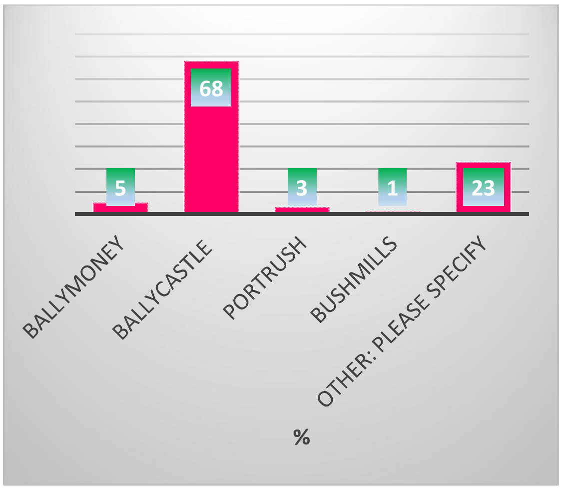
4.4 HOW LONG DO YOU INTEND TO SPEND HERE FOR THIS VISIT?

Almost half the respondents (48%) confirmed that they intended to stay two hours or more in the town (Table 8); just over a fifth (21%) intended staying for at least one hour but less than two hours; 17% planned staying for at least thirty minutes but less than one hour;

TABLE 8: How long do you intend to spend here for this visit? (n=100)

Less than 10 minutes	2
At least 10 minutes but less than 30 minutes	10
At least 30 minutes but less than 1 hour	17
At least 1 hour but less than 2 hours	21
2 hours or more	48
No comment	2
TOTAL	100





10% planned staying between 10 and 30 minutes and a further 2% intended to stay less than 10 minutes.

Visitors were statistically significantly more likely than residents to report being in the town centre for two hours or more.

4.5 WHERE HAVE YOU TRAVELLED FROM TO GET TO BALLYCASTLE TOWN CENTRE TODAY?

As shown in Table 9, 68% of respondents stated that they had travelled from the Ballycastle area to visit the town centre; this was followed by 5% from Ballymoney and 3% from Portrush.

4.6

TABLE 9: Where have you travelled from to get to Ballycastle town centre today? (n=100)	
Ballymoney	5
Ballycastle	68
Portrush	3
Bushmills	1
Other: Please Specify	23
Total	100

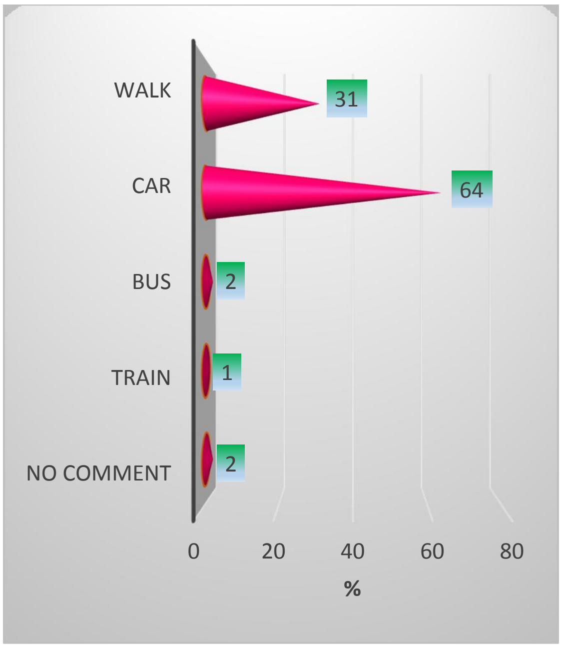
Table 10 provides a breakdown of the other areas respondents travelled from to visit Ballycastle town centre.

TABLE 10: Where have you travelled from to get to Ballycastle today? Other (n=23)	
Moyarget	1
England	1
Belfast	4
Carnduff	1
Cushendun	3
Banbridge	2
Lisburn	2
Armoy	6
Balinlea	1
Derry	1
Loughguile	1
TOTAL	23

4.6 HOW DID YOU TRAVEL TO THE AREA?

Almost two-thirds of respondents (64%) travelled by car to Ballycastle town centre; 31% walked to the area; 2% travelled by bus and 1% by train (Table 11).

TABLE 11: How did you travel to the area? (n=100)	
Walk	31
Car	64
Bus	2
Train	1
No comment	2
TOTAL	100



4.7 IN TOTAL, HOW MUCH DO YOU INTEND TO SPEND/HAVE YOU SPENT DURING YOUR VISIT TODAY?

4.8

Ten percent of respondents reported that they spent nothing during their visit. Just over a fifth (22%) of respondents reported that they spent between £0.01 and £10; a further 26% spent between £10.01 and £20; 10% spent between £20.01 and £30, whilst 13% spent between £30.01 and £40. Seven per cent spent between spent £40.01 and £50 (Table 12). Ten per cent spent over £50.

TABLE 12: In total, how much do you intend to spend / have you spent during your visit today? (n=100)	
£0 (nothing)	10
£0.01 - £10	22
£10.01 - £20	26
£20.01 - £30	10
£30.01 – £40	13
£40.01 – £50	7
Over £50	10
No Comment	2

4.8 HOW LONG HAVE YOU BEEN VISITING THE TOWN?

The majority of respondents (89%) confirmed they had been visiting the town for more than 5 years (Table 13).

TABLE 13: How long have you been visiting the town? (n=100)	
Less than 6 months	3
At least 6 months but less than 1 year	1
At least 1 year but less than 2 years	3
At least 2 years but less than 5 years	2
More than 5 years	89
No comment	2
TOTAL	100

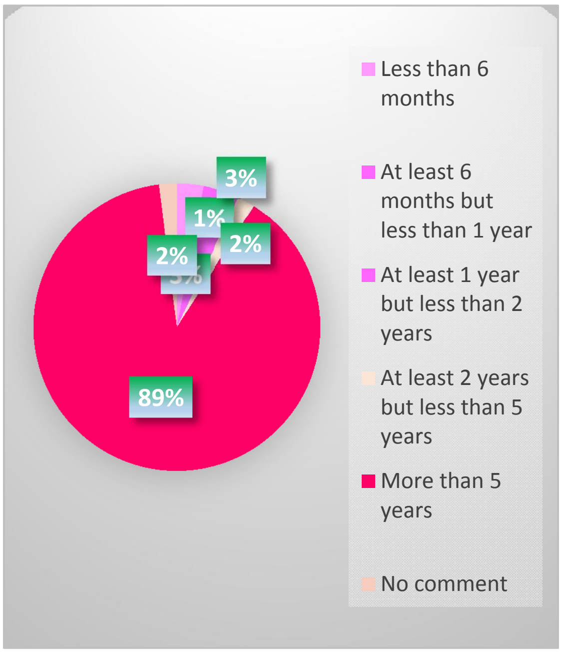


TABLE 14: Overall, what is your perception of the town centre? (n=100)	
Very poor	1
Poor	4
Average	54
Good	26
Very good	15
TOTAL	100

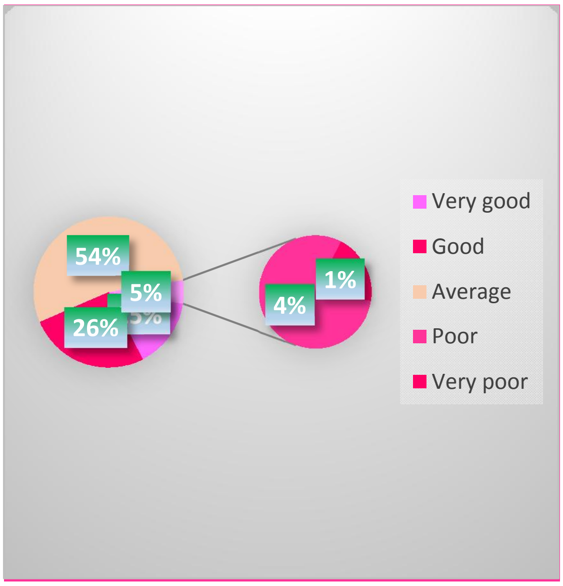
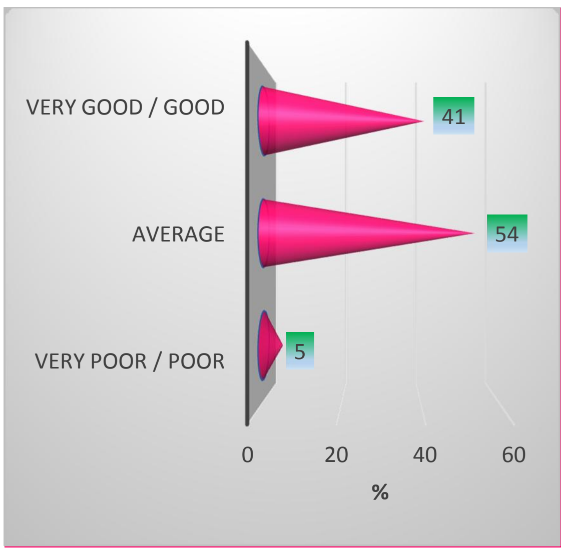


TABLE 15: Overall, what is your perception of the town centre (Grouped)? (n=100)	
Very poor / poor	5
Average	54
Very good / good	41



4.9 OVERALL, WHAT IS YOUR PERCEPTION OF THE TOWN CENTRE?

Just over half of respondents (54%) stated that their overall perception of Ballycastle town centre was average; two fifths (41%) described their perception as very good/good, whilst 5% described it as very poor/poor (Tables 14 and 15).

Residents were statistically significantly more likely than visitors to describe the town centre as poor.

4.10 OTHER COMMENTS

TABLE 16: Overall, what is your perception of the town centre? Other (n=7)	
Dull and boring	1
Shabby	1
Better range of shops	1
Needs more facilities	1
Good job on the church	1
Independent shops	5
Empty shops and buildings like the Antrim Arms and park manor	1
TOTAL	7

4.11 PLEASE SCORE YOUR CURRENT OPINION OF THE FOLLOWING ASPECTS OF THE TOWN CENTRE (SCALE 1 – 10, 1 VERY POOR, 5 AVERAGE, 10 - VERY GOOD)

Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Ballycastle town centre (1 very poor and 10 very good). The results are shown in detail in Table 16. For further clarity Table 17 sets out a summary of poor scores (1-4), average (5) and good scores.

As shown, the highest level of 'good' scores were for the following aspects:

- Friendliness of staff / people (97%);
- Safety (95%);
- Pedestrian access (94%); and
- Street lighting (93%).

The highest level of 'average' scores were for the following aspects:

- On-street entertainment (26%);
- Dereliction (20%); and
- Vacant shops (19%).

The highest level of 'poor' scores were for the following aspects:

- On-street entertainment (47%);
- Range of goods/services (29%);
- Variety of shops (29%); and
- Dereliction (22%).

4.12 WHAT THREE ASPECTS OF THE TOWN COULD BE IMPROVED?

Respondents were asked to rank their top three priorities for improvement in Ballycastle. Table 18 provides a comprehensive breakdown of the findings. These included:

4.12.1 FIRST PRIORITY – IMPROVEMENT

- Wider variety of shops (33%);
- More for children/teenagers (15%); and,
- More recreation facilities (10%).

4.12.2 SECOND PRIORITY - IMPROVEMENT

- More shops (25%);
- More recreation facilities (22%);
- Wider variety of shops (11%); and,
- Better bus service (11%).

4.12.3 THIRD PRIORITY - IMPROVEMENT

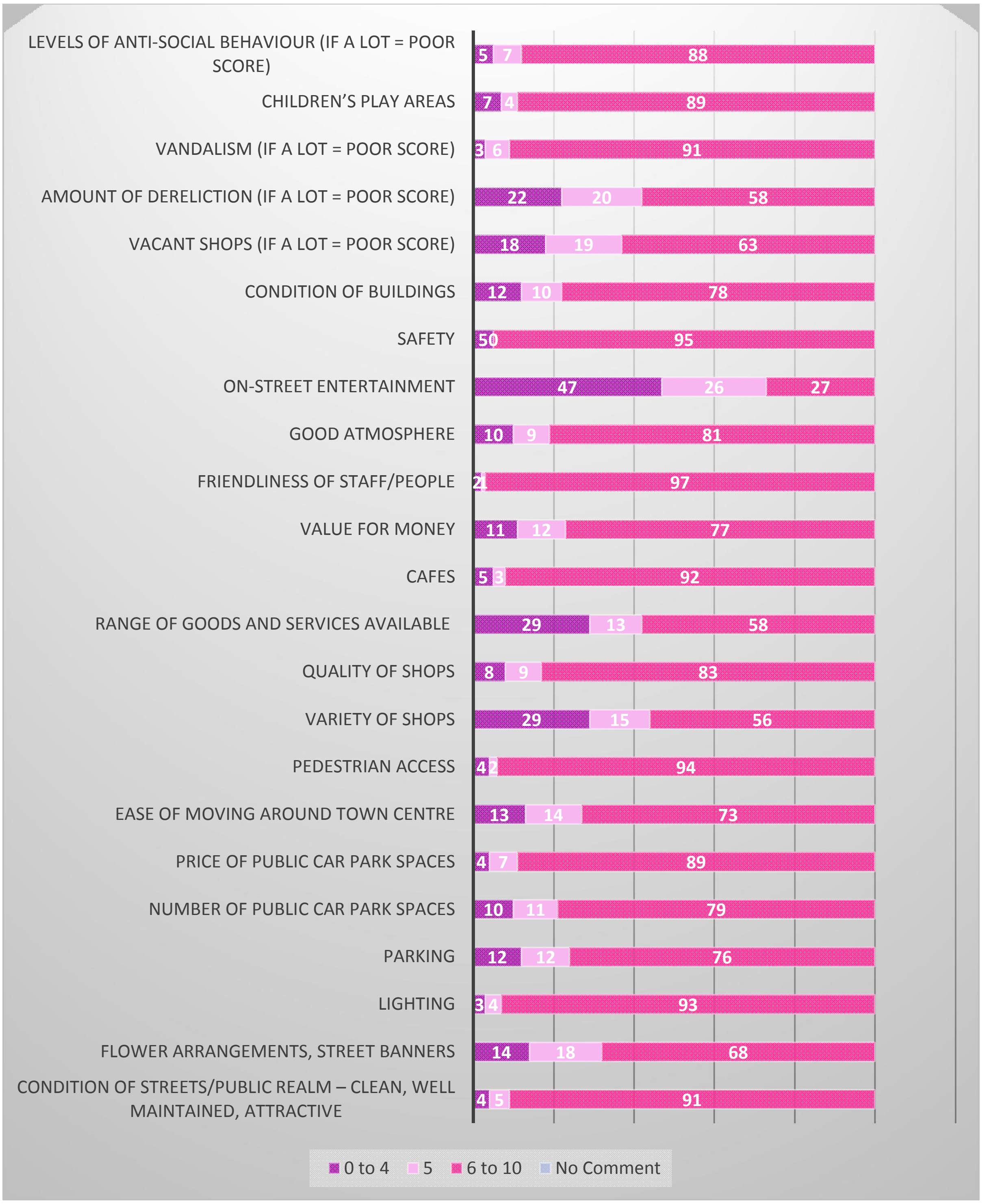
- More recreation facilities (22%);
- Wider variety of shops (18%); and
- More public toilets (16%).

The combined highest (1^{st}, 2^{nd} and 3^{rd}) priority included: wider variety of shops - 62%; more recreation facilities – 54% and, more for shops – 37%.

TABLE 17: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) (n=100)												
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**99**	
Condition of streets/public realm – clean, well maintained, attractive	2	0	1	1	5	9	22	41	11	8	0	100
Flower arrangements, street banners	2	0	4	8	18	18	24	20	1	5	0	100
Lighting	0	0	0	3	4	3	21	39	22	8	0	100
Parking	1	5	2	4	12	10	25	25	11	5	0	100
Number of public car park spaces	1	2	4	3	11	11	25	27	10	6	0	100
Price of public car park spaces	1	2	1	1	7	7	13	28	26	14	0	100
Ease of moving around town centre	0	4	5	4	14	17	14	29	7	6	0	100
Pedestrian access	0	0	0	4	2	9	8	39	20	18	0	100
Variety of shops	1	2	6	20	15	22	14	10	5	5	0	100
Quality of shops	0	1	0	7	9	14	30	28	3	8	0	100
Range of goods and services available	1	4	3	21	13	15	18	17	1	7	0	100
Cafes	0	2	0	3	3	9	10	37	23	13	0	100
Value for money	0	0	6	5	12	9	17	39	7	5	0	100
Friendliness of staff/people	0	0	2	0	1	3	5	30	31	28	0	100
Good atmosphere	1	1	1	7	9	4	20	30	17	10	0	100
On-street entertainment	10	13	8	16	26	7	6	5	5	4	0	100
Safety	1	0	2	2	0	8	18	40	18	11	0	100
Condition of buildings	0	1	2	9	10	12	27	26	10	3	0	100
Vacant shops (if a lot = poor score)	1	1	6	10	19	20	32	10	1	0	0	100
Amount of dereliction (if a lot = poor score)	2	3	4	13	20	21	25	8	4	0	0	100
Vandalism (if a lot = poor score)	1	0	1	1	6	6	13	41	27	4	0	100
Levels of anti-social behaviour (if a lot = poor score)	0	2	0	5	4	5	24	35	12	13	0	100
Children's play areas	1	1	1	2	7	10	16	41	16	5	0	100
TOTAL	26	44	59	149	227	249	427	645	288	186	0	2300

TABLE 18: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) Grouped Scores (n=100)					
	1 – 4	**5**	**6 – 10**	**No Comment**	***Rounded to 100**
Condition of streets/public realm – clean, well maintained, attractive	4	5	91	0	100
Flower arrangements, street banners	14	18	68	0	100
Lighting	3	4	93	0	100
Parking	12	12	76	0	100
Number of public car park spaces	10	11	79	0	100
Price of public car park spaces	4	7	89	0	100
Ease of moving around town centre	13	14	73	0	100
Pedestrian access	4	2	94	0	100
Variety of shops	29	15	56	0	100
Quality of shops	8	9	83	0	100
Range of goods and services available	29	13	58	0	100
Cafes	5	3	92	0	100
Value for money	11	12	77	0	100
Friendliness of staff/people	2	1	97	0	100
Good atmosphere	10	9	81	0	100
On-street entertainment	47	26	27	0	100
Safety	5	0	95	0	100
Condition of buildings	12	10	78	0	100
Vacant shops (if a lot = poor score)	18	19	63	0	100
Amount of dereliction (if a lot = poor score)	22	20	58	0	100
Vandalism (if a lot = poor score)	3	6	91	0	100
Levels of anti-social behaviour (if a lot = poor score)	7	4	89	0	100
Children's play areas	5	7	88	0	100
TOTAL	277	227	1796	0	2300

Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) Grouped Scores (n=100)

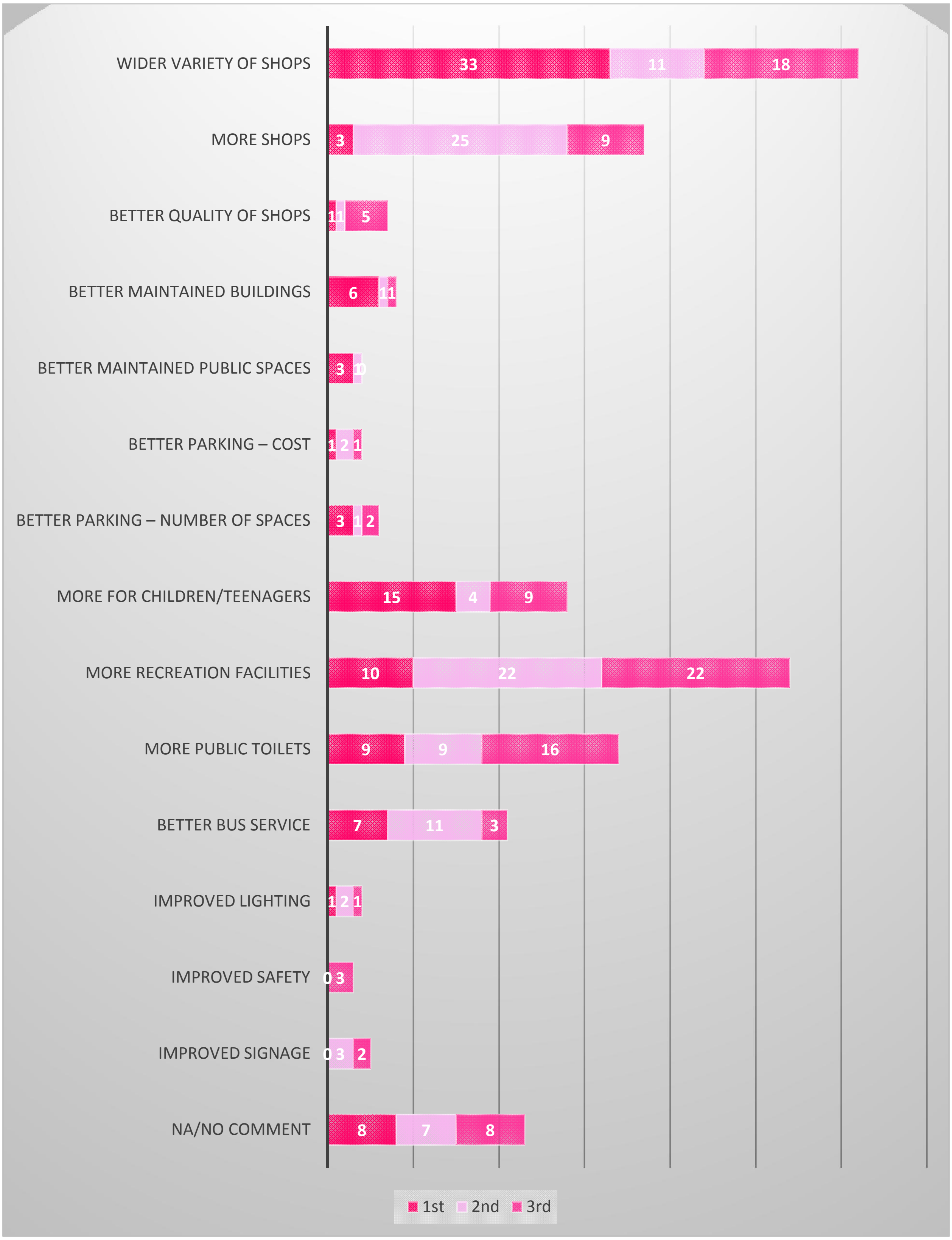


Males were statistically significantly more likely than females to describe the quality of goods / services as good.

Visitors were statistically significantly more likely than residents to describe the condition of buildings in the town centre as good.

TABLE 19: What three aspects of the town could be improved?				
	1st (n=100)	**2nd (n=100)**	**3rd (n=100)**	**TOTAL**
Wider variety of shops	*33*	11	18	62
More shops	*3*	25	9	37
Better quality of shops	*1*	1	5	7
Better maintained buildings	*6*	1	1	8
Better maintained public spaces	*3*	1	0	4
Better parking – cost	*1*	2	1	4
Better parking – number of spaces	*3*	*1*	2	6
More for children/teenagers	*15*	4	9	28
More recreation facilities	*10*	22	22	54
More Public toilets	*9*	9	16	34
Better bus service	*7*	11	3	21
Improved safety	*0*	0	3	3
Improved lighting	*1*	2	1	4
Improved signage	*0*	3	2	5
NA	8	7	8	23
TOTAL	100	100	100	300

What three aspects of the town could be improved?



APPENDIX 1: General Public Questionnaire Ballycastle and Map of Town Centre Area

GENERAL PUBLIC SURVEY

February 2017

Causeway Coast and Glens Borough Council would like to invite you to participate in a Survey to enable it to better understand the general public's perception of the town centre.

The findings from this research will be used by the Council to inform its Local Development Plan and may include the identification of lands for future retail development and the production of land use policies to guide development proposals.

The General Public Survey will take approximately 4 minutes to complete. All responses are anonymous and will be treated with strict confidentiality.

The town centre area is shown on the map attached.

If you have any queries, please contact Sharon Mulhern from Causeway Coast & Glens Borough Council using telephone number 028 70347244 or Dr Jenny Sproule from *Sproule Consulting* on 07860 342493.

Yours Faithfully

Sharon Mulhern

Local Development Plan Manager

Causeway Coast & Glens Borough Council

1. Are you a resident of _____________ or visitor today? **[PLEASE CIRCLE ONE ONLY]**

Resident	1	Visitor	2

2. How often do you visit the town centre? **[PLEASE CIRCLE ONE ONLY]**

Daily	1
At least once a week	2
At least once a fortnight	3
At least once a month	4
Less often	5

3. Why have you come to the town today? **[PLEASE CIRCLE ALL THAT APPLY]**

Work/school in the area	1	Books, newsagent, stationery	10
Grocery shopping	2	Eating/drinking (cafes, restaurants, pubs)	11
Clothes shopping	3	Pharmacy/optician	12
Footwear shopping	4	Doctor/dentist	13
Jewellery shopping	5	Using financial, legal or insurance services	14
Health and beauty	6	Entertainment (arcade)	15
Hairdresser/barber	7	Leisure (leisure centre, park)	16
Homeware	8	Other: **Please Specify**	17
Electrical goods	9		

4. How long do you intend to spend here for this visit? **[PLEASE CIRCLE ONE ONLY]**

Less than 10 minutes	1
At least 10 minutes but less than 30 minutes	2
At least 30 minutes but less than 1 hour	3
At least 1 hour but less than 2 hours	4
2 hours or more	5

5. Where have you travelled from to get to __________ today? **[PLEASE CIRCLE ONE ONLY]**

Coleraine	1	Garvagh	7
Ballymoney	2	Kilrea	8
Limavady	3	Bushmills	9
Ballycastle	4	Dungiven	10
Portrush	5	Other: **Please Specify**	11
Portstewart	6		

6. How did you travel to the area? **[PLEASE CIRCLE ONE ONLY]**

Walk	1	Train	6
Bus	2	Cycle	7
Car	3	Other: **Please Specify**	8
Taxi	4		
Electrical goods	5		

7. In total, how much do you intend to spend/have you spent during your visit today? **[PLEASE CIRCLE ONE ONLY]**

£0	1	£31 – 40	6
£0 - £10	2	£41 – 50	7
£11 - £20	3	£51 or more	8
£21 - £30	4		

8. How long have you been visiting the town? **[PLEASE CIRCLE ONE ONLY]**

Less than 6 months	1
At least 6 months but less than 1 year	2
At least 1 year but less than 2 years	3
At least 2 years but less than 5 years	4
More than 5 years	5

Town Centre

9. Overall, what is your perception of the town centre? **[PLEASE CIRCLE ONE ONLY]**

Very poor	1
Poor	2
Average	3
Good	4
Very good	5

Please comment: ______________________________

10. Please score your current opinion of the following aspects of the town centre (Scale 1 – 10, 1 very poor, 5 average, 10 – very good) **[PLEASE INSERT FOR EACH]**

Range of goods and services available	
Condition of buildings	
Condition of streets/public realm – clean, well maintained, attractive	
Number of public car park spaces	
Price of public car park spaces	
Safety	
Lighting	
On-street entertainment	
Levels of anti-social behaviour	
Vandalism	
Vacant shops	
Amount of dereliction	
Convenience	
Friendliness of staff/people	
Variety of shops	
Good atmosphere	
Quality of shops	
Cafes	
Children's play areas	
Parking	
Value for money	
Presence of pedestrian area	
Flower arrangements, street banners	

11. What three aspects of the town could be improved? **[PLEASE RANK 1,2,3]**

Wider variety of shops	
More shops	
Better quality of shops	
Better maintained buildings	
Better maintained public spaces	
Better parking – cost	
Better parking – number of spaces	
More for children/teenagers	
More recreation facilities	
More Public toilets	
Better bus service	
Improved safety	
Improved street lighting	
Improved signage	

Background Information

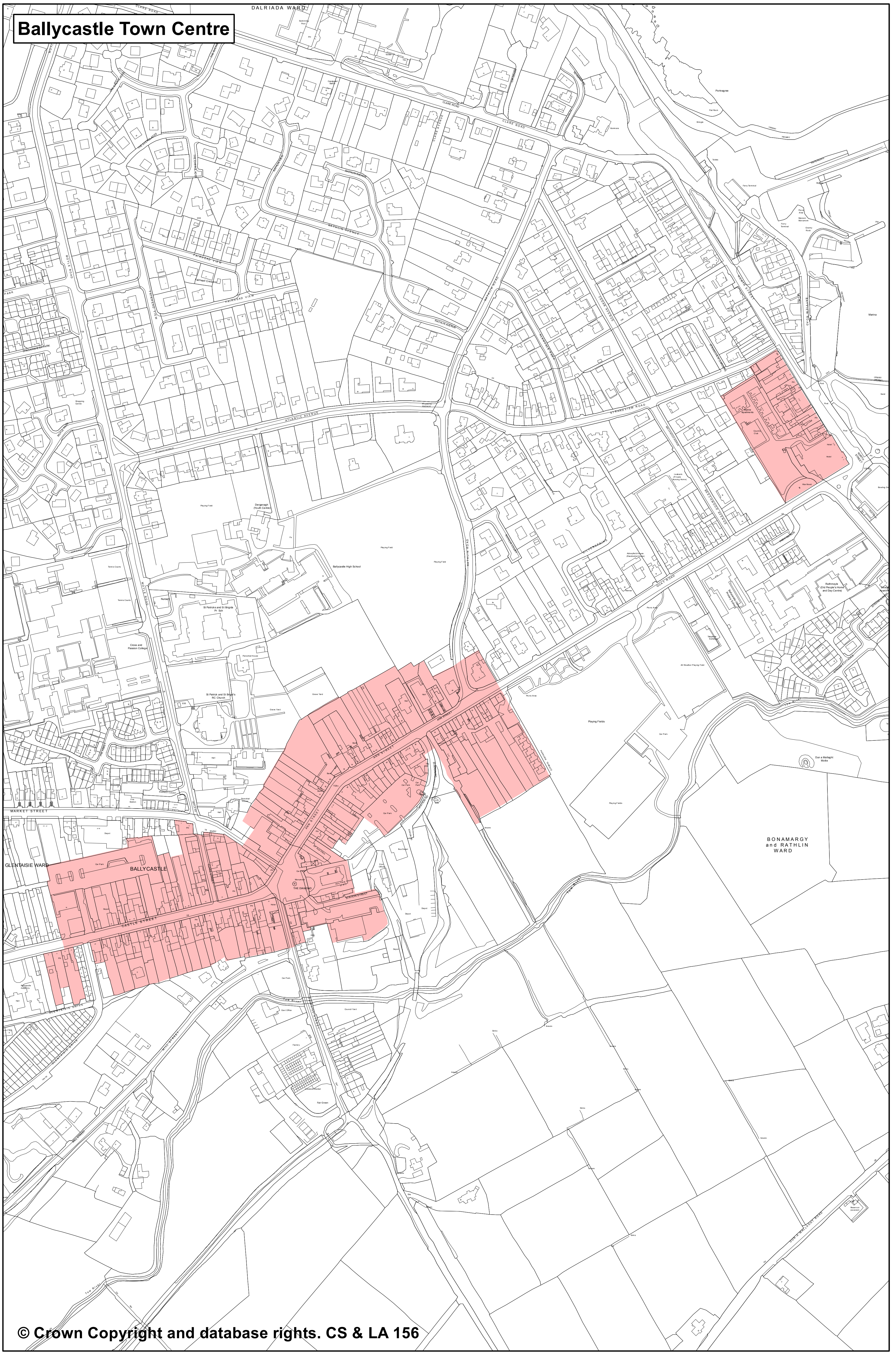
Male	1	Female	2
Age (Years)			

Thank you for your participation.

Date: _____________

Location: _____________

Ballycastle Town Centre



Sproule Consulting

FINAL REPORT:

21st April 2017

Causeway Coast & Glens Borough Council

Dr Jenny Sproule

EMAIL: jenny.sproule@btinternet.com

EXECUTIVE SUMMARY

- 48% of business owners / managers described their main business type as 'other' – these included: coffee shop / café (n=9); butcher (n=4); take-away (n=2); laundry / dry cleaning (n=2); insurance broker (n=2) etc; 17% reported that their main business type was clothing / footwear/ jewellery and accessories.

- 52% traded in their current premises for between 1-10 years; 16% had traded in their current premises for 11-20 years; 10% had been trading in their current premises for between 31-40 years; 6% had been trading in their current premises between 21-30 years and 4% between 41-50 years; 1 business had been trading in Ballymoney town centre for 50 + years.

- 74% described their business ownership as being an independent trader / retailer; 9% were part of a local chain; 3% confirmed they were part of a multinational chain, 3% were part of a franchise; 2% were part of a national chain and 4% reported being other.

- 54% described their turnover in the last business year as average (normal); 21% reported that their turnover was below average; 12% described their turnover as above average, whilst 6% confirmed that their turnover was well below average; 2% confirmed their turnover was well above average.

- Respondents who described their turnover as average / above average were statistically significantly more likely to confirm they had invested money in their business, compared to respondents whose turnover had been described as below / well below average.

- 56% had invested money in improvements to their business in the last year.

- 32% had invested in technology, 43% in building works and 26% in staff development.

- 79% of businesses had full-time staff, 77% had part-time staff, 7% had volunteers working more than 16 hours per week and 12% had volunteers working less than 16 hours per week.

- 299 staff were employed on a full-time basis, 294 were employed on a part-time basis, giving a total of 593 staff employed in either a full-time or part-time capacity; 69 people were involved as volunteers for more than 16 hours per week, whilst a further 90 volunteered for less than 16 hours.

- 76% employed between 1-10 full-time staff, 3% of businesses employed between 11-20 full-time staff.

- 73% employed between 1-10 part-time staff, 2% employed between 11-20 and 2% employed between 31-40.

- 2% of businesses reported having between 1-10 people volunteer 16+ hours per week. Three per cent of businesses reported having volunteers between 11-20 hours per week.

- 10% reported having between 1-10 volunteers involved for less than 16 hours each per week; 1% had volunteers 11-20 hours per week and a further 1% had volunteers between 31-40 hours per week.

- 54% described their overall perception of Ballymoney town centre as very poor / poor; 31% reported that their perception of the town centre was average, whilst 13% stated that it was very good / good.

➢ Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Ballymoney town centre (1 very poor and 10 very good). As shown, the highest level of 'good' scores were for the following aspects:

- Friendliness of staff / people (86%);
- Cafes (79%);
- Good atmosphere (76%); and,
- Lighting (72%).

➢ The highest level of 'average' scores were for the following aspects:

- Vandalism (38%);
- Children's play areas (33%);
- Carparking - cost (30%); and
- Condition of streets/cleanliness (29%).

➢ The highest level of 'poor' scores were for the following aspects:

- Dereliction (85%);
- Vacant shops (81%);
- Variety of shops (68%); and,
- Condition of buildings (51%).

Respondents were asked to rank their top three priorities for improvement in Ballymoney. These included:

- 1st PRIORITY: Wider variety of shops (28%);
  More shops (17%);
  Better quality shops (6%); and,
  Better parking – number of spaces (4%).

- 2nd PRIORITY: More shops (17%);
  Wider variety of shops (12%);
  Better maintained buildings (9%); and,
  Better quality of shops (8%).

- 3rd PRIORITY: Better quality shops (12%);
  Better maintained buildings (12%);
  More shops (8%); and,
  Wider variety of shops (8%).

- The combined highest (1st, 2nd and 3rd) priority included: wider variety of shops (48); more shops (42); and, better quality of shops (26).

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LIST OF FIGURES:

LIST OF TABLES:

***PLEASE NOTE THAT DUE TO ROUNDING SOME TABLES MAY NOT TOTAL 100%.**

1. INTRODUCTION

Causeway Coast and Glens Borough Council (CCGBC) commissioned Sproule Consulting to conduct business and general public surveys in each of the six main towns within the Borough. Table 1 provides a comprehensive breakdown of the number of surveys completed.

TABLE 1: Completed Surveys

	On-Street (General Public)	Business
Coleraine	100	100
Ballymoney	100	90
Portrush	100	40
Portstewart	100	40
Limavady	100	78
Ballycastle	100	54
TOTAL	600	402

The purpose of this Report is to provide empirical data to inform CCGBC's Local Development Plan for the Ballymoney area. The survey findings set out in this Business Report, together with the data collated from the general public, will be instrumental in establishing stakeholders' and users' attitudes and perceptions of Ballymoney town centre.

2. RESEARCH: KEY OBJECTIVES

The key objectives of this research are shown in Figure 1.

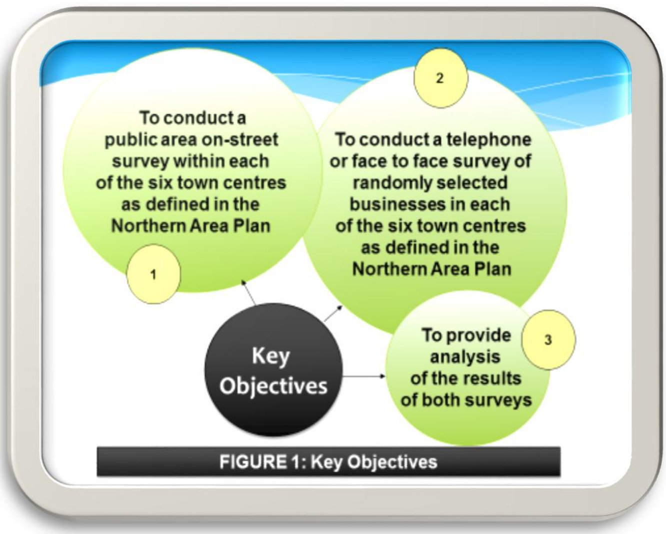


FIGURE 1: Key Objectives

3. DEMOGRAPHIC PROFILE OF BUSINESS OWNERS / MANAGERS SURVEYED

Thirty-one per cent of the business owners / managers surveyed were male, 36% were female; the remaining 33% made no comment (Table 2).

TABLE 2: Gender (n=90)

Male	31
Female	36
No Comment	33

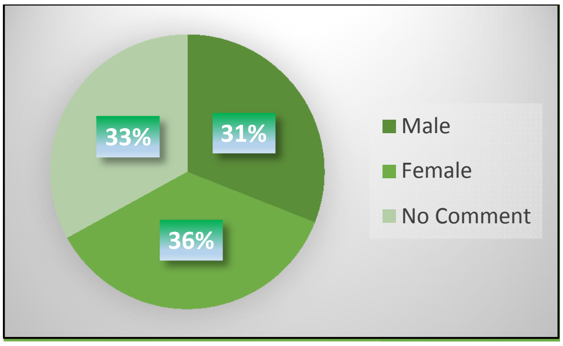
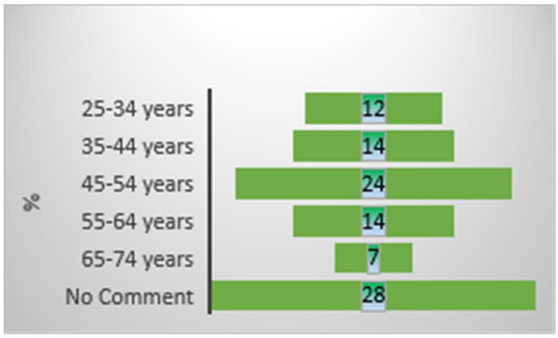
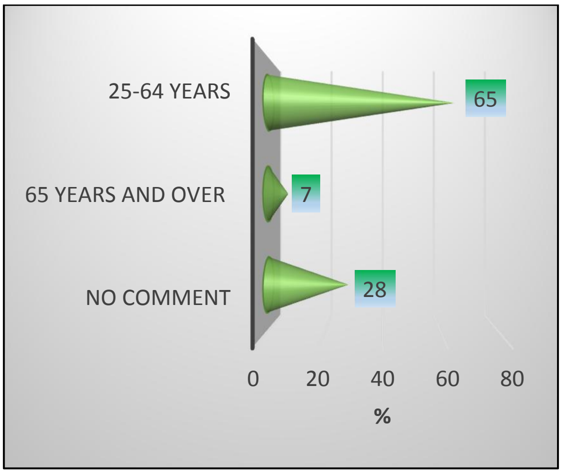


Table 3 sets out the achieved age profile.



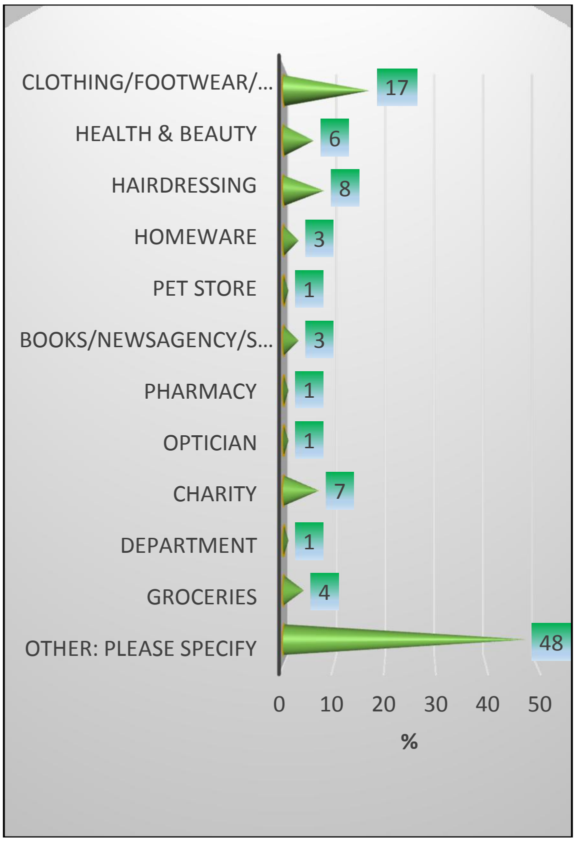


4. BUSINESS SURVEY FINDINGS - BALLYMONEY TOWN CENTRE

4.1 TYPE OF MAIN BUSINESS?

Forty-eight per cent of business owners / managers described their main business type as 'other'; 17% reported that their main business type was clothing / footwear/ jewellery and accessories (Table 3).

TABLE 3: Type of Main Business (n=90)	
Clothing / footwear / jewellery / accessories	17
Health & beauty	6
Hairdressers	8
Homeware	3
Pet store / supplies	1
Books/newsagency/stationery	3
Pharmacy	1
Optician	1
Charity	7
Department	1
Groceries	4
Other: Please Specify	48



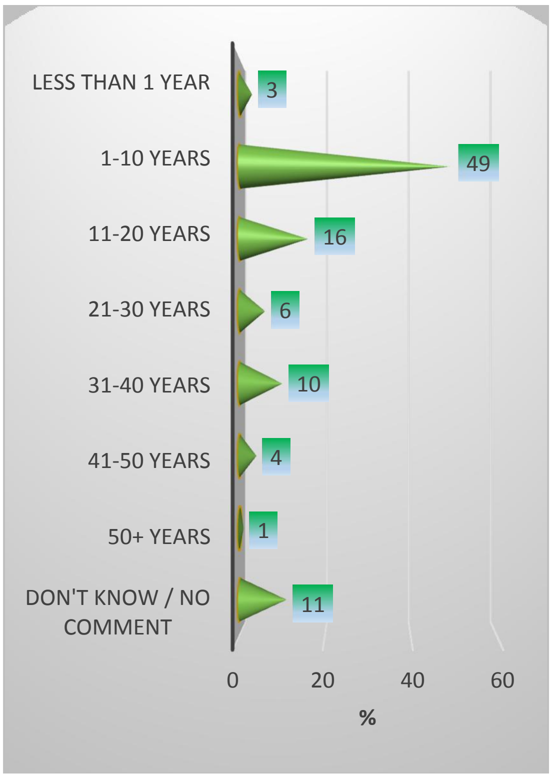
Almost half of respondents (48%) described their main type of business as 'other'. Table 4 provides a comprehensive breakdown of the range of other businesses types included.

TABLE 4: Type - Other (n=43)	
Take-away	2
Hot food	1
Coffee shop/café	9
Wool shop	1
E-cigarettes	1
Hotel	1
Car accessories	1
Butcher	4
Cards and gifts	1
Food franchise	1
Public house	1
Off license	1
Pet grooming	1
Hardware/builder supply	1
Coffee and gift shop	1
Banking	1
Solicitors	1
Laundry/dry cleaning	2
Health food store	1
Estate agent	1
Accountant	1
Tattoo shop	1
Travel agent	1
Insurance broker	2
Auctioneer	1
Architecture	1

4.2 HOW MANY YEARS HAVE YOU TRADED IN THESE PREMISES?

Just over half of business respondents (52%) reported that they had traded in their current premises for between 1-10 years; a further 16% had traded in their current premises for 11-20 years (Table 5). Ten per cent stated that they had been trading in their current premises for between 31-40 years. Six percent have been trading in their current premises between 21-30 years and 4% between 41-50 years. One business had been trading in Ballymoney town centre for 50 + years.

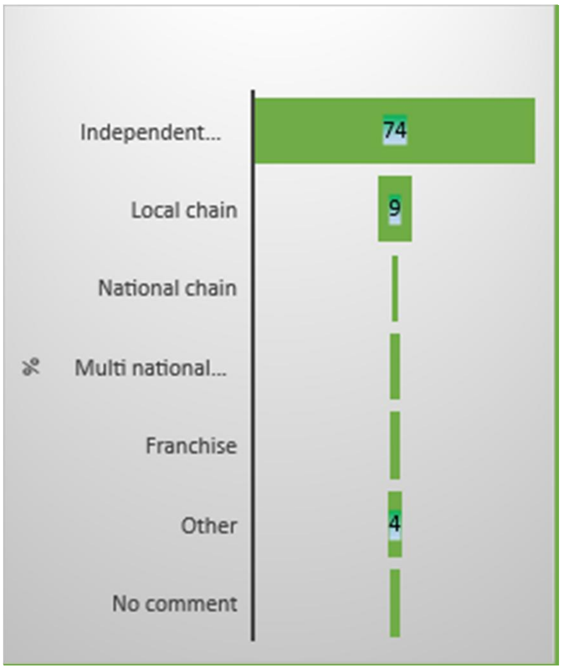
TABLE 5: How many years have you traded in these premises – Grouped (N=90)	
Less than 1 year	3
1-10 years	49
11-20 years	16
21-30 years	6
31-40 years	10
41-50 years	4
50+ years	1
Don't Know / No Comment	11



4.3 WHAT IS THE OWNERSHIP OF YOUR BUSINESS

Almost three-quarters of business respondents (74%) described their business ownership as being an independent trader / retailer; 9% were part of a local chain; 3% confirmed they were part of a multinational chain, 3% were part of a franchise; 2% were part of a national chain and 4% reported being other (Table 6).

TABLE 6: What is the ownership of your business? (n=90)	
Independent trader/retailer	74
Local chain	9
National chain	2
Multinational chain	3
Franchise	3
Other: Please Specify	4
No comment	3



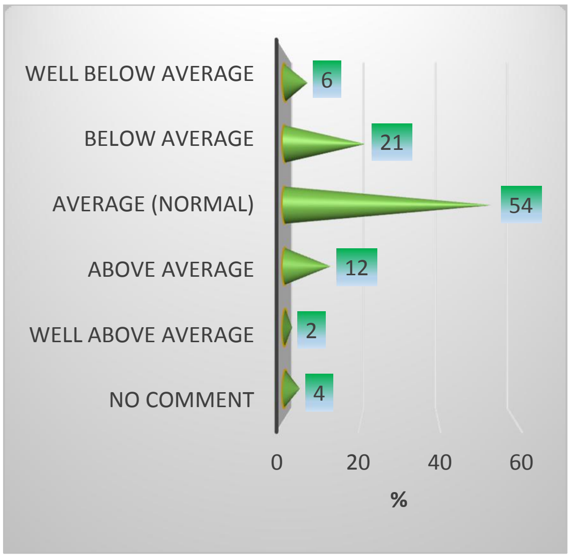
The 'other' forms of ownership described are listed in Table 7.

TABLE 7: Type of Ownership – Other (n=4)	
Local charity/registered charity	3
Ltd Co	1

4.4 HOW WOULD YOU DESCRIBE YOUR TURNOVER IN THE LAST BUSINESS YEAR?

Fifty-four per cent of respondents described their turnover in the last business year as average (normal); just over a fifth (21%) reported that their turnover was below average. Twelve per cent described their turnover as above average, whilst 6% confirmed that their turnover was well below average. Two per cent of respondents confirmed their turnover was well above average (Table 8).

TABLE 8: How would you describe your turnover in the last business year? (n=90)	
Well below average	6
Below average	21
Average (normal)	54
Above average	12
Well above average	2
No Comment	4



Respondents who described their turnover as average / above average were statistically significantly more likely to confirm they had invested money in their business, compared to respondents whose turnover had been described as below / well below average.

4.5 HAVE YOU INVESTED MONEY IN IMPROVEMENTS TO YOUR BUSINESS IN THE LAST YEAR?

Over half of respondents (56%) confirmed that they had invested money in improvements to their business in the last year (Table 9).

Some 32% confirmed that they had invested in technology, 43% in building works and 26% in staff development (Table 10).

TABLE 9: Have you invested money in improvements to your business in the last year? (n=90)	
Yes	56
No	40
No Comment	4

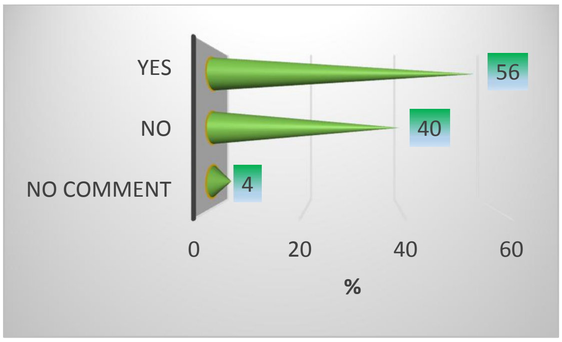
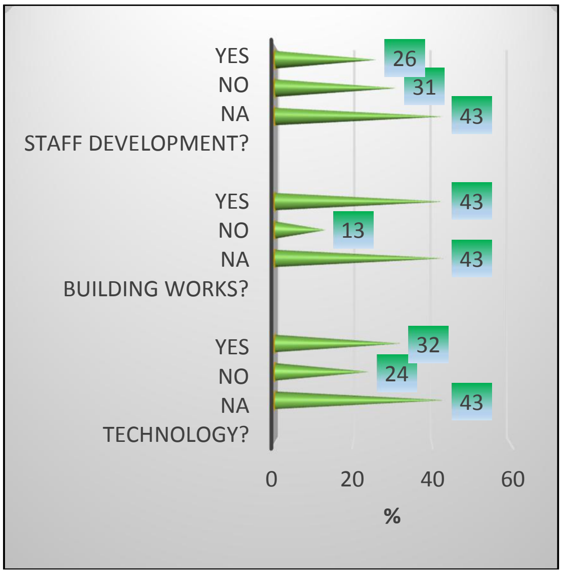


TABLE 10: Invested in…? (n=90)	
Technology	32
Building Works	43
Staff Development	26



4.6 HOW MANY PEOPLE ARE CURRENTLY INVOLVED IN YOUR BUSINESS (INCLUDING ANY WORKING OWNERS)?

Seventy-nine percent of businesses had full-time staff, 77% had part-time staff, 7% had volunteers working more than 16 hours per week and 12% had volunteers working less than 16 hours per week.

TABLE 11: Number of businesses with... (n=90)	
Full time staff	79
Part time staff	77
Volunteers (more than 16 hours)	7
Volunteers (less than 16 hours)	12

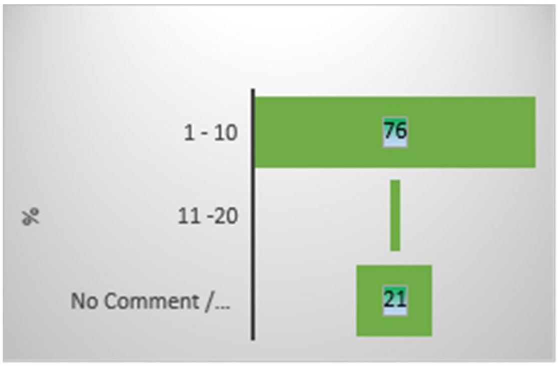
As shown in Table 12, 299 staff were employed on a full-time basis, 294 were employed on a part-time basis, giving a total of 593 staff employed in either a full-time or part-time capacity. Sixty-nine people were involved as volunteers for more than 16 hours per week, whilst a further 90 volunteered for less than 16 hours.

TABLE 12:How many people are currently involved in your business (including any working owners) (n=90)		Total
Full time (more than 30 hours)	299	593
Part time (up to 30 hours)	294	
Volunteers (more than 16 hours)	69	159
Volunteers (less than 16 hours)	90	
		752

4.6.1 FULL TIME (MORE THAN 30 HOURS)

Just over three-quarters of businesses (76%) employed between 1-10 full-time staff, 3% of businesses employed between 11-20 full-time staff (Table 13).

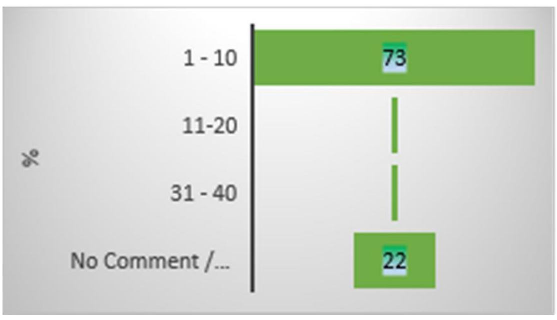
TABLE 13: How many people are currently involved in your business (Full-Time) (including any working owners) (n=90)	
1 - 10	76
11 -20	3
No Comment / NA	21



4.6.2 PART TIME (UP TO 30 HOURS)

Almost three-quarters (73%) of businesses employed between 1-10 part-time staff, 2% employed between 11-20 and 2% employed between 31-40 (Table 14).

TABLE 14: How many people are currently involved in your business (Part-Time) (including any working owners) (n=90)	
1 - 10	73
11 - 20	2
31 - 40	2
No Comment / NA	22



4.6.3 VOLUNTEERS (MORE THAN 16 HOURS PER WEEK)

As shown in Table 15, 2% of businesses reported having between 1-10 people volunteer 16+ hours per week. Three per cent of businesses reported having volunteers between 11-20 hours per week.

TABLE 15: How many people are currently involved in your business (volunteers 16+ hours) (including any working owners) (n=90)	
1 - 10	2
11-20	3
No Comment / NA	94

4.6.4 VOLUNTEERS (LESS THAN 16 HOURS PER WEEK)

Ten per cent of businesses reported having between 1-10 volunteers involved for less than 16 hours each per week; 1% had volunteers 11-20 hours per week and a further 1% had volunteers between 31-40 hours per week (Table 16).

TABLE 16: How many people are currently involved in your business (volunteers less than 16 hours) (including any working owners) (n=90)	
1 - 10	10
11-20	1
31-40	1
No Comment / NA	88

4.7 OVERALL, WHAT IS YOUR PERCEPTION OF THE TOWN CENTRE?

Fifty-four per cent of respondents (54%) described their overall perception of Ballymoney town centre as very poor / poor (Tables 17 and 18). Thirty-one per cent reported that their perception of the town centre was average, whilst 13% stated that it was very good / good.

TABLE 17: Overall, what is your perception of the town centre? (n=90)	
Very poor	12
Poor	42
Average	31
Good	13
No comment	1

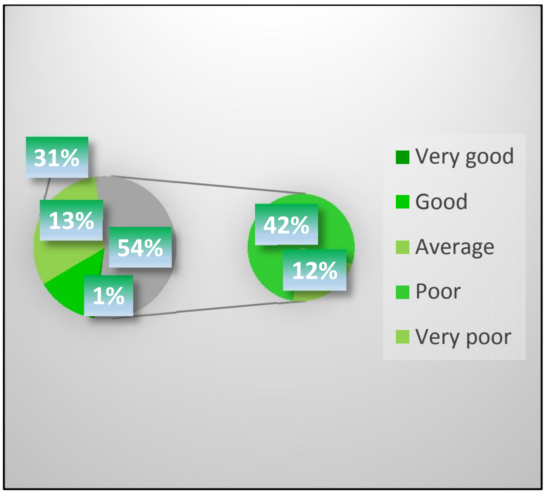
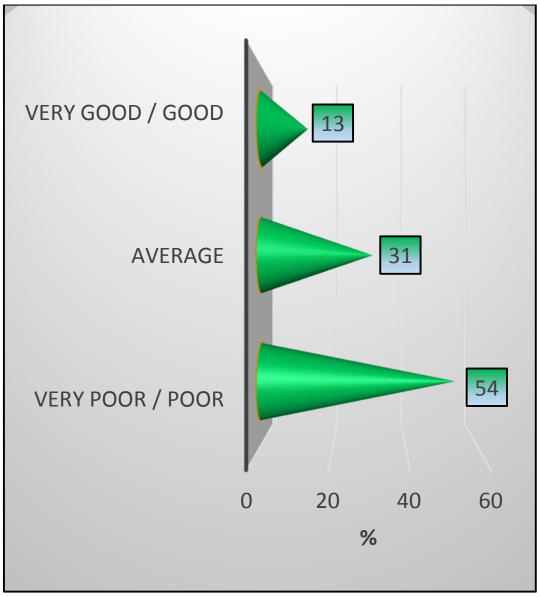


TABLE 18: Overall, what is your perception of the town centre? (n=90)	
Very poor / poor	54
Average	31
Very good / good	13



4.8 OTHER COMMENTS - PERCEPTION

Table 19 sets out a comprehensive breakdown of other comments relating to perception.

TABLE 19: Perception town centre - Other (n=24)	
Too many empty shops and large number of charity shops	1
Town needs more shops except hair salons + charity	1
Empty units, poor variety unless you want a coffee or a hair cut	1
A place where people want to come	1
Too many of the same business i.e. beauty salon	1
Only coffee shops and charity shops	1
Too many charity shops, hairdressers and empty units. No longer a shopping destination.	1
Store closures	1
Dereliction/hairdressers/cafes/charity shops!	1
Buildings need further improvement	1
Need more footfall	1
Needs more variety and parking facility	1
Needs to be kept "fresh"	1
Linenhall and Charles St poor	1
Too many empty properties/too many closed shops/vacant shops/too many empty buildings/lots of vacant premises @ present	4
There are very little shops to entice shoppers. Have to go elsewhere for clothing etc.	1
Street condition is very bad - especially pavements	1
Traffic congestion and variety of shops	1
More shops/chains would be welcome to give shoppers reason to visit	1
Not enough being done by Councils to bring people into town + traffic wardens big no.	1
Derelict shops/dilapidated. Rates too much.	1

4.9 PLEASE SCORE YOUR CURRENT OPINION OF THE FOLLOWING ASPECTS OF THE TOWN CENTRE (SCALE 1 – 10, 1 VERY POOR, 5 AVERAGE, 10 - VERY GOOD)

Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Ballymoney town centre (1 very poor and 10 very good). The results are shown in detail in Table 20. For further clarity Table 21 sets out a summary of poor scores (1-4), average (5) and good scores (6-10).

As shown, the highest level of 'good' scores were for the following aspects:

- Friendliness of staff / people (86%);
- Cafes (79%);
- Good atmosphere (76%); and,
- Lighting (72%).

The highest level of 'average' scores were for the following aspects:

- Vandalism (38%);
- Children's play areas (33%);
- Carparking - cost (30%); and
- Condition of streets/cleanliness (29%).

The highest level of 'poor' scores were for the following aspects:

- Dereliction (85%);
- Vacant shops (81%);
- Variety of shops (68%); and,
- Condition of buildings (51%).

TABLE 20: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Scores (n=90)													
	0	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**No Comment**	***Rounded to 100**
Condition of streets/public realm – clean, well maintained, attractive	0	6	7	4	4	29	10	10	10	2	2	15	100
Flower arrangements, street banners	0	2	4	6	3	26	7	13	21	1	14	2	100
Lighting	0	1	1	2	1	22	5	18	27	6	17	1	100
Parking	0	11	6	7	11	24	9	10	13	2	6	1	100
Number of public car park spaces	0	8	6	8	7	21	8	7	22	3	9	2	100
Price of public car park spaces	0	16	2	6	2	30	5	11	11	6	10	2	100
Ease of moving around town centre	0	3	10	8	11	27	10	14	9	2	2	3	100
Pedestrian access	1	2	1	7	3	22	14	18	16	4	8	3	100
Variety of shops	0	23	12	20	13	12	10	4	1	2	0	1	100
Quality of shops	0	7	7	9	7	28	11	13	13	1	1	3	100
Range of goods and services available	0	16	8	7	10	24	14	10	5	2	1	3	100
Cafes	0	0	2	2	2	11	9	17	23	7	23	3	100
Value for money	0	0	2	3	6	28	13	21	16	6	1	5	100
Friendliness of staff/people	0	0	0	1	0	10	6	8	29	19	24	3	100
Good atmosphere	0	1	1	2	2	14	9	8	26	14	19	3	100
On-street entertainment	1	17	11	13	8	24	3	7	5	0	3	8	100
Safety	0	2	0	3	4	24	9	18	22	2	10	4	100
Condition of buildings	0	17	10	13	11	20	4	14	4	0	1	4	100
Vacant shops (if a lot = poor score)	0	39	18	10	14	11	2	3	0	0	0	2	100
Amount of dereliction (if a lot = poor score)	0	43	18	8	16	6	1	3	0	0	1	4	100
Vandalism (if a lot = poor score)	0	7	1	10	5	38	6	12	13	3	1	4	100
Children's play areas	0	1	5	9	2	33	10	11	17	3	3	6	100
Levels of anti-social behaviour (if a lot = poor score)	0	18	8	7	6	19	8	7	9	1	7	12	100
	2	240	139	165	147	503	181	257	310	86	163	94	-

Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Scores (n=90)

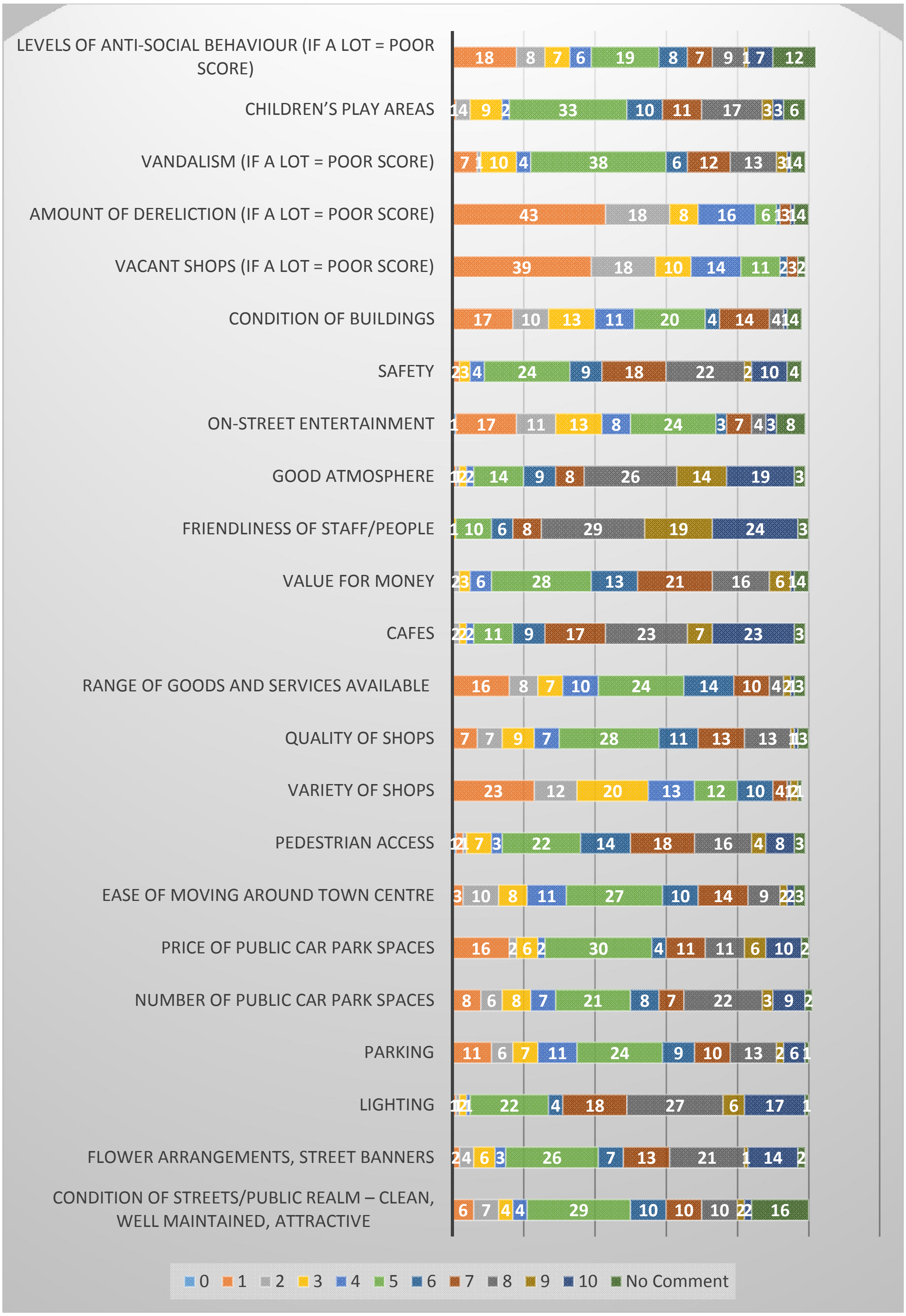
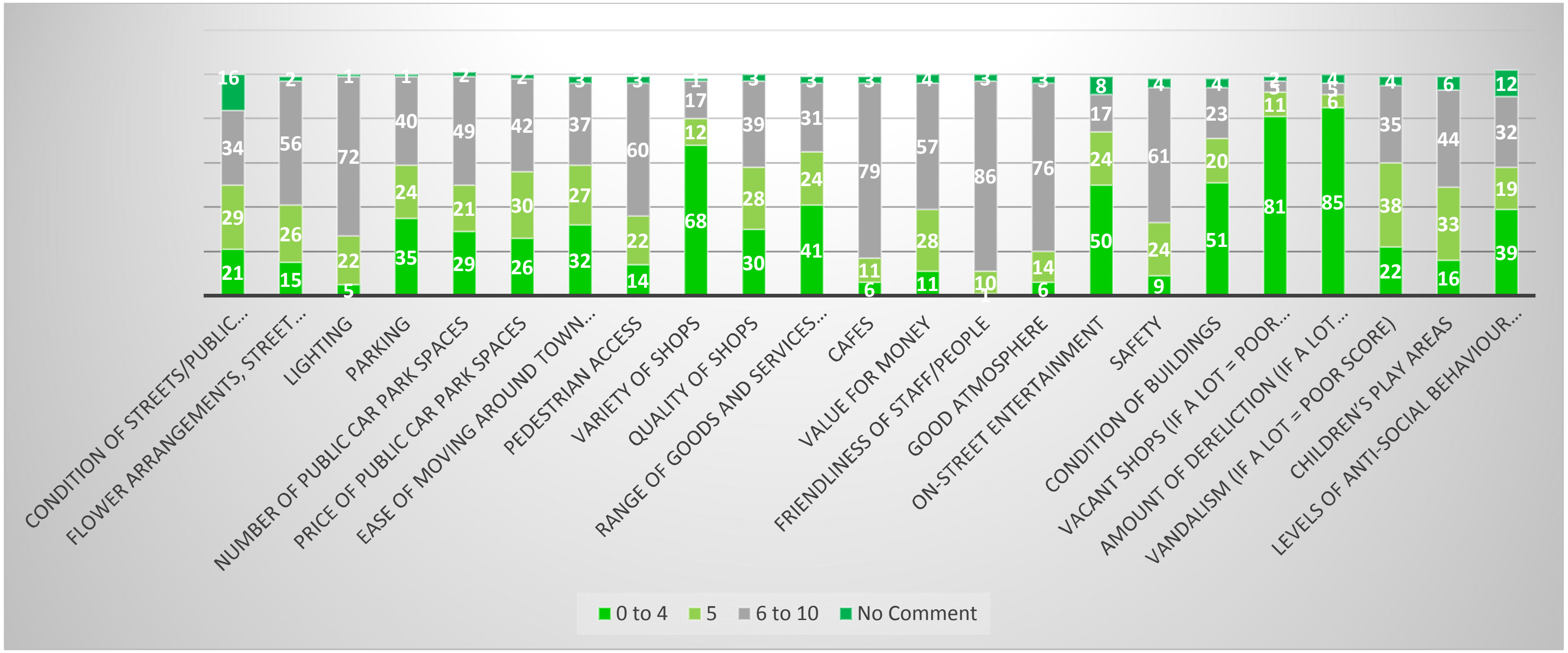


TABLE 21: Please score your current opinion of the following aspects of the town centre (Scale 0-4, 0 very poor, 5 average, 6-10 good) - Grouped Scores (n=90)					
	0 to 4	**5**	**6 to 10**	**No Comment**	***Rounded to 100**
Condition of streets/public realm – clean, well maintained, attractive	21	29	34	16	100
Flower arrangements, street banners	15	26	56	2	100
Lighting	5	22	72	1	100
Parking	35	24	40	1	100
Number of public car park spaces	29	21	49	2	100
Price of public car park spaces	26	30	42	2	100
Ease of moving around town centre	32	27	37	3	100
Pedestrian access	14	22	60	3	100
Variety of shops	68	12	17	1	100
Quality of shops	30	28	39	3	100
Range of goods and services available	41	24	31	3	100
Cafes	6	11	79	3	100
Value for money	11	28	57	4	100
Friendliness of staff/people	1	10	86	3	100
Good atmosphere	6	14	76	3	100
On-street entertainment	50	24	17	8	100
Safety	9	24	61	4	100
Condition of buildings	51	20	23	4	100
Vacant shops (if a lot = poor score)	81	11	5	2	100
Amount of dereliction (if a lot = poor score)	85	6	5	4	100
Vandalism (if a lot = poor score)	22	38	35	4	100
Levels of anti-social behaviour (if a lot = poor score)	16	33	44	6	100
Children's play areas	39	19	32	12	100
TOTAL	*693*	*503*	*997*	*94*	-

Scores - current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Grouped Scores (n=90)



4.10 WHAT THREE ASPECTS OF THE TOWN COULD BE IMPROVED?

Respondents were asked to rank their top three priorities for improvement in Ballymoney. Table 22 provides a comprehensive breakdown of the findings. These included:

4.10.1 FIRST PRIORITY – IMPROVEMENT

- Wider variety of shops (28%);
- More shops (17%);
- Better quality shops (6%); and,
- Better parking – number of spaces (4%).

4.10.2 SECOND PRIORITY - IMPROVEMENT

- More shops (17%);
- Wider variety of shops (12%);
- Better maintained buildings (9%); and,
- Better quality of shops (8%).

4.10.3 THIRD PRIORITY - IMPROVEMENT

- Better quality shops (12%);
- Better maintained buildings (12%);
- More shops (8%); and,
- Wider variety of shops (8%).

The combined highest (1st, 2nd and 3rd) priority included: wider variety of shops (48); more shops (42); and, better quality of shops (26).

TABLE 22: What three aspects of the town could be improved? (n=90)

	1st	2nd	3rd	TOTAL
Wider variety of shops	28	12	8	48
More shops	17	17	8	42
Better quality of shops	6	8	12	26
Better maintained buildings	2	9	12	23
Better maintained public spaces	0	4	2	6
Better parking – cost	3	3	2	8
Better parking – number of spaces	4	2	1	7
More for children/teenagers	3	6	6	15
More recreation facilities	0	0	1	1
More Public toilets	1	1	3	5
Better bus service	0	2	7	9
Improved safety	0	0	1	1
Improved street lighting	0	0	0	0
Improved signage	0	0	0	0
NA/No Comment	36	36	37	109
TOTAL	100	100	100	300

4.11 OTHER COMMENTS

Other comments are set out in Table 23.

What three aspects of the town could be improved? (n=90)

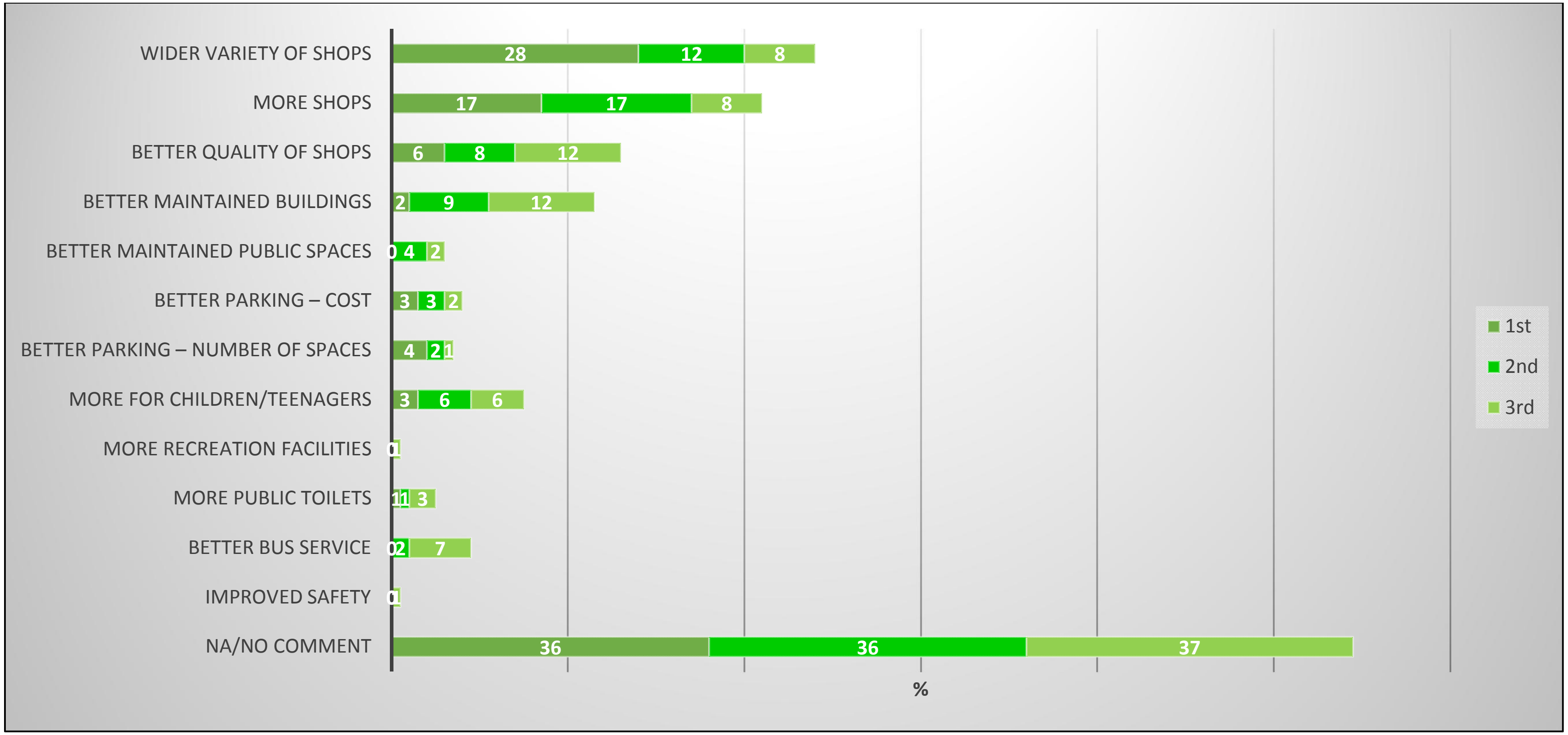


TABLE 23: Any other comments (n=23)	
Need quality independent shops - not multinationals!	1
Footpaths need immediate attention/bad footpaths/footpaths a disgrace/dangerous footpaths that no-one will rectify	4
Need more modern outlook	1
High street shops need to be brought to town	1
Incentive needed to draw business into the centre (what was the point of Christmas events being at Elim??)	1
Rates reduction	1
Keep it going	1
Certain areas need tidied up with regards to weeds on footpath etc.	1
Evening entertainment	1
No business rates for new business e.g. 5 yr. start = encouragement	1
Too many loading bays - bottleneck parking on Main Street/half of Main St taken as loading bay	2
Owners of town centre properties should be responsible and made to keep them in a reasonable and eye pleasing condition	1
Too many of the same business. Need more clothes shops for younger people.	1
Business on Main Street cannot park outside business even though no back way in. Getting rid of £1 parking for 5 hours = big mistake! Repeat business i.e. charity, coffee shops, butcher should only be allowed open if an existing one closes.	1
Too much empty buildings	1
More promotion for Ballymoney	1
Dropping of bus services decreased. Clientele going to other towns e.g. Ballymena, Coleraine	1
Being aware some current shop owners blocking future business coming to the town not acceptable	1
Rent too high in Ballymoney	1

APPENDIX 1: Business Questionnaire Ballymoney and Map of Town Centre Area

BUSINESS SURVEY

February 2017

Causeway Coast and Glens Borough Council would like to invite you to participate in a Business Survey to enable it to better understand business owners'/managers' perceptions of the town centre.

The findings from this research will be used by the Council to inform its Local Development Plan and may include the identification of lands for future retail development and the production of land use policies to guide development proposals.

The Business Survey will take approximately 4 minutes to complete. All responses will be treated with strict confidentiality.

The town centre area is shown on the map attached.

If you have any queries, please contact Sharon Mulhern from Causeway Coast & Glens Borough Council using telephone number 028 70347244 or Dr Jenny Sproule from *Sproule Consulting* on 07860 342493.

Yours Faithfully

Sharon Mulhern

Local Development Plan Manager

Causeway Coast & Glens Borough Council

Date: ________

Business Profile

1. Business Name: ___________________________
2. Business Address: ___________________________
3. Type of Main Business: **[PLEASE CIRCLE ONE ONLY]**

Clothing/footwear/jewellery/accessories	1
Health & beauty	2
Hairdressing	3
Homeware	4
Pet food/accessories	5
Books/newsagent/stationery	6
Pharmacy	7
Optician	8
Doctor/Dentist	9
Entertainment or leisure (gym, arcade, etc)	10
Charity	11
Department store	12
Groceries	13
Other: **Please Specify**	14

4. How many years have you traded in these premises? _________________________________
5. What is the ownership of your business? **[PLEASE CIRCLE ONE ONLY]**

Independent trader/retailer	1
Local chain	2
National chain	3
Multi national chain	4
Franchise	5
Other: **Please Specify**	6

6. How would you describe your current turnover / turnover in last year? **[PLEASE CIRCLE ONE ONLY]**

Well below average	1
Below average	2
Average (normal)	3
Above average	4
Well above average	5

7. Have you/the business owner invested capital in improvements to your business in the last year? **[PLEASE CIRCLE ONE ONLY]**

Yes	1
No	2

8. How many people are currently involved in running your business (including any working owners)? **[PLEASE INSERT FOR EACH]**

Full time (more than 30 hours)	
Part time (up to 30 hours)	
Volunteers (16 hours+)	
Volunteers (16 hours or less)	

Town Centre Perceptions

9. Overall, what is your perception of the town centre? **[PLEASE CIRCLE ONE ONLY]**

Very poor	1
Poor	2
Average	3
Good	4
Very good	5

Please comment: ______________________________

10. Please score your current opinion of the following aspects of the town centre (Scale 1 – 10, 1 very poor, 5 average, 10 – very good) **[PLEASE INSERT FOR EACH]**

Range of goods and services available	
Condition of buildings	
Condition of streets/public realm – clean, well maintained, attractive	
Number of public car park spaces	
Price of public car park spaces	
Safety	
Lighting	
On-street entertainment	
Levels of anti-social behaviour	
Vandalism	
Vacant shops	
Amount of dereliction	
Convenience	
Friendliness of staff/people	
Variety of shops	
Good atmosphere	
Quality of shops	
Cafes	
Children's play areas	
Parking	
Value for money	
Presence of pedestrian area	
Flower arrangements, street banners	

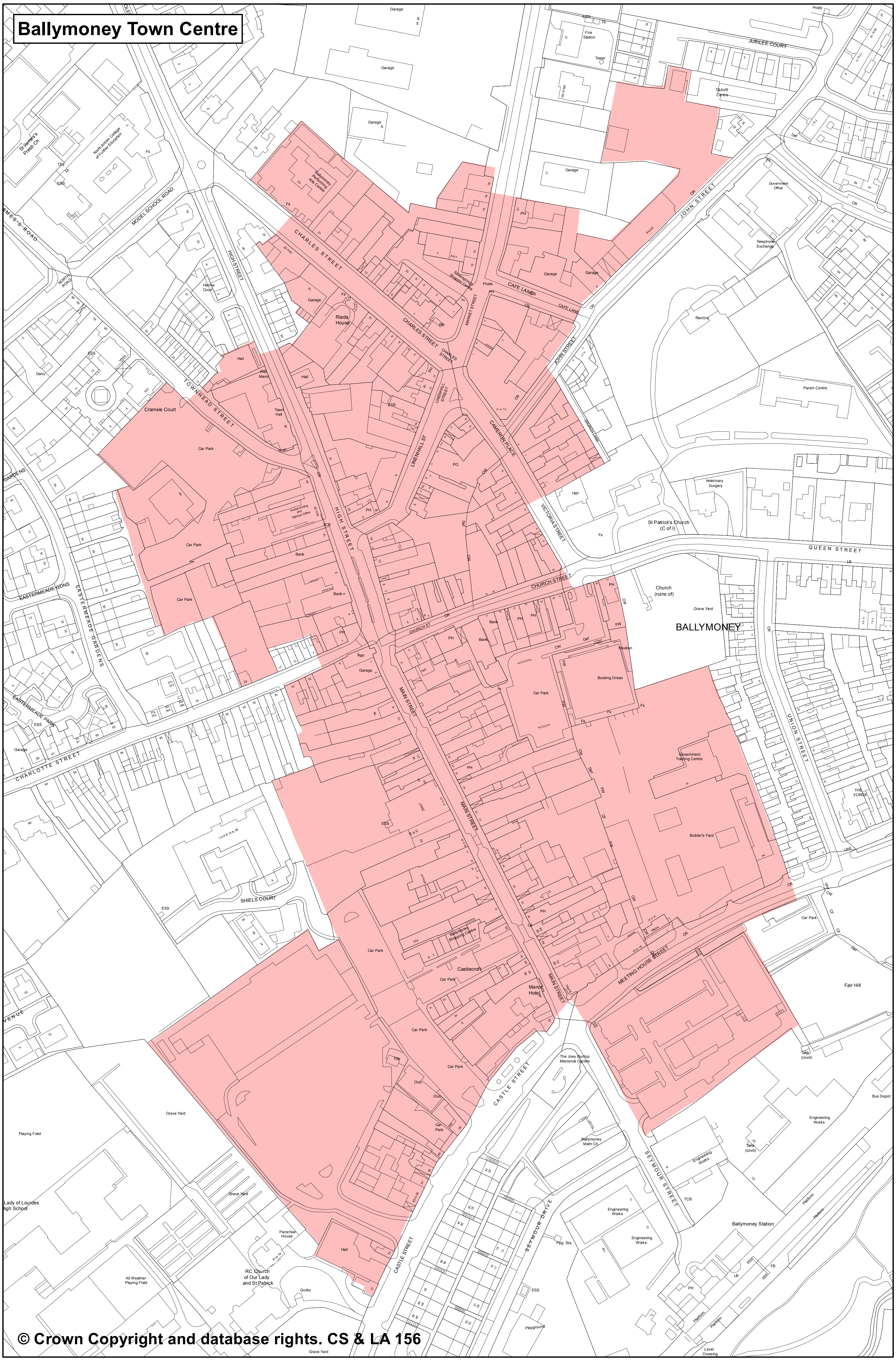
11. What three aspects of the town could be improved? **[PLEASE RANK 1,2,3]**

Wider variety of shops	
More shops	
Better quality of shops	
Better maintained buildings	
Better maintained public spaces	
Better parking – cost	
Better parking – number of spaces	
More for children/teenagers	
More recreation facilities	
More Public toilets	
Better bus service	
Improved safety	
Improved street lighting	
Improved signage	

Background Information

Male	1	Female	2
Age (Years)			

Thank you for your participation.


Ballymoney Town Centre
CHARLES STREET
HIGH STREET
MAIN STREET
TOWNHEAD STREET
CHURCH STREET
CASTLE STREET
SEYMOUR STREET
MEETING HOUSE STREET
QUEEN STREET
UNION STREET
JOHN STREET
CHARLOTTE STREET
EASTERMEADE GARDENS
SEYMOUR DRIVE
VICTORIA STREET
CAMERON PLACE
LINENHALL ST
CAFE LANE
MODEL SCHOOL ROAD
SHIELS COURT
JUBILEE COURT
BALLYMONEY
Cramsie Court
Riada House
Castlecroft
Manor Hotel
Bowling Green
Government Training Centre
Builder's Yard
St Patrick's Church (C of I)
Church (ruins of)
Grave Yard
Car Park
Ballymoney Station
Fair Hill
Parish Centre
Telephone Exchange
Government Office
Fire Station
Engineering Works
Bus Depot
RC Church of Our Lady and St Patrick
Parochial House
All Weather Playing Field
Playing Field
Ballymoney Meth Ch
The Joey Dunlop Memorial Garden
Rectory
Veterinary Surgery
Garage
Hall
Town Hall
Bank
Club
Grotto
Level Crossing

Sproule Consulting

FINAL REPORT:

21st April 2017

Causeway
Coast & Glens
Borough Council

Dr Jenny Sproule

EMAIL: jenny.sproule@btinternet.com

EXECUTIVE SUMMARY

- 73% of respondents were residents of Ballymoney, 27% were visitors to the town.

- 41% visited Ballymoney town centre at least once a week, 39% visited it daily; 1% visited the town centre at least once a fortnight, 8% visited at least once a month, whilst 11% visited less often.

- 55% visited Ballymoney for grocery shopping; 24% had visited the town to eat / drink at local cafes, restaurants and pubs; 17% were at work / school in the area; 16% were shopping for clothes; 9% were visiting a pharmacy / optician.

- 29% intended staying in the town centre for at least one hour but less than two hours; 26% intended to stay two hours or more; 25% planned staying for at least thirty minutes but less than one hour; 16% planned staying in town for at least 10 minutes but less than 30 minutes; only 3% planned staying for less than ten minutes.

- 54% had travelled from the Ballymoney area to visit the town centre; 26% travelled from other areas and 6% from Coleraine.

- 71% travelled by car to Ballymoney town centre; 19% walked to the area, 5% travelled by train and 3% by bus.

- 24% spent between £10.01 and £20 during their visit to the town centre; 21% spent over £50; 20% spent £10 or less during their visit; 13% spent between £20.01 and £30, with a further 13% having spent between £30.01 and £40; 5% spent between £40.01 and £50; whilst 4% spent nothing.

- Females were statistically significantly more likely than males to report spending over £50.

- 86% had been visiting the town for more than 5 years.

- 35% stated that their overall perception of Ballymoney town centre was very good/good; 29% described their perception of the town centre as very poor/poor, whilst 36% described it as average.

- Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Ballymoney town centre (1 very poor and 10 very good); the highest level of 'good' scores were for the following aspects:

    - Friendliness of staff / people (89%);
    - Cafe (88%);
    - Good atmosphere (83%); and,
    - Pedestrian access (74%).

The highest level of 'average' scores were for the following aspects:

- Condition of streets/public realm – clean, well maintained, attractive (26%);
- Variety of shops (21%);
- Vandalism (21%);
- Quality of shops (19%);
- Value for money (18%); and,
- Condition of buildings (18%).

The highest level of 'poor' scores were for the following aspects:

- Amount of dereliction (74%);
- Vacant shops (66%);
- On-street entertainment (59%); and,
- Variety of shops (53%).

- Females were statistically significantly more likely than males to describe on street entertainment as poor / very poor.

- The main priorities for improvement included:

  - 1st Priority: Wider variety of shops (39%);
More shops (26%); and,
Better parking - spaces (7%).
  - 2nd Priority: More shops (22%);
Better maintained buildings (18%); and,
Better quality of shops (11%).
  - 3rd Priority: Wider variety of shops (15%);
Better quality shops (15%); and,
More for children and teenagers (12%).

- Respondents aged 45-54 were statistically significantly more likely to describe "wider variety of shops" as their first priority for improvement, compared to those in other age groups.

- The combined highest (1st, 2nd and 3rd) priority included: wider variety of shops; more shops, and better maintained buildings.

TABLE OF CONTENTS

LIST OF TABLES:

1. INTRODUCTION

Causeway Coast and Glens Borough Council (CCGBC) commissioned Sproule Consulting to conduct general public and business surveys in the six main towns within the Borough. Table 1 provides a comprehensive breakdown of the number of surveys completed.

TABLE 1: Completed Surveys

	On-Street (General Public)	Business
Coleraine	100	100
Ballymoney	100	92
Portrush	100	41
Portstewart	100	40
Limavady	100	80
Ballycastle	100	40
TOTAL	600	393

The purpose of this Report is to provide empirical data to inform CCGBC's Local Development Plan for the Ballymoney area.

The survey findings set out in this General Public Report, together with the data collated from the Business Report, will therefore be instrumental in establishing users' and stakeholders' attitudes and perceptions of Ballymoney town centre.

2. RESEARCH: KEY OBJECTIVES

The key objectives of this research are shown in Figure 1.

3. DEMOGRAPHIC PROFILE

Fifty-five per cent of the general public survey respondents were female, 45% were male (Table 2).

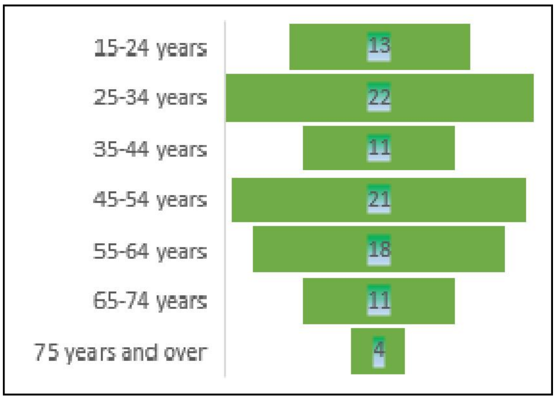
TABLE 2: Gender (n=100)

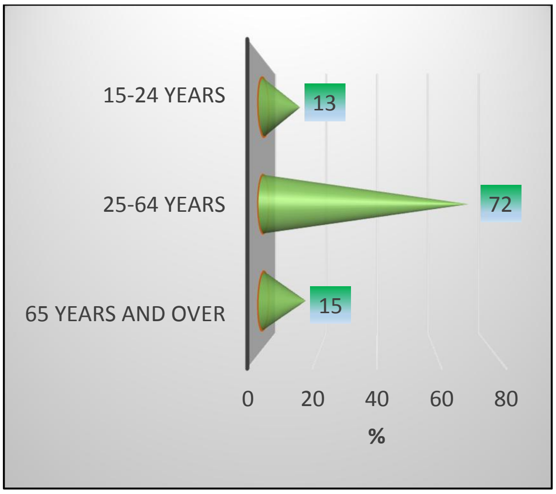
Male	45
Female	55

Table 3 sets out the achieved age profile.

TABLE 3: Age (n=100)

15-24 years	13
25-34 years	22
35-44 years	11
45-54 years	21
55-64 years	18
+65-74 years	11
75 years and over	4
TOTAL	100



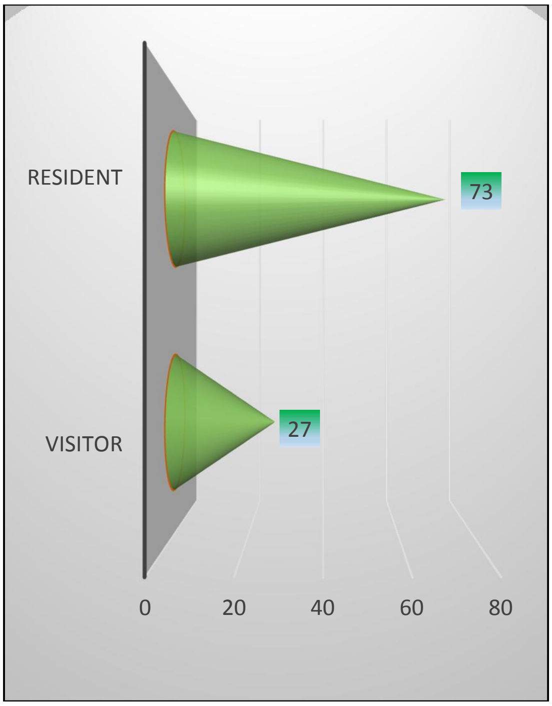


4. GENERAL PUBLIC SURVEY FINDINGS - BALLYMONEY TOWN CENTRE

4.1 ARE YOU A RESIDENT OF BALLYMONEY OR VISITOR TODAY?

As shown in Table 4, almost three quarters of respondents (73%) were residents of Ballymoney, the remaining 27% were visitors to the town.

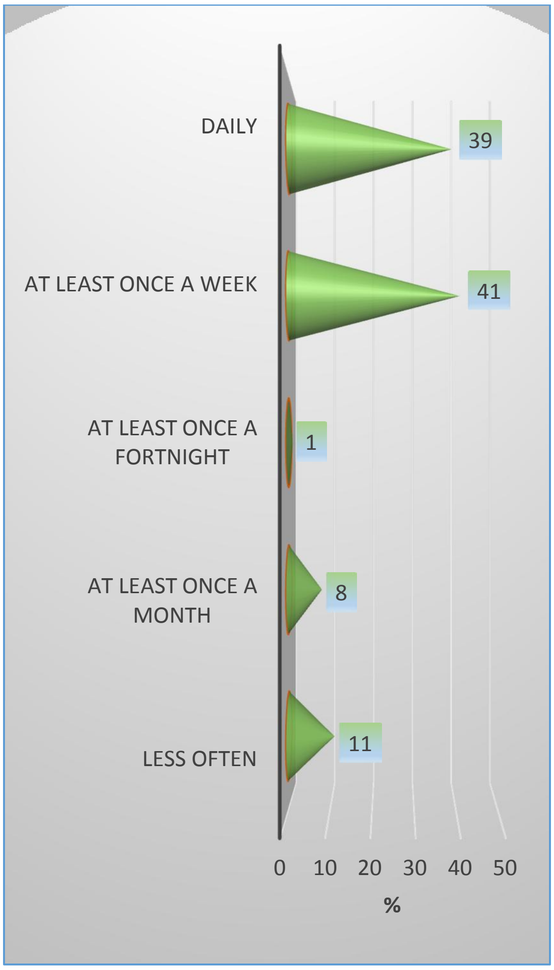
TABLE 4: Are you a resident of Ballymoney or visitor today? (n=100)	
	%
Resident	73
Visitor	27
TOTAL	100



4.2 HOW OFTEN DO YOU VISIT THE TOWN CENTRE?

Some 41% of respondents reported that they visited Ballymoney town centre at least once a week (Table 5); a further 39% stated that they visited the town centre daily; 1% visited at least once a fortnight; 8% visited the town centre at least once a month, whilst 11% visited less often.

TABLE 5: How often do you visit the town centre? (n=100)	
	%
Daily	39
At least once a week	41
At least once a fortnight	1
At least once a month	8
Less often	11
TOTAL	100



4.3 WHY HAVE YOU COME TO THE TOWN TODAY?

Over half the respondents (55%) stated that they had visited Ballymoney for grocery shopping (Table 6); almost a quarter (24%) had visited the town to eat / drink at local cafes, restaurants and pubs; 20% were in the town centre for other reasons than those specified; 17% were at work / school in the area; 16% were shopping for clothes; whilst 9% were visiting a pharmacy/optician.

TABLE 6: Why have you come to the town today? (multiple responses)	
Work/school in the area	17
Grocery shopping	55
Clothes shopping	16
Footwear shopping	4
Jewellery shopping	1
Health and beauty	2
Hairdresser/barber	5
Homeware	1
Books, newsagent, stationery	5
Eating/drinking (cafes, restaurants, pubs)	24
Pharmacy/optician	9
Using financial, legal or insurance services	2
Entertainment (arcade)	1
Other: Please Specify	20

4.3.1 OTHER REASONS FOR COMING TO THE TOWN TO-DAY?

Other reasons given for visiting the town centre are shown in Table 7.

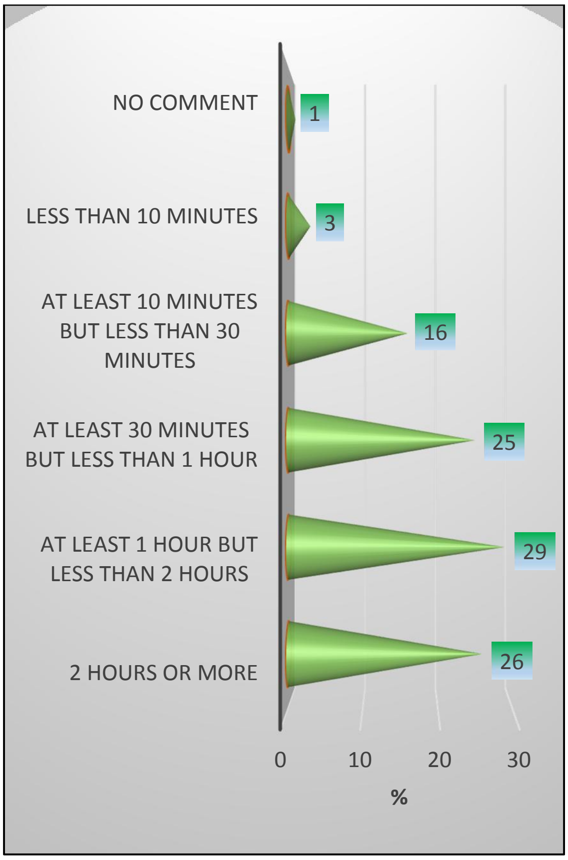
TABLE 7: Other Reasons for Coming to the Town To-day - Please Specify (n=20)	
Stroll/dander/walk/walk through	6
Meeting friends/meeting mum/visiting family	4
Car wash	1
Window shopping	1
Other half	1
Tattoo	1
Recycling	1
Engagement presents	1
Staying nearby	1
Butchers	1
Garden Centre	1
No Comment	1

4.4 HOW LONG DO YOU INTEND TO SPEND HERE FOR THIS VISIT?

Twenty-nine per cent of respondents confirmed that they intended to stay for at least one hour but less than two hours; 26% intended staying two hours or more, whilst a quarter (25%) planned staying for at least thirty minutes but less than one hour; 16% planned to stay for at least 10 minutes but less than 30 minutes and only 3% planned staying for less than ten minutes (Table 8).

TABLE 8: How long do you intend to spend here for this visit? (n=100)

Less than 10 minutes	3
At least 10 minutes but less than 30 minutes	16
At least 30 minutes but less than 1 hour	25
At least 1 hour but less than 2 hours	29
2 hours or more	26
No comment	1



4.5 WHERE HAVE YOU TRAVELLED FROM TO GET TO BALLYMONEY TOWN CENTRE TODAY?

As shown in Table 9, just over half of the respondents (54%) stated that they had travelled from the Ballymoney area to visit the town centre; this was followed by 26% of respondents who travelled from other areas than those listed; 6% had travelled from Coleraine.

TABLE 9: Where have you travelled from to get to Ballymoney town centre today? (n=100)

Coleraine	6
Ballymoney	54
Limavady	1
Ballycastle	3
Portstewart	1
Garvagh	2
Kilrea	5
Dungiven	1
Other: Please Specify	26

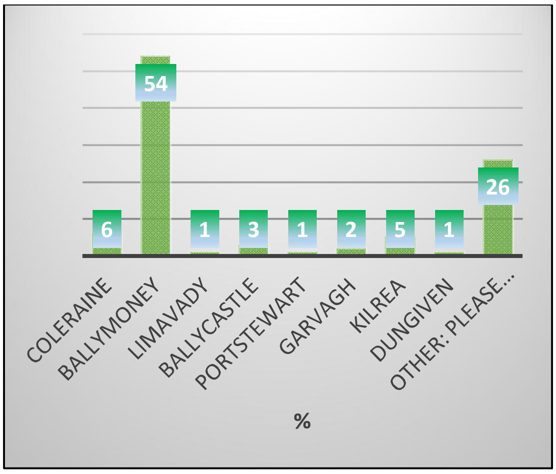


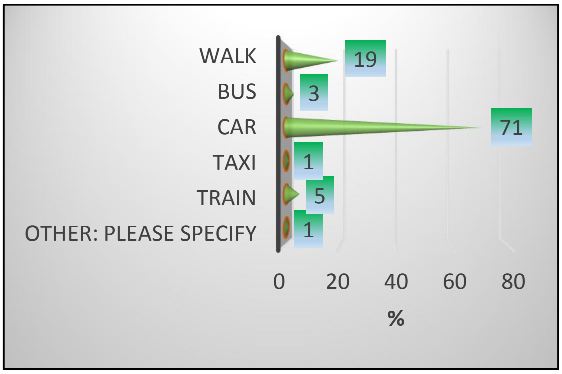
Table 10 sets out a comprehensive list of other areas travelled from.

TABLE 10: Where have you travelled from to get to Coleraine town centre today? Other (n=26)	
Balnamore	3
Antrim	1
Ballymena	2
Armoy	2
Outside Ballymoney	1
Carrickfergus	2
Dunloy	3
Finvoy	2
Bendooragh	2
Rasharkin	1
Aghalee	1
Upperlands	1
Dervock	1
Glarryford	1
Cookstown	1
Magherafelt	1
Burn Quarter	1

4.6 HOW DID YOU TRAVEL TO THE AREA?

Seventy-one per cent of respondents travelled by car to Ballymoney town centre; 19% walked to the area; 5% travelled by train and 3% by bus (Table 11). One respondent reported travelling to the town centre by motorbike.

TABLE 11: How did you travel to the area? (n=100)	
Walk	19
Bus	3
Car	71
Taxi	1
Train	5
Other: Please Specify	1



4.7 IN TOTAL, HOW MUCH DO YOU INTEND TO SPEND/HAVE YOU SPENT DURING YOUR VISIT TODAY?

Almost a quarter of respondents (24%) reported that they spent between £10.01 and £20; just over a fifth (21%) spent over £50; 20% spent £10 or less during their visit; 13% spent between £20.01 and £30, with a further 13% having spent between £30.01 and £40; 5% spent between £40.01 and £50; whilst 4% spent nothing (Table 12).

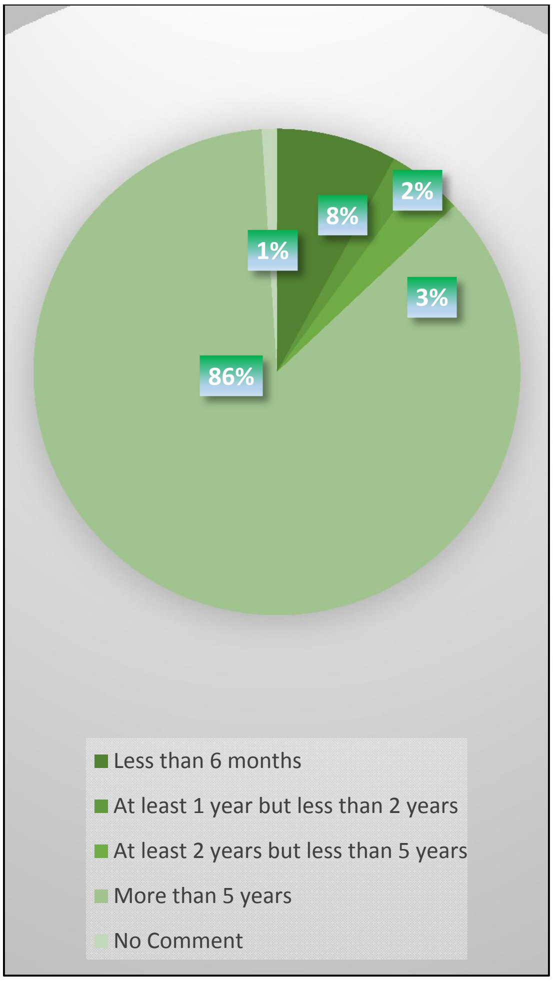
TABLE 12: In total, how much do you intend to spend / have you spent during your visit today? (n=100)	
£0 (nothing)	4
£0.01 - £10	20
£10.01 - £20	24
£20.01 - £30	13
£30.01 – £40	13
£40.01 – £50	5
Over £50	21

Females were statistically significantly more likely than males to report spending over £50.

4.8 HOW LONG HAVE YOU BEEN VISITING THE TOWN?

The majority of respondents (86%) confirmed they had been visiting the town for more than five years (Table 13).

TABLE 13: How long have you been visiting the town? (n=100)	
Less than 6 months	8
At least 1 year but less than 2 years	2
At least 2 years but less than 5 years	3
More than 5 years	86
No comment	1



4.9 OVERALL, WHAT IS YOUR PERCEPTION OF THE TOWN CENTRE?

Just over a third of respondents (35%) stated that their overall perception of Ballymoney town centre was very good/good; 29% described their perception as very poor/poor, whilst almost a quarter (23%) described it as average (Tables 14 and 15).

TABLE 14: Overall, what is your perception of the town centre? (n=100)	
Very poor	8
Poor	21
Average	36
Good	27
Very good	8

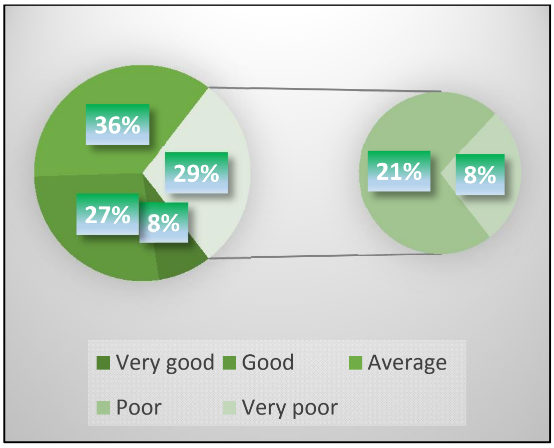
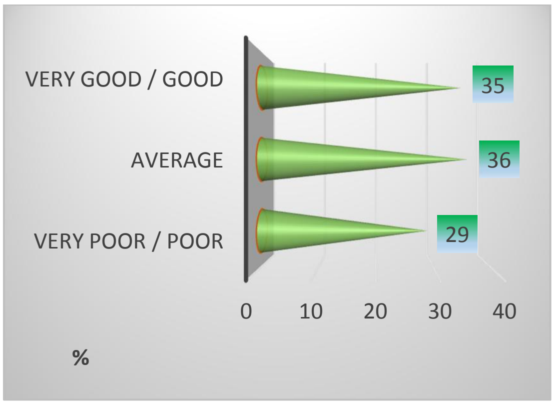


TABLE 15: Overall, what is your perception of the town centre (Grouped)? (n=100)	
Very poor / poor	29
Average	36
Very good / good	35



4.10 PLEASE SCORE YOUR CURRENT OPINION OF THE FOLLOWING ASPECTS OF THE TOWN CENTRE (SCALE 1 – 10, 1 VERY POOR, 5 AVERAGE, 10 - VERY GOOD)

Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Ballymoney town centre (1 very poor and 10 very good) (Table 16). Table 17 sets out a summary of poor scores (1-4), average (5) and good scores (6-10).

As shown, the highest level of 'good' scores were for the following aspects:

- Friendliness of staff / people (89%);
- Cafe (88%);
- Good atmosphere (83%); and,
- Pedestrian access (74%).

The highest level of 'average' scores were for the following aspects:

- Condition of streets/public realm – clean, well maintained, attractive (26%);
- Variety of shops (21%);
- Vandalism (21%);
- Quality of shops (19%);
- Value for money (18%); and,
- Condition of buildings (18%).

The highest level of 'poor' scores were for the following aspects:

- Amount of dereliction (74%);
- Vacant shops (66%);
- On-street entertainment (59%); and,
- Variety of shops (53%).

Females were statistically significantly more likely than males to describe on street entertainment as poor / very poor.

4.11 WHAT THREE ASPECTS OF THE TOWN COULD BE IMPROVED?

Respondents were asked to rank their top three priorities for improvement in Ballymoney. Table 18 provides a comprehensive breakdown of the findings.

4.11.1 FIRST PRIORITY – IMPROVEMENT

- Wider variety of shops (39%);
- More shops (26%); and,
- Better parking - spaces (7%).

4.11.2 SECOND PRIORITY - IMPROVEMENT

- More shops (22%);
- Better maintained buildings (18%); and,
- Better quality of shops (11%).

4.11.3 THIRD PRIORITY – IMPROVEMENT

- Wider variety of shops (15%);
- Better quality shops (15%); and,
- More for children and teenagers (12%).

Respondents aged 45-54 years were statistically significantly more likely to describe "wider variety of shops" as their first priority for improvement, compared to those in other age groups.

Females were statistically significantly more likely than males to describe on street entertainment as poor / very poor.

The combined highest (1st, 2nd and 3rd) priority included: wider variety of shops; more shops, and better maintained buildings.

TABLE 16: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) (n=100)												
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**No Com**	**TOTAL**
Condition of streets/public realm – clean, well maintained, attractive	3	6	4	5	26	14	17	10	1	12	2	100
Flower arrangements, street banners	8	7	8	1	16	11	21	10	4	10	4	100
Lighting	1	1	1	3	14	8	32	19	6	8	7	100
Parking	6	3	6	5	16	7	24	15	3	6	9	100
Number of public car park spaces	4	2	2	8	9	9	27	17	4	7	11	100
Price of public car park spaces	6	2	3	4	13	10	22	15	5	9	11	100
Ease of moving around town centre	2	6	4	1	12	10	29	15	6	12	3	100
Pedestrian access	2	2	3	0	16	11	34	11	7	11	3	100
Variety of shops	11	15	14	13	21	9	8	3	1	4	1	100
Quality of shops	9	6	3	7	19	13	24	11	3	4	1	100
Range of goods and services available	10	8	9	7	14	11	20	11	4	4	2	100
Cafes	2	0	0	0	8	8	14	17	17	32	2	100
Value for money	4	1	3	1	18	10	28	12	7	13	3	100
Friendliness of staff/people	0	0	1	1	8	1	15	24	16	33	1	100
Good atmosphere	2	2	2	1	8	4	25	21	18	15	2	100
On-street entertainment	27	22	8	2	15	3	9	2	2	5	5	100
Safety	2	4	2	1	12	8	30	14	5	16	6	100
Condition of buildings	13	16	8	6	18	12	6	11	1	7	2	100
Vacant shops (if a lot = poor score)	23	25	14	4	14	10	1	0	0	5	4	100
Amount of dereliction (if a lot = poor score)	28	26	14	6	10	4	3	1	0	5	3	100
Vandalism (if a lot = poor score)	1	6	3	7	21	18	18	8	1	9	8	100
Levels of anti-social behaviour (if a lot = poor score)	19	10	5	4	13	6	13	8	3	7	12	100
Children's play areas	6	3	6	2	15	7	13	14	1	8	25	100
TOTAL	189	173	123	89	336	204	433	269	115	242	127	2300

TABLE 17: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) Grouped Scores (n=100)					
	1 – 4	**5**	**6 – 10**	**No Comment**	**TOTAL %**
Condition of streets/public realm – clean, well maintained, attractive	*18*	26	54	2	100
Flower arrangements, street banners	*24*	16	56	4	100
Lighting	*6*	14	73	7	100
Parking	*20*	16	55	9	100
Number of public car park spaces	*16*	9	64	11	100
Price of public car park spaces	*15*	13	61	11	100
Ease of moving around town centre	*13*	12	72	3	100
Pedestrian access	*7*	16	74	3	100
Variety of shops	*53*	21	25	1	100
Quality of shops	*25*	19	55	1	100
Range of goods and services available	*34*	14	50	2	100
Cafes	*2*	8	88	2	100
Value for money	*9*	18	70	3	100
Friendliness of staff/people	*2*	8	89	1	100
Good atmosphere	*7*	8	83	2	100
On-street entertainment	*59*	15	21	5	100
Safety	*9*	12	73	6	100
Condition of buildings	*43*	18	37	2	100
Vacant shops (if a lot = poor score)	*66*	14	16	4	100
Amount of dereliction (if a lot = poor score)	*74*	10	13	3	100
Vandalism (if a lot = poor score)	*17*	21	54	8	100
Levels of anti-social behaviour (if a lot = poor score)	*38*	13	37	12	100
Children's play areas	*17*	15	43	25	100
TOTAL	574	336	1263	127	2300

Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) Grouped Scores (n=100)

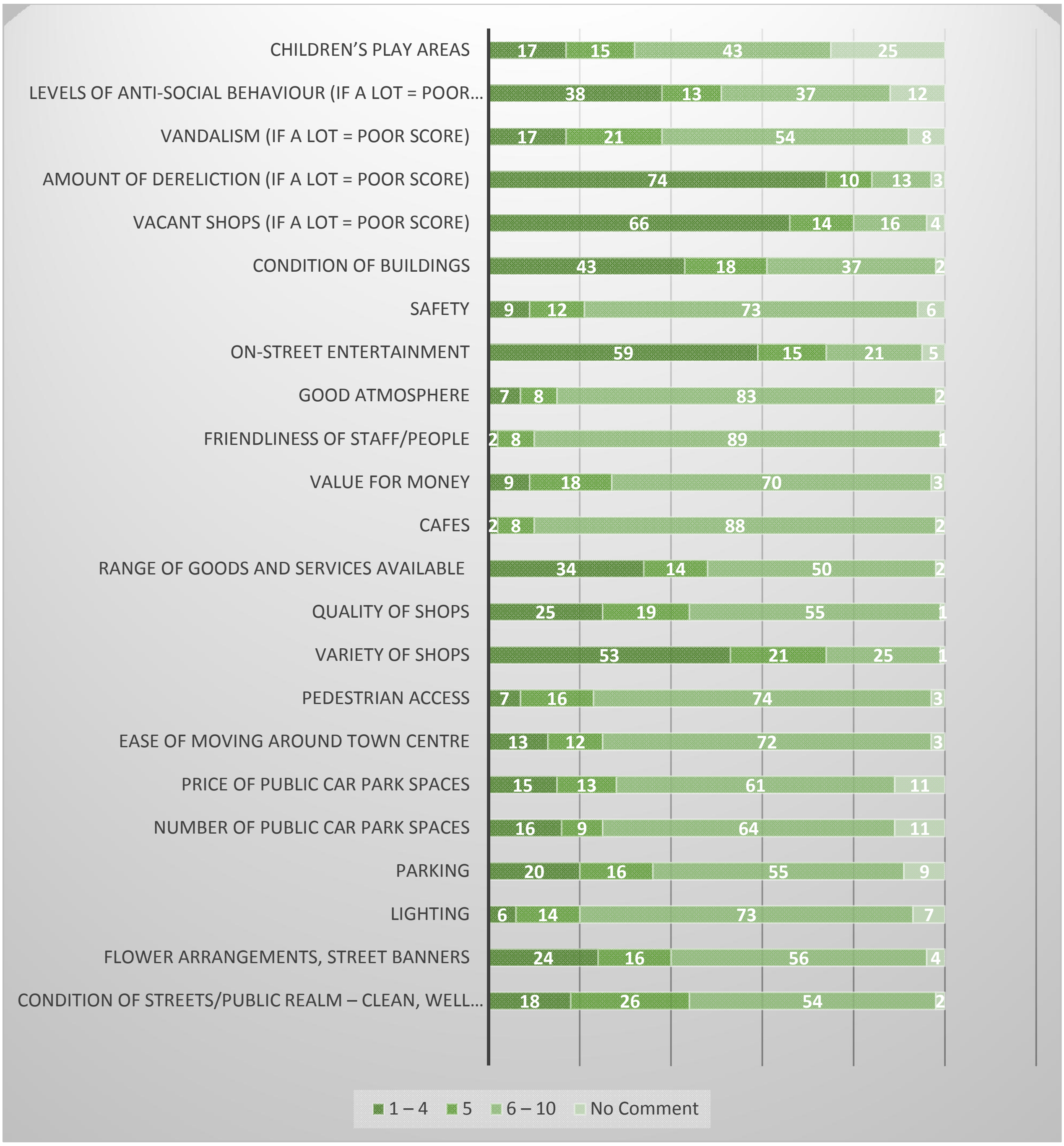
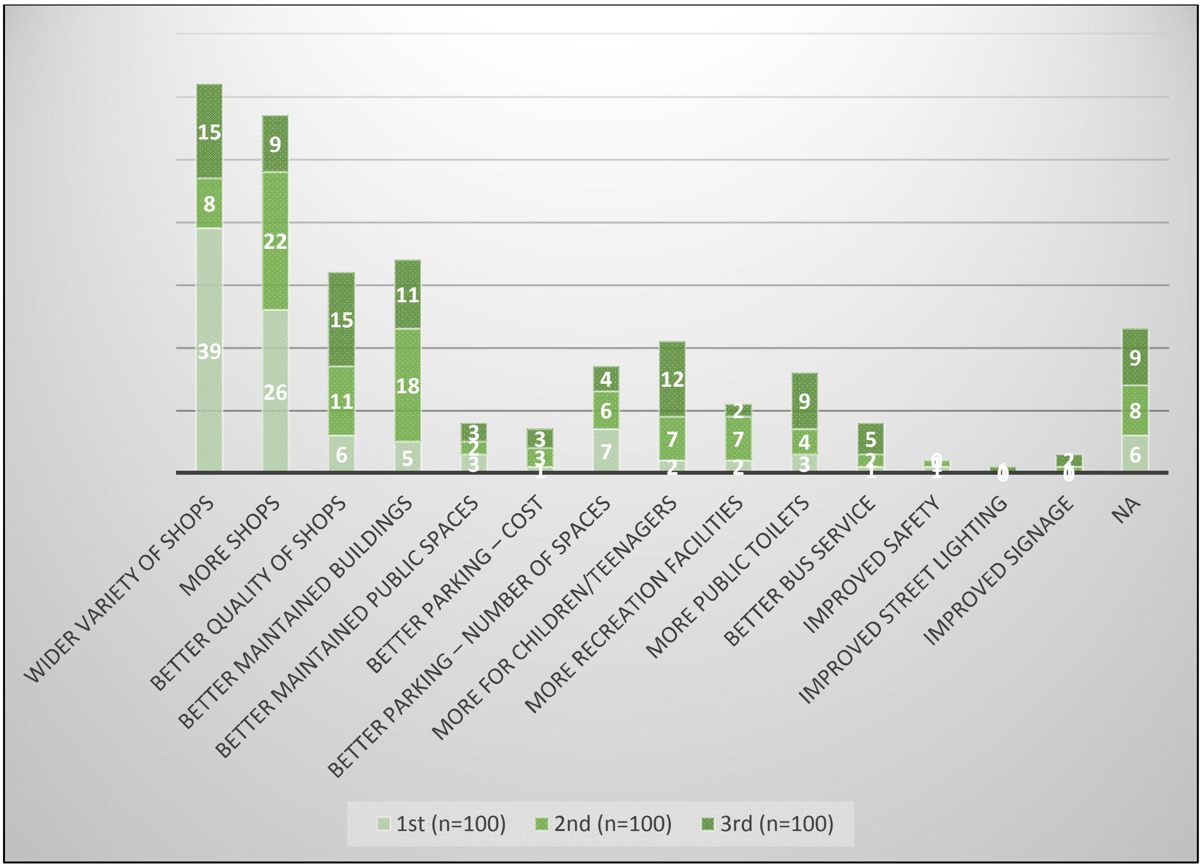


TABLE 18: What three aspects of the town could be improved?				
	1st (n=100)	**2nd (n=100)**	**3rd (n=100)**	**TOTAL**
Wider variety of shops	39	8	15	62
More shops	26	22	9	57
Better quality of shops	6	11	15	32
Better maintained buildings	5	18	11	34
Better maintained public spaces	3	2	3	8
Better parking – cost	1	3	3	7
Better parking – number of spaces	7	6	4	17
More for children/teenagers	2	7	12	21
More recreation facilities	2	7	2	11
More Public toilets	3	4	9	16
Better bus service	1	2	5	8
Improved safety	1	1	0	2
Improved street lighting	0	0	1	1
Improved signage	0	1	2	3
NA	6	8	9	23
TOTAL	100	100	100	300

Respondents aged 45-54 were statistically significantly more likely to describe "wider variety of shops" as their first priority for improvement compared to those in other age groups.



APPENDIX 1: General Public Questionnaire Ballymoney and Map of Town Centre Area

GENERAL PUBLIC SURVEY

February 2017

Causeway Coast and Glens Borough Council would like to invite you to participate in a Survey to enable it to better understand the general public's perception of the town centre.

The findings from this research will be used by the Council to inform its Local Development Plan and may include the identification of lands for future retail development and the production of land use policies to guide development proposals.

The General Public Survey will take approximately 4 minutes to complete. All responses are anonymous and will be treated with strict confidentiality.

The town centre area is shown on the map attached.

If you have any queries, please contact Sharon Mulhern from Causeway Coast & Glens Borough Council using telephone number 028 70347244 or Dr Jenny Sproule from *Sproule Consulting* on 07860 342493.

Yours Faithfully

Sharon Mulhern
Local Development Plan Manager

Causeway Coast & Glens Borough Council

1. Are you a resident of ____________ or visitor today? **[PLEASE CIRCLE ONE ONLY]**

Resident	1	Visitor	2

2. How often do you visit the town centre? **[PLEASE CIRCLE ONE ONLY]**

Daily	1
At least once a week	2
At least once a fortnight	3
At least once a month	4
Less often	5

3. Why have you come to the town today? **[PLEASE CIRCLE ALL THAT APPLY]**

Work/school in the area	1	Books, newsagent, stationery	10
Grocery shopping	2	Eating/drinking (cafes, restaurants, pubs)	11
Clothes shopping	3	Pharmacy/optician	12
Footwear shopping	4	Doctor/dentist	13
Jewellery shopping	5	Using financial, legal or insurance services	14
Health and beauty	6	Entertainment (arcade)	15
Hairdresser/barber	7	Leisure (leisure centre, park)	16
Homeware	8	Other: **Please Specify**	17
Electrical goods	9		

4. How long do you intend to spend here for this visit? **[PLEASE CIRCLE ONE ONLY]**

Less than 10 minutes	1
At least 10 minutes but less than 30 minutes	2
At least 30 minutes but less than 1 hour	3
At least 1 hour but less than 2 hours	4
2 hours or more	5

5. Where have you travelled from to get to __________ today? **[PLEASE CIRCLE ONE ONLY]**

Coleraine	1	Garvagh	7
Ballymoney	2	Kilrea	8
Limavady	3	Bushmills	9
Ballycastle	4	Dungiven	10
Portrush	5	Other: **Please Specify**	11
Portstewart	6		

6. How did you travel to the area? **[PLEASE CIRCLE ONE ONLY]**

Walk	1	Train	6
Bus	2	Cycle	7
Car	3	Other: **Please Specify**	8
Taxi	4		
Electrical goods	5		

7. In total, how much do you intend to spend/have you spent during your visit today? **[PLEASE CIRCLE ONE ONLY]**

£0	1	£31 – 40	6
£0 - £10	2	£41 – 50	7
£11 - £20	3	£51 or more	8
£21 - £30	4		

8. How long have you been visiting the town? **[PLEASE CIRCLE ONE ONLY]**

Less than 6 months	1
At least 6 months but less than 1 year	2
At least 1 year but less than 2 years	3
At least 2 years but less than 5 years	4
More than 5 years	5

Town Centre

9. Overall, what is your perception of the town centre? **[PLEASE CIRCLE ONE ONLY]**

Very poor	1
Poor	2
Average	3
Good	4
Very good	5

Please comment: ______________________________

10. Please score your current opinion of the following aspects of the town centre (Scale 1 – 10, 1 very poor, 5 average, 10 – very good) **[PLEASE INSERT FOR EACH]**

Range of goods and services available	
Condition of buildings	
Condition of streets/public realm – clean, well maintained, attractive	
Number of public car park spaces	
Price of public car park spaces	
Safety	
Lighting	
On-street entertainment	
Levels of anti-social behaviour	
Vandalism	
Vacant shops	
Amount of dereliction	
Convenience	
Friendliness of staff/people	
Variety of shops	
Good atmosphere	
Quality of shops	
Cafes	
Children's play areas	
Parking	
Value for money	
Presence of pedestrian area	
Flower arrangements, street banners	

11. What three aspects of the town could be improved? **[PLEASE RANK 1,2,3]**

Wider variety of shops	
More shops	
Better quality of shops	
Better maintained buildings	
Better maintained public spaces	
Better parking – cost	
Better parking – number of spaces	
More for children/teenagers	
More recreation facilities	
More Public toilets	
Better bus service	
Improved safety	
Improved street lighting	
Improved signage	

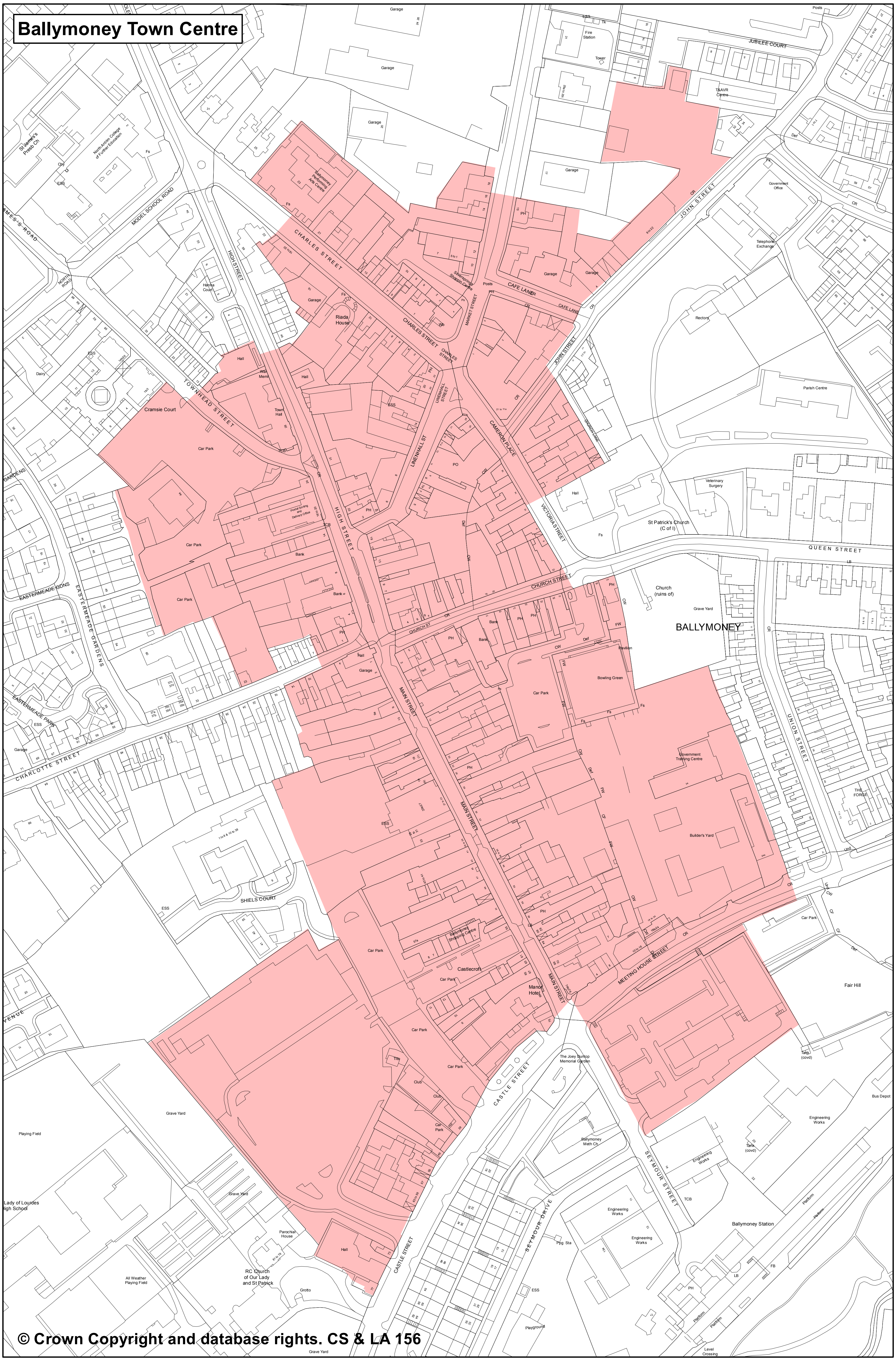
Background Information

Male	1	Female	2
Age (Years)			

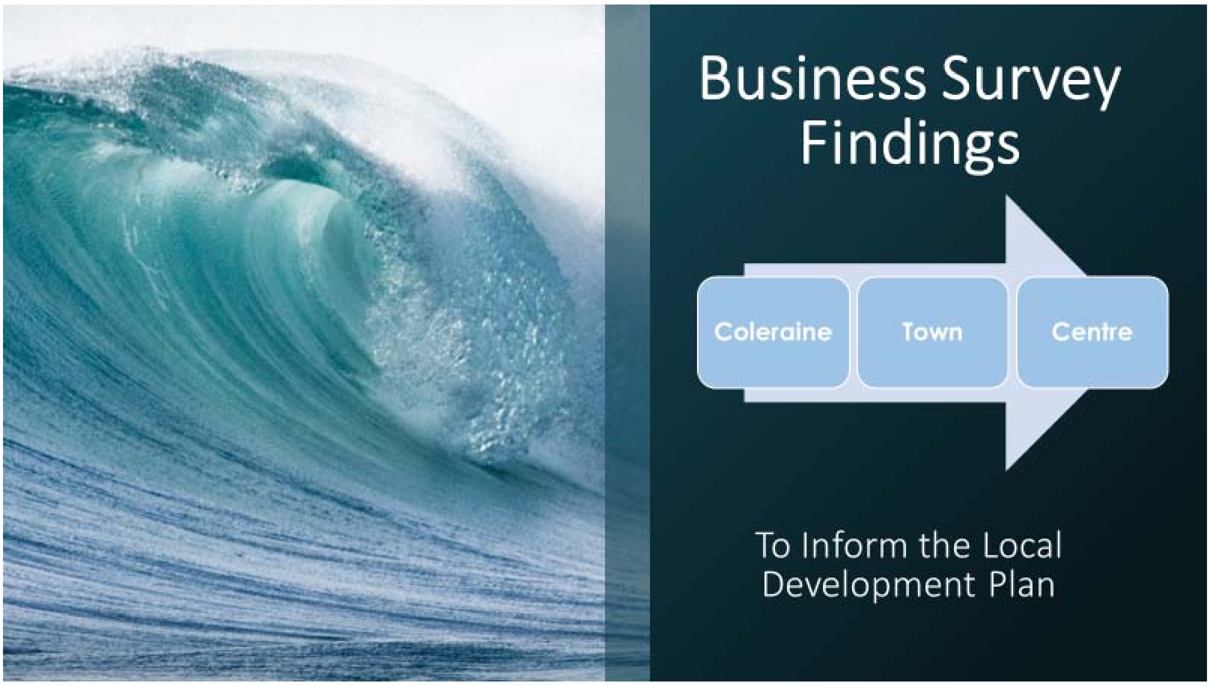
Thank you for your participation.

Date: ____________

Location: ____________


Ballymoney Town Centre
HIGH STREET
CHARLES STREET
MAIN STREET
CHURCH STREET
MEETING HOUSE STREET
CASTLE STREET
SEYMOUR DRIVE
SEYMOUR STREET
JOHN STREET
QUEEN STREET
UNION STREET
CHARLOTTE STREET
TOWNHEAD STREET
EASTERMEADE GARDENS
MODEL SCHOOL ROAD
VICTORIA STREET
CAMERON PLACE
LINENHALL ST
MARKET STREET
CAFE LANE
JUBILEE COURT
SHIELS COURT
BALLYMONEY
Ballymoney Station
Riada House
Cramsie Court
Castlecroft
Manor Hotel
Car Park
Bowling Green
Government Training Centre
Builder's Yard
Fair Hill
Bus Depot
Engineering Works
St Patrick's Church (C of I)
Church (ruins of)
Grave Yard
RC Church of Our Lady and St Patrick
Parish Centre
Rectory
Telephone Exchange
Government Office
Fire Station
Playing Field
All Weather Playing Field
Ballymoney Meth Ch
The Joey Dunlop Memorial Garden

Sproule Consulting



FINAL REPORT:

21st April 2017

Causeway Coast & Glens Borough Council

Dr Jenny Sproule

EMAIL: jenny.sproule@btinternet.com

EXECUTIVE SUMMARY

- 23% of business owners / managers reported their main business type as clothing / footwear / jewellery and accessories; 55% described their main type of business as other – which included: coffee shops / cafés n=6; estate agents n=4; travel agency n=4; telecommunications / mobile phones / electronics / phone retail n=4; gift shop / cards and gifts (n=3) etc.

- 45% have been trading in their current premises for between 1-10 years, 21% for between 11-20 years.

- 4% of businesses have been in existence in Coleraine town centre for over fifty years; the longest established business surveyed has been in existence for 177 years.

- 56% described their business ownership as being an independent trader / retailer; 18% were part of a multi-national chain; 12% were part of a national chain, 6% were part of a franchise and 5% reported being a local chain.

- 49% of business owners / managers described their turnover in the last business year as average (normal); 21% reported that their turnover was above average; 14% described their turnover as below average, whilst 8% confirmed that their takings were well below average.

- 69% had invested money in improvements to their business in the last year.

- 53% confirmed that they had invested in technology, 37% in building works and 44% in staff development.

- 86% of businesses had full-time staff, 76% had part-time staff, 3% had volunteers working more than 16 hours per week and 7% had volunteers working less than 16 hours per week.

- 408 staff were employed on a full-time basis, 548 were employed on a part-time basis, giving total of 956 staff employed in either a full-time or part-time capacity; 13 people were involved as volunteers for more than 16 hours per week, a further 75 volunteered for less than 16 hours.

- 79% employed between 1-10 full-time staff, four businesses employed between 11-20 full-time staff; one business employed between 21-30 full-time staff, one employed between 31-40 full-time staff and one employed between 41-50.

- 63% employed between 1-10 part-time staff, 7% employed between 11-20, 3% employed between 21-30, 1% employed between 31-40, 1% employed between 41-50% and 1% employed over 50.

- 3 businesses reported having between 1-10 people volunteer 16+ hours per week.

- 4 businesses had between 1-10 volunteers involved for less than 16 hours each per week.

- 58% described their overall perception of Coleraine town centre as very poor/poor; 33% reported that their perception of the town centre was average, whilst 3% stated that it was very good / good.

- Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Coleraine town centre (1 very poor and 10 very good); the highest level of 'good' scores were for the following aspects:

  - Flower arrangements / street banners (81%);
  - Cafes (78%);
  - Friendliness of staff / people (76%); and,
  - Lighting (73%).

- The highest level of 'average' scores were for the following aspects:

  - Levels of anti-social behaviour (31%);
  - Range of goods and services available (30%);
  - Vandalism (28%);
  - Condition of buildings (26%); and,
  - Value for money (25%).

- The highest level of 'poor' scores were for the following aspects:

  - Price of public car park spaces (71%);
  - Vacant shops (67%);
  - Variety of shops (64%);
  - Children's play areas (60%); and,
  - On-street entertainment (59%).

- The main priorities for improvement included:

  - 1st Priority: Wider variety of shops (29%);
More shops (16%);
Better parking – cost (16%); and,
Better parking – number of spaces (12%).
  - 2nd Priority: Better parking – cost (22%);
Wider variety of shops (15%);
Better quality of shops (13%);
More shops (11%); and,
Better parking – number of spaces (11%).
  - 3rd Priority: Wider variety of shops (14%);
Better quality of shops (14%);
More shops (9%);
Better parking – cost (9%); and,
Better parking – number of spaces (9%).

- The combined highest (1st, 2nd and 3rd) priority included: wider variety of shops; better parking – cost; more shops; and, better quality of shops.

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1. INTRODUCTION

Causeway Coast and Glens Borough Council (CCGBC) commissioned Sproule Consulting to conduct business and general public surveys in each of the six main towns within the Borough. Table 1 provides a comprehensive breakdown of the number of surveys completed.

TABLE 1: Completed Surveys

	On-Street (General Public)	Business
Coleraine	100	100
Ballymoney	100	90
Portrush	100	40
Portstewart	100	40
Limavady	100	78
Ballycastle	100	54
TOTAL	600	402

The purpose of this Report is to provide empirical data to inform CCGBC's Local Development Plan for the Coleraine area. The survey findings set out in this Business Report, together with the data collated from the general public, will be instrumental in establishing stakeholders' and users' attitudes and perceptions of Coleraine town centre.

2. RESEARCH: KEY OBJECTIVES

The key objectives of this research are shown in Figure 1.

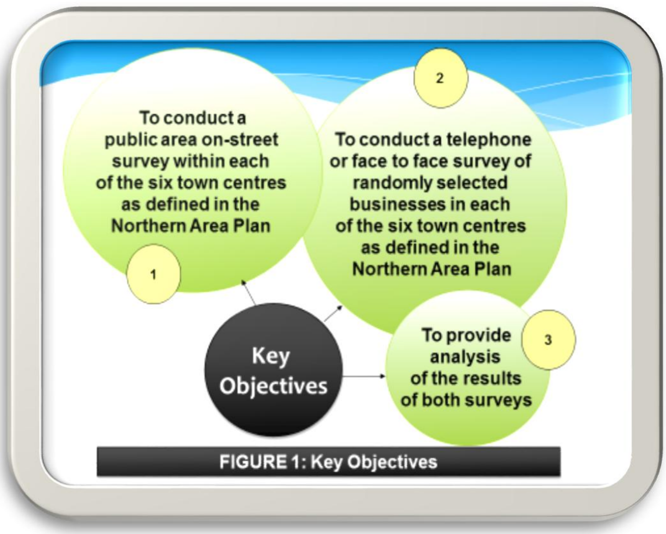


FIGURE 1: Key Objectives

3. DEMOGRAPHIC PROFILE OF BUSINESS OWNERS / MANAGERS SURVEYED

Thirty-eight per cent of the business owners / managers surveyed were male, 37% were female; the remaining 25% made no comment (Table 2).

TABLE 2: Gender (n=100)

Male	38
Female	37
No Comment	25

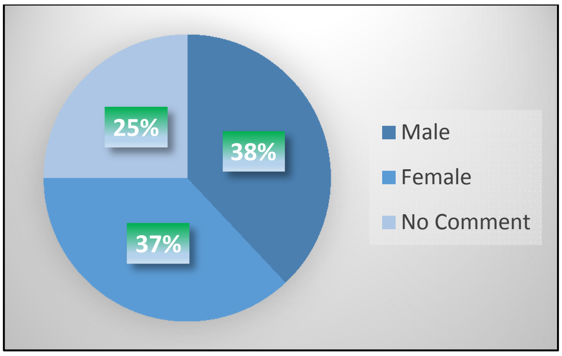
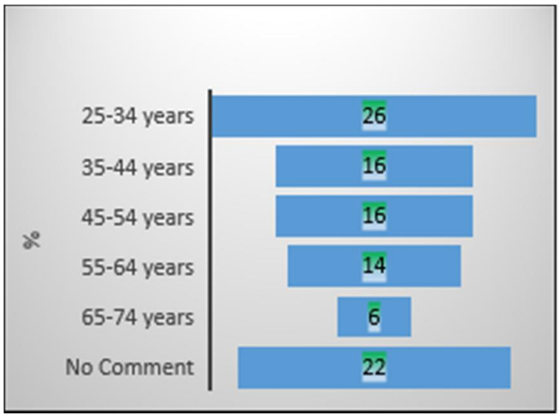
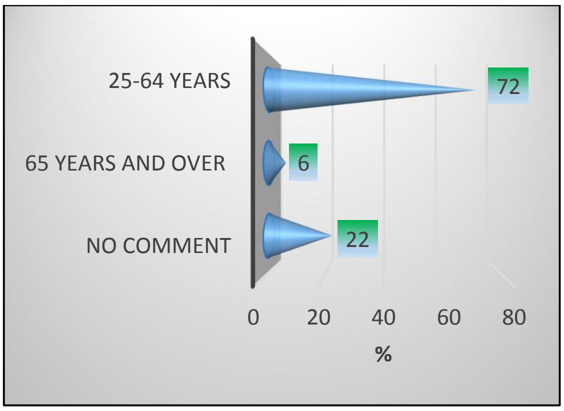


Table 3 sets out the achieved age profile.



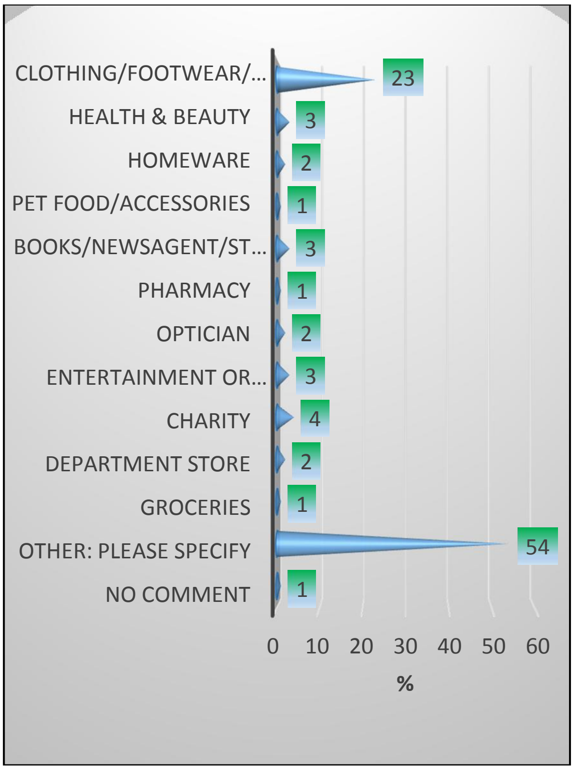


4. BUSINESS SURVEY FINDINGS - COLERAINE TOWN CENTRE

4.1 TYPE OF MAIN BUSINESS?

Almost a quarter (23%) of business owners / managers described their main business type as clothing / footwear/ jewellery and accessories (Table 3).

TABLE 3: Type of Main Business (n=100)	
Clothing / footwear / jewellery / accessories	23
Health & beauty	3
Homeware	2
Pet food/accessories	1
Books/newsagent/stationery	3
Pharmacy	1
Optician	2
Entertainment or leisure (gym, arcade, etc)	3
Charity	4
Department store	2
Groceries	1
Other: Please Specify	55



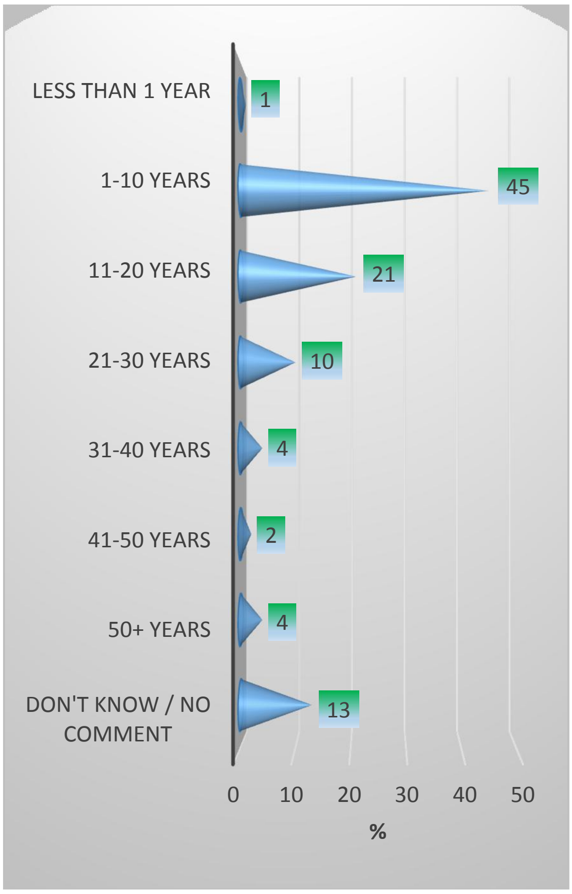
Over half of respondents (55%) described their main type of business as 'other'. Table 4 provides a comprehensive breakdown of the range of other business types included.

TABLE 4: Type - Other (n=55)	
Repair Shop	1
Food Hall	1
Estate Agents	4
Art Gallery	1
Gift Shop / Cards and Gifts	3
Candle Store	1
Craft & Art	1
Travel Agency	4
Clothing, footwear, jewellery, accessories; health and beauty; homeware; pet food and accessories; pharmacy; groceries	4
Photo Lab	1
Coffee Shop / Café	6
Off-sales	1
E-Cigarettes	2
Sports Retail	1
Telecommunications/mobile phones/electronics/Phone retail	4
Lighting / tv / hifi	1
Butchers	2
Clothing Retail	1
Florist	1
Greengrocer	1
Multi choice retailer	1
Art / Picture framing	2
Restaurant	1
Haberdashery / crafts	1
Health & Beauty and Pharmacy	1
Fast food	1
Furniture retail	1
Architect	1
Chartered Accountant	1
Post Office	1
Chinese Restaurant	1
Credit Union	1
Mobile phone repair	1

4.2 HOW MANY YEARS HAVE YOU TRADED IN THESE PREMISES?

Forty-five per cent of business respondents reported that they had traded in their current premises for between 1-10 years (Table 5). Just over a fifth (21%) stated that they had been trading in their current premises for between 11-20 years. Four of the businesses surveyed have been in existence in Coleraine town centre for over fifty years. The longest established business surveyed has been in existence for 177 years.

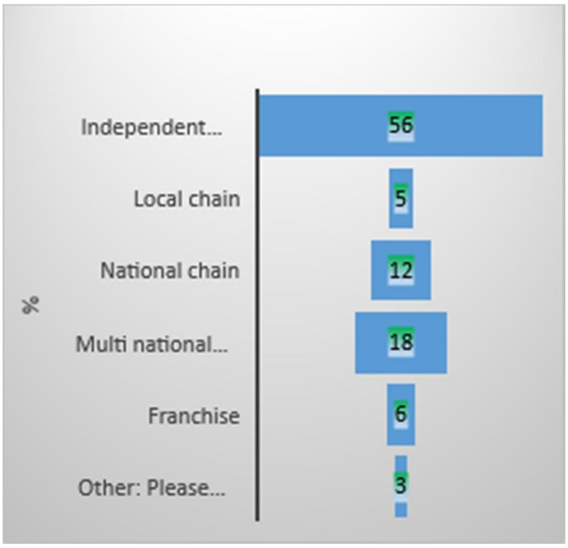
TABLE 5: How many years have you traded in these premises – Grouped (N=100)	
Less than 1 year	1
1-10 years	45
11-20 years	21
21-30 years	10
31-40 years	4
41-50 years	2
50+ years	4
Don't Know / No Comment	13



4.3 WHAT IS THE OWNERSHIP OF YOUR BUSINESS

Over half of business respondents (56%) described their business ownership as being an independent trader / retailer; 18% were part of a multi-national chain; 12% confirmed they were part of a national chain, 6% were part of a franchise and 5% reported being a local chain (Table 6).

TABLE 6: What is the ownership of your business? (n=100)	
Independent trader/retailer	56
Local chain	5
National chain	12
Multi national chain	18
Franchise	6
Other: Please Specify	3



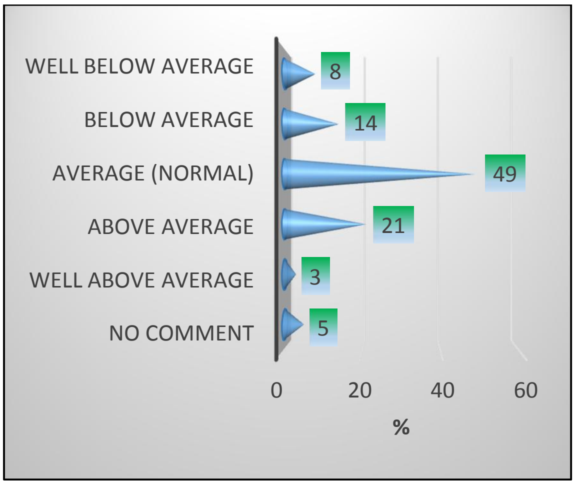
The three 'other' forms of ownership described are listed in Table 7.

TABLE 7: Type of Ownership – Other (n=3)	
Charity shop	1
Craft collective	1
Ltd Co. / Partnership	1

4.4 HOW WOULD YOU DESCRIBE YOUR TURNOVER IN THE LAST BUSINESS YEAR?

Almost half of the respondents (49%) described their turnover in the last business year as average (normal); just over a fifth (21%) reported that their turnover was above average. Fourteen per cent described their turnover as below average, whilst 8% confirmed that their takings were well below average (Table 8).

TABLE 8: How would you describe your turnover in the last business year? (n=100)	
Well below average	8
Below average	14
Average (normal)	49
Above average	21
Well above average	3
No Comment	5

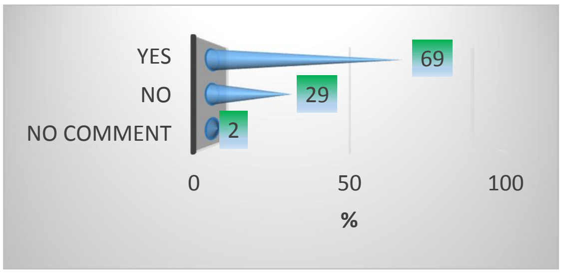


4.5 HAVE YOU INVESTED MONEY IN IMPROVEMENTS TO YOUR BUSINESS IN THE LAST YEAR?

Almost seven out of ten respondents (69%) confirmed that they had invested money in improvements to their business in the last year (Table 9).

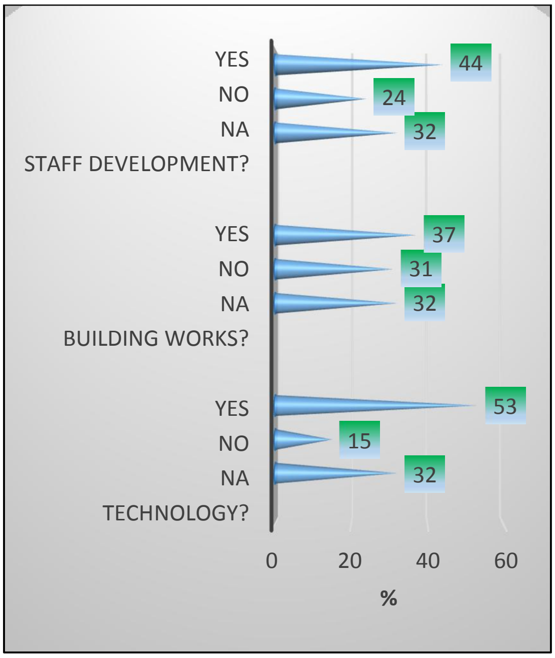
Some 53% confirmed that they had invested in technology, 37% in building works and 44% in staff development (Table 10).

TABLE 9: Have you invested money in improvements to your business in the last year? (n=100)	
Yes	69
No	29
No Comment	2



Male business owners / managers were statistically significantly more likely than female business owners / managers to report having invested money in improvements to their businesses in the last year.

TABLE 10: Invested in…? (n=100)	
Technology	53
Building Works	37
Staff Development	44

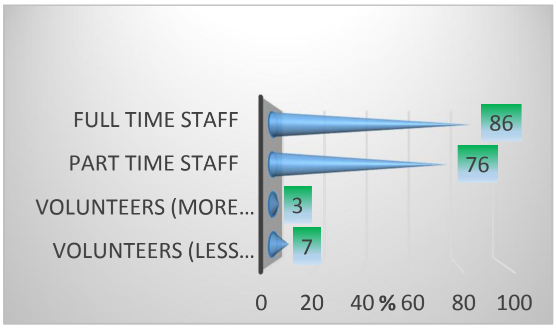


Males business owners / managers were statistically significantly more likely than females to report having invested money in technology in the last year.

4.6 HOW MANY PEOPLE ARE CURRENTLY INVOLVED IN YOUR BUSINESS (INCLUDING ANY WORKING OWNERS)?

Eighty-six percent of businesses had full-time staff, 76% had part-time staff, 3% had volunteers working more than 16 hours per week and 7% had volunteers working less than 16 hours per week.

TABLE 11: Number of businesses with... (n=100)	
Full time staff	86
Part time staff	76
Volunteers (more than 16 hours)	3
Volunteers (less than 16 hours)	7



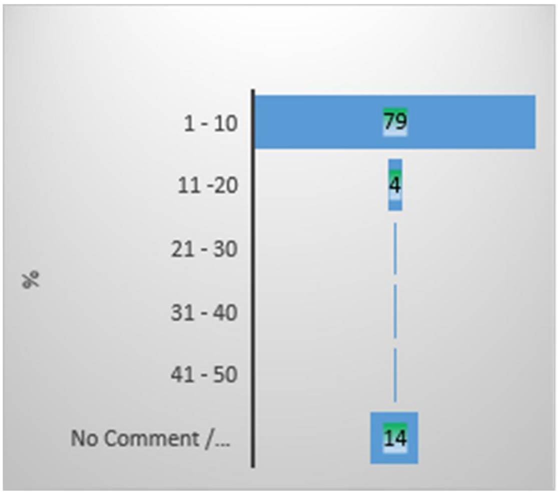
As shown in Table 12, 408 staff were employed on a full-time basis, 548 were employed on a part-time basis, giving total of 956 staff employed in either a full-time or part-time capacity. Thirteen people were involved as volunteers for more than 16 hours per week, whilst a further 75 volunteered for less than 16 hours.

TABLE 12: How many people are currently involved in your business (including any working owners) (n=100)		
		Total
Full time (more than 30 hours)	408	956
Part time (up to 30 hours)	548	
Volunteers (more than 16 hours)	13	88
Volunteers (less than 16 hours)	75	
		1044

4.6.1 FULL TIME (MORE THAN 30 HOURS)

Almost four-fifths of businesses (79%) employed between 1-10 full-time staff, four businesses employed between 11-20 full-time staff; one business employed between 21-30 full-time staff, one employed between 31-40 full-time staff and one employed between 41-50 (Table 13).

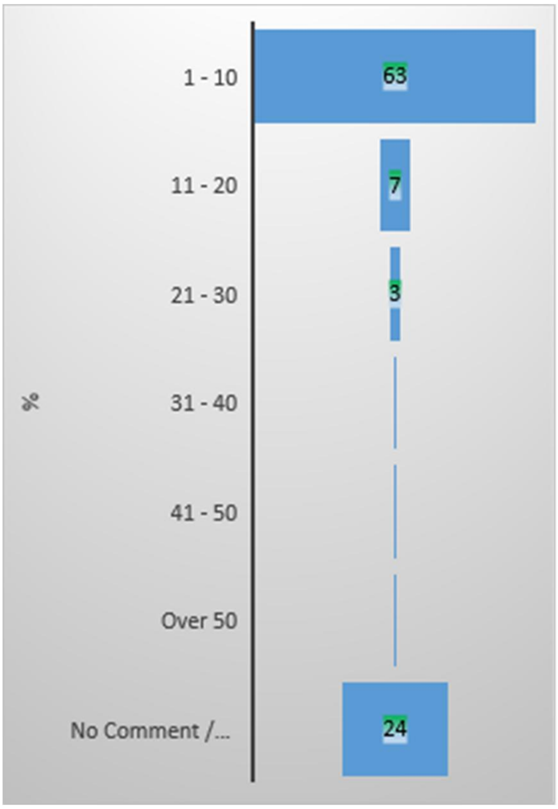
TABLE 13: How many people are currently involved in your business (Full-Time) (including any working owners) (n=100)	
1 - 10	79
11 -20	4
21 - 30	1
31 - 40	1
41 - 50	1
No Comment / NA	14



4.6.2 PART TIME (UP TO 30 HOURS)

Sixty-three per cent of businesses employed between 1-10 part-time staff, 7% employed between 11-20, 3% employed between 21-30, 1% employed between 31-40, 1% employed between 41-50% and 1% employed over 50 (Table 14).

TABLE 14: How many people are currently involved in your business (Part-Time) (including any working owners) (n=100)	
1 - 10	63
11 - 20	7
21 - 30	3
31 - 40	1
41 - 50	1
Over 50	1
No Comment / NA	24



4.6.3 VOLUNTEERS (MORE THAN 16 HOURS PER WEEK)

As shown in Table 15, three businesses reported having between 1-10 people volunteer 16+ hours per week.

TABLE 15: How many people are currently involved in your business (volunteers 16+ hours) (including any working owners) (n=100)	
1 - 10	3
No Comment / NA	97

4.6.4 VOLUNTEERS (LESS THAN 16 HOURS PER WEEK)

Four businesses reported having between 1-10 volunteers involved for less than 16 hours each per week (Table 16).

TABLE 16: How many people are currently involved in your business (volunteers less than 16 hours) (including any working owners) (n=100)	
1 - 10	4
11 - 30	2
21 - 30	1
No Comment / NA	93

4.7 OVERALL, WHAT IS YOUR 8 PERCEPTION OF THE TOWN CENTRE?

Almost three-fifths of respondents (58%) described their overall perception of Coleraine town centre as very poor/poor (Tables 17 and 18). A third (33%) reported that their perception of the town centre was average, whilst 3% stated that it was very good / good.

TABLE 17: Overall, what is your perception of the town centre? (n=100)	
Very poor	15
Poor	43
Average	33
Good	6
Very good	1
No Comment	2

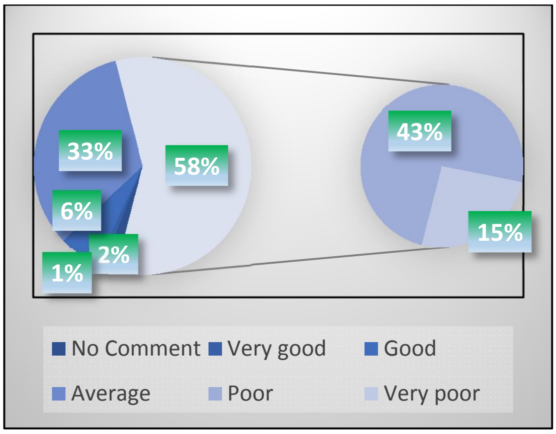
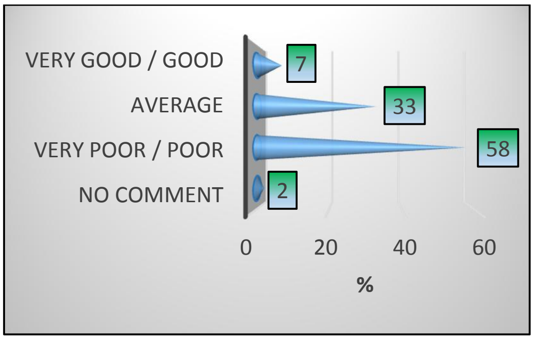


TABLE 18: Overall, what is your perception of the town centre? (n=100)	
Very poor / poor	58
Average	33
Very good / good	7
No Comment	2



4.8 OTHER COMMENTS - PERCEPTION

Table 19 sets out a comprehensive breakdown of other comments relating to perception.

TABLE 19: Perception town centre - Other (n=33)	
No / Not much / Not enough variety of shops	3
Could encourage small business	1
Requires investment and entertainment	1
Too many empty shops	2
Side street could do with some investment	1
I think Bridge St is forgotten/Need more shops	1
Lack of diversity in the stores to attract custom	1
Lots of empty units and not a good range of shops	1
Not enough to keep people in town or late night shopping	1
Poor parking	1
Deserted	1
Too many coffee shops and charity shops	1
No shops!!	1
Town only seems to get done up when visitors are coming	1
Empty units, too many coffee shops, cars in pedestrian area	1
Not open late night or Sunday	1
Lack of trading hours	1
Gradual decline	1
Street lighting in Brook St very poor; Mill St - NONE	1
No decent shops	1
Could do more; presentation of town; free parking	1
Very little life	1
I normally shop in Ballymoney or Belfast	1
Need some newness	1
Too many shops closed	1
Not enough independent traders	1
Recent work / trees / greenery looks different	1
Business retention poor - no new businesses	1
On side street, not much contact with Main St	1
Businesses need free parking and need more loading bays (people with lorries are taking up parking spaces for shoppers)	1

4.9 PLEASE SCORE YOUR CURRENT OPINION OF THE FOLLOWING ASPECTS OF THE TOWN CENTRE (SCALE 1 – 10, 1 VERY POOR, 5 AVERAGE, 10 - VERY GOOD)

Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Coleraine town centre (1 very poor and 10 very good). The results are shown in detail in Table 20. For further clarity Table 21 sets out a summary of poor scores (1-4), average (5) and good scores.

As shown, the highest level of 'good' scores were for the following aspects:

- Flower arrangements / street banners (81%);
- Cafes (78%);
- Friendliness of staff / people (76%); and,
- Lighting (73%).

The highest level of 'average' scores were for the following aspects:

- Levels of anti-social behaviour (31%);
- Range of goods and services available (30%);
- Vandalism (28%);
- Condition of buildings (26%); and,
- Value for money (25%).

The highest level of 'poor' scores were for the following aspects:

- Price of public car park spaces (71%);
- Vacant shops (67%);
- Variety of shops (64%);
- Children's play areas (60%); and,
- On-street entertainment (59%).

Male respondents were statistically significantly more likely than female respondents to describe parking in Coleraine Town Centre as poor.

Female respondents were statistically significantly more likely than male respondents to describe value for money as good.

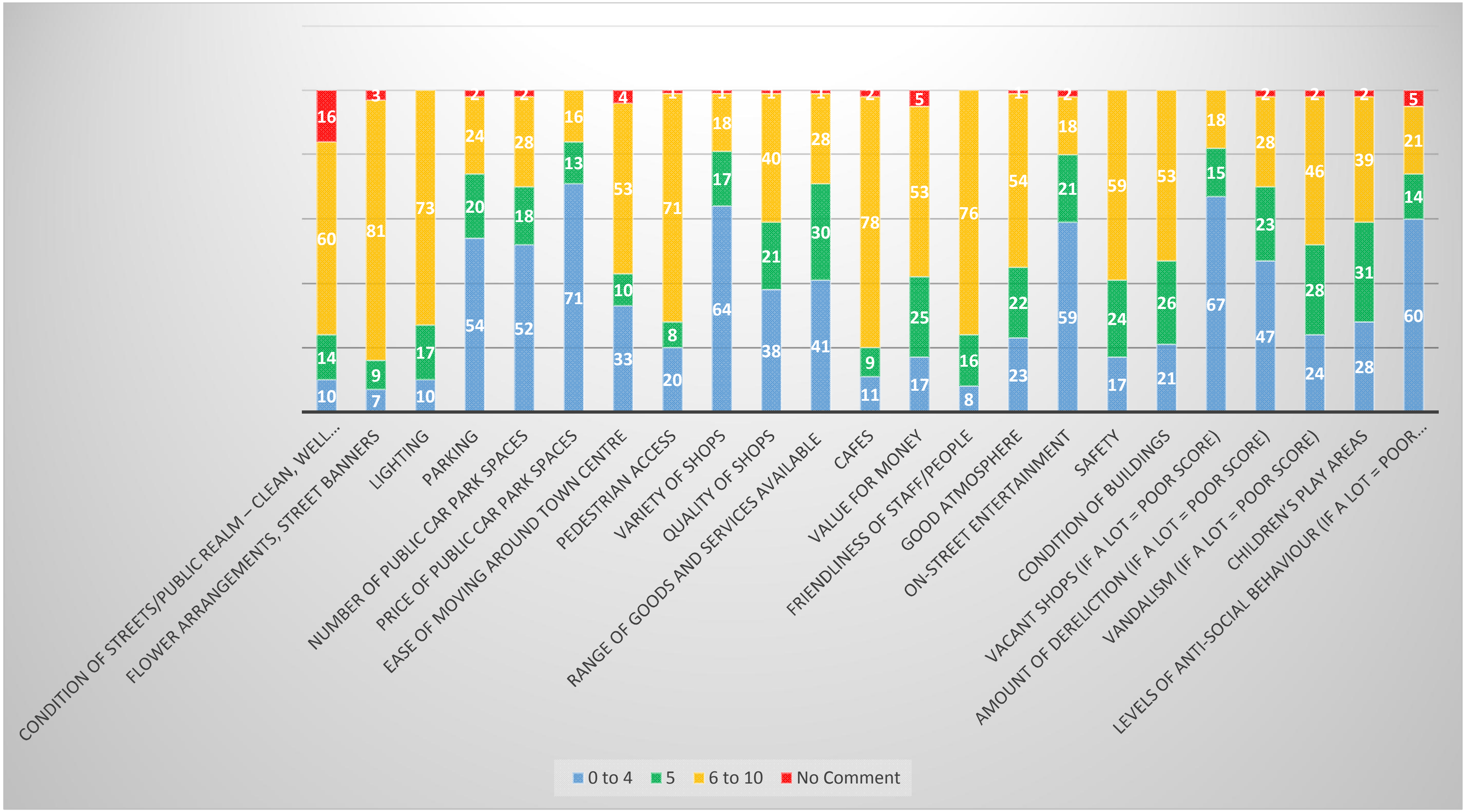
TABLE 20: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Scores (n=100)

	0	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**No Comment**	
Condition of streets/public realm – clean, well maintained, attractive	0	1	0	6	3	14	5	13	28	7	7	16	100
Flower arrangements, street banners	0	0	0	4	3	9	4	19	33	10	15	3	100
Lighting		2	2	2	4	17	7	18	29	8	11		100
Parking	2	18	11	14	9	20	7	10	5		2	2	100
Number of public car park spaces	1	17	6	13	15	18	8	10	6	1	3	2	100
Price of public car park spaces	3	34	15	15	4	13	5	5	4	1	1	0	100
Ease of moving around town centre	1	7	10	7	8	10	11	12	21	2	7	4	100
Pedestrian access	2	6	3	4	5	8	13	19	21	7	11	1	100
Variety of shops	2	21	7	14	20	17	7	6	4	1	0	1	100
Quality of shops	1	6	5	11	15	21	13	14	12	1	0	1	100
Range of goods and services available	0	8	4	6	23	30	10	9	8	1	0	1	100
Cafes	1	1	2	3	4	9	3	14	27	9	25	2	100
Value for money	0	0	2	7	8	25	13	21	14	3	2	5	100
Friendliness of staff/people	0	0	3	1	4	16	11	19	28	13	5	0	100
Good atmosphere	0	2	4	8	9	22	20	12	13	7	2	1	100
On-street entertainment	2	17	16	11	13	21	6	8	4	0	0	2	100
Safety	1	3	4	5	4	24	10	14	27	4	4	0	100
Condition of buildings	1	2	1	9	8	26	18	15	13	6	1	0	100
Vacant shops (if a lot = poor score)	3	22	11	19	12	15	8	4	4	2	0	0	100
Amount of dereliction (if a lot = poor score)	2	10	10	8	17	23	12	8	6	2	0	2	100
Vandalism (if a lot = poor score)	0	1	2	8	13	28	9	19	13	3	2	2	100
Children's play areas	0	1	4	9	14	31	9	16	11	3		2	100
Levels of anti-social behaviour (if a lot = poor score)	2	9	15	13	21	14	10	5	4	0	2	5	100
	24	188	137	197	236	431	219	290	335	91	100	52	2300

TABLE 21: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Grouped Scores (n=100)

	0 to 4	**5**	**6 to 10**	**No Comment**	
Condition of streets/public realm – clean, well maintained, attractive	10	14	60	16	100
Flower arrangements, street banners	7	9	81	3	100
Lighting	10	17	73	0	100
Parking	54	20	24	2	100
Number of public car park spaces	52	18	28	2	100
Price of public car park spaces	71	13	16	0	100
Ease of moving around town centre	33	10	53	4	100
Pedestrian access	20	8	71	1	100
Variety of shops	64	17	18	1	100
Quality of shops	38	21	40	1	100
Range of goods and services available	41	30	28	1	100
Cafes	11	9	78	2	100
Value for money	17	25	53	5	100
Friendliness of staff/people	8	16	76	0	100
Good atmosphere	23	22	54	1	100
On-street entertainment	59	21	18	2	100
Safety	17	24	59	0	100
Condition of buildings	21	26	53	0	100
Vacant shops (if a lot = poor score)	67	15	18	0	100
Amount of dereliction (if a lot = poor score)	47	23	28	2	100
Vandalism (if a lot = poor score)	24	28	46	2	100
Levels of anti-social behaviour (if a lot = poor score)	28	31	39	2	100
Children's play areas	60	14	21	5	100
TOTAL	782	431	1035	52	2300

Scores - current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Grouped Scores (n=100)



4.10 WHAT THREE ASPECTS OF THE TOWN COULD BE IMPROVED?

Respondents were asked to rank their top three priorities for improvement in Coleraine. Table 22 provides a comprehensive breakdown of the findings. These included:

4.10.1 FIRST PRIORITY – IMPROVEMENT

- Wider variety of shops (29%);
- More shops (16%);
- Better parking – cost (16%); and,
- Better parking – number of spaces (12%).

4.10.2 SECOND PRIORITY - IMPROVEMENT

- Better parking – cost (22%);
- Wider variety of shops (15%);
- Better quality of shops (13%);
- More shops (11%); and,
- Better parking – number of spaces (11%).

4.10.3 THIRD PRIORITY - IMPROVEMENT

- Wider variety of shops (14%);
- Better quality of shops (14%);
- More shops (9%);
- Better parking – cost (9%); and,
- Better parking – number of spaces (9%).

The combined highest (1^{st}, 2^{nd} and 3^{rd}) priority included: wider variety of shops; better parking – cost; more shops (36); and, better quality of shops (32).

TABLE 22: What three aspects of the town could be improved? (n=100)

	1st	**2nd**	**3rd**	**TOTAL**
Wider variety of shops	29	15	14	58
More shops	16	11	9	36
Better quality of shops	5	13	14	32
Better maintained buildings	3	3	6	12
Better maintained public spaces	0	0	0	0
Better parking – cost	16	22	9	47
Better parking – number of spaces	12	11	9	32
More for children/teenagers	1	2	4	7
More recreation facilities	1	0	5	6
More Public toilets	0	0	4	4
Better bus service	0	1	1	2
Improved safety	0	3	0	3
Improved street lighting	0	2	2	4
Improved signage	0	0	2	2
NA/No Comment	17	17	21	55
TOTAL	100	100	100	300

4.11 OTHER COMMENTS

Other comments are set out in Table 23.

What three aspects of the town could be improved? (n=100)

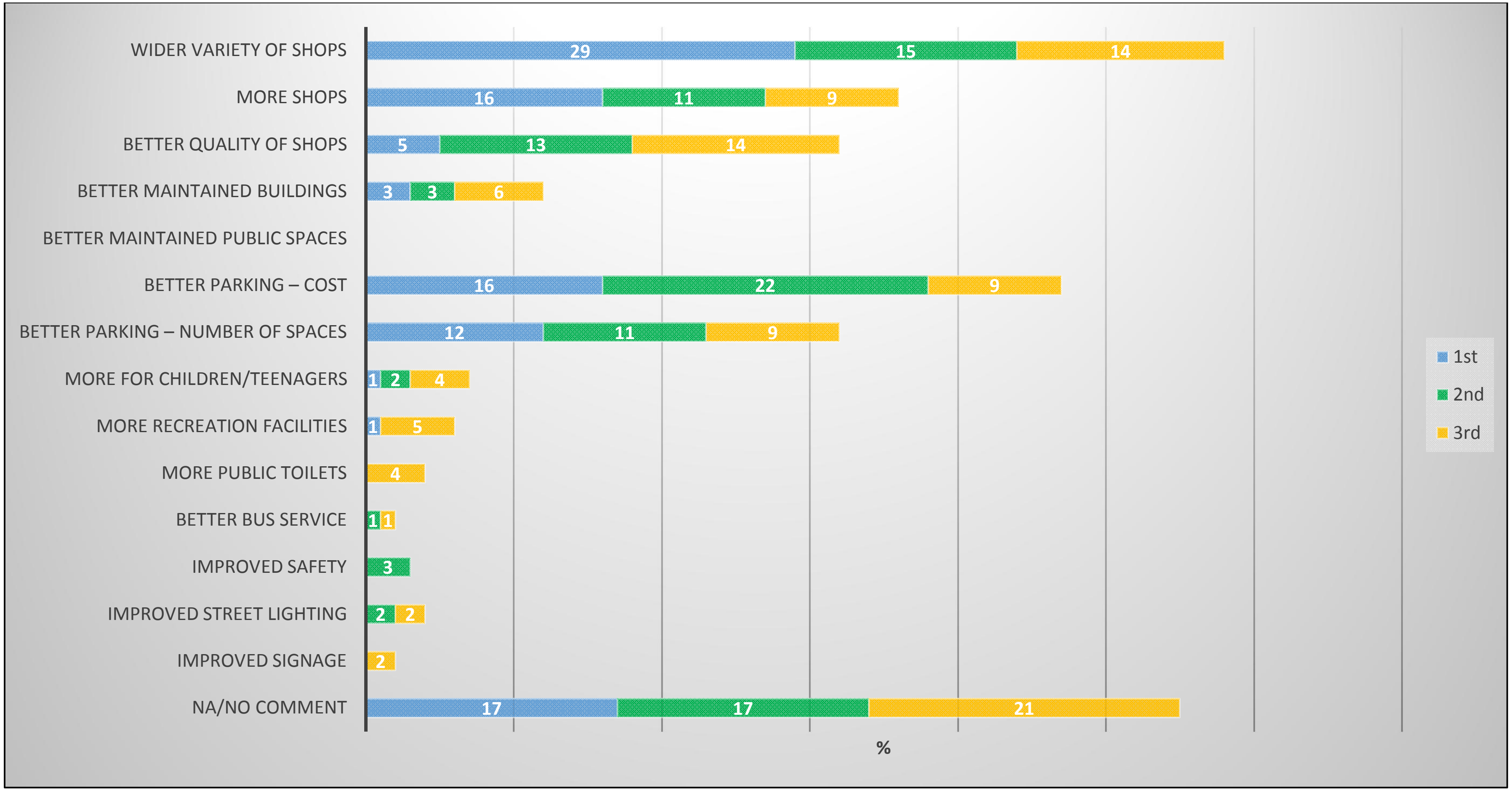


TABLE 23: Any other comments (n=27)	
There are very rarely new shops opening	1
Too many cafes / safety concerns about cars in pedestrian area / concerned about rates - as a small independent business, I am trying to survive in a world of huge chain stores. I desperately want to move to the main street but I can't afford triple the rate increase! I am not getting enough footfall and passing trade to make it work. My current rates, just over £4K - 25% SBRR. Shop on Kingsgate - slightly smaller - rates £10,300!!! I won't be able to continue to trade on xxxxx as it isn't profitable. Yet can't afford to pay the Main Street rates. There just isn't enough help for small business' in the start of their enterprise. Not enough affordable rentals for new businesses either!	1
Would be good to be able to comment more on certain questions	1
Need better traffic access / parking / roads	1
Need more clothes shops	1
Would like a street banner for Queen Street / Parking too expensive	1
Much lower rates (needed)!! / Rates too high / Rates	3
Public events at the weekends would be good to add footfall	1
High speed cars through town centre	1
All shops (should be) open Sunday	1
Town is lacking in shops	1
Causeway Market affects trade when on; Christmas trading hours appalling; move Christmas tree back to main entrance at Town Hall	1
Need to sort this town out better for the sake of business people	1
Less out of town shops; too many cafes	1
Parking - too expensive	1
Not hungry for trade	1
Lack of free parking a big problem when Riverside Retail Park have it; too many empty shops and discounters forcing others out	1
Everything is centred around Town Hall - the rest left out; Condition of streets - no sweeper; too many cafes	1
What's 'normal' turnover? When is there on-street entertainment? Every single aspect of the town centre needs improved	1
Too many cafes	2
Marketing to encourage people to come into the town	1
Traffic flow could be improved / rates too high	1
Retail changed massively in last 5 years, especially with internet shopping; Parking, access and Riverside planning - key issues / public transport closer to / in town centre	1
Opening hours should have late night shopping	1

APPENDIX 1: Business Questionnaire Coleraine and Map of Town Centre Area

BUSINESS SURVEY

February 2017

Causeway Coast and Glens Borough Council would like to invite you to participate in a Business Survey to enable it to better understand business owners'/managers' perceptions of the town centre.

The findings from this research will be used by the Council to inform its Local Development Plan and may include the identification of lands for future retail development and the production of land use policies to guide development proposals.

The Business Survey will take approximately 4 minutes to complete. All responses will be treated with strict confidentiality.

The town centre area is shown on the map attached.

If you have any queries, please contact Sharon Mulhern from Causeway Coast & Glens Borough Council using telephone number 028 70347244 or Dr Jenny Sproule from *Sproule Consulting* on 07860 342493.

Yours Faithfully

Sharon Mulhern

Local Development Plan Manager

Causeway Coast & Glens Borough Council

Date: ________

Business Profile

1. Business Name: ___________________________
2. Business Address: ________________________
3. Type of Main Business: **[PLEASE CIRCLE ONE ONLY]**

Clothing/footwear/jewellery/accessories	1
Health & beauty	2
Hairdressing	3
Homeware	4
Pet food/accessories	5
Books/newsagent/stationery	6
Pharmacy	7
Optician	8
Doctor/Dentist	9
Entertainment or leisure (gym, arcade, etc)	10
Charity	11
Department store	12
Groceries	13
Other: **Please Specify**	14

4. How many years have you traded in these premises? ________________________________

5. What is the ownership of your business? **[PLEASE CIRCLE ONE ONLY]**

Independent trader/retailer	1
Local chain	2
National chain	3
Multi national chain	4
Franchise	5
Other: **Please Specify**	6

6. How would you describe your current turnover / turnover in last year? **[PLEASE CIRCLE ONE ONLY]**

Well below average	1
Below average	2
Average (normal)	3
Above average	4
Well above average	5

7. Have you/the business owner invested capital in improvements to your business in the last year? **[PLEASE CIRCLE ONE ONLY]**

Yes	1
No	2

8. How many people are currently involved in running your business (including any working owners)? **[PLEASE INSERT FOR EACH]**

Full time (more than 30 hours)	
Part time (up to 30 hours)	
Volunteers (16 hours+)	
Volunteers (16 hours or less)	

Town Centre Perceptions

9. Overall, what is your perception of the town centre? **[PLEASE CIRCLE ONE ONLY]**

Very poor	1
Poor	2
Average	3
Good	4
Very good	5

Please comment: ______________________________

10. Please score your current opinion of the following aspects of the town centre (Scale 1 – 10, 1 very poor, 5 average, 10 – very good) **[PLEASE INSERT FOR EACH]**

Range of goods and services available	
Condition of buildings	
Condition of streets/public realm – clean, well maintained, attractive	
Number of public car park spaces	
Price of public car park spaces	
Safety	
Lighting	
On-street entertainment	
Levels of anti-social behaviour	
Vandalism	
Vacant shops	
Amount of dereliction	
Convenience	
Friendliness of staff/people	
Variety of shops	
Good atmosphere	
Quality of shops	
Cafes	
Children's play areas	
Parking	
Value for money	
Presence of pedestrian area	
Flower arrangements, street banners	

11. What three aspects of the town could be improved? **[PLEASE RANK 1,2,3]**

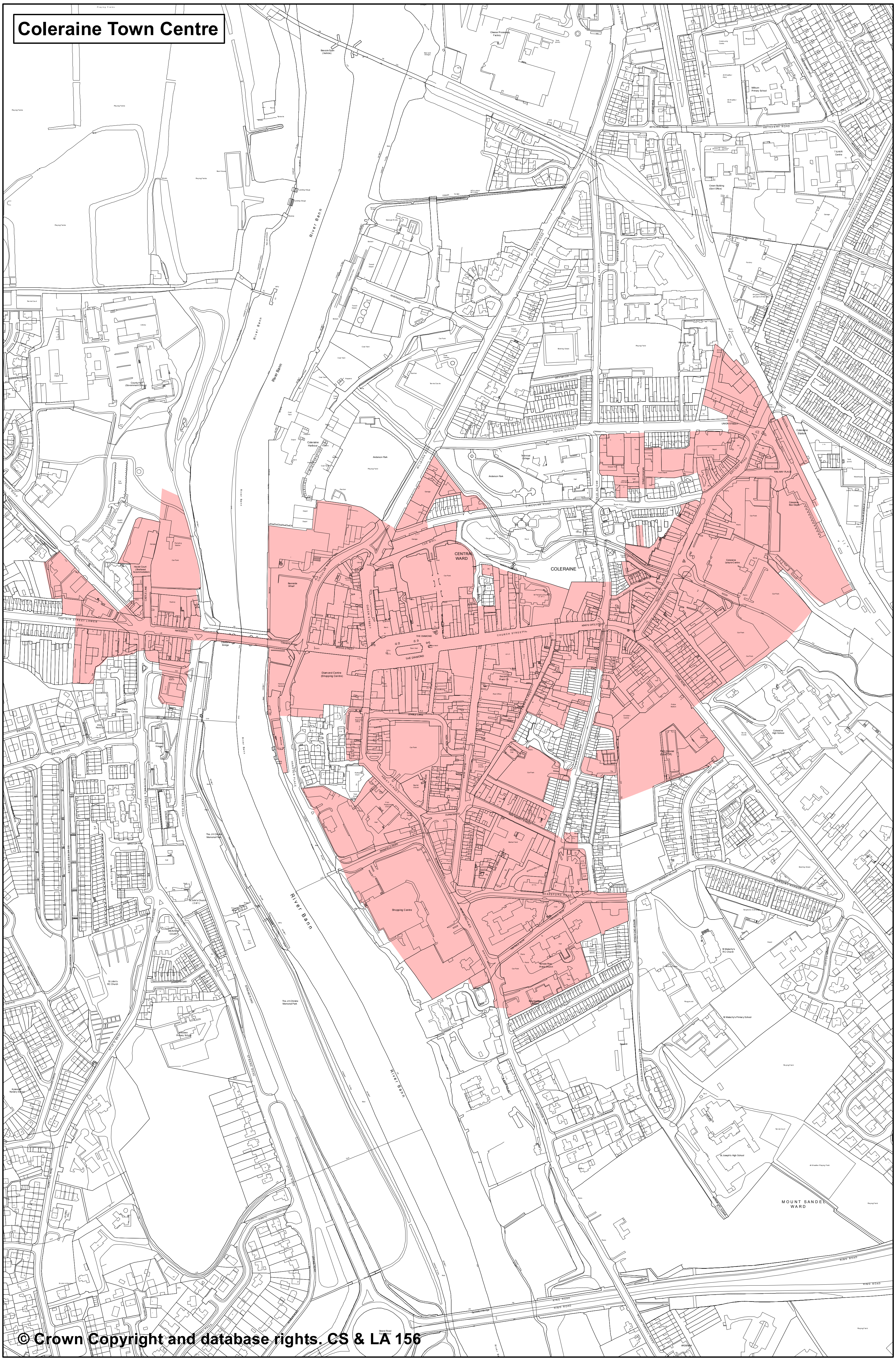
Wider variety of shops	
More shops	
Better quality of shops	
Better maintained buildings	
Better maintained public spaces	
Better parking – cost	
Better parking – number of spaces	
More for children/teenagers	
More recreation facilities	
More Public toilets	
Better bus service	
Improved safety	
Improved street lighting	
Improved signage	

Background Information

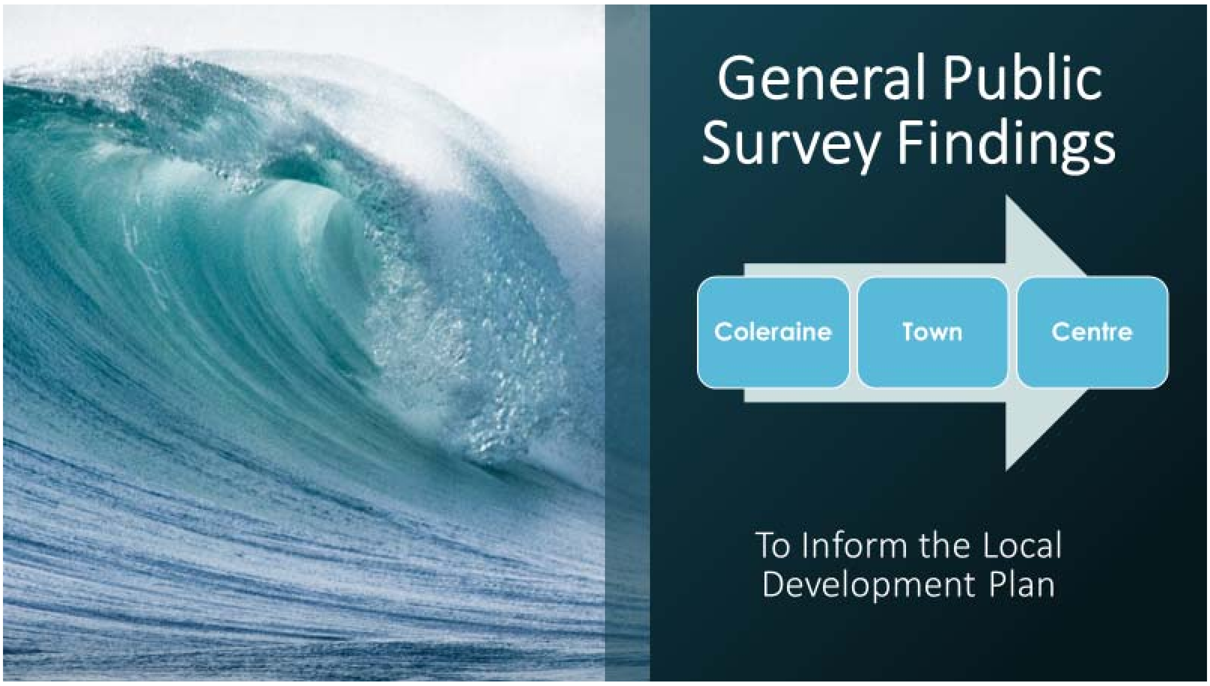
Male	1	Female	2
Age (Years)			

Thank you for your participation.

Coleraine Town Centre



Sproule Consulting



FINAL REPORT:

21st April 2017

Causeway Coast & Glens Borough Council

Dr Jenny Sproule

EMAIL: jenny.sproule@btinternet.com

EXECUTIVE SUMMARY

- 61% of respondents were residents of Coleraine, 39% were visitors to the town.
- 62% visited Coleraine town centre at least once a week, 20% visited the town centre weekly, 7% visited the town centre at least once a fortnight, 7% visited at least once a month, whilst 4% visited less often.
- Respondents aged 45-54 years were statistically significantly more likely than those in other age groups to report being in town at least once a week.
- 39% visited Coleraine for grocery shopping; 34% had visited the town to eat / drink at local cafes, restaurants and pubs; 29% were clothes shopping; 17% were at work / school in the area; 15% were shopping for books, visiting a newsagents or purchasing stationery; 14% were visiting a pharmacy / optician; 10% were shopping for footwear.
- Females were significantly more likely than males to report being in town to do grocery shopping and clothes shopping.
- 39% intended to stay two hours or more in the town; 32% intended staying for at least one hour but less than two hours; 21% planned staying for at least thirty minutes but less than one hour; only 5% planned staying for less than ten minutes.
- 62% had travelled from the Coleraine area to visit the town centre; 11% travelled from Ballymoney and 6% from Portstewart.
- 52% travelled by car to Coleraine town centre; 26% walked to the area, 12% travelled by bus and 7% by train.
- 23% spent £10 or less during their visit to the town centre; 20% spent between £30.01 and £40; 19% spent between £20.01 and £30, whilst 18% spent between £10.01 and £20; only 6% of respondents spent over £50; 5% spent nothing.
- 89% had been visiting the town for more than 5 years.
- Respondents aged 65 years and over were statistically significantly more likely than those from other age groups to report having visited Coleraine town centre for more than five years.
- 61% stated that their overall perception of Coleraine town centre was very good/good; 16% described their perception as very poor/poor, whilst 23% described it as average.

- Visitors to Coleraine were statistically significantly more likely to describe their perception of the town as very good / good compared to residents.

- Respondents who reported being in Coleraine to go grocery shopping were statistically significantly more likely to describe their perception of the town centre as very poor / poor compared to those who were not going grocery shopping.

- Those who spent two hours or more in Coleraine were statistically significantly more likely to describe their perception of the town as very good / good compared to those who spent less time.

- Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Coleraine town centre (1 very poor and 10 very good); the highest level of 'good' scores were for the following aspects:

    - Safety (98%);
    - Flower arrangements / street banners (96%);
    - Ease of moving around town centre (96%);
    - Pedestrian access (96%);
    - Friendliness of staff / people (95%);
    - Good atmosphere (93%);
    - Value for money (92%)
    - Condition of buildings (92%); and,
    - Amount of dereliction (92%).

- The highest level of 'average' scores were for the following aspects:

    - Children's play areas (28%);
    - On-street entertainment (21%);
    - Levels of anti-social behaviour (17%);
    - Range of goods and services available (14%);
    - Lighting (11%);
    - Parking (11%); and,
    - Number of public car parking spaces (11%).

- The highest level of 'poor' scores were for the following aspects:

    - Vacant shops (18%);
    - Variety of shops (14%);
    - On-street entertainment (11%); and,
    - Price of public car park spaces (9%).

- The main priorities for improvement included:
  - 1st Priority: More shops (35%);
    Wider variety of shops (28%); and,
    Better quality of shops (9%).
- Respondents aged between 35-44 years were statistically significantly more likely than those from other age groups to report more shops as their number one priority that could be improved about the town.
  - 2nd Priority: Better parking – cost (18%);
    Wider variety of shops (16%);
    More shops (16%); and,
    More public toilets (12%).
  - 3rd Priority: Better quality of shops (20%);
    More public toilets (18%);
    Wider variety of shops (12%); and,
    More shops (11%).
- The combined highest (1st, 2nd and 3rd) priority included: more shops; wider variety of shops; and, better quality of shops.

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LIST OF TABLES:

1. INTRODUCTION

Causeway Coast and Glens Borough Council (CCGBC) commissioned Sproule Consulting to conduct general public and business surveys in the six main towns within the Borough. Table 1 provides a comprehensive breakdown of the number of surveys completed.

TABLE 1: Completed Surveys

	On-Street (General Public)	Business
Coleraine	100	100
Ballymoney	100	90
Portrush	100	40
Portstewart	100	40
Limavady	100	78
Ballycastle	100	54
TOTAL	600	402

The purpose of this Report is to provide empirical data to inform CCGBC's Local Development Plan for the Coleraine area.

The survey findings set out in this General Public Report, together with the data collated from the Business Report, will therefore be instrumental in establishing users' and stakeholders' attitudes and perceptions of Coleraine town centre.

2. RESEARCH: KEY OBJECTIVES

The key objectives of this research are shown in Figure 1.

3. DEMOGRAPHIC PROFILE

Fifty-three per cent of the general public survey respondents were female, 47% were male (Table 2).

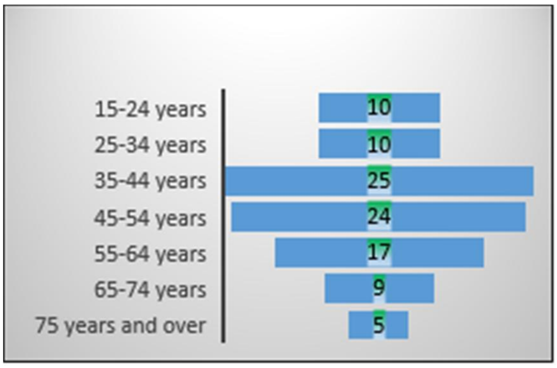
TABLE 2: Gender (n=100)

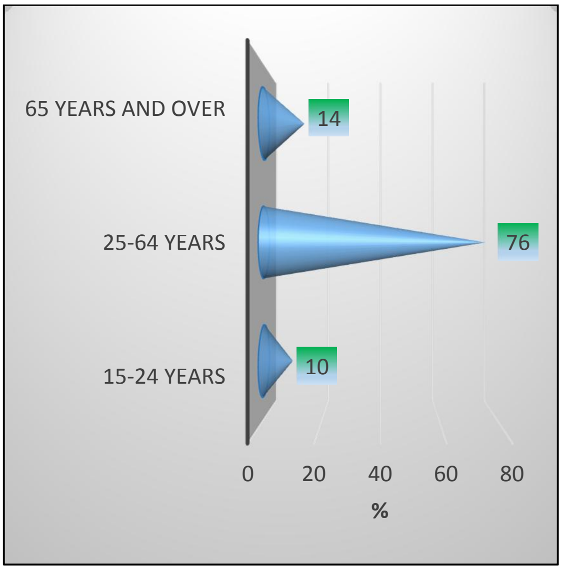
Male	47
Female	53

Table 3 sets out the achieved age profile.

TABLE 3: Age (n=100)

15-24 years	10
25-34 years	10
35-44 years	25
45-54 years	24
55-64 years	17
+65-74 years	9
75 years and over	5
TOTAL	100





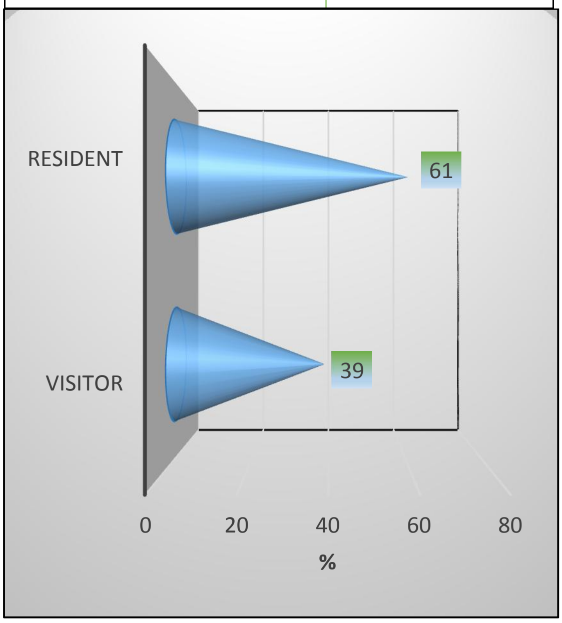
4. GENERAL PUBLIC SURVEY FINDINGS - COLERAINE TOWN CENTRE

4.1 ARE YOU A RESIDENT OF COLERAINE OR VISITOR TODAY?

As shown in Table 4, just over three-fifths of respondents (61%) were residents of Coleraine, the remaining 39% were visitors to the town.

TABLE 4: Are you a resident of Coleraine or visitor today? (n=100)

	%
Resident	61
Visitor	39
TOTAL	100

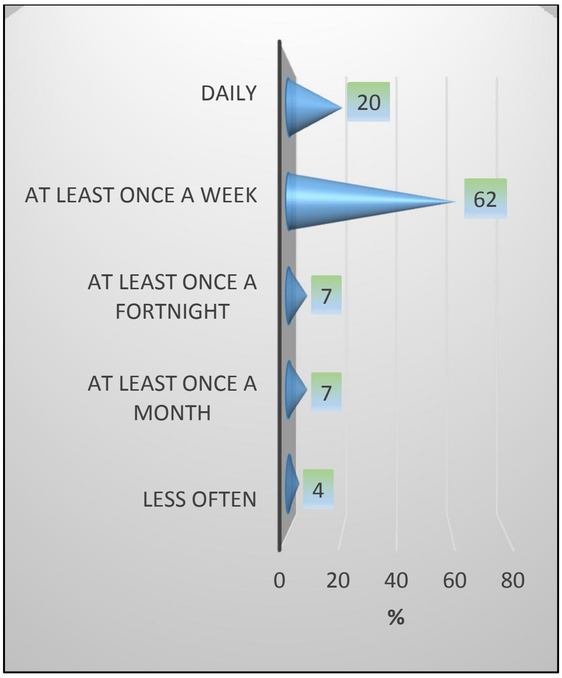


4.2 HOW OFTEN DO YOU VISIT THE TOWN CENTRE?

Some 62% of respondents reported that they visited Coleraine town centre at least once a week (Table 5); a fifth (20%) stated that they visited the town centre weekly; 7% visited the town centre at least once a fortnight, a further 7% visited at least once a month, whilst 4% visited less often.

TABLE 5: How often do you visit the town centre? (n=100)

	%
Daily	20
At least once a week	62
At least once a fortnight	7
At least once a month	7
Less often	4
TOTAL	100



Respondents aged 45-54 years were statistically significantly more likely than those in other age groups to report being in town at least once a week.

4.3 WHY HAVE YOU COME TO THE TOWN TODAY?

Almost four out of ten respondents (39%) stated that they had visited Coleraine for grocery shopping (Table 6); just over a third (34%) had visited the town to eat / drink at local cafes, restaurants and pubs; 29% were clothes shopping; 17% were at work / school in the area; 15% were shopping for books, visiting a newsagents or purchasing stationery; 14% were visiting a pharmacy / optician; 10% were shopping for footwear.

TABLE 6: Why have you come to the town today? (multiple responses)

	%
Work/school in the area	17
Grocery shopping	39
Clothes shopping	29
Footwear shopping	10
Jewellery shopping	3
Health and beauty	5
Hairdresser/barber	1
Homeware	9
Electrical goods	1
Books, newsagent, stationery	15
Eating/drinking (cafes, restaurants, pubs)	34
Pharmacy/optician	14
Doctor/dentist	2
Using financial, legal or insurance services	1
Entertainment (arcade)	5
Leisure (leisure centre, park)	7
*Other: **Please Specify***	3

Females were significantly more likely than males to report being in town to do grocery shopping and clothes shopping.

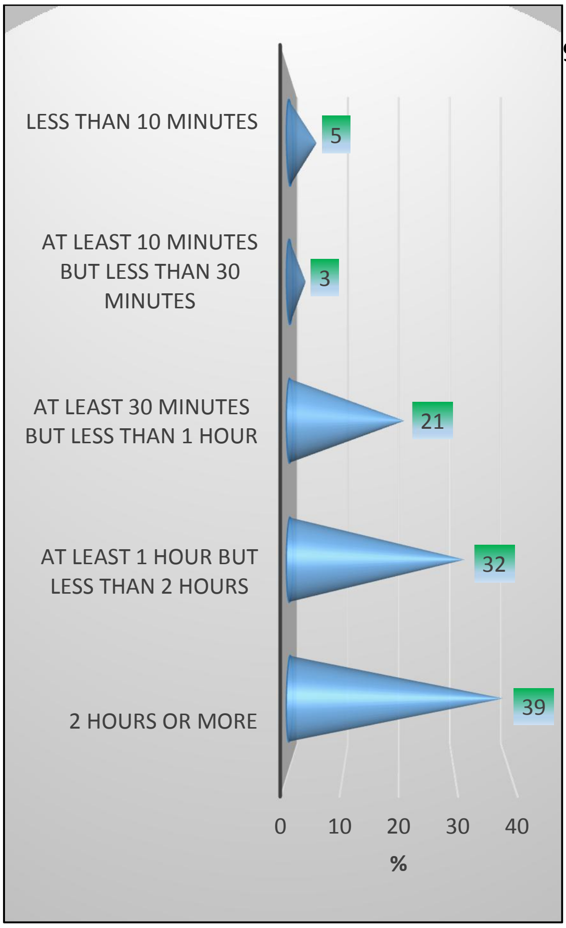
TABLE 7: Other Reason for Coming to Town - Please Specify (n=3)

Key cutting	1
Job interview	1
No Comment	1
TOTAL	3

4.4 HOW LONG DO YOU INTEND TO SPEND HERE FOR THIS VISIT?

Thirty-nine per cent of respondents confirmed that they intended to stay two hours or more in the town (Table 8); almost a third (32%) intended staying for at least one hour but less than two hours; just over a fifth (21%) planned staying for at least thirty minutes but less than one hour; only 5% planned staying for less than ten minutes.

TABLE 8: How long do you intend to spend here for this visit? (n=100)	
Less than 10 minutes	5
At least 10 minutes but less than 30 minutes	3
At least 30 minutes but less than 1 hour	21
At least 1 hour but less than 2 hours	32
2 hours or more	39
TOTAL	100



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4.5 WHERE HAVE YOU TRAVELLED FROM TO GET TO COLERAINE TOWN CENTRE TODAY?

As shown in Table 9, 62% of respondents stated that they had travelled from the Coleraine area to visit the town centre; this was followed by 11% from Ballymoney and 6% from Portstewart.

TABLE 9: Where have you travelled from to get to Coleraine town centre today? (n=100)	
Coleraine	62
Ballymoney	11
Limavady	1
Ballycastle	3
Portrush	1
Portstewart	6
Garvagh	2
Kilrea	1
Bushmills	4
Other: Please Specify	9

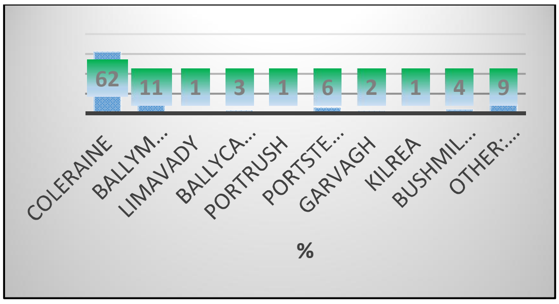


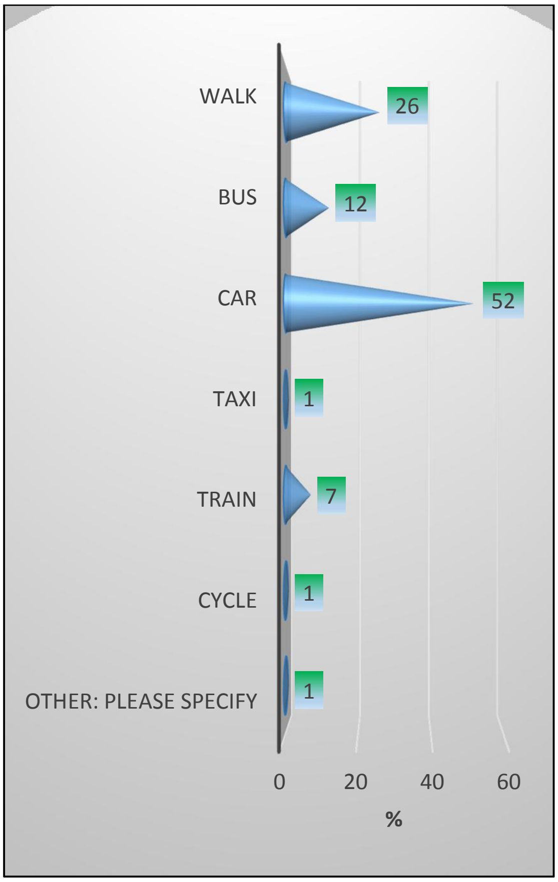
Table 10 provides a breakdown of the other areas respondents travelled from to visit Coleraine town centre.

TABLE 10: Where have you travelled from to get to Coleraine today? Other (n=9)	
Eglinton	1
Ballymena	1
London	1
Cookstown	1
Co.Down	1
Portballintrae	2
Newtownabbey	1
Castlerock	1

4.6 HOW DID YOU TRAVEL TO THE AREA?

Over half of respondents (52%) travelled by car to Coleraine town centre; just over a quarter (26%) walked to the area; 12% travelled by bus and 7% by train (Table 11).

TABLE 11: How did you travel to the area? (n=100)	
Walk	26
Bus	12
Car	52
Taxi	1
Train	7
Cycle	1
Other: Please Specify	1
TOTAL	100



One respondent travelled using a combination of plane, train and walking.

4.7 IN TOTAL, HOW MUCH DO YOU INTEND TO SPEND/HAVE YOU SPENT DURING YOUR VISIT TODAY?

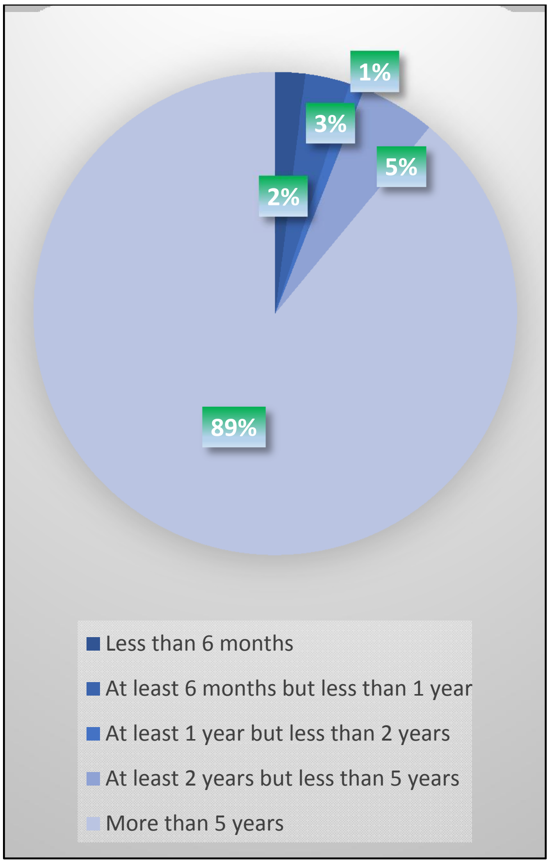
Twenty-three per cent of respondents reported that they spent £10 or less during their visit to the town centre; a further 20% spent between £30.01 and £40; 19% spent between £20.01 and £30, whilst 18% spent between £10.01 and £20 (Table 12). Only 6% of respondents spent over £50; 5% spent nothing.

TABLE 12: In total, how much do you intend to spend / have you spent during your visit today? (n=100)	
£0 (nothing)	5
£0.01 - £10	23
£10.01 - £20	18
£20.01 - £30	19
£30.01 – £40	20
£40.01 – £50	8
Over £50	6
No Comment	1

4.8 HOW LONG HAVE YOU BEEN VISITING THE TOWN?

The majority of respondents (89%) confirmed they had been visiting the town for more than 5 years (Table 13).

TABLE 13: How long have you been visiting the town? (n=100)	
Less than 6 months	2
At least 6 months but less than 1 year	3
At least 1 year but less than 2 years	1
At least 2 years but less than 5 years	5
More than 5 years	89
TOTAL	100



Respondents aged 65 years and over were statistically significantly more likely than those from other age groups to report having visited Coleraine town centre for more than five years.

4.9 OVERALL, WHAT IS YOUR PERCEPTION OF THE TOWN CENTRE?

Over three-fifths of respondents (61%) stated that their overall perception of Coleraine town centre was very good/good; 16% described their perception as very poor/poor, whilst almost a quarter (23%) described it as average (Tables 14 and 15).

TABLE 14: Overall, what is your perception of the town centre? (n=100)	
Very poor	2
Poor	14
Average	23
Good	49
Very good	12
TOTAL	100

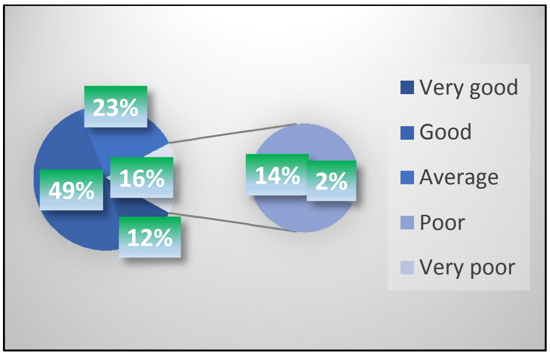
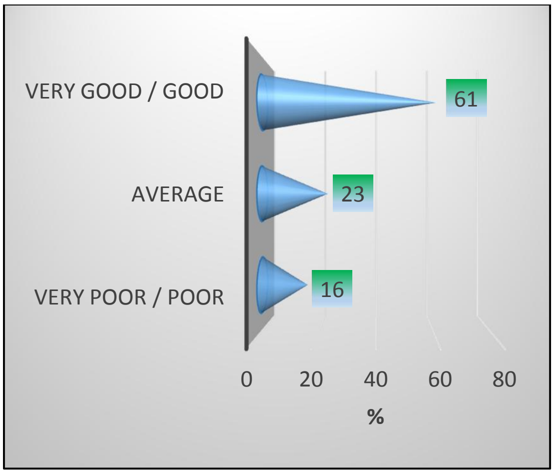


TABLE 15: Overall, what is your perception of the town centre (Grouped)? (n=100)	
Very poor / poor	16
Average	23
Very good / good	61



Visitors to Coleraine were statistically significantly more likely to describe their perception of the town as very good / good compared to residents.

Respondents who reported being in Coleraine to go grocery shopping were statistically significantly more likely to describe their perception of the town centre as very poor / poor compared to those who were not going grocery shopping.

Those who spent two hours or more in Coleraine were statistically significantly more likely to describe their perception of the town as very good / good compared to those who spent less time.

4.10 OTHER COMMENTS

One respondent commented that the town was "quiet."

4.11 PLEASE SCORE YOUR CURRENT OPINION OF THE FOLLOWING ASPECTS OF THE TOWN CENTRE (SCALE 1 – 10, 1 VERY POOR, 5 AVERAGE, 10 - VERY GOOD)

Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Coleraine town centre (1 very poor and 10 very good). The results are shown in detail in Table 16. For further clarity Table 17 sets out a summary of poor scores (1-4), average (5) and good scores.

As shown, the highest level of 'good' scores were for the following aspects:

- Safety (98%);
- Flower arrangements / street banners (96%);
- Ease of moving around town centre (96%);
- Pedestrian access (96%);
- Friendliness of staff / people (95%);
- Good atmosphere (93%);
- Value for money (92%)
- Condition of buildings (92%); and,
- Amount of dereliction (92%).

The highest level of 'average' scores were for the following aspects:

- Children's play areas (28%);
- On-street entertainment (21%);
- Levels of anti-social behaviour (17%);
- Range of goods and services available (14%);
- Lighting (11%);
- Parking (11%); and,
- Number of public car parking spaces (11%).

The highest level of 'poor' scores were for the following aspects:

- Vacant shops (18%);
- Variety of shops (14%);
- On-street entertainment (11%); and,
- Price of public car park spaces (9%).

4.12 WHAT THREE ASPECTS OF THE TOWN COULD BE IMPROVED?

Respondents were asked to rank their top three priorities for improvement in Coleraine. Table 18 provides a comprehensive breakdown of the findings. These included:

4.12.1 FIRST PRIORITY – IMPROVEMENT

- More shops (35%);
- Wider variety of shops (28%); and,
- Better quality of shops (9%).

Respondents aged between 35-44 years were statistically significantly more likely than those from other age groups to report more shops as their number one priority that could be improved about the town.

4.12.2 SECOND PRIORITY - IMPROVEMENT

- Better parking – cost (18%);
- Wider variety of shops (16%);
- More shops (16%); and,
- More public toilets (12%).

4.12.3 THIRD PRIORITY - IMPROVEMENT

- Better quality of shops (20%);
- More public toilets (18%);
- Wider variety of shops (12%); and,
- More shops (11%).

The combined highest (1st, 2nd and 3rd) priority included: more shops; wider variety of shops; and, better quality of shops.

TABLE 16: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) (n=100)												
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**No Comment**	**TOTAL**
Condition of streets/public realm – clean, well maintained, attractive	1	2	1	1	9	15	30	21	11	7	2	100
Flower arrangements, street banners	0	0	0	1	2	10	22	31	21	12	1	100
Lighting	0	0	0	2	11	13	26	20	15	12	1	100
Parking	0	1	1	2	11	21	34	16	3	9	2	100
Number of public car park spaces	0	2	1	2	11	18	30	21	4	9	2	100
Price of public car park spaces	3	3	2	1	10	27	23	16	6	7	2	100
Ease of moving around town centre	1	0	0	1	1	4	27	24	18	23	1	100
Pedestrian access	0	0	0	2	1	5	26	25	16	24	1	100
Variety of shops	3	2	2	7	10	13	33	22	3	3	2	100
Quality of shops	0	2	1	2	10	13	37	21	6	7	1	100
Range of goods and services available	0	1	1	2	14	12	30	23	7	9	1	100
Cafes	0	0	0	3	8	6	10	36	16	20	1	100
Value for money	0	0	1	1	5	7	28	32	15	10	1	100
Friendliness of staff/people	0	0	0	0	4	3	17	31	25	19	1	100
Good atmosphere	0		0	1	5	9	33	24	11	16	1	100
On-street entertainment	1	7	0	3	21	17	30	12	4	4	1	100
Safety	0	0	0	0	1	3	20	27	24	24	1	100
Condition of buildings	1	0	0	1	5	10	33	32	12	5	1	100
Vacant shops (if a lot = poor score)	2	4	5	7	10	15	27	24	4	1	1	100
Amount of dereliction (if a lot = poor score)	0	1	0	1	5	11	31	31	14	5	1	100
Vandalism (if a lot = poor score)	0	0	2	3	8	6	32	33	12	3	1	100
Levels of anti-social behaviour (if a lot = poor score)	1	0	2	2	17	10	32	25	7	3	1	100
Children's play areas	1	1	2	4	28	13	28	14	3	5	1	100
TOTAL	14	26	21	49	207	261	639	561	257	237	28	2300

Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) (n=100)

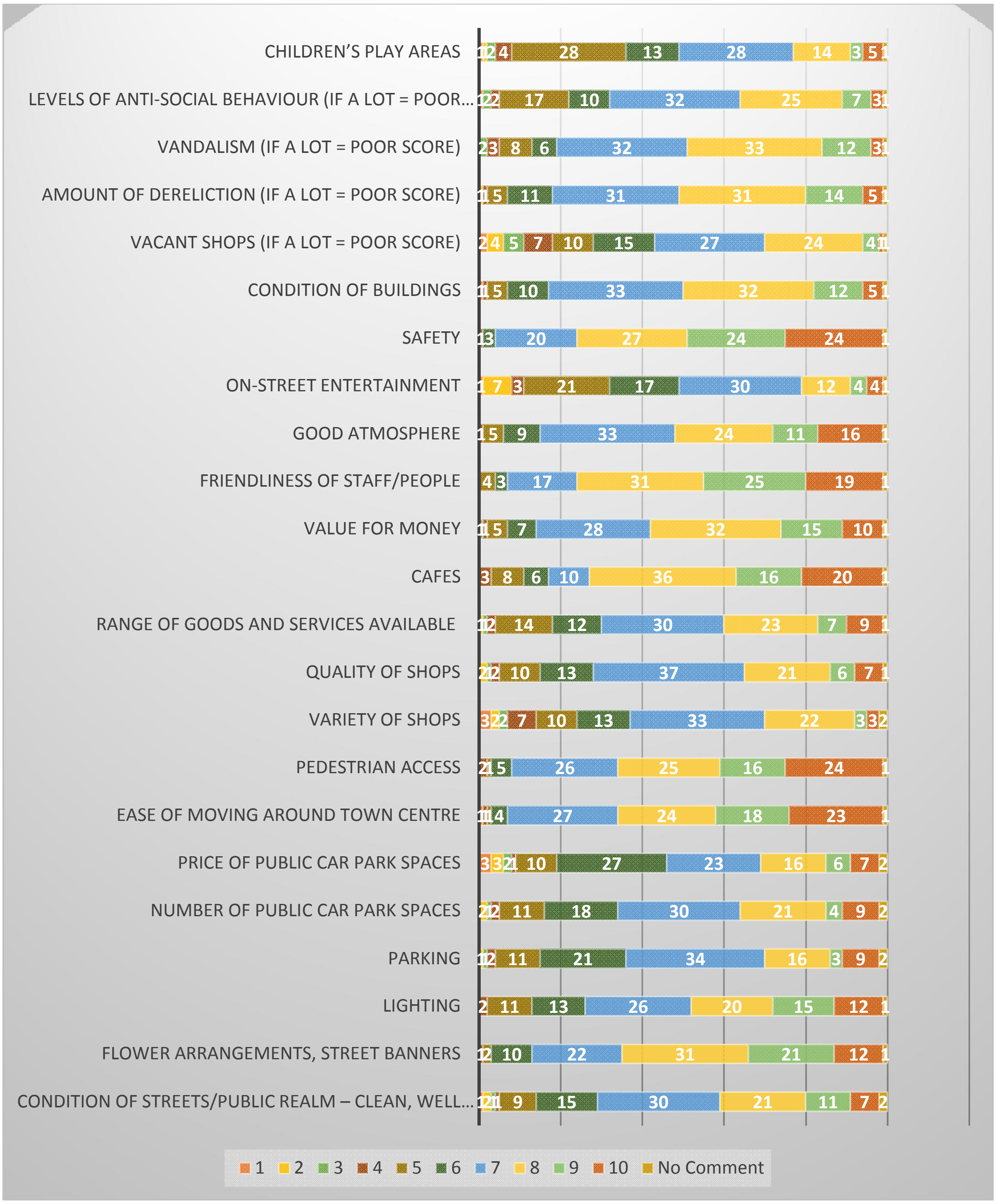


TABLE 17: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) Grouped Scores (n=100)					
	1 – 4	**5**	**6 – 10**	**NA**	**TOTAL %**
Condition of streets/public realm – clean, well maintained, attractive	5	9	84	2	100
Flower arrangements, street banners	1	2	96	1	100
Lighting	2	11	86	1	100
Parking	4	11	83	2	100
Number of public car park spaces	5	11	82	2	100
Price of public car park spaces	9	10	79	2	100
Ease of moving around town centre	2	1	96	1	100
Pedestrian access	2	1	96	1	100
Variety of shops	14	10	74	2	100
Quality of shops	5	10	84	1	100
Range of goods and services available	4	14	81	1	100
Cafes	3	8	88	1	100
Value for money	2	5	92	1	100
Friendliness of staff/people	0	4	95	1	100
Good atmosphere	1	5	93	1	100
On-street entertainment	11	21	67	1	100
Safety	0	1	98	1	100
Condition of buildings	2	5	92	1	100
Vacant shops (if a lot = poor score)	18	10	71	1	100
Amount of dereliction (if a lot = poor score)	2	5	92	1	100
Vandalism (if a lot = poor score)	5	8	86	1	100
Levels of anti-social behaviour (if a lot = poor score)	5	17	77	1	100
Children's play areas	8	28	63	1	100
TOTAL	110	207	1955	28	2300

Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) Grouped Scores (n=100)

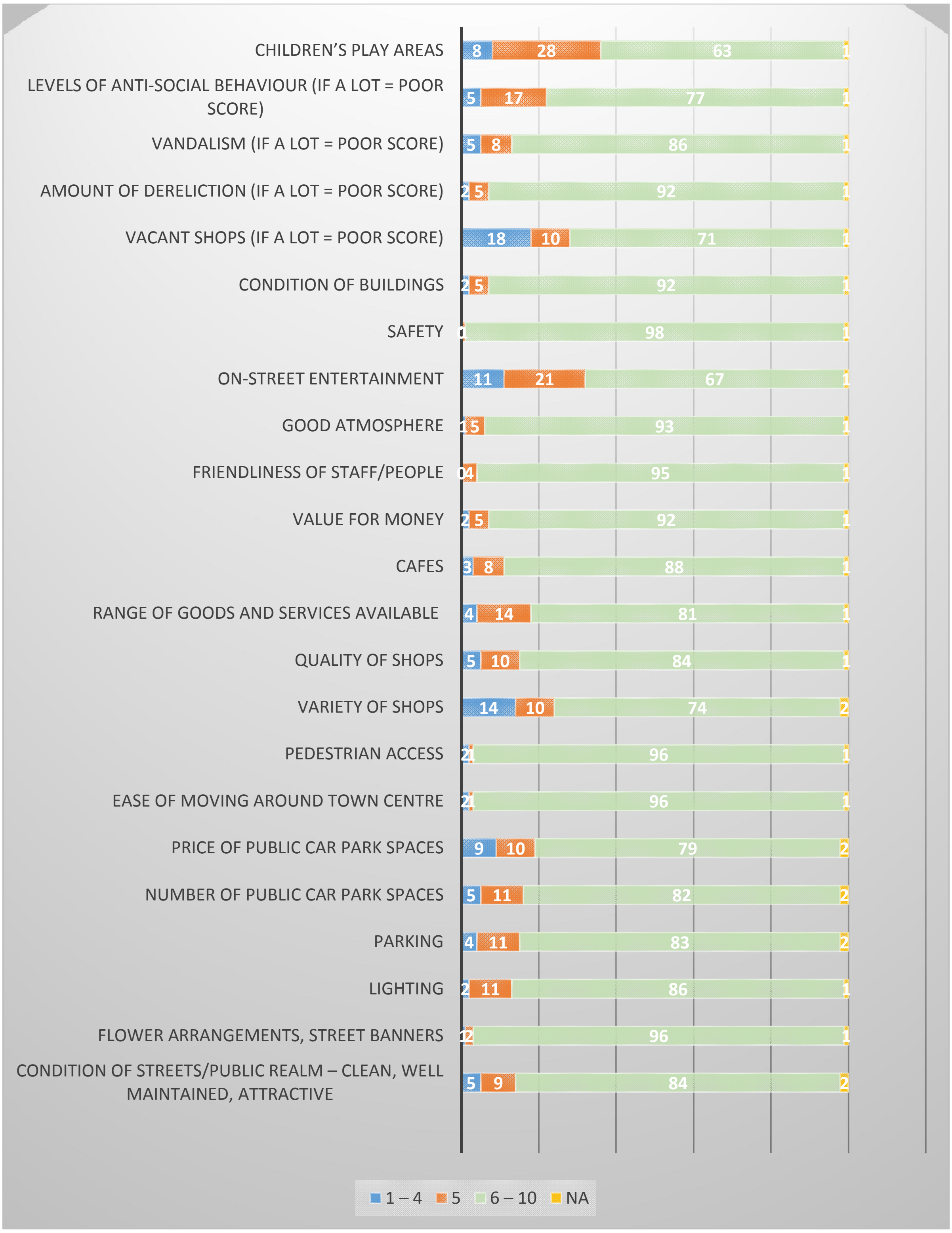
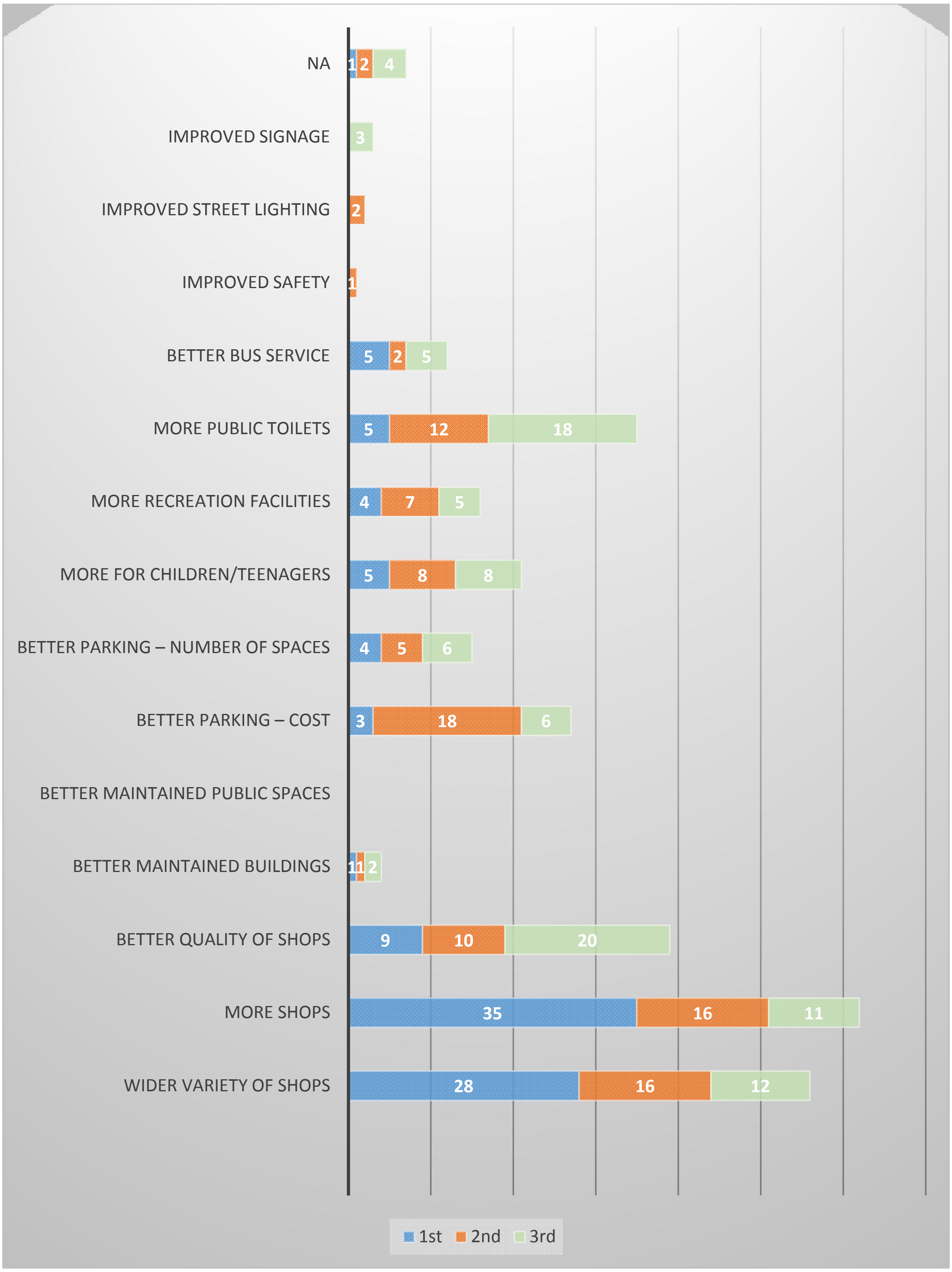


TABLE 18: What three aspects of the town could be improved?				
	1st (n=100)	**2nd (n=100)**	**3rd (n=100)**	**TOTAL**
Wider variety of shops	28	16	12	56
More shops	35	16	11	62
Better quality of shops	9	10	20	39
Better maintained buildings	1	1	2	4
Better maintained public spaces	0	0	0	0
Better parking – cost	3	18	6	27
Better parking – number of spaces	4	5	6	15
More for children/teenagers	5	8	8	21
More recreation facilities	4	7	5	16
More Public toilets	5	12	18	35
Better bus service	5	2	5	12
Improved safety	0	1	0	1
Improved street lighting	0	2	0	2
Improved signage	0	0	3	3
NA	1	2	4	7
TOTAL	100	100	100	300

What three aspects of the town could be improved?



APPENDIX 1: General Public Questionnaire Coleraine and Map of Town Centre Area

GENERAL PUBLIC SURVEY

February 2017

Causeway Coast and Glens Borough Council would like to invite you to participate in a Survey to enable it to better understand the general public's perception of the town centre.

The findings from this research will be used by the Council to inform its Local Development Plan and may include the identification of lands for future retail development and the production of land use policies to guide development proposals.

The General Public Survey will take approximately 4 minutes to complete. All responses are anonymous and will be treated with strict confidentiality.

The town centre area is shown on the map attached.

If you have any queries, please contact Sharon Mulhern from Causeway Coast & Glens Borough Council using telephone number 028 70347244 or Dr Jenny Sproule from *Sproule Consulting* on 07860 342493.

Yours Faithfully

Sharon Mulhern
Local Development Plan Manager

Causeway Coast & Glens Borough Council

1. Are you a resident of _____________ or visitor today? **[PLEASE CIRCLE ONE ONLY]**

Resident	1	Visitor	2

2. How often do you visit the town centre? **[PLEASE CIRCLE ONE ONLY]**

Daily	1
At least once a week	2
At least once a fortnight	3
At least once a month	4
Less often	5

3. Why have you come to the town today? **[PLEASE CIRCLE ALL THAT APPLY]**

Work/school in the area	1	Books, newsagent, stationery	10
Grocery shopping	2	Eating/drinking (cafes, restaurants, pubs)	11
Clothes shopping	3	Pharmacy/optician	12
Footwear shopping	4	Doctor/dentist	13
Jewellery shopping	5	Using financial, legal or insurance services	14
Health and beauty	6	Entertainment (arcade)	15
Hairdresser/barber	7	Leisure (leisure centre, park)	16
Homeware	8	Other: **Please Specify**	17
Electrical goods	9		

4. How long do you intend to spend here for this visit? **[PLEASE CIRCLE ONE ONLY]**

Less than 10 minutes	1
At least 10 minutes but less than 30 minutes	2
At least 30 minutes but less than 1 hour	3
At least 1 hour but less than 2 hours	4
2 hours or more	5

5. Where have you travelled from to get to __________ today? **[PLEASE CIRCLE ONE ONLY]**

Coleraine	1	Garvagh	7
Ballymoney	2	Kilrea	8
Limavady	3	Bushmills	9
Ballycastle	4	Dungiven	10
Portrush	5	Other: **Please Specify**	11
Portstewart	6		

6. How did you travel to the area? **[PLEASE CIRCLE ONE ONLY]**

Walk	1	Train	6
Bus	2	Cycle	7
Car	3	Other: **Please Specify**	8
Taxi	4		
Electrical goods	5		

7. In total, how much do you intend to spend/have you spent during your visit today? **[PLEASE CIRCLE ONE ONLY]**

£0	1	£31 – 40	6
£0 - £10	2	£41 – 50	7
£11 - £20	3	£51 or more	8
£21 - £30	4		

8. How long have you been visiting the town? **[PLEASE CIRCLE ONE ONLY]**

Less than 6 months	1
At least 6 months but less than 1 year	2
At least 1 year but less than 2 years	3
At least 2 years but less than 5 years	4
More than 5 years	5

Town Centre

9. Overall, what is your perception of the town centre? **[PLEASE CIRCLE ONE ONLY]**

Very poor	1
Poor	2
Average	3
Good	4
Very good	5

Please comment: ______________________________

10. Please score your current opinion of the following aspects of the town centre (Scale 1 – 10, 1 very poor, 5 average, 10 – very good) **[PLEASE INSERT FOR EACH]**

Range of goods and services available	
Condition of buildings	
Condition of streets/public realm – clean, well maintained, attractive	
Number of public car park spaces	
Price of public car park spaces	
Safety	
Lighting	
On-street entertainment	
Levels of anti-social behaviour	
Vandalism	
Vacant shops	
Amount of dereliction	
Convenience	
Friendliness of staff/people	
Variety of shops	
Good atmosphere	
Quality of shops	
Cafes	
Children's play areas	
Parking	
Value for money	
Presence of pedestrian area	
Flower arrangements, street banners	

11. What three aspects of the town could be improved? **[PLEASE RANK 1,2,3]**

Wider variety of shops	
More shops	
Better quality of shops	
Better maintained buildings	
Better maintained public spaces	
Better parking – cost	
Better parking – number of spaces	
More for children/teenagers	
More recreation facilities	
More Public toilets	
Better bus service	
Improved safety	
Improved street lighting	
Improved signage	

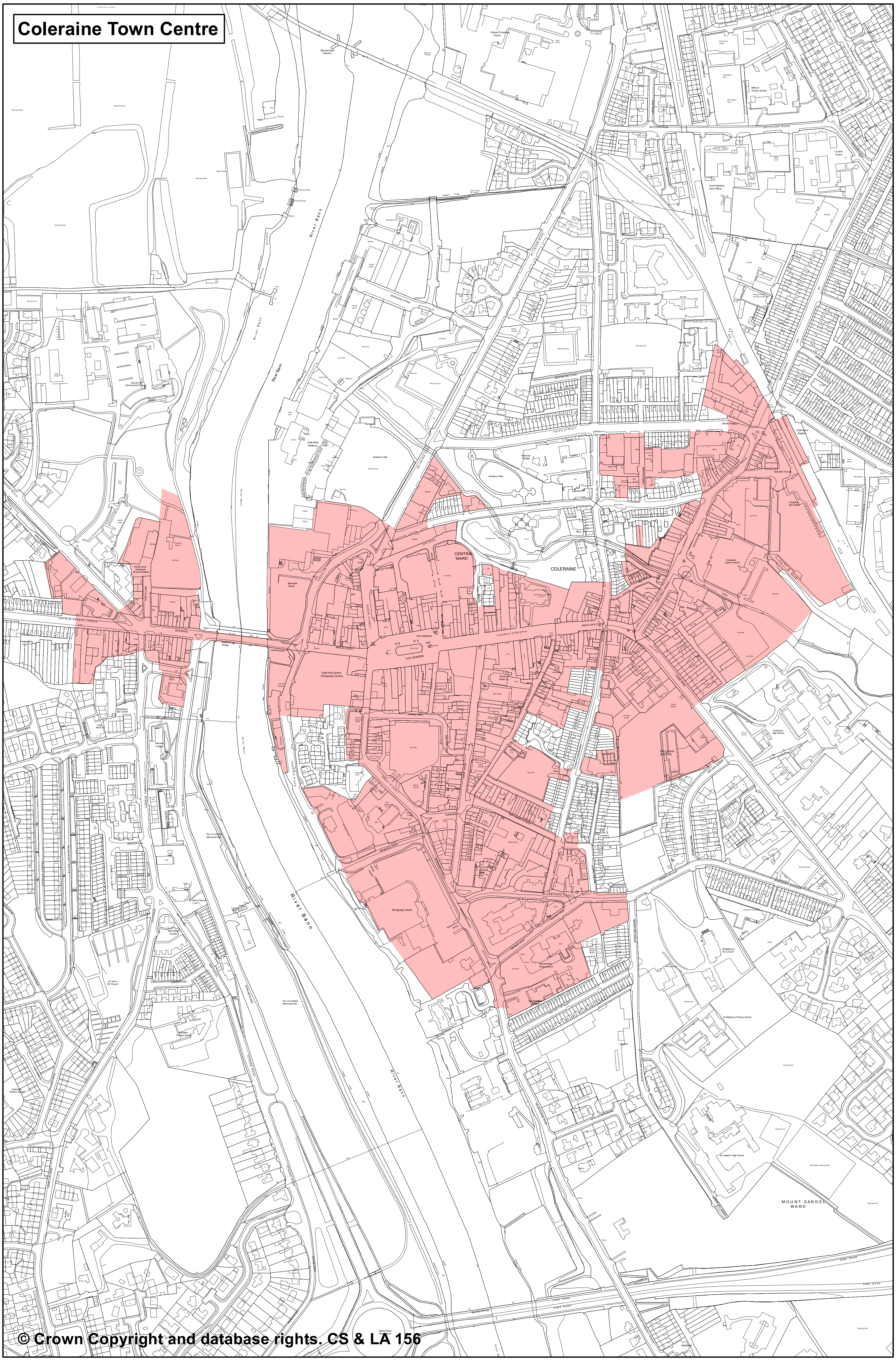
Background Information

Male	1	Female	2
Age (Years)			

Thank you for your participation.

Date: _____________

Location: _____________



Coleraine Town Centre
CENTRAL WARD
COLERAINE
River Bann
MOUNT SANDEL WARD
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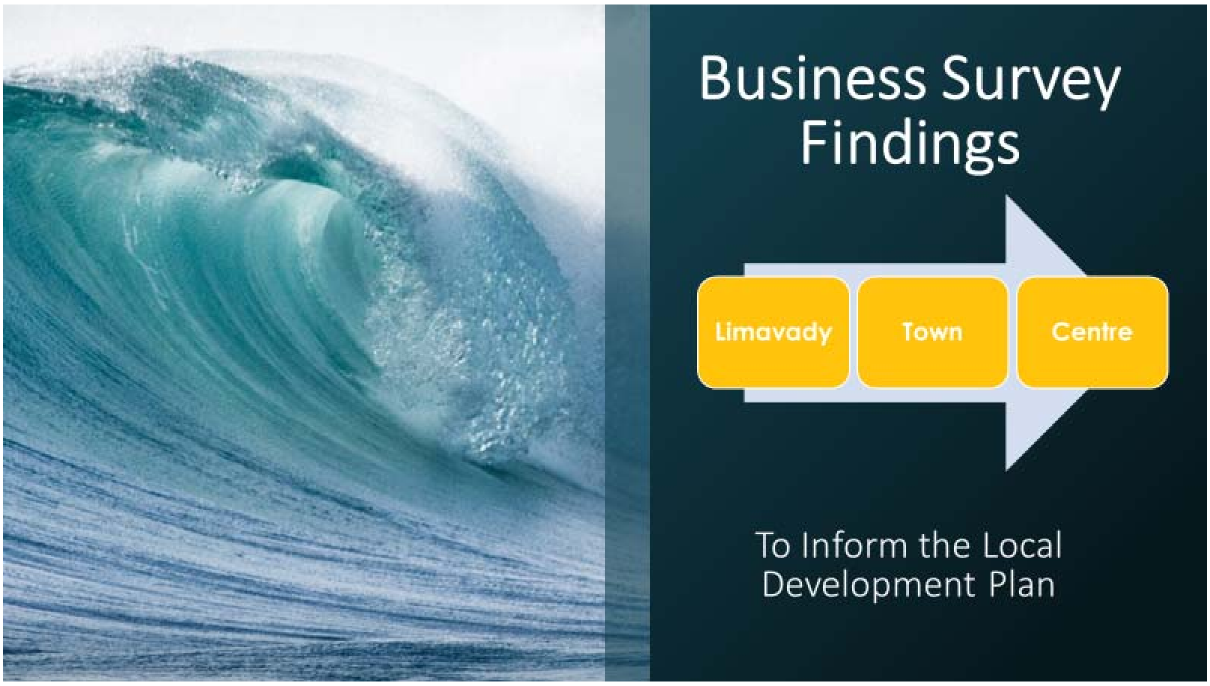
Sproule Consulting



FINAL REPORT:

21st April 2017

Causeway
Coast & Glens
Borough Council

Dr Jenny Sproule

EMAIL: jenny.sproule@btinternet.com

EXECUTIVE SUMMARY

- 55% of business owners / managers described their main business type as ‘other’ – these included: café / coffee shop (n=4); estate agent (n=3); florist (n=2); legal services (n=2); banking (n=2); vape and e-liquid (n=2); 21% reported that their main business type was clothing / footwear/ jewellery and accessories.

- 48% had traded in their current premises for between 0-10; 15% had traded in their current premises for between 21-30 years; 14% had been trading in their current premises for between 11-20 years; 5% of businesses surveyed have been in existence in Limavady town centre for over fifty years.

- 76% described their business ownership as being an independent trader / retailer; 8% were part of a national chain; 4% confirmed they were part of a franchise, 3% were part of a local chain; 3% were part of a multi-national chain and 5% reported being other.

- Independent traders / retailers were statistically significantly more likely to be aged 45-54 years.

- 58% described their turnover in the last business year as average (normal); 19% reported that their turnover was below average; 12% described their turnover as above average, whilst 3% confirmed that their turnover was well below average; 1% confirmed their turnover was well above average.

- 64% had invested money in improvements to their business in the last year.

- 45% had invested in technology, 35% in building works and 37% in staff development.

- Males were statistically significantly more likely to confirm having invested in technology.

- 87% had full-time staff, 79% had part-time staff, 4% had volunteers working more than 16 hours per week and 5% had volunteers working less than 16 hours per week.

- 258 staff were employed on a full-time basis, 312 were employed on a part-time basis, giving total of 570 staff employed in either a full-time or part-time capacity; 14 people were involved as volunteers for more than 16 hours per week, a further 6 volunteered for less than 16 hours.

- 82% employed between 1-10 full-time staff, 5% of businesses employed between 11-20 full-time staff.

- 74% employed between 1-10 part-time staff, 3% employed 11-20, 1% employed between 31-40, 1% employed over 50.

- 4% reported having between 1-10 people volunteer 16+ hours per week.

- 5% of businesses reported having between 1-10 volunteers involved for less than 16 hours each per week.

- 37% described their overall perception of Limavady town centre as very good/good; 37% reported that their perception of the town centre was average, whilst 26% stated that it was very poor / poor.

- Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Limavady town centre (1 very poor and 10 very good). The results are shown in detail in Table 20. For further clarity Table 21 sets out a summary of poor scores (1-4), average (5) and good scores (6-10).

- The highest level of 'good' scores were for the following aspects:

- Friendliness of staff / people (91%);
- Cafes (85%);
- Good atmosphere (82%); and,
- Pedestrian access (78%).

- The highest level of 'average' scores were for the following aspects:

- Dereliction (30%);
- Vacant shops (27%); and,
- Children's play areas (26%).

- The highest level of 'poor' scores were for the following aspects:

- Levels of Anti-social behaviour (60%);
- Price of carpark spaces (48%);
- On street entertainment (45%); and,
- Dereliction (35%).

- Males were statistically significantly more likely than females to describe the variety of shops as good.
- Males were statistically significantly more likely than females to describe safety as good / very good.

Respondents were asked to rank their top three priorities for improvement in Limavady. Table 22 provides a comprehensive breakdown of the findings. These included:

- 1st PRIORITY – IMPROVEMENT

- Better parking – cost (19%);
- Wider variety of shops (18%);
- More shops (8%); and,
- Better maintained buildings (8%).

- 2nd PRIORITY - IMPROVEMENT

- Better maintained buildings (12%);
- More shops (10%);

- Wider variety of shops (10%); and,
- More for children/teenagers (10%);

- 3rd PRIORITY - IMPROVEMENT

- More for children/teenagers (18%);
- Better parking – number of spaces (10%);
- More shops (8%); and,
- Improved street lighting (6%).

- The combined highest (1st, 2nd and 3rd) priority included: more for children/teenagers (34); wide variety of shops (33); and, better parking cost (31).

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***PLEASE NOTE THAT DUE TO ROUNDING SOME TABLES MAY NOT TOTAL 100%.**

1. INTRODUCTION

Causeway Coast and Glens Borough Council (CCGBC) commissioned Sproule Consulting to conduct business and general public surveys in each of the six main towns within the Borough. Table 1 provides a comprehensive breakdown of the number of surveys completed.

TABLE 1: Completed Surveys		
	On-Street (General Public)	Business
Coleraine	100	100
Ballymoney	100	90
Portrush	100	40
Portstewart	100	40
Limavady	100	78
Ballycastle	100	54
TOTAL	600	402

The purpose of this Report is to provide empirical data to inform CCGBC's Local Development Plan for the Limavady area. The survey findings set out in this Business Report, together with the data collated from the general public, will be instrumental in establishing stakeholders' and users' attitudes and perceptions of Limavady town centre.

2. RESEARCH: KEY OBJECTIVES

The key objectives of this research are shown in Figure 1.

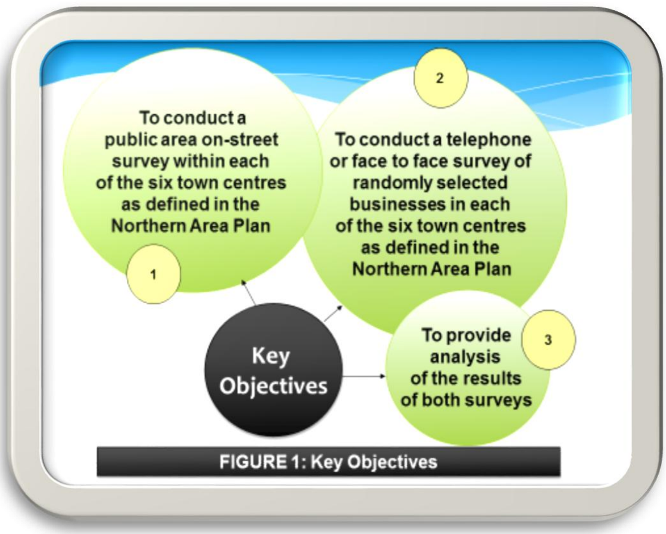


FIGURE 1: Key Objectives

3. DEMOGRAPHIC PROFILE OF BUSINESS OWNERS / MANAGERS SURVEYED

Thirty-three per cent of the business owners / managers surveyed were male, 40% were female; the remaining 27% made no comment (Table 2).

TABLE 2: Gender (n=78)	
Male	33
Female	40
No Comment	27

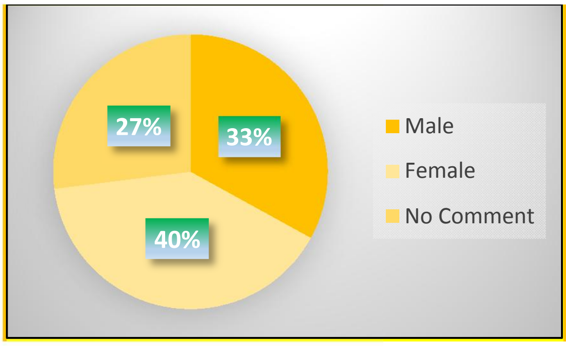
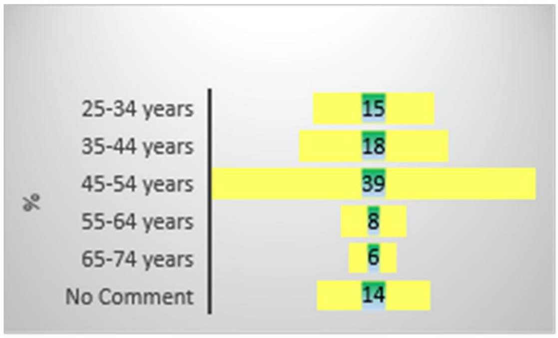
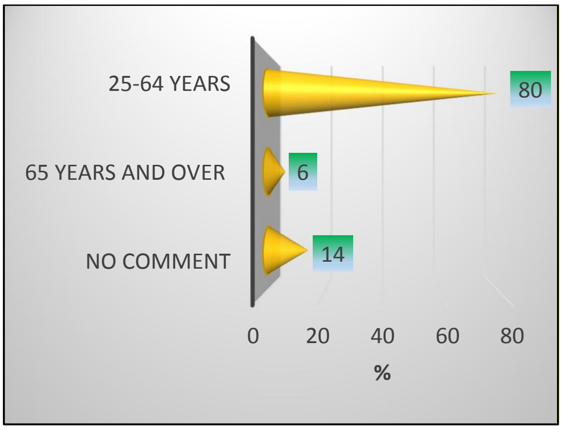


Table 3 sets out the achieved age profile.



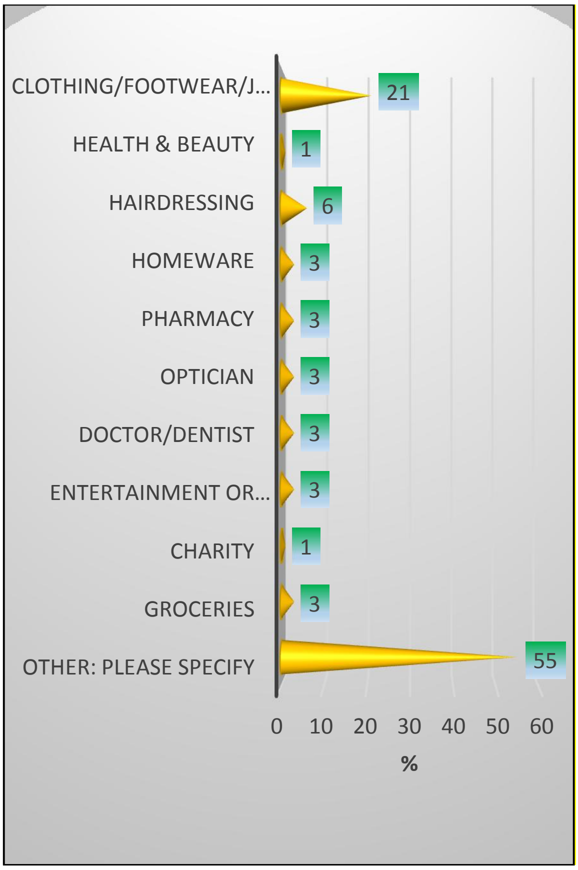


4. BUSINESS SURVEY FINDINGS - LIMAVADY TOWN CENTRE

4.1 TYPE OF MAIN BUSINESS?

Just over a fifth (21%) of business owners / managers described their main business type as clothing / footwear/ jewellery and accessories (Table 3).

TABLE 3: Type of Main Business (n=78)	
Clothing / footwear / jewellery / accessories	21
Health & beauty	1
Hairdressers	6
Homeware	3
Pharmacy	3
Optician	3
Doctor/Dentist	3
Entertainment or leisure (gym, arcade, etc.)	3
Charity	1
Groceries	3
Other: Please Specify	55



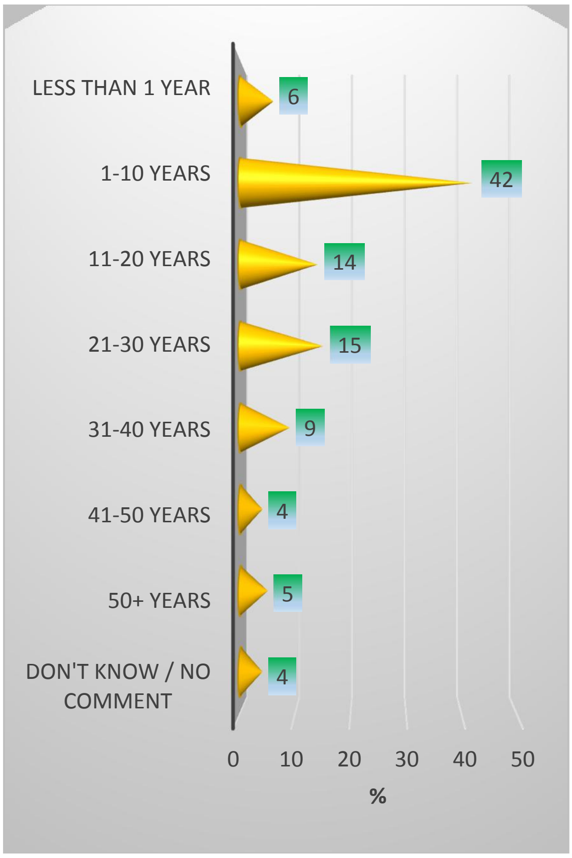
Over half of respondents (55%) described their main type of business as 'other'. Table 4 provides a comprehensive breakdown of the range of other businesses types included.

TABLE 4: Type - Other (n=42)	
Catering	1
Card shop	1
Sport retailer	1
Café/coffee shop	4
Florist	2
Dry cleaners	1
Accountant	1
Estate agent	3
Legal services	2
Architecture	1
Banking	2
Office	1
Craft	1
Travel agent	1
Vape and e-liquid	2
Hab and wool shop	1
Quantity surveying	1
Hair and beauty supplies	1
Specialist aquatic retail goods	1
Insurance consultants	1
Oil company	1
Furniture/carpet	1
Butcher	1
Dressmaker/haberdashery	1
Gift shop	1
Phone shop	1
Bar/restaurant	1
Picture framer/engraver	1
Takeaway	1
Taxi firm	1
Stationery/art supply	1
Cards and gifts	1
Electrical retailer	1

4.2 HOW MANY YEARS HAVE YOU TRADED IN THESE PREMISES?

Forty-eight per cent of business respondents reported that they had traded in their current premises for between 0-10 and a further 15% reported they had traded in their current premises for between 21-30 years (Table 5). Fourteen per cent stated that they had been trading in their current premises for between 11-20 years. Five per cent of the businesses surveyed have been in existence in Limavady town centre for over fifty years.

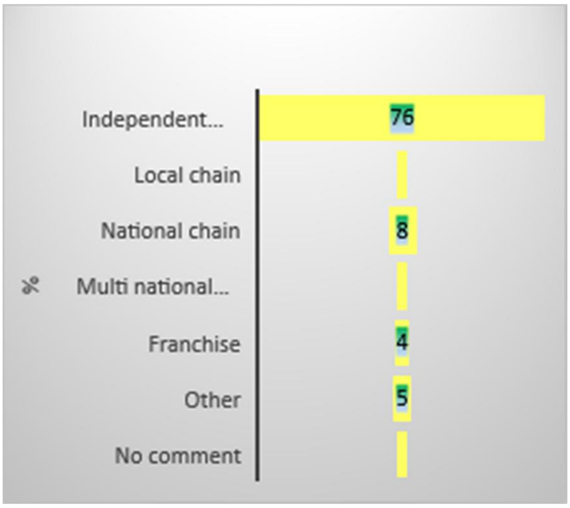
TABLE 5: How many years have you traded in these premises – Grouped (N=78)	
Less than 1 year	6
1-10 years	42
11-20 years	14
21-30 years	15
31-40 years	9
41-50 years	4
50+ years	5
Don't Know / No Comment	4



4.3 WHAT IS THE OWNERSHIP OF YOUR BUSINESS

Just over three-quarters of business respondents (76%) described their business ownership as being an independent trader / retailer; 8% were part of a national chain; 4% confirmed they were part of a franchise, 3% were part of a local chain; 3% were part of a multi-national chain and 5% reported being other (Table 6).

TABLE 6: What is the ownership of your business? (n=78)	
Independent trader/retailer	76
Local chain	3
National chain	8
Multinational chain	3
Franchise	4
Other: Please Specify	5
No comment	3



The three 'other' forms of ownership described are listed in Table 7.

TABLE 7: Type of Ownership – Other (n=3)	
LLP	1
Private owner	1
Partnership	1

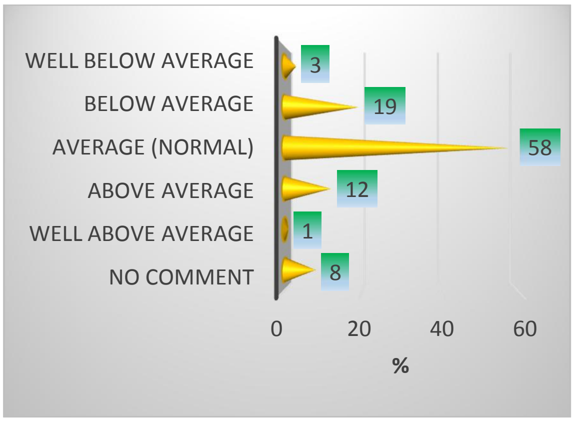
Independent traders / retailers were statistically significantly more likely to be aged 45-54 years.

4.4 HOW WOULD YOU DESCRIBE YOUR TURNOVER IN THE LAST BUSINESS YEAR?

Fifty-eight per cent of respondents described their turnover in the last business year as average (normal); just under a fifth (19%) reported that their turnover was below average. Twelve per cent described their turnover as above average, whilst 3% confirmed that their turnover was well below average. One per cent of respondents confirmed their turnover was well above average (Table 8).

TABLE 8: How would you describe your turnover in the last business year? (n=78)

Well below average	3
Below average	19
Average (normal)	58
Above average	12
Well above average	1
No Comment	8



4.5 HAVE YOU INVESTED MONEY IN IMPROVEMENTS TO YOUR BUSINESS IN THE LAST YEAR?

Almost two thirds of respondents (64%) confirmed that they had invested money in improvements to their business in the last year (Table 9).

Some 45% confirmed that they had invested in technology, 35% in building works and 37% in staff development (Table 10).

TABLE 9: Have you invested money in improvements to your business in the last year? (n=78)

Yes	64
No	31
No Comment	5

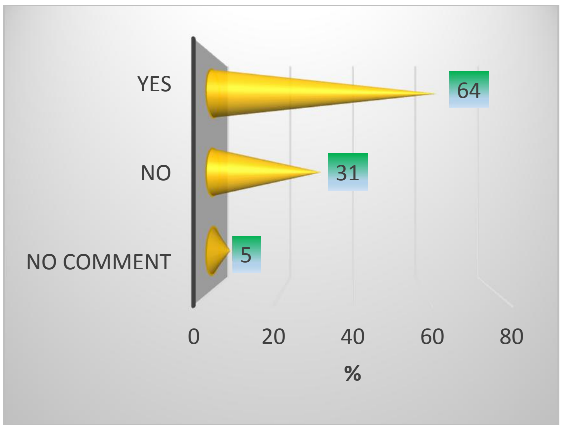
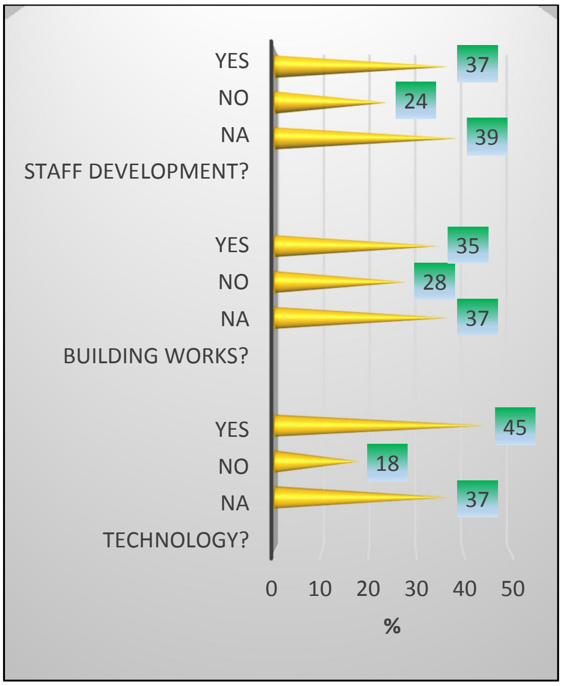


TABLE 10: Invested in…? (n=78)

Technology	45
Building Works	35
Staff Development	37



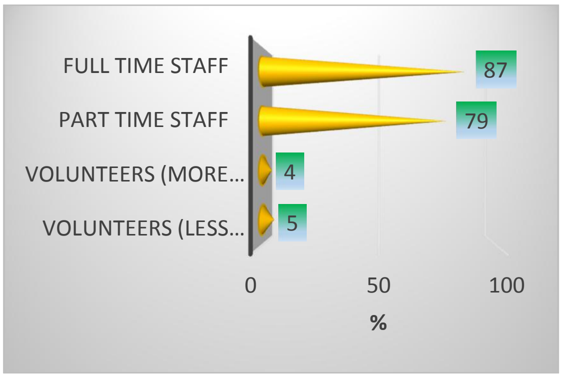
Males were statistically significantly more likely to confirm having invested in technology.

4.6 HOW MANY PEOPLE ARE CURRENTLY INVOLVED IN YOUR BUSINESS (INCLUDING ANY WORKING OWNERS)?

Eighty-seven percent of businesses had full-time staff, 79% had part-time staff, 4% had volunteers working more than 16 hours per week and 5% had volunteers working less than 16 hours per week.

TABLE 11: Number of businesses with... (n=78)

Full time staff	87
Part time staff	79
Volunteers (more than 16 hours)	4
Volunteers (less than 16 hours)	5



As shown in Table 12, 258 staff were employed on a full-time basis, 312 were employed on a part-time basis, giving total of 570 staff employed in either a full-time or part-time capacity; 14 people were involved as volunteers for more than 16 hours per week, a further 6 volunteered for less than 16 hours.

TABLE 12: How many people are currently involved in your business (including any working owners) (n=78)

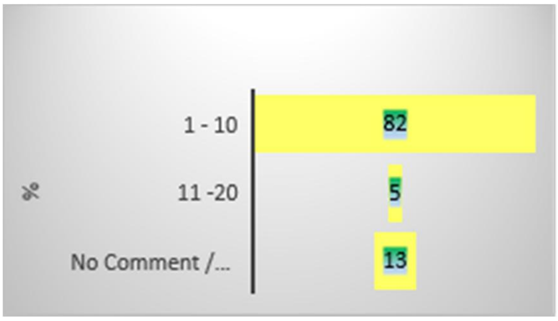
		Total
Full time (more than 30 hours)	258	570
Part time (up to 30 hours)	312	
Volunteers (more than 16 hours)	14	20
Volunteers (less than 16 hours)	6	
		590

4.6.1 FULL TIME (MORE THAN 30 HOURS)

Just over four-fifths of businesses (82%) employed between 1-10 full-time staff, 5% of businesses employed between 11-20 full-time staff (Table 13).

TABLE 13: How many people are currently involved in your business (Full-Time) (including any working owners) (n=78)

1 - 10	82
11 -20	5
No Comment / NA	13

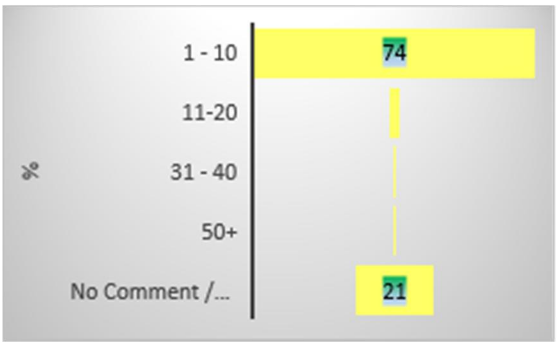


4.6.2 PART TIME (UP TO 30 HOURS)

Almost three-quarters (74%) of businesses employed between 1-10 part-time staff, 3% employed 11-20, 1% employed between 31-40, 1% employed over 50 (Table 14).

TABLE 14: How many people are currently involved in your business (Part-Time) (including any working owners) (n=78)

1 - 10	74
11 - 20	3
31 - 40	1
50+	1
No Comment / NA	21



4.6.3 VOLUNTEERS (MORE THAN 16 HOURS PER WEEK)

As shown in Table 15, 4% of businesses reported having between 1-10 people volunteer 16+ hours per week.

TABLE 15: How many people are currently involved in your business (volunteers 16+ hours) (including any working owners) (n=78)	
1 - 10	4
No Comment / NA	96

4.6.4 VOLUNTEERS (LESS THAN 16 HOURS PER WEEK)

Five per cent of businesses reported having between 1-10 volunteers involved for less than 16 hours each per week (Table 16).

TABLE 16: How many people are currently involved in your business (volunteers less than 16 hours) (including any working owners) (n=78)	
1 - 10	5
No Comment / NA	95

4.7 OVERALL, WHAT IS YOUR PERCEPTION OF THE TOWN CENTRE?

Just over a third of respondents (37%) described their overall perception of Limavady town centre as very good/good (Tables 17 and 18). A further 37% reported that their perception of the town centre was average, whilst 26% stated that it was very poor / poor.

TABLE 17: Overall, what is your perception of the town centre? (n=78)	
Very poor	5
Poor	21
Average	37
Good	33
Very good	4

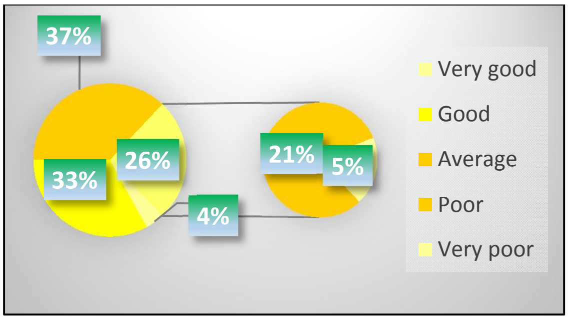
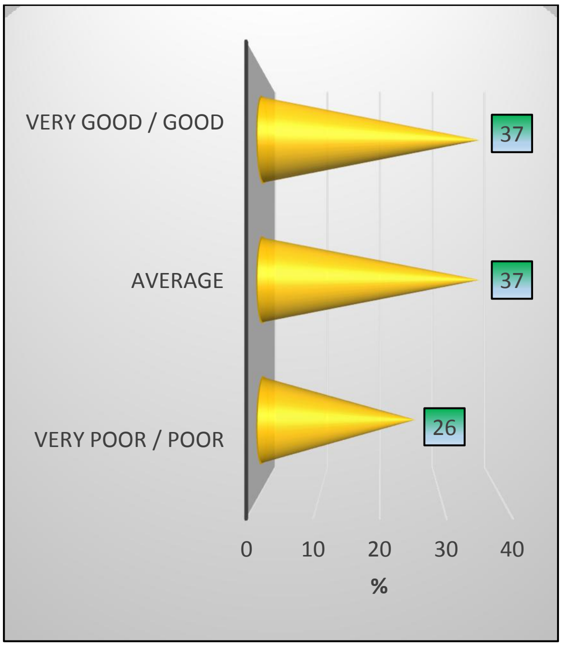


TABLE 18: Overall, what is your perception of the town centre? (n=78)	
Very poor / poor	26
Average	37
Very good / good	37



4.8 OTHER COMMENTS - PERCEPTION

Table 19 sets out a comprehensive breakdown of other comments relating to perception.

TABLE 19: Perception town centre - Other (n=15)	
Tired, late night poor	1
Lack of quality stores	1
Has improved over the last few years	1
Eyesore beside courthouse!	1
But could be better - council should support business with lighting and hanging baskets etc. to improve overall appearance	1
No promotion of town/anything to bring people in	1
Rates and rent r killing business	1
Limavady has great potential as a unique town but needs more help from council	1
Some areas/streets require improvements	1
Too many charity shops filling empty spaces??	1
Entries leading to shopping streets badly maintained	1
Need more big stores	1
Good on Market St - Catherine St is forgotten about	1
No support from council	1
Room for more growth	1

4.9 PLEASE SCORE YOUR CURRENT OPINION OF THE FOLLOWING ASPECTS OF THE TOWN CENTRE (SCALE 1 – 10, 1 VERY POOR, 5 AVERAGE, 10 - VERY GOOD)

Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Limavady town centre (1 very poor and 10 very good). The results are shown in detail in Table 20. For further clarity Table 21 sets out a summary of poor scores (1-4), average (5) and good scores (6-10).

As shown, the highest level of 'good' scores were for the following aspects:

- Friendliness of staff / people (91%);
- Cafes (85%);
- Good atmosphere (82%); and,
- Pedestrian access (78%).

The highest level of 'average' scores were for the following aspects:

- Dereliction (30%);
- Vacant shops (27%); and,
- Children's play areas (26%);

The highest level of 'poor' scores were for the following aspects:

- Levels of Anti-social behaviour (60%);
- Price of carpark spaces (48%);
- On street entertainment (45%); and,
- Dereliction (35%).

TABLE 20: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Scores (n=78)													
	0	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**No Comment**	***Rounded to 100**
Condition of streets/public realm – clean, well maintained, attractive	*0*	1	0	1	4	9	5	23	18	6	13	19	100
Flower arrangements, street banners	*0*	0	1	1	4	24	8	15	27	6	10	3	100
Lighting	*0*	1	0	5	3	21	9	21	22	8	10	1	100
Parking	*0*	9	6	8	6	17	10	15	13	3	12	1	100
Number of public car park spaces	*0*	4	3	8	4	23	12	12	12	8	15	1	100
Price of public car park spaces	*0*	18	12	12	6	23	4	6	10	1	5	3	100
Ease of moving around town centre	*0*	3	0	5	5	24	9	15	18	6	14	0	100
Pedestrian access	*0*	0	1	0	4	15	6	12	30	12	18	3	100
Variety of shops	*0*	5	5	9	6	19	5	21	15	3	12	0	100
Quality of shops	*0*	1	3	3	9	15	10	12	28	5	14	0	100
Range of goods and services available	*0*	0	1	6	12	24	9	14	21	3	10	0	100
Cafes	*0*	0	1	0	4	10	3	18	27	14	23	0	100
Value for money	*0*	0	3	3	5	21	10	8	30	8	13	1	100
Friendliness of staff/people	*0*	0	0	1	0	8	10	6	32	17	26	0	100
Good atmosphere	*0*	0	0	3	4	13	12	9	30	9	22	0	100
On-street entertainment	*0*	18	12	3	12	14	14	15	5	4	4	0	100
Safety	*0*	3	1	3	5	24	6	17	23	6	10	1	100
Condition of buildings	*0*	5	8	4	4	21	18	14	22	0	5	0	100
Vacant shops (if a lot = poor score)	*0*	5	8	5	10	27	9	12	13	9	3	0	100
Amount of dereliction (if a lot = poor score)	*0*	12	8	9	6	30	6	14	10	4	1	0	100
Vandalism (if a lot = poor score)	*0*	4	10	5	6	21	12	23	14	4	1	0	100
Children's play areas	*0*	10	6	1	10	26	5	18	18	4	0	1	100
Levels of anti-social behaviour (if a lot = poor score)	*0*	22	17	12	9	22	3	6	5	0	0	5	100
	0	121	106	107	138	451	195	326	443	140	241	39	-

Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Scores (n=78)

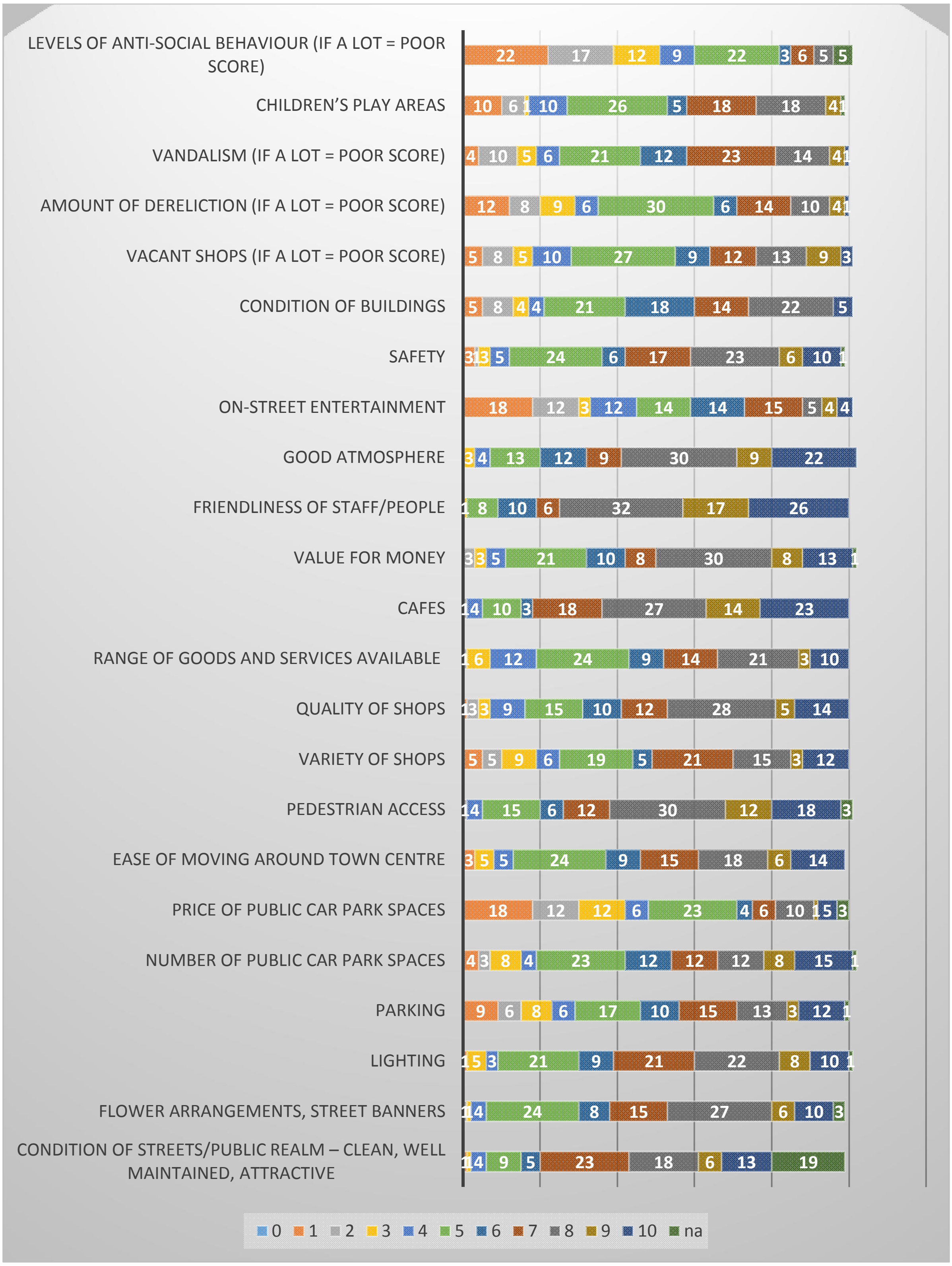
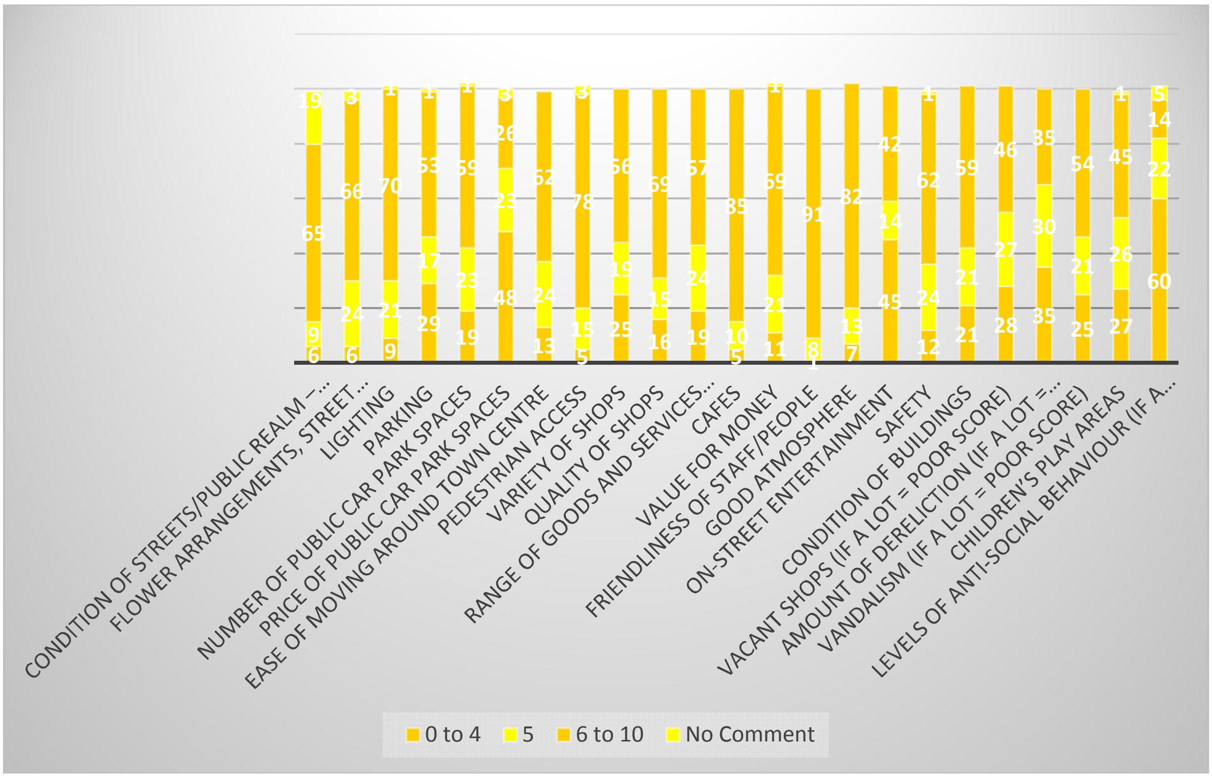


TABLE 21: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Grouped Scores (n=78)					
	0 to 4	**5**	**6 to 10**	**No Comment**	***Rounded to 100**
Condition of streets/public realm – clean, well maintained, attractive	6	**9**	65	**19**	100
Flower arrangements, street banners	6	24	66	3	100
Lighting	9	21	70	1	100
Parking	29	17	53	1	100
Number of public car park spaces	19	23	59	1	100
Price of public car park spaces	48	23	26	3	100
Ease of moving around town centre	13	24	62	0	100
Pedestrian access	5	15	78	3	100
Variety of shops	25	19	56	0	100
Quality of shops	16	15	69	0	100
Range of goods and services available	19	24	57	0	100
Cafes	5	10	85	0	100
Value for money	11	21	69	1	100
Friendliness of staff/people	1	8	91	0	100
Good atmosphere	7	13	82	0	100
On-street entertainment	45	14	42	0	100
Safety	12	24	62	1	100
Condition of buildings	21	21	59	0	100
Vacant shops (if a lot = poor score)	28	27	46	0	100
Amount of dereliction (if a lot = poor score)	35	30	35	0	100
Vandalism (if a lot = poor score)	25	21	54	0	100
Levels of anti-social behaviour (if a lot = poor score)	27	26	45	1	100
Children's play areas	60	22	14	5	100
TOTAL	*472*	*451*	*1345*	*39*	-

Males were statistically significantly more likely than females to describe the variety of shops as good.

Males were statistically significantly more likely than females to describe safety as good / very good.

Scores - current opinion of the following aspects of the town centre (Scale 0-4, 0 poor, 5 average, 6-10 - good) - Grouped Scores (n=78)



4.10 WHAT THREE ASPECTS OF THE TOWN COULD BE IMPROVED?

Respondents were asked to rank their top three priorities for improvement in Limavady. Table 22 provides a comprehensive breakdown of the findings. These included:

4.10.1 FIRST PRIORITY – IMPROVEMENT

- Better parking – cost (19%);
- Wider variety of shops (18%);
- More shops (8%); and,
- Better maintained buildings (8%).

4.10.2 SECOND PRIORITY - IMPROVEMENT

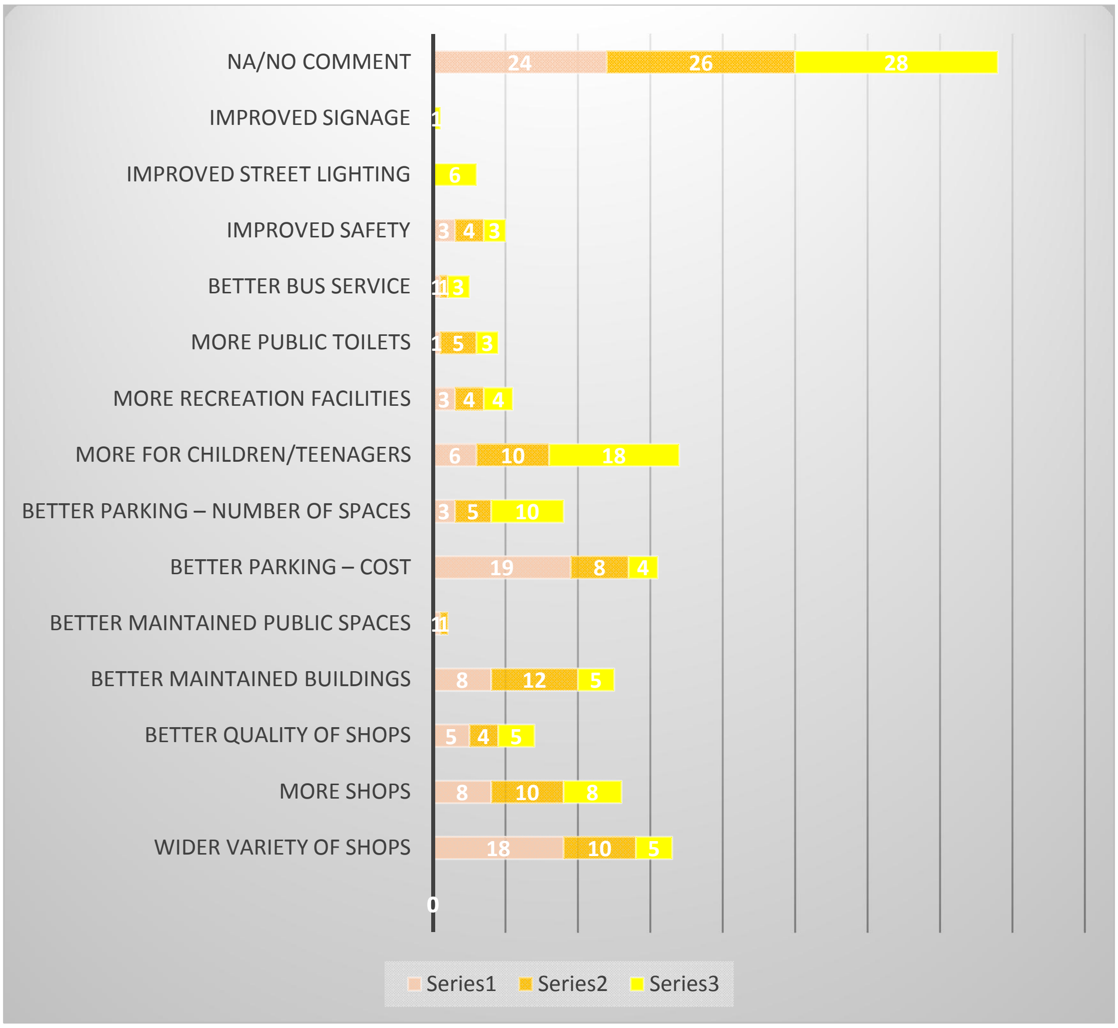
- Better maintained buildings (12%);
- More shops (10%);
- Wider variety of shops (10%); and,
- More for children/teenagers (10%);

4.10.3 THIRD PRIORITY - IMPROVEMENT

- More for children/teenagers (18%);
- Better parking – number of spaces (10%);
- More shops (8%); and,
- Improved street lighting (6%).

The combined highest (1st, 2nd and 3rd) priority included: more for children/teenagers (34); wide variety of shops (33); and, better parking cost (31).

TABLE 22: What three aspects of the town could be improved? (n=78)				
	1st	2nd	3rd	TOTAL
Wider variety of shops	18	10	5	33
More shops	8	10	8	26
Better quality of shops	5	4	5	14
Better maintained buildings	8	12	5	25
Better maintained public spaces	1	1	0	2
Better parking – cost	19	8	4	31
Better parking – number of spaces	3	5	10	18
More for children/teenagers	6	10	18	34
More recreation facilities	3	4	4	11
More Public toilets	1	5	6	9
Better bus service	1	1	1	5
Improved safety	3	4	-	10
Improved street lighting	0	-	3	6
Improved signage	0	-	3	1
NA/No Comment	24	26	28	78
TOTAL	100	100	100	-



4.11 OTHER COMMENTS

Other comments are set out in Table 23.

TABLE 23: Any other comments (n=16)	
Please try to do more for the shop keepers - e.g. free car parking spaces for every shop owner. 1 car park space in the central car park for 1 year is £540 - a little toooo much - since it is the shop keepers who are paying the rates and bringing in JOBS & business for the Council - think about it.	1
Good shopping centre needed with branded shops!	1
Reduce rates dramatically to encourage new businesses to come to town and enable existing businesses to grow - please try and have enterprise zone for the whole of Limavady - why not try to pay the same as residential	1
Roof Market Street/need cover/roof on Market St – urgently	2
Town needs investment and lower rates for small business	1
Bad environmental pollution with one way driving system around the town centre wasting petrol driving in circles pollution	1
Need to attract employment to the area i.e. jobs	1
Free parking for workers. They r being punished.	1
Too many charity shops in town! And rates are too high!	1
Linenhall Street and Irish Green Street are an eyesore - first streets you see when coming into town. Just want to say that when coming into Limavady from Derry, Dungiven or Coleraine - the first streets you have to drive through are Irish Green Street and Linenhall Street - both are full of derelict buildings, a complete unsafe route to even walk in. If I wasn't in the town, I wouldn't stop - as both these streets would put me off. I think for the other shops on the other streets paying high rent and rates it is totally unfair for these buildings to be allowed to be left in the state they are in. And charity shops when they close down should be occupied asap.	1
What we have at present is good, of the shops that are here, but we need more larger retail shops to stop people travelling elsewhere!	1
Linenhall Street has been omitted from planned investment	1
Bigger store e.g. Dunnes, Primark, New Look, etc.	1
Signage - car parks could be improved on - signage for public toilets	1
More brand shop	1
Lighting in Castle St disgraceful - no street entertainment - traffic have to go through Castle St - heavy traffic	1

APPENDIX 1: Business Questionnaire Limavady and Map of Town Centre Area

BUSINESS SURVEY

February 2017

Causeway Coast and Glens Borough Council would like to invite you to participate in a Business Survey to enable it to better understand business owners'/managers' perceptions of the town centre.

The findings from this research will be used by the Council to inform its Local Development Plan and may include the identification of lands for future retail development and the production of land use policies to guide development proposals.

The Business Survey will take approximately 4 minutes to complete. All responses will be treated with strict confidentiality.

The town centre area is shown on the map attached.

If you have any queries, please contact Sharon Mulhern from Causeway Coast & Glens Borough Council using telephone number 028 70347244 or Dr Jenny Sproule from *Sproule Consulting* on 07860 342493.

Yours Faithfully

Sharon Mulhern

Local Development Plan Manager

Causeway Coast & Glens Borough Council

Date: ________

Business Profile

1. Business Name: ___________________________
2. Business Address: __________________________
3. Type of Main Business: **[PLEASE CIRCLE ONE ONLY]**

Clothing/footwear/jewellery/accessories	1
Health & beauty	2
Hairdressing	3
Homeware	4
Pet food/accessories	5
Books/newsagent/stationery	6
Pharmacy	7
Optician	8
Doctor/Dentist	9
Entertainment or leisure (gym, arcade, etc)	10
Charity	11
Department store	12
Groceries	13
Other: **Please Specify**	14

4. How many years have you traded in these premises? _________________________________
5. What is the ownership of your business? **[PLEASE CIRCLE ONE ONLY]**

Independent trader/retailer	1
Local chain	2
National chain	3
Multi national chain	4
Franchise	5
Other: **Please Specify**	6

6. How would you describe your current turnover / turnover in last year? **[PLEASE CIRCLE ONE ONLY]**

Well below average	1
Below average	2
Average (normal)	3
Above average	4
Well above average	5

7. Have you/the business owner invested capital in improvements to your business in the last year? **[PLEASE CIRCLE ONE ONLY]**

Yes	1
No	2

8. How many people are currently involved in running your business (including any working owners)? **[PLEASE INSERT FOR EACH]**

Full time (more than 30 hours)	
Part time (up to 30 hours)	
Volunteers (16 hours+)	
Volunteers (16 hours or less)	

Town Centre Perceptions

9. Overall, what is your perception of the town centre? **[PLEASE CIRCLE ONE ONLY]**

Very poor	1
Poor	2
Average	3
Good	4
Very good	5

Please comment: ______________________________

10. Please score your current opinion of the following aspects of the town centre (Scale 1 – 10, 1 very poor, 5 average, 10 – very good) **[PLEASE INSERT FOR EACH]**

Range of goods and services available	
Condition of buildings	
Condition of streets/public realm – clean, well maintained, attractive	
Number of public car park spaces	
Price of public car park spaces	
Safety	
Lighting	
On-street entertainment	
Levels of anti-social behaviour	
Vandalism	
Vacant shops	
Amount of dereliction	
Convenience	
Friendliness of staff/people	
Variety of shops	
Good atmosphere	
Quality of shops	
Cafes	
Children's play areas	
Parking	
Value for money	
Presence of pedestrian area	
Flower arrangements, street banners	

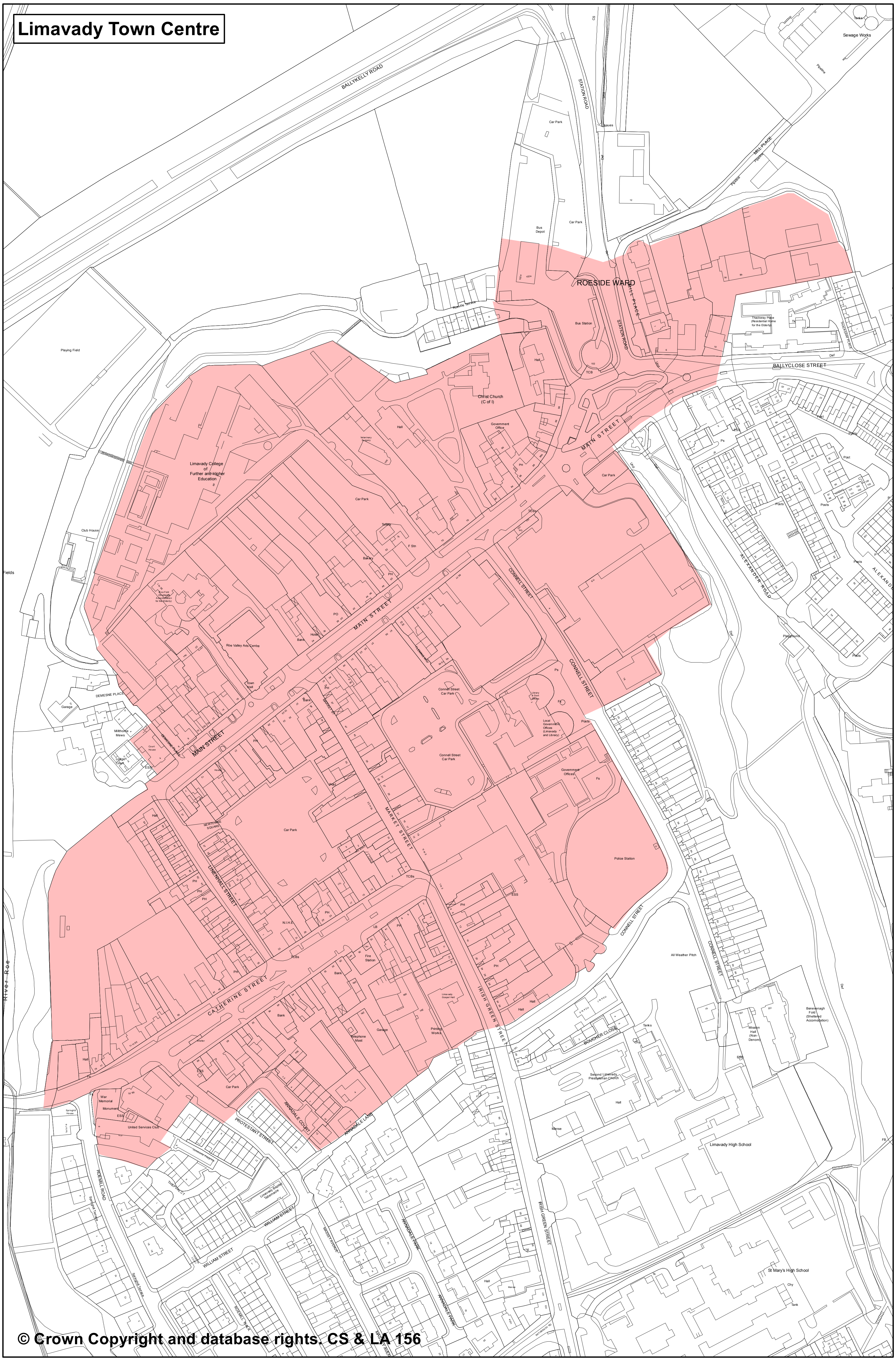
11. What three aspects of the town could be improved? **[PLEASE RANK 1,2,3]**

Wider variety of shops	
More shops	
Better quality of shops	
Better maintained buildings	
Better maintained public spaces	
Better parking – cost	
Better parking – number of spaces	
More for children/teenagers	
More recreation facilities	
More Public toilets	
Better bus service	
Improved safety	
Improved street lighting	
Improved signage	

Background Information

Male	1	Female	2
Age (Years)			

Thank you for your participation.


Limavady Town Centre
MAIN STREET
CATHERINE STREET
MARKET STREET
IRISH GREEN STREET
CONNELL STREET
LINENHALL STREET
STATION ROAD
BALLYKELLY ROAD
BALLYCLOSE STREET
ALEXANDER ROAD
PROTESTANT STREET
ANNADALE LANE
BOUCHER CLOSE
DEMESNE PLACE
ROESIDE WARD
Limavady College of Further and Higher Education
Christ Church (C of I)
Roe Valley Arts Centre
Connell Street Car Park
Police Station
Government Offices
Bus Station
Car Park
Club House
Playing Field
Limavady High School
St Mary's High School
All Weather Pitch
Thackeray Place (Residential Home for the Elderly)
Second Limavady Presbyterian Church
United Services Club
War Memorial
River Roe
Sewage Works
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Sproule Consulting

FINAL REPORT:

21st April 2017

Causeway Coast & Glens Borough Council

Dr Jenny Sproule

EMAIL: jenny.sproule@btinternet.com

EXECUTIVE SUMMARY

- 74% were residents of Limavady, the remaining 26% were visitors to the town.

- 46% visited Limavady town centre at least once a week; 33% visited the town centre daily; 5% visited the town centre at least once a fortnight, a further 3% visited at least once a month, whilst 12% visited less often.

- 48% had visited Limavady for grocery shopping; 30% had visited the town for clothes shopping, 18% for footwear shopping, 17% to eat / drink at local cafes, restaurants and pubs; 12% were at work / school in the area, whilst 12% were shopping for books, visiting a newsagents or purchasing stationery.

- 39% intended to stay at least one hour but less than two hours in the town; 26% intended staying for at least thirty minutes but less than one hour; 18% planned staying two hours or more, whilst 17% planned staying at least ten minutes but less than thirty minutes.

- 73% had travelled from the Limavady area to visit the town centre; this was followed by 5% from Dungiven, 2% from Coleraine and 2% from Ballymoney.

- 76% travelled by car to Limavady town centre; 18% walked to the area; 5% travelled by bus and 1% cycled.

- 21% spent £10 or less during their visit to the town centre; 21% spent between £10.01 and £20; 18% spent between £20.01 and £30, whilst 13% spent between £30.01 and £40; only 7% spent between £40.01 and £50; 16% spent over £50, whilst 4% spent nothing.

- 88% had been visiting the town for more than 5 years.

- 64% stated that their overall perception of Limavady town centre was very good/good; 11% described their perception as very poor/poor, whilst almost a quarter (24%) described it as average.

- Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Limavady town centre (1 very poor and 10 very good). For further clarity the scores have been grouped as follows: poor scores (1-4), average (5) and good scores (6-10).

- The highest level of 'good' scores were for the following aspects:

  - Pedestrian access (94%);
  - Cafes (94%);
  - Friendliness of staff / people (94%);
  - Safety (93%);
  - Condition of streets/public realm – clean, well maintained, attractive (92%);
  - Good atmosphere (91%);

- Condition of buildings (91%);
- Amount of dereliction (91%);
- Ease of moving around town centre (90%); and,
- Value for money (90%).

- The highest level of 'average' scores were for the following aspects:

  - On-street entertainment (25%);
  - Flower arrangements / street banners (15%);
  - Lighting (13%);
  - Parking (13%);
  - Number of public car parking spaces (13%); and,
  - Price of public car par spaces (13%).

- The highest level of 'poor' scores were for the following aspects:

  - On-street entertainment (20%);
  - Price of public car park spaces (20%);
  - Children's play areas (17%);
  - Variety of shops (13%);
  - Range of goods and services available (12%); and,
  - Flower arrangements / street banners (10%).

- Respondents were asked to rank their top three priorities for improvement in Limavady, these included:

  - 1st PRIORITY: More shops (27%);
    Wider variety of shops (19%); and,
    Better parking - cost (16%).

  - 2nd PRIORITY: More shops (19%);
    More for children / teenagers (17%);
    More public toilets (13%); and,
    Wider variety of shops (10%).

  - 3rd PRIORITY: More recreation facilities (13%)
    More public toilets (13%);
    Wider variety of shops (12%);
    More for children / teenagers (11%);
    Better bus service (11%); and,
    Better quality of shops (10%).

- The combined highest (1st, 2nd and 3rd) priority included: more shops; wider variety of shops; and, more public toilets.

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1. INTRODUCTION

Causeway Coast and Glens Borough Council (CCGBC) commissioned Sproule Consulting to conduct general public and business surveys in the six main towns within the Borough. Table 1 provides a comprehensive breakdown of the number of surveys completed.

TABLE 1: Completed Surveys		
	On-Street (General Public)	Business
Coleraine	100	100
Ballymoney	100	90
Portrush	100	40
Portstewart	100	40
Limavady	100	78
Ballycastle	100	54
TOTAL	600	402

The purpose of this Report is to provide empirical data to inform CCGBC's Local Development Plan for the Limavady area.

The survey findings set out in this General Public Report, together with the data collated from the Business Report, will therefore be instrumental in establishing users' and stakeholders' attitudes and perceptions of Limavady town centre.

2. RESEARCH: KEY OBJECTIVES

The key objectives of this research are shown in Figure 1.

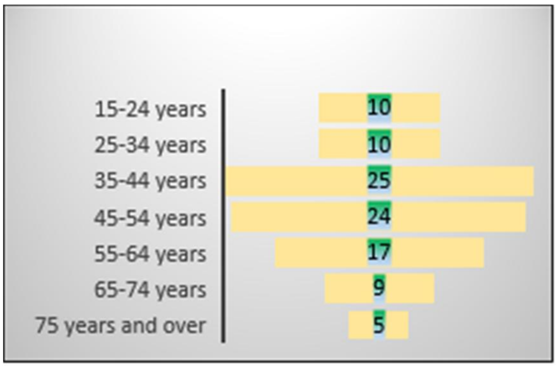
3. DEMOGRAPHIC PROFILE

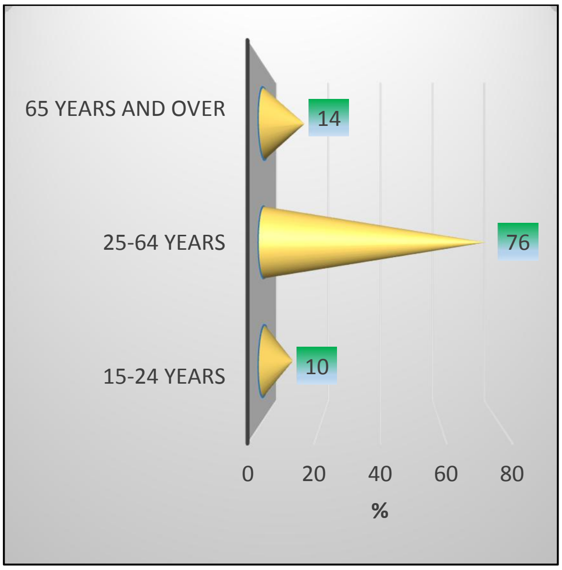
Fifty-three per cent of the general public survey respondents were female, 47% were male (Table 2).

TABLE 2: Gender (n=100)	
Male	43
Female	57

Table 3 sets out the achieved age profile.

TABLE 3: Age (n=100)	
15-24 years	10
25-34 years	10
35-44 years	25
45-54 years	24
55-64 years	17
+65-74 years	9
75 years and over	5
TOTAL	100



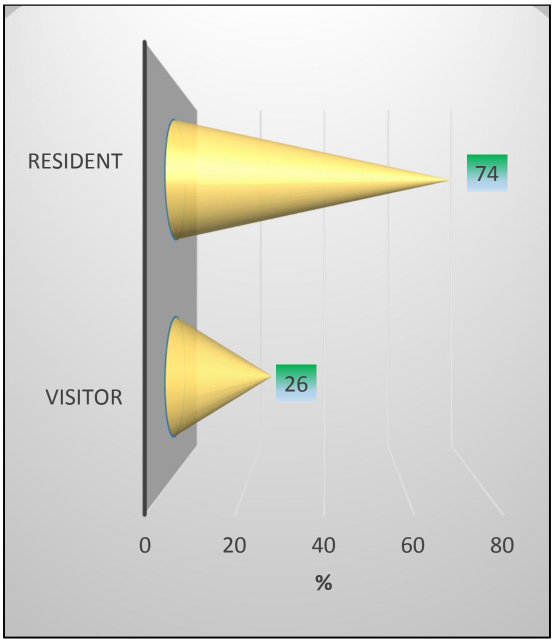


4. GENERAL PUBLIC SURVEY FINDINGS - LIMAVADY TOWN CENTRE

4.1 ARE YOU A RESIDENT OF LIMAVADY OR VISITOR TODAY?

As shown in Table 4, almost three-quarters of respondents (74%) were residents of Limavady, the remaining 26% were visitors to the town.

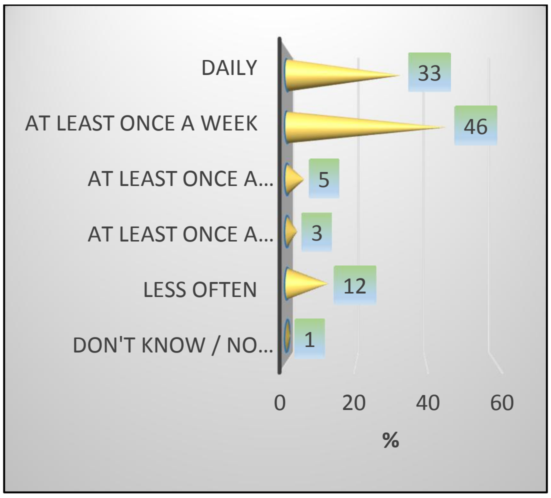
TABLE 4: Are you a resident of Limavady or visitor today? (n=100)	
	%
Resident	74
Visitor	26
TOTAL	100



4.2 HOW OFTEN DO YOU VISIT THE TOWN CENTRE?

Some 46% of respondents reported that they visited Limavady town centre at least once a week (Table 5); a third (33%) stated that they visited the town centre daily; 5% visited the town centre at least once a fortnight, a further 3% visited at least once a month, whilst 12% visited less often.

TABLE 5: How often do you visit the town centre? (n=100)	
Daily	33
At least once a week	46
At least once a fortnight	5
At least once a month	3
Less often	12
Don't Know / No Comment	1
TOTAL	100



4.3 WHY HAVE YOU COME TO THE TOWN TODAY?

Almost half of the respondents (48%) stated that they had visited Limavady for grocery shopping (Table 6); three in ten respondents (30%) had visited the town for clothes shopping, 18% for footwear shopping, 17% to eat / drink at local cafes, restaurants and pubs; 12% were at work / school in the area, whilst 12% were shopping for books, visiting a newsagents or purchasing stationery.

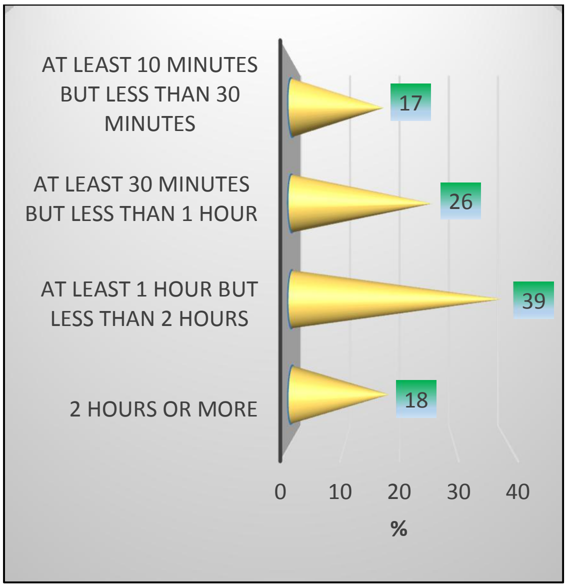
TABLE 6: Why have you come to the town today? (multiple responses)	%
Work/school in the area	12
Grocery shopping	48
Clothes shopping	30
Footwear shopping	18
Hairdresser/barber	4
Homeware	1
Books, newsagent, stationery	12
Eating/drinking (cafes, restaurants, pubs)	17
Pharmacy/optician	1
Doctor/dentist	1
Leisure (leisure centre, park)	5
Other: Please Specify	6

TABLE 7: Other Reason for Coming to Town - Please Specify (n=6)	
Nosey	1
Tech	1
Visit family	1
Oil payment	1
Car cleaned	1
Bookies	1

4.4 HOW LONG DO YOU INTEND TO SPEND HERE FOR THIS VISIT?

Thirty-nine per cent of respondents confirmed that they intended to stay at least one hour but less than two hours in the town (Table 8); just over a quarter (26%) intended staying for at least thirty minutes but less than one hour; 18% planned staying two hours or more, whilst 17% planned staying at least ten minutes but less than thirty minutes.

TABLE 8: How long do you intend to spend here for this visit? (n=100)	
At least 10 minutes but less than 30 minutes	17
At least 30 minutes but less than 1 hour	26
At least 1 hour but less than 2 hours	39
2 hours or more	18
TOTAL	100



4.5 WHERE HAVE YOU TRAVELLED FROM TO GET TO LIMAVADY TOWN CENTRE TODAY?

As shown in Table 9, 73% of respondents stated that they had travelled from the Limavady area to visit the town centre; this was followed by 5% from Dungiven, 2% from Coleraine and 2% from Ballymoney.

TABLE 9: Where have you travelled from to get to Limavady town centre today? (n=100)	
Coleraine	2
Ballymoney	2
Limavady	73
Dungiven	5
Other: Please Specify	18
TOTAL	100

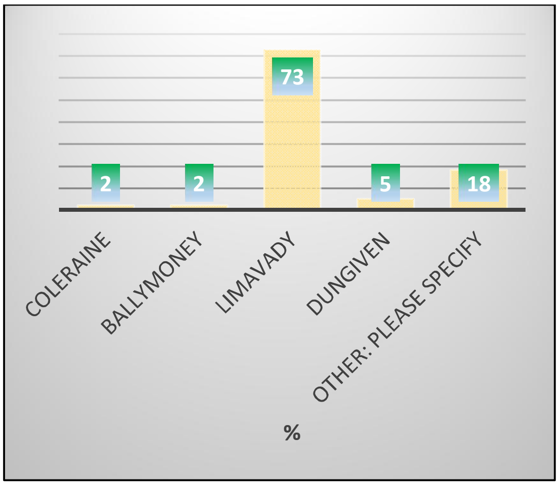


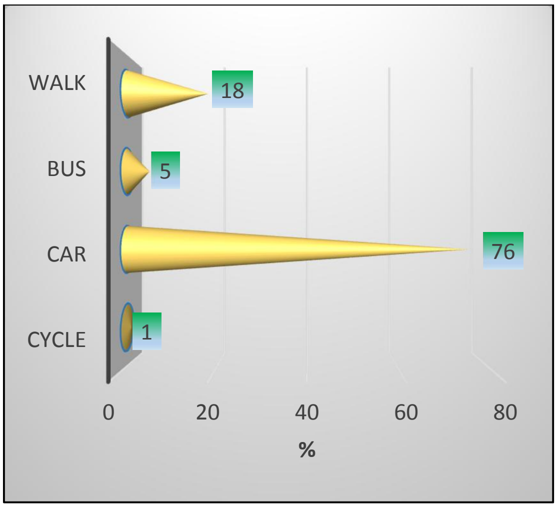
Table 10 provides a breakdown of the other areas respondents travelled from to visit Limavady town centre.

TABLE 10: Where have you travelled from to get to Limavady town centre today? Other (n=18)	
L/derry	5
Dunloy	1
Dromore	2
Ballykelly	5
Co.Clare	2
Ballyclare	1
Southampton	1
Belfast	1

4.6 HOW DID YOU TRAVEL TO THE AREA?

Over three-quarters of respondents (76%) travelled by car to Limavady town centre; less than a fifth (18%) walked to the area; 5% travelled by bus and 1% cycled (Table 11).

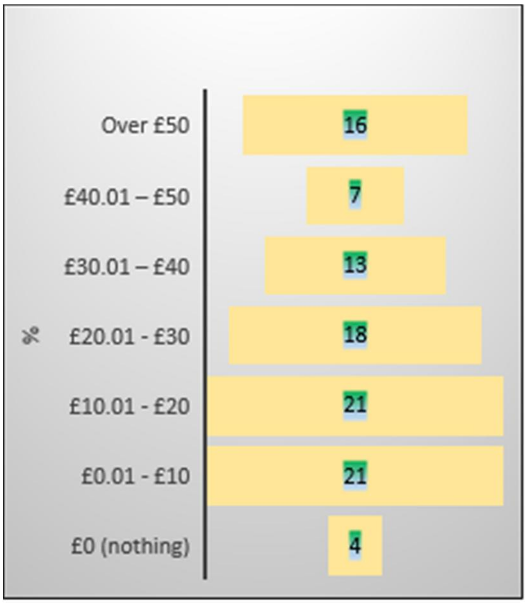
TABLE 11: How did you travel to the area? (n=100)	
Walk	18
Bus	5
Car	76
Cycle	1
TOTAL	100



4.7 IN TOTAL, HOW MUCH DO YOU INTEND TO SPEND/HAVE YOU SPENT DURING YOUR VISIT TODAY?

Twenty-one per cent of respondents reported that they spent £10 or less during their visit to the town centre; a further 21% spent between £10.01 and £20; 18% spent between £20.01 and £30, whilst 13% spent between £30.01 and £40 (Table 12). Only 7% of respondents spent between £40.01 and £50; 16% spent over £50, whilst 4% spent nothing.

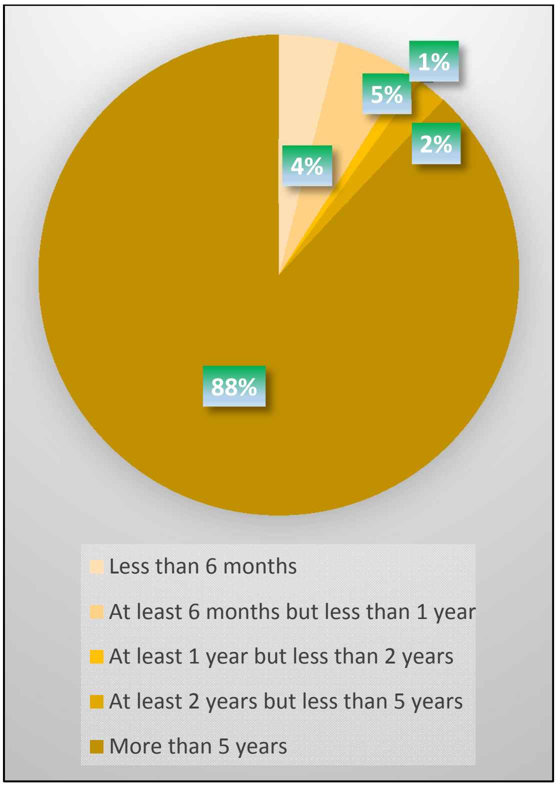
TABLE 12: In total, how much do you intend to spend / have you spent during your visit today? (n=100)	
£0 (nothing)	4
£0.01 - £10	21
£10.01 - £20	21
£20.01 - £30	18
£30.01 – £40	13
£40.01 – £50	7
Over £50	16
TOTAL	100



4.8 HOW LONG HAVE YOU BEEN VISITING THE TOWN?

The majority of respondents (88%) confirmed they had been visiting the town for more than 5 years (Table 13).

TABLE 13: How long have you been visiting the town? (n=100)	
Less than 6 months	4
At least 6 months but less than 1 year	1
At least 1 year but less than 2 years	2
At least 2 years but less than 5 years	5
More than 5 years	88
TOTAL	100



4.9 OVERALL, WHAT IS YOUR PERCEPTION OF THE TOWN CENTRE?

Almost two-thirds of respondents (64%) stated that their overall perception of Limavady town centre was very good/good; 11% described their perception as very poor/poor, whilst almost a quarter (24%) described it as average (Tables 14 and 15).

TABLE 14: Overall, what is your perception of the town centre? (n=100)	
Very poor	2
Poor	9
Average	24
Good	49
Very good	15
No Comment	1
TOTAL	100

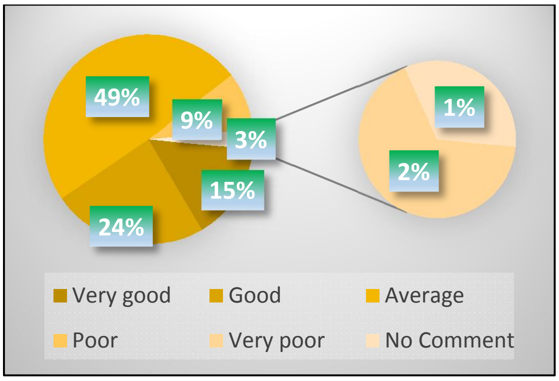
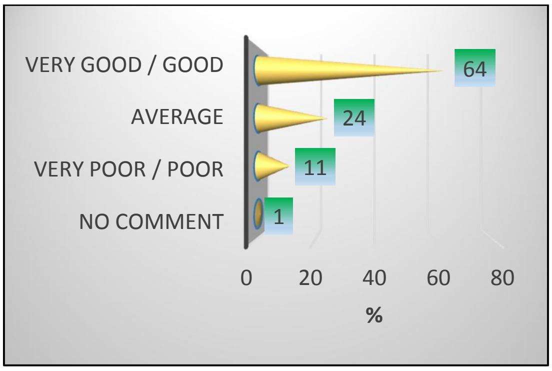


TABLE 15: Overall, what is your perception of the town centre (Grouped)? (n=100)	
Very poor / poor	11
Average	24
Very good / good	64
No Comment	1
TOTAL	100



4.10 OTHER COMMENTS

One respondent commented that "business rates were poor."

4.11 PLEASE SCORE YOUR CURRENT OPINION OF THE FOLLOWING ASPECTS OF THE TOWN CENTRE (SCALE 1 – 10, 1 VERY POOR, 5 AVERAGE, 10 - VERY GOOD)

Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Limavady town centre (1 very poor and 10 very good). The results are shown in detail in Table 16. For further clarity Table 17 sets out a summary of poor scores (1-4), average (5) and good scores (6-10).

As shown, the highest level of 'good' scores were for the following aspects:

- Pedestrian access (94%);
- Cafes (94%);
- Friendliness of staff / people (94%);
- Safety (93%);
- Condition of streets/public realm – clean, well maintained, attractive (92%);
- Good atmosphere (91%);
- Condition of buildings (91%);
- Amount of dereliction (91%);
- Ease of moving around town centre (90%); and,
- Value for money (90%).

The highest level of 'average' scores were for the following aspects:

- On-street entertainment (25%);
- Flower arrangements / street banners (15%);
- Lighting (13%);
- Parking (13%);
- Number of public car parking spaces (13%); and,
- Price of public car par spaces (13%).

The highest level of 'poor' scores were for the following aspects:

- On-street entertainment (20%);
- Price of public car park spaces (20%);
- Children's play areas (17%);
- Variety of shops (13%);
- Range of goods and services available (12%); and,
- Flower arrangements / street banners (10%).

4.12 WHAT THREE ASPECTS OF THE TOWN COULD BE IMPROVED?

Respondents were asked to rank their top three priorities for improvement in Limavady. Table 18 provides a comprehensive breakdown of the findings. These included:

4.12.1 FIRST PRIORITY – IMPROVEMENT

- More shops (27%);
- Wider variety of shops (19%); and,
- Better parking - cost (16%).

4.12.2 SECOND PRIORITY - IMPROVEMENT

- More shops (19%);
- More for children / teenagers (17%);
- More public toilets (13%); and,
- Wider variety of shops (10%).

4.12.3 THIRD PRIORITY - IMPROVEMENT

- More recreation facilities (13%)
- More public toilets (13%);
- Wider variety of shops (12%);
- More for children / teenagers (11%);
- Better bus service (11%); and,
- Better quality of shops (10%).

The combined highest (1st, 2nd and 3rd) priority included: more shops; wider variety of shops; and, more public toilets.

TABLE 16: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Grouped Scores (n=100)												
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**No Comment**	**TOTAL**
Condition of streets/public realm – clean, well maintained, attractive	3	0	0	0	5	5	25	31	14	17	0	100
Flower arrangements, street banners	1	2	2	5	15	12	20	17	16	10	0	100
Lighting	0	0	1	0	13	6	26	18	20	14	2	100
Parking	0	1	1	5	13	11	18	17	13	19	2	100
Number of public car park spaces	0	1	1	4	13	13	18	17	13	18	2	100
Price of public car park spaces	4	4	3	9	13	13	20	8	12	14	0	100
Ease of moving around town centre	0	1	1	5	3	1	12	21	36	20	0	100
Pedestrian access	0	0	0	3	2	3	18	17	35	21	1	100
Variety of shops	2	2	2	7	8	14	28	17	13	7	0	100
Quality of shops	0	0	1	7	7	6	23	25	14	16	1	100
Range of goods and services available	1	1	2	8	8	17	24	20	12	7	0	100
Cafes	0	0	2	1	3	2	10	36	29	17	0	100
Value for money	0	1	2	3	4	7	21	28	20	14	0	100
Friendliness of staff/people	0	1	0	3	1	5	11	16	27	35	1	100
Good atmosphere	0	0	0	5	4	6	18	19	23	25	0	100
On-street entertainment	1	3	3	13	25	20	21	5	5	3	1	100
Safety				4	2	1	5	23	29	35	1	100
Condition of buildings	1	2	2	1	3	9	39	29	9	5	0	100
Vacant shops (if a lot = poor score)	2	1	3	1	11	10	31	34	4	2	1	100
Amount of dereliction (if a lot = poor score)	1	3	0	1	3	9	38	28	11	5	1	100
Vandalism (if a lot = poor score)	3	3	1	0	9	14	32	27	8	1	2	100
Levels of anti-social behaviour (if a lot = poor score)	2	2	4	9	34	19	15	10	4	1	0	100
Children's play areas	2	1	0	6	12	12	37	26	3	1	0	100
	23	29	31	100	211	215	510	489	370	307	15	2300

TABLE 17: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Grouped Scores (n=100)					
	1 to 4	**5**	**6 to 10**	**No Comment**	
Condition of streets/public realm – clean, well maintained, attractive	3	5	92	0	100
Flower arrangements, street banners	10	15	75	0	100
Lighting	1	13	84	2	100
Parking	7	13	78	2	100
Number of public car park spaces	6	13	79	2	100
Price of public car park spaces	20	13	67	0	100
Ease of moving around town centre	7	3	90	0	100
Pedestrian access	3	2	94	1	100
Variety of shops	13	8	79	0	100
Quality of shops	8	7	84	1	100
Range of goods and services available	12	8	80	0	100
Cafes	3	3	94	0	100
Value for money	6	4	90	0	100
Friendliness of staff/people	4	1	94	1	100
Good atmosphere	5	4	91	0	100
On-street entertainment	20	25	54	1	100
Safety	4	2	93	1	100
Condition of buildings	6	3	91	0	100
Vacant shops (if a lot = poor score)	7	11	81	1	100
Amount of dereliction (if a lot = poor score)	5	3	91	1	100
Vandalism (if a lot = poor score)	7	9	82	2	100
Levels of anti-social behaviour (if a lot = poor score)	9	12	79	0	100
Children's play areas	17	34	49	0	100
TOTAL	183	211	1891	15	2300

Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Grouped Scores (n=100)

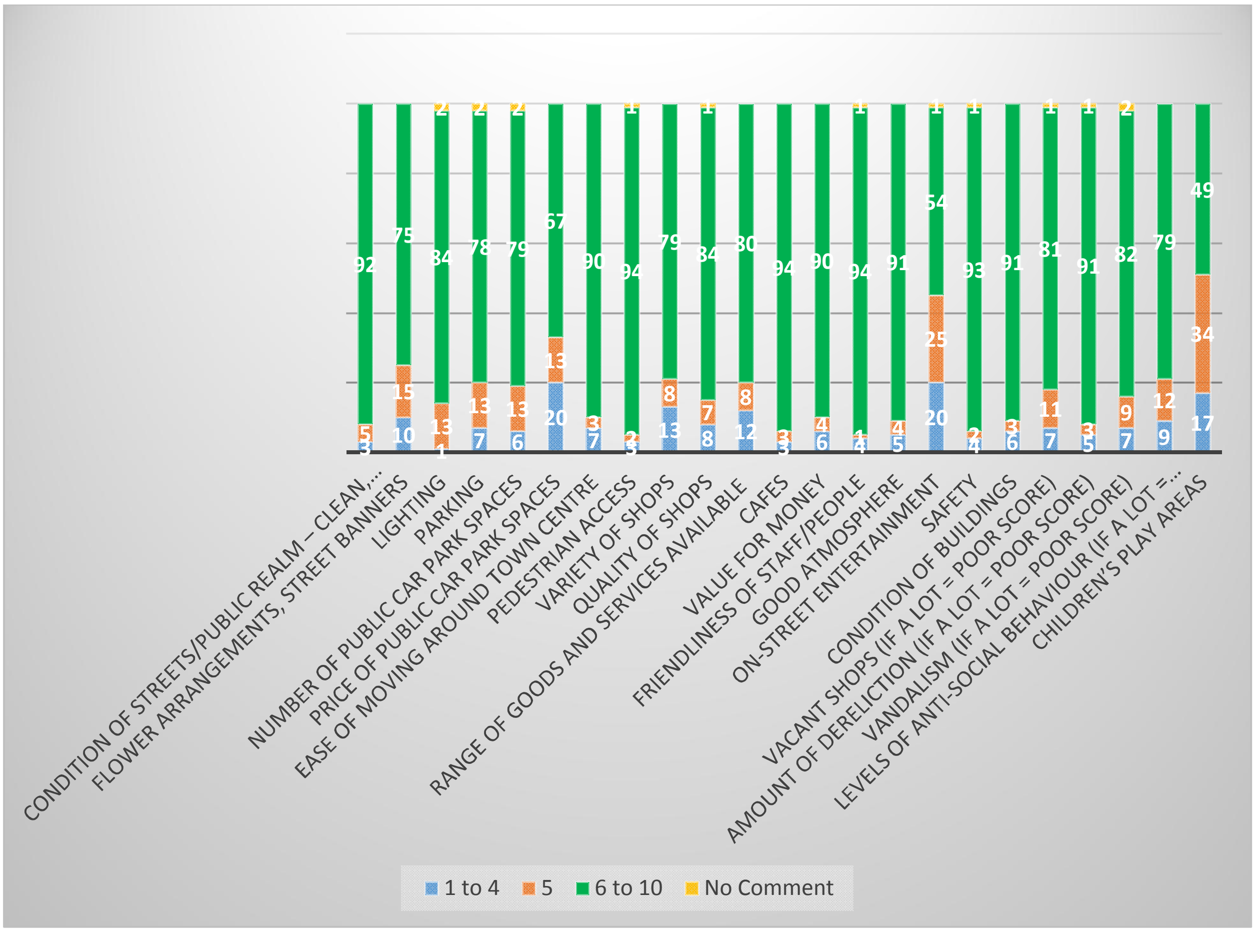
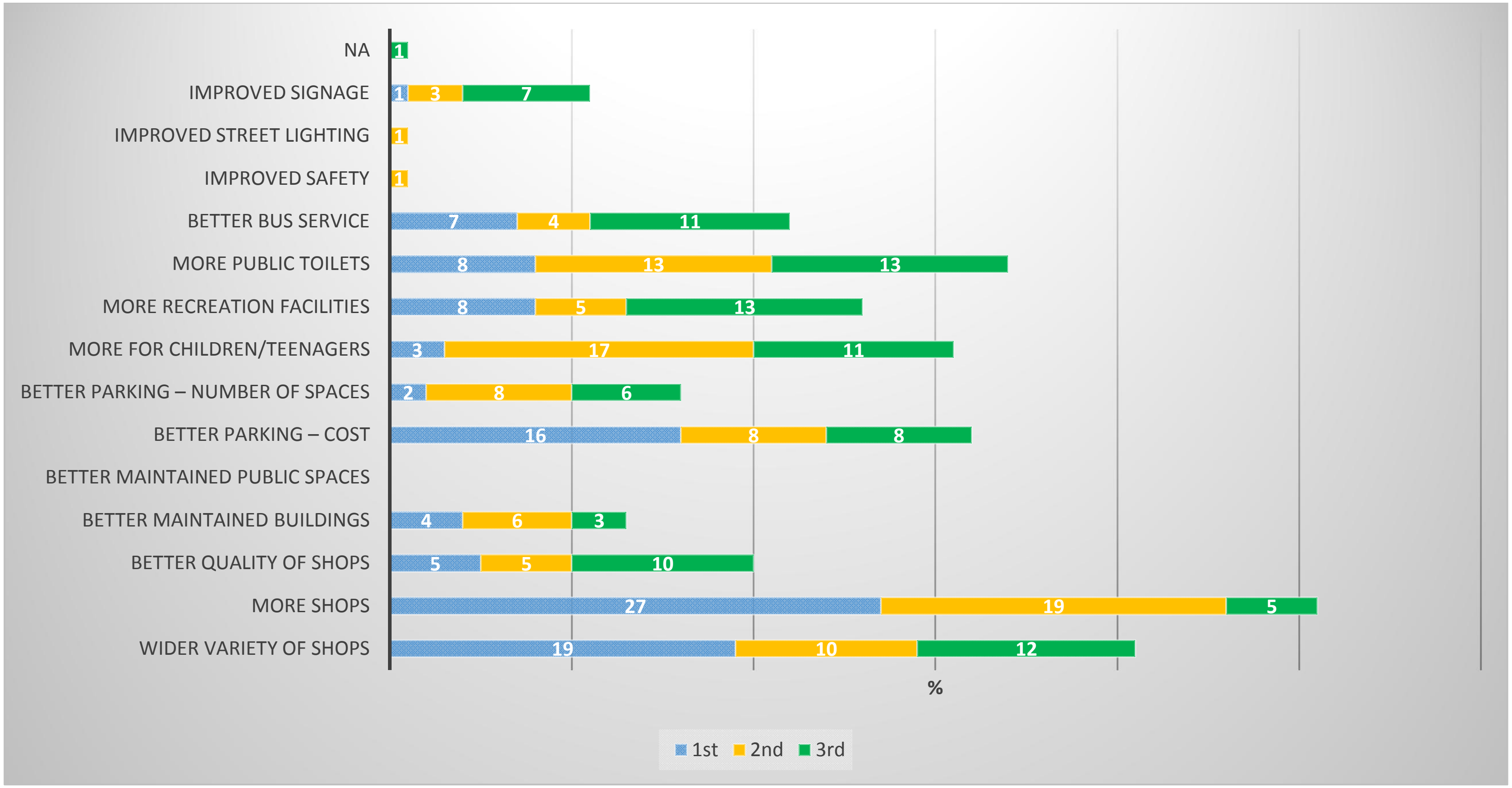


TABLE 18: What three aspects of the town could be improved? (n=100)				
	1st	2nd	3rd	TOTAL
Wider variety of shops	19	10	12	41
More shops	27	19	5	51
Better quality of shops	5	5	10	20
Better maintained buildings	4	6	3	13
Better maintained public spaces	0	0	0	0
Better parking – cost	16	8	8	32
Better parking – number of spaces	2	8	6	16
More for children/teenagers	3	17	11	31
More recreation facilities	8	5	13	26
More Public toilets	8	13	13	34
Better bus service	7	4	11	22
Improved safety	0	1	0	1
Improved street lighting	0	1	0	1
Improved signage	1	3	7	11
NA	0	0	1	1
TOTAL	100	100	100	300

What three aspects of the town could be improved? (n=100)



APPENDIX 1: General Public Questionnaire Limavady and Map of Town Centre Area

GENERAL PUBLIC SURVEY

February 2017

Causeway Coast and Glens Borough Council would like to invite you to participate in a Survey to enable it to better understand the general public's perception of the town centre.

The findings from this research will be used by the Council to inform its Local Development Plan and may include the identification of lands for future retail development and the production of land use policies to guide development proposals.

The General Public Survey will take approximately 4 minutes to complete. All responses are anonymous and will be treated with strict confidentiality.

The town centre area is shown on the map attached.

If you have any queries, please contact Sharon Mulhern from Causeway Coast & Glens Borough Council using telephone number 028 70347244 or Dr Jenny Sproule from *Sproule Consulting* on 07860 342493.

Yours Faithfully

Sharon Mulhern
Local Development Plan Manager

Causeway Coast & Glens Borough Council

1. Are you a resident of _____________ or visitor today? **[PLEASE CIRCLE ONE ONLY]**

Resident	1	Visitor	2

2. How often do you visit the town centre? **[PLEASE CIRCLE ONE ONLY]**

Daily	1
At least once a week	2
At least once a fortnight	3
At least once a month	4
Less often	5

3. Why have you come to the town today? **[PLEASE CIRCLE ALL THAT APPLY]**

Work/school in the area	1	Books, newsagent, stationery	10
Grocery shopping	2	Eating/drinking (cafes, restaurants, pubs)	11
Clothes shopping	3	Pharmacy/optician	12
Footwear shopping	4	Doctor/dentist	13
Jewellery shopping	5	Using financial, legal or insurance services	14
Health and beauty	6	Entertainment (arcade)	15
Hairdresser/barber	7	Leisure (leisure centre, park)	16
Homeware	8	Other: **Please Specify**	17
Electrical goods	9		

4. How long do you intend to spend here for this visit? **[PLEASE CIRCLE ONE ONLY]**

Less than 10 minutes	1
At least 10 minutes but less than 30 minutes	2
At least 30 minutes but less than 1 hour	3
At least 1 hour but less than 2 hours	4
2 hours or more	5

5. Where have you travelled from to get to __________ today? **[PLEASE CIRCLE ONE ONLY]**

Coleraine	1	Garvagh	7
Ballymoney	2	Kilrea	8
Limavady	3	Bushmills	9
Ballycastle	4	Dungiven	10
Portrush	5	Other: **Please Specify**	11
Portstewart	6		

6. How did you travel to the area? **[PLEASE CIRCLE ONE ONLY]**

Walk	1	Train	6
Bus	2	Cycle	7
Car	3	Other: **Please Specify**	8
Taxi	4		
Electrical goods	5		

7. In total, how much do you intend to spend/have you spent during your visit today? **[PLEASE CIRCLE ONE ONLY]**

£0	1	£31 – 40	6
£0 - £10	2	£41 – 50	7
£11 - £20	3	£51 or more	8
£21 - £30	4		

8. How long have you been visiting the town? **[PLEASE CIRCLE ONE ONLY]**

Less than 6 months	1
At least 6 months but less than 1 year	2
At least 1 year but less than 2 years	3
At least 2 years but less than 5 years	4
More than 5 years	5

Town Centre

9. Overall, what is your perception of the town centre? **[PLEASE CIRCLE ONE ONLY]**

Very poor	1
Poor	2
Average	3
Good	4
Very good	5

Please comment: ______________________________

10. Please score your current opinion of the following aspects of the town centre (Scale 1 – 10, 1 very poor, 5 average, 10 – very good) **[PLEASE INSERT FOR EACH]**

Range of goods and services available	
Condition of buildings	
Condition of streets/public realm – clean, well maintained, attractive	
Number of public car park spaces	
Price of public car park spaces	
Safety	
Lighting	
On-street entertainment	
Levels of anti-social behaviour	
Vandalism	
Vacant shops	
Amount of dereliction	
Convenience	
Friendliness of staff/people	
Variety of shops	
Good atmosphere	
Quality of shops	
Cafes	
Children's play areas	
Parking	
Value for money	
Presence of pedestrian area	
Flower arrangements, street banners	

11. What three aspects of the town could be improved? **[PLEASE RANK 1,2,3]**

Wider variety of shops	
More shops	
Better quality of shops	
Better maintained buildings	
Better maintained public spaces	
Better parking – cost	
Better parking – number of spaces	
More for children/teenagers	
More recreation facilities	
More Public toilets	
Better bus service	
Improved safety	
Improved street lighting	
Improved signage	

Background Information

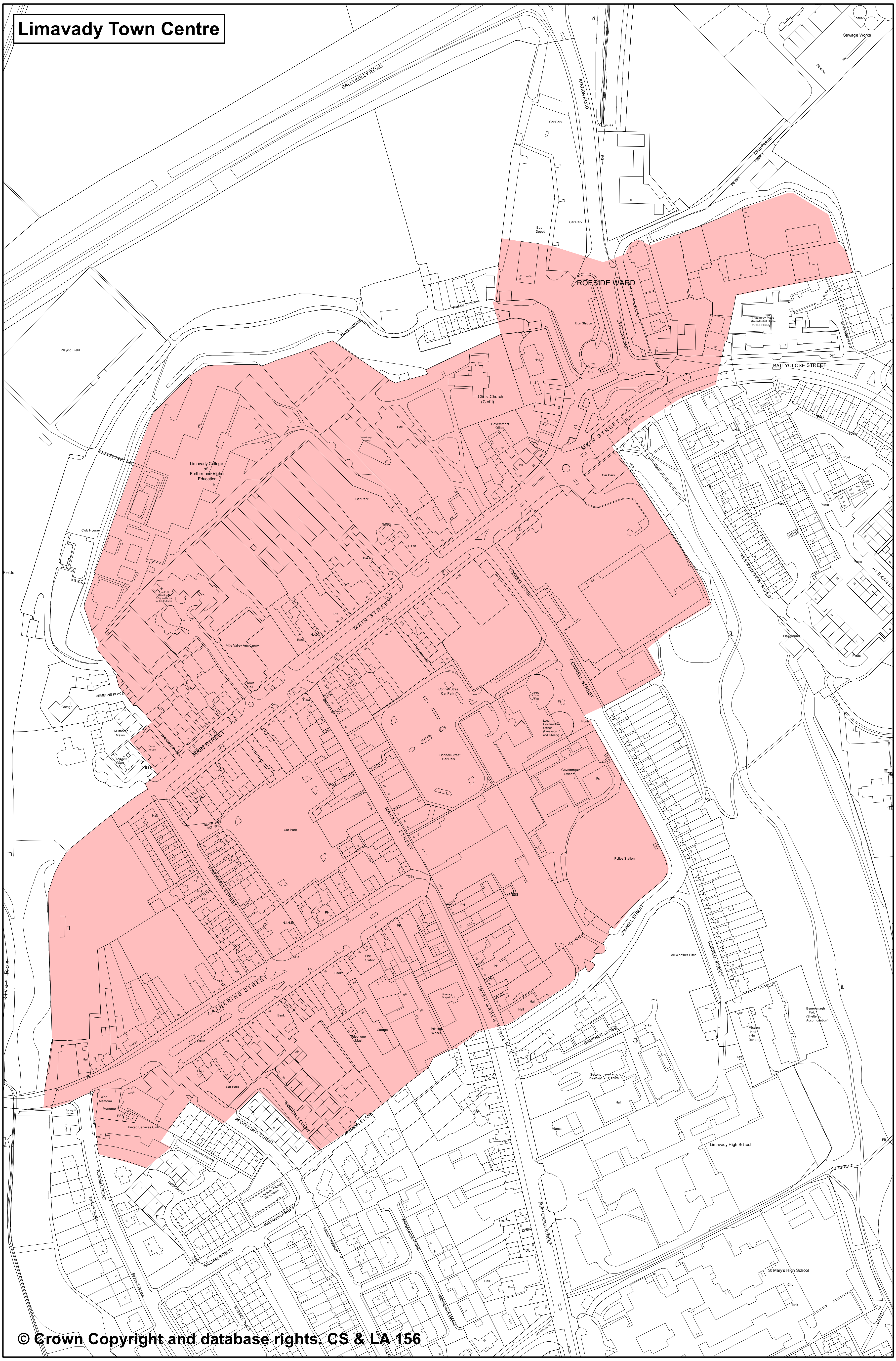
Male	1	Female	2
Age (Years)			

Thank you for your participation.

Date: _____________

Location: _____________

Limavady Town Centre



Sproule Consulting

FINAL REPORT:

21st April 2017

Causeway Coast & Glens Borough Council

Dr Jenny Sproule

EMAIL: jenny.sproule@btinternet.com

EXECUTIVE SUMMARY

- 63% of business owners / managers described their main business type as 'other' – these included: café / coffee shop (n=6); hotel / bed and breakfast (n=3); estate agent (n=2) etc; 10% described it as entertainment or leisure (gym, arcade etc).

- 40% traded in their current premises for between 1-10 years; 30% had been trading in their current premises for between 11-20 years; 13% had been trading in their current town centre premises for between 21-30 years.

- 85% described their business ownership as an independent trader / retailer; 5% were part of a national chain; 3% were part of a local chain, 3% part of a multi-national chain and 3% were part of a franchise.

- 58% described their turnover in the last business year as average (normal); 15% reported that their turnover was below average and a further 15% reported their turnover as being above average; 5% described their turnover as well below average, whilst 3% confirmed that their turnover was well above average.

- 73% had invested money in improvements to their business in the last year.

- 38% had invested in technology, 53% in building works and 43% in staff development.

- Respondents who confirmed they had invested money in their businesses were statistically significantly more likely to describe their turnover as average.

- 93% of businesses had full-time staff, 68% had part-time staff, 8% had volunteers working more than 16 hours per week and 5% had volunteers working less than 16 hours per week.

- 187 staff were employed on a full-time basis, 104 were employed on a part-time basis, giving a total of 291 staff employed in either a full-time or part-time capacity; 6 people (n=3) were involved as volunteers for more than 16 hours per week; a further 3 (n=2) volunteered for less than 16 hours.

- 85% employed between 1-10 full-time staff, 3% of businesses employed between 11-20 full-time staff; 3% employed between 21-30 full-time staff, 3% employed between 41-50.

- 63% of businesses employed between 1-10 part-time staff and 5% employed between 11-20 people.

- 8% of businesses reported having between 1-10 people volunteer 16+ hours per week.
- 5% reported having between 1-10 volunteers involved for less than 16 hours each per week.

- 51% described their overall perception of Portrush town centre as very poor/poor; 45% reported that their perception of the town centre was average, whilst 5% stated that it was good.

Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Portrush town centre (1 very poor and 10 very good). The results are shown in detail in Table 20. For further clarity Table 21 sets out a summary of poor scores (1-4), average (5) and good scores (6-10).

- As shown, the highest level of 'good' scores were for the following aspects:

  - Friendliness of staff / people (88%);
  - Cafes (85%);
  - Good atmosphere (75%); and,
  - Pedestrian access (65%).

- The highest level of 'average' scores were for the following aspects:

  - Vandalism (45%);
  - Lighting (40%);
  - Condition of buildings (38%); and,
  - Value for money (35%).

- The highest level of 'poor' scores were for the following aspects:
  - Parking (65%);
  - Amount of dereliction (63%);
  - Number of public car parking spaces (60%); and,
  - Children's play areas (58%).

- Respondents were asked to rank their top three priorities for improvement in Portrush. Table 22 provides a comprehensive breakdown of the findings. These included:

1st PRIORITY:	Better parking – number of spaces (25%); Better maintained buildings (20%); Better quality of shops (10%); and, More public toilets (8%).
2nd PRIORITY:	More for children / teenagers (18%); Wider variety of shops (15%); Better maintained public spaces (10%); More shops (10%); More public toilets (10%); and, More recreational facilities (10%).
3rd PRIORITY:	More public toilets (15%); Better parking – number of spaces (13%); Better maintained buildings (10%); More recreation facilities (10%); and, Improved street lighting (10%).

- The combined highest (1st, 2nd and 3rd) priority included: better parking – number of spaces (43); better maintained buildings (35) and more public toilets (33).

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***PLEASE NOTE THAT DUE TO ROUNDING SOME TABLES MAY NOT TOTAL 100.**

1. INTRODUCTION

Causeway Coast and Glens Borough Council (CCGBC) commissioned Sproule Consulting to conduct business and general public surveys in each of the six main towns within the Borough. Table 1 provides a comprehensive breakdown of the number of surveys completed.

TABLE 1: Completed Surveys		
	On-Street (General Public)	Business
Coleraine	100	100
Ballymoney	100	90
Portrush	100	40
Portstewart	100	40
Limavady	100	78
Ballycastle	100	54
TOTAL	600	402

The purpose of this Report is to provide empirical data to inform CCGBC's Local Development Plan for the Portrush area. The survey findings set out in this Business Report, together with the data collated from the general public, will be instrumental in establishing stakeholders' and users' attitudes and perceptions of Portrush town centre.

2. RESEARCH: KEY OBJECTIVES

The key objectives of this research are shown in Figure 1.

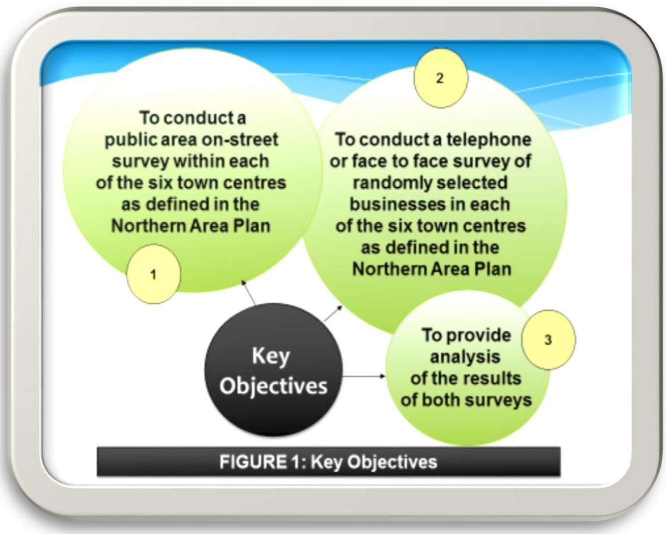


FIGURE 1: Key Objectives

3. DEMOGRAPHIC PROFILE OF BUSINESS OWNERS / MANAGERS SURVEYED

Forty per cent of the business owners / managers surveyed were male, 30% were female; the remaining 30% made no comment (Table 2).

TABLE 2: Gender (n=40)	
Male	40
Female	30
No Comment	30

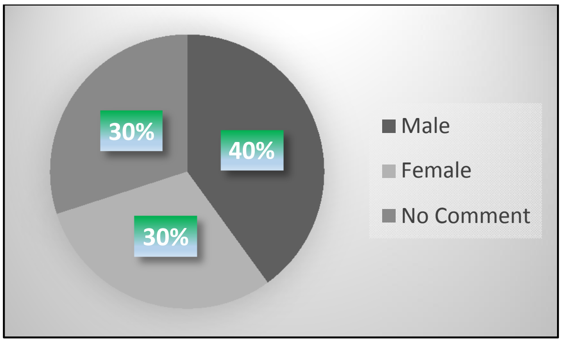
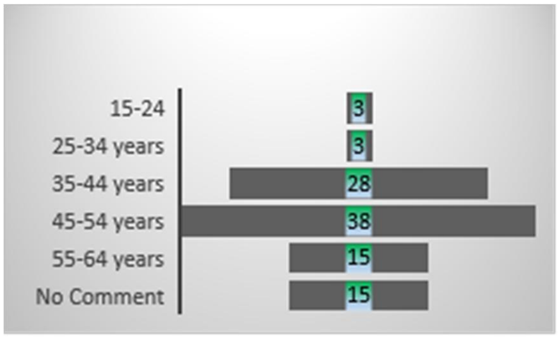
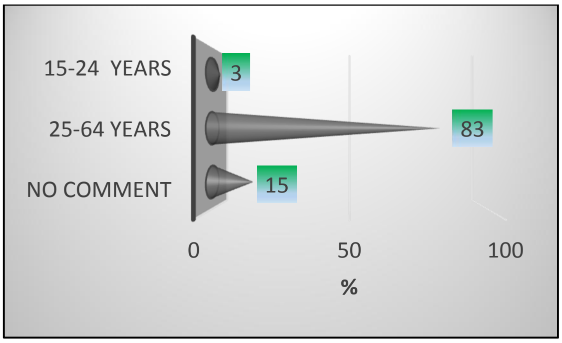


Table 3 sets out the achieved age profile.





4. BUSINESS SURVEY FINDINGS - PORTRUSH TOWN CENTRE

4.1 TYPE OF MAIN BUSINESS?

Sixty-three per cent of business owners / managers described their main business type as 'other'; 10% described it as entertainment or leisure (gym, arcade etc) (Table 3).

TABLE 3: Type of Main Business (n=40)	
Clothing / footwear / jewellery / accessories	3
Hairdressing	3
Pet food/accessories	3
Pharmacy	8
Optician	3
Entertainment or leisure (gym, arcade, etc.)	10
Charity	3
Groceries	8
Other: Please Specify	63

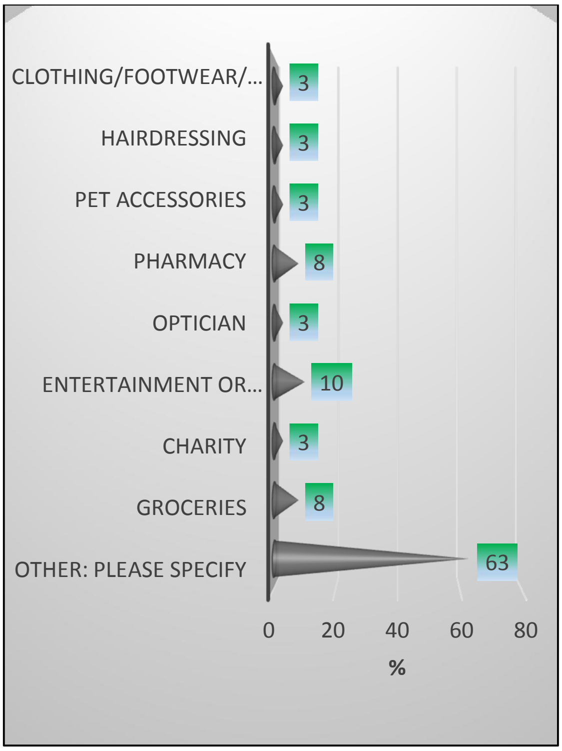


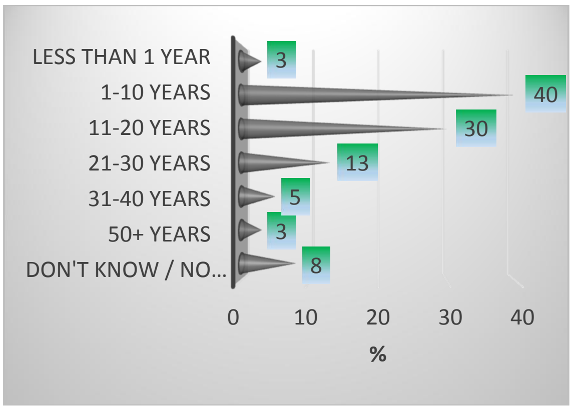
Table 4 provides a comprehensive breakdown of the range of 'other' businesses types included.

TABLE 4: Type - Other (n=25)	
Fancy goods	1
Café/coffee shop	6
Gift shop	1
Estate agent	2
Hotel/bed and breakfast	3
Interiors	1
E-cig shop	1
Travel agents	1
Banking	1
Vintage	1
Restaurant	1
Bookmakers	1
Butchers	1
Chip shop	1
Dressmaker	1
Bakery	1
Gallery	1

4.2 HOW MANY YEARS HAVE YOU TRADED IN THESE PREMISES?

Forty per cent had traded in their current premises for between 1-10 years (Table 5); 30% had been trading in current premises for between 11-20 years; 13% had been trading in the town centre between 21-30 years.

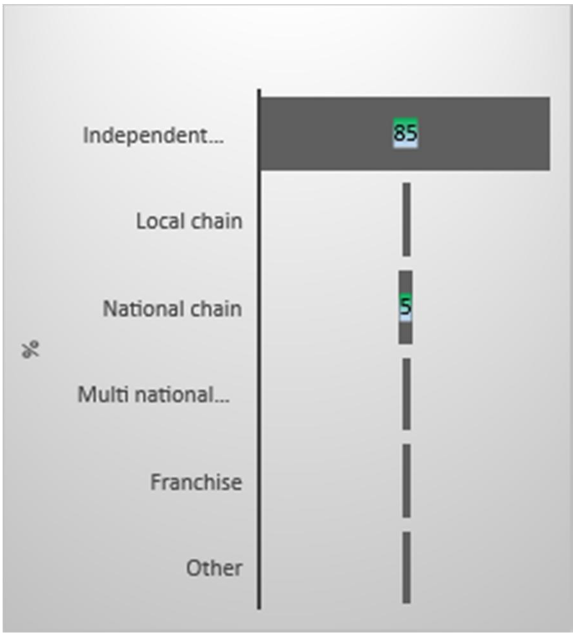
TABLE 5: How many years have you traded in these premises – Grouped (N=40)	
Less than 1 year	3
1-10 years	40
11-20 years	30
21-30 years	13
41-50 years	5
50+ years	3
Don't Know / No Comment	8



4.3 WHAT IS THE OWNERSHIP OF YOUR BUSINESS

Eighty-five per cent of business respondents described their business ownership as being an independent trader / retailer; 5% were part of a national chain; 3% confirmed they were part of a local chain, 3% part of a multi-national chain, 3% were part of a franchise and 3% reported being other (Table 6).

TABLE 6: What is the ownership of your business? (n=40)	
Independent trader/retailer	85
Local chain	3
National chain	5
Multinational chain	3
Franchise	3
Other: Please Specify	3



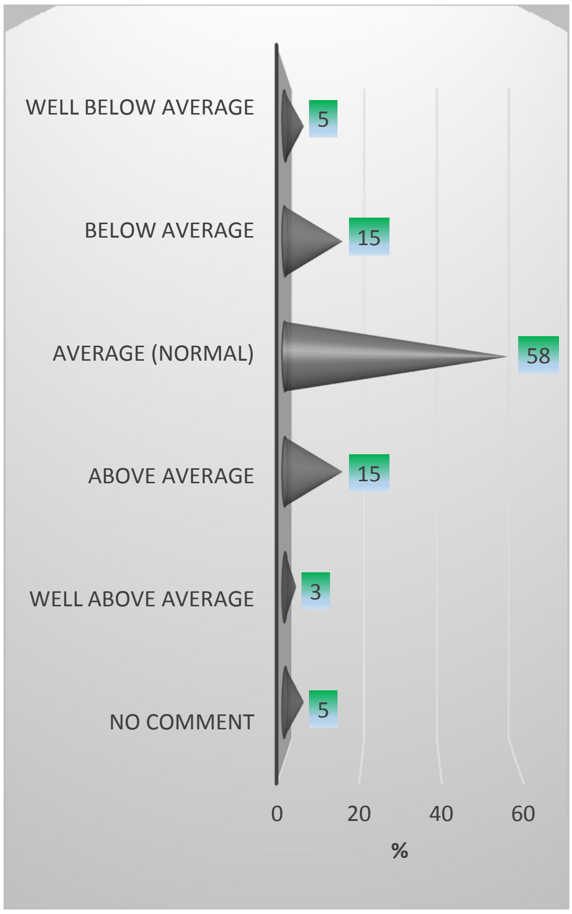
The 'other' form of ownership is listed in Table 7.

TABLE 7: Type of Ownership – Other (n=1)	
Partnership	1

4.4 HOW WOULD YOU DESCRIBE YOUR TURNOVER IN THE LAST BUSINESS YEAR?

Fifty-eight percent of respondents described their turnover in the last business year as average (normal); 15% reported that their turnover was below average and a further 15% reported their turnover as being above average. Five per cent described their turnover as well below average, whilst 3% confirmed that their turnover was well above average (Table 8).

TABLE 8: How would you describe your turnover in the last business year? (n=40)	
Well below average	5
Below average	15
Average (normal)	58
Above average	15
Well above average	3
No Comment	5

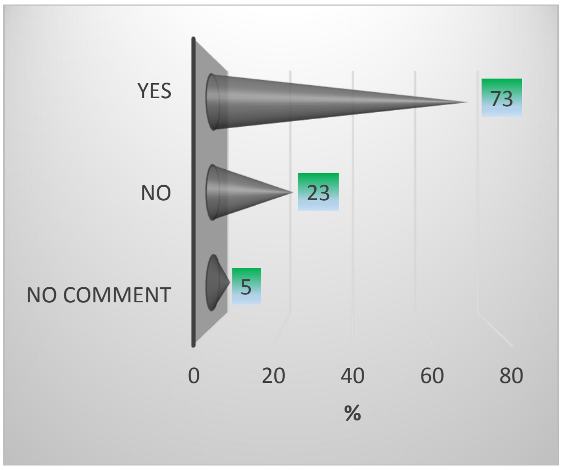


4.5 HAVE YOU INVESTED MONEY IN IMPROVEMENTS TO YOUR BUSINESS IN THE LAST YEAR?

Almost three quarters of respondents (73%) confirmed that they had invested money in improvements to their business in the last year (Table 9).

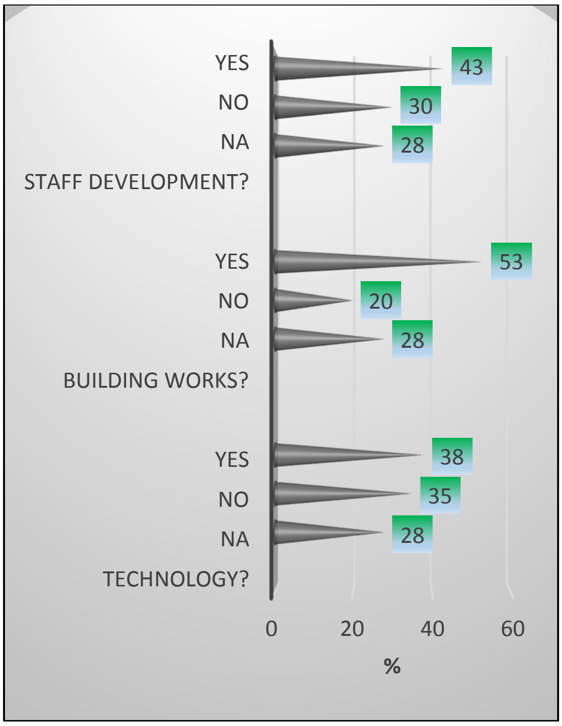
Some 38% confirmed that they had invested in technology, 53% in building works and 43% in staff development (Table 10).

TABLE 9: Have you invested money in improvements to your business in the last year? (n=40)	
Yes	73
No	23
No Comment	5



Respondents who confirmed they had invested money in their businesses were statistically significantly more likely to describe their turnover as average.

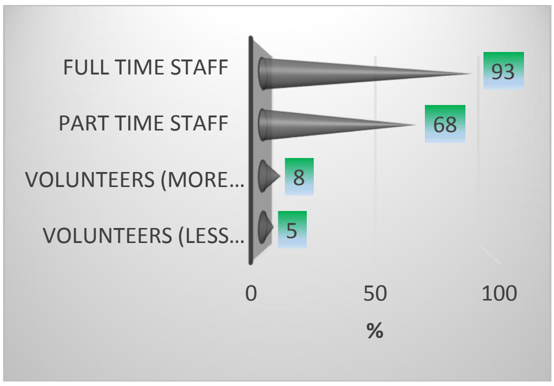
TABLE 10: Invested in...? (n=40)	
Technology	38
Building Works	53
Staff Development	43



4.6 HOW MANY PEOPLE ARE CURRENTLY INVOLVED IN YOUR BUSINESS (INCLUDING ANY WORKING OWNERS)?

Ninety-three percent of businesses had full-time staff, 68% had part-time staff, 8% had volunteers working more than 16 hours per week and 5% had volunteers working less than 16 hours per week.

TABLE 11: Businesses with... (n=40)	
Full time staff	93
Part time staff	68
Volunteers (more than 16 hours)	8
Volunteers (less than 16 hours)	5



As shown in Table 12, 187 staff were employed on a full-time basis, 104 were employed on a part-time basis, giving a total of 291 staff employed in either a full-time or part-time capacity. Six people (n=3) were involved as volunteers for more than 16 hours per week, whilst a further 3 (n=2) volunteered for less than 16 hours.

TABLE 12: How many people are currently involved in your business (including any working owners) (n=40)

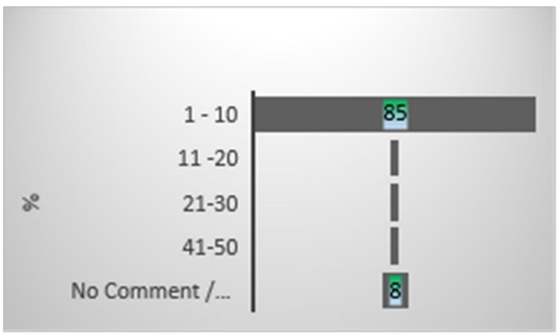
		Total
Full time (more than 30 hours)	187	291
Part time (up to 30 hours)	104	
Volunteers (more than 16 hours)	6	9
Volunteers (less than 16 hours)	3	
		300

4.6.1 FULL TIME (MORE THAN 30 HOURS)

Just over four-fifths of businesses (85%) employed between 1-10 full-time staff, 3% of businesses employed between 11-20 full-time staff; 3% employed between 21-30 full-time staff, 3% employed between 41-50 (Table 13).

TABLE 13: How many people are currently involved in your business (Full-Time) (including any working owners) (n=40)

1 - 10	85
11 -20	3
21 - 30	3
41 - 50	3
No Comment / NA	8

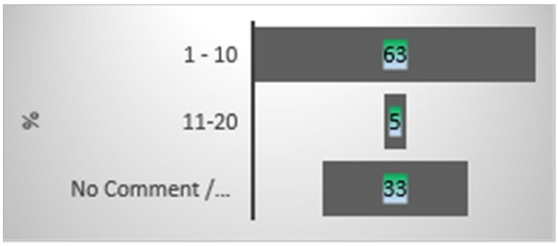


4.6.2 PART TIME (UP TO 30 HOURS)

Sixty-three per cent of businesses employed between 1-10 part-time staff and 5% employed between 11-20 people (Table 14).

TABLE 14: How many people are currently involved in your business (Part-Time) (including any working owners) (n=40)

1 - 10	63
11 - 20	5
No Comment / NA	33



4.6.3 VOLUNTEERS (MORE THAN 16 HOURS PER WEEK)

As shown in Table 15, 8% of businesses reported having between 1-10 people volunteer 16+ hours per week.

TABLE 15: How many people are currently involved in your business (volunteers 16+ hours) (including any working owners) (n=40)

1 - 10	8
No Comment / NA	92

4.6.4 VOLUNTEERS (LESS THAN 16 HOURS PER WEEK)

Five per cent of businesses reported having between 1-10 volunteers involved for less than 16 hours each per week (Table 16).

TABLE 16: How many people are currently involved in your business (volunteers less than 16 hours) (including any working owners) (n=40)

1 - 10	5
No Comment / NA	95

4.7 OVERALL, WHAT IS YOUR PERCEPTION OF THE TOWN CENTRE?

Over half of respondents (51%) described their overall perception of Portrush town centre as very poor/poor (Tables 17 and 18). Forty-five per cent reported that their perception of the town centre was average, whilst 5% stated that it was good.

TABLE 17: Overall, what is your perception of the town centre? (n=40)

Very poor	8
Poor	43
Average	45
Good	5

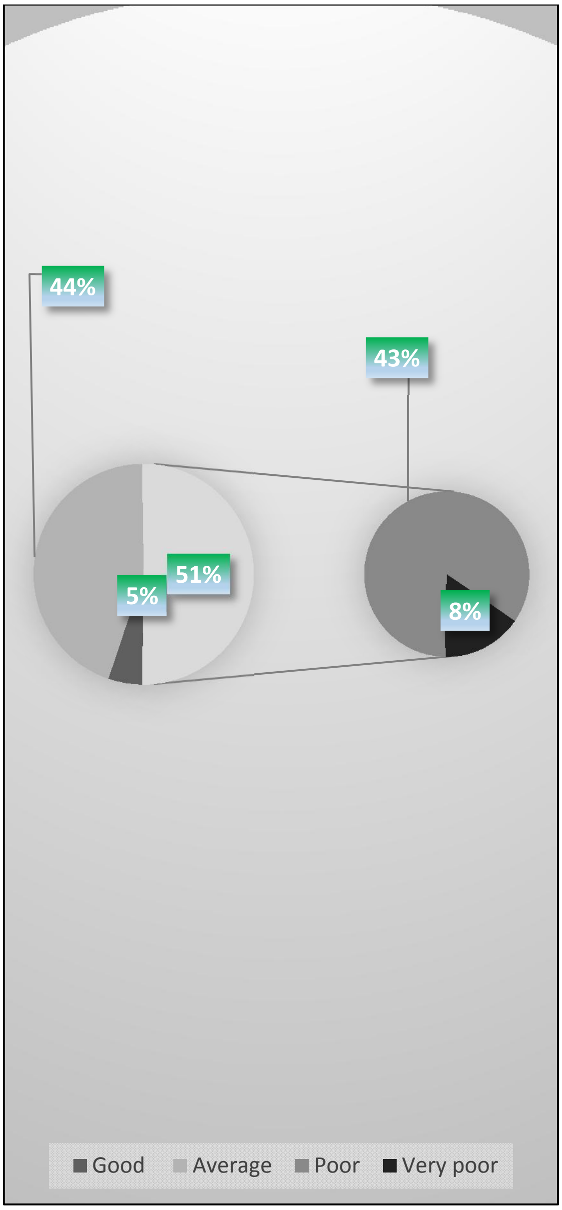
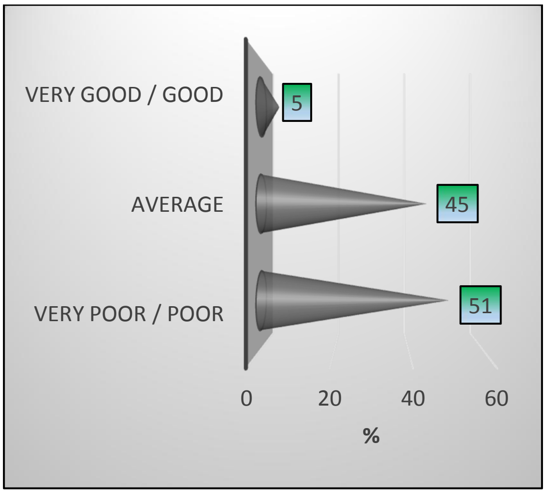


TABLE 18: Overall, what is your perception of the town centre? (n=40)

Very poor / poor	51
Average	45
Very good / good	5



8

4.8 OTHER COMMENTS - PERCEPTION

Table 19 sets out a comprehensive breakdown of other comments relating to perception.

TABLE 19: Perception town centre - Other (n=5)

Improvements made in 2012 have made difference	1
Not much happening in it	1
Needs total facelift	1
Too many dilapidated buildings	1
Tired, dated, run down/dated/dull tired look	1

4.9 PLEASE SCORE YOUR CURRENT OPINION OF THE FOLLOWING ASPECTS OF THE TOWN CENTRE (SCALE 1 – 10, 1 VERY POOR, 5 AVERAGE, 10 - VERY GOOD)

Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Portrush town centre (1 very poor and 10 very good). The results are shown in detail in Table 20. For further clarity Table 21 sets out a summary of poor scores (1-4), average (5) and good scores (6-10).

As shown, the highest level of 'good' scores were for the following aspects:

- Friendliness of staff / people (88%);
- Cafes (85%);
- Good atmosphere (75%); and,
- Pedestrian access (65%).

The highest level of 'average' scores were for the following aspects:

- Vandalism (45%);
- Lighting (40%);
- Condition of buildings (38%); and,
- Value for money (35%).

The highest level of 'poor' scores were for the following aspects:

- Parking (65%);
- Amount of dereliction (63%);
- Number of public car parking spaces (60%); and,
- Children's play areas (58%).

TABLE 20: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Scores (n=40)

	0	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**No Comment**	*Rounded to 100
Condition of streets/public realm – clean, well maintained, attractive	0	0	10	5	10	38	8	10	8	0	0	13	100
Flower arrangements, street banners	0	10	8	15	8	28	13	5	8	0	8	0	100
Lighting	0	0	5	10	3	40	10	10	15	3	5	0	100
Parking	0	20	15	25	5	23	5	3	5	0	0	0	100
Number of public car park spaces	0	15	10	25	10	20	5	3	8	0	5	0	100
Price of public car park spaces	0	3	0	3	0	23	3	0	5	3	50	13	100
Ease of moving around town centre	0	8	3	13	5	23	18	18	10	0	5	0	100
Pedestrian access	0	0	0	10	8	18	8	18	35	3	3	0	100
Variety of shops	0	5	18	15	8	20	18	8	10	0	0	0	100
Quality of shops	0	8	15	13	3	25	10	10	10	0	8	0	100
Range of goods and services available	0	3	10	13	13	25	15	13	5	3	3	0	100
Cafes	0	0	0	3	0	10	10	30	13	10	23	3	100
Value for money	0	3	0	8	0	35	13	15	13	8	8	0	100
Friendliness of staff/people	0	0	0	0	0	13	5	10	30	13	30	0	100
Good atmosphere	0	0	0	5	0	20	3	23	25	8	18	0	100
On-street entertainment	0	18	20	3	10	23	10	8	3	3	5	0	100
Safety	0	3	0	3	5	30	10	20	18	5	8	0	100
Condition of buildings	0	5	8	10	18	38	13	8	3	0	0	0	100
Vacant shops (if a lot = poor score)	0	5	8	18	15	20	8	10	15	3	0	0	100
Amount of dereliction (if a lot = poor score)	0	8	8	25	23	28	3	3	5	0	0	0	100
Vandalism (if a lot = poor score)	0	3	3	8	5	45	13	13	8	3	0	3	100
Children's play areas	0	13	5	10	10	30	13	5	13	3	0	0	100
Levels of anti-social behaviour (if a lot = poor score)	0	18	20	15	5	15	13	8	3	0	3	3	100
	0	148	166	255	164	590	227	251	268	68	182	35	-

Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Scores (n=40)

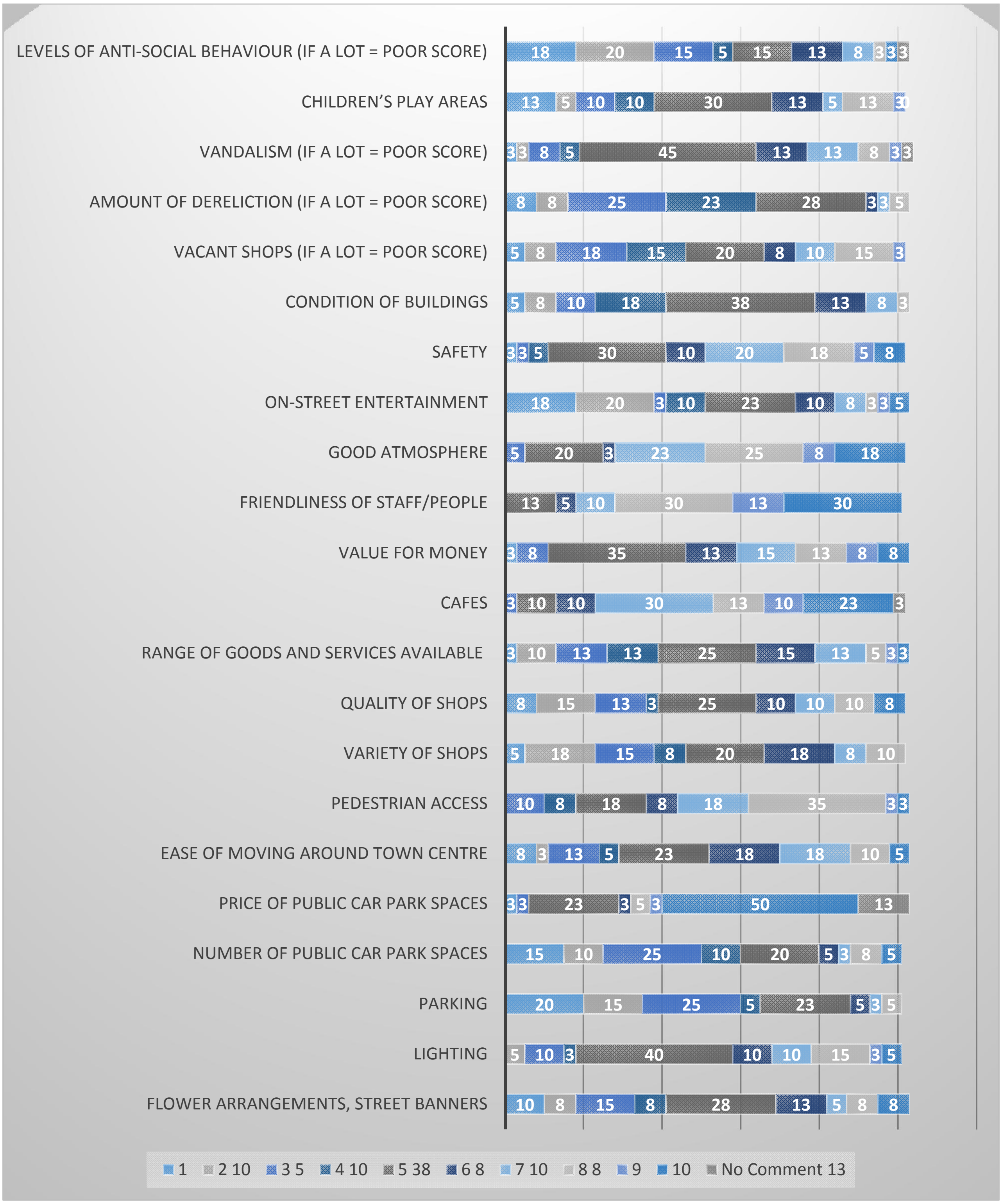
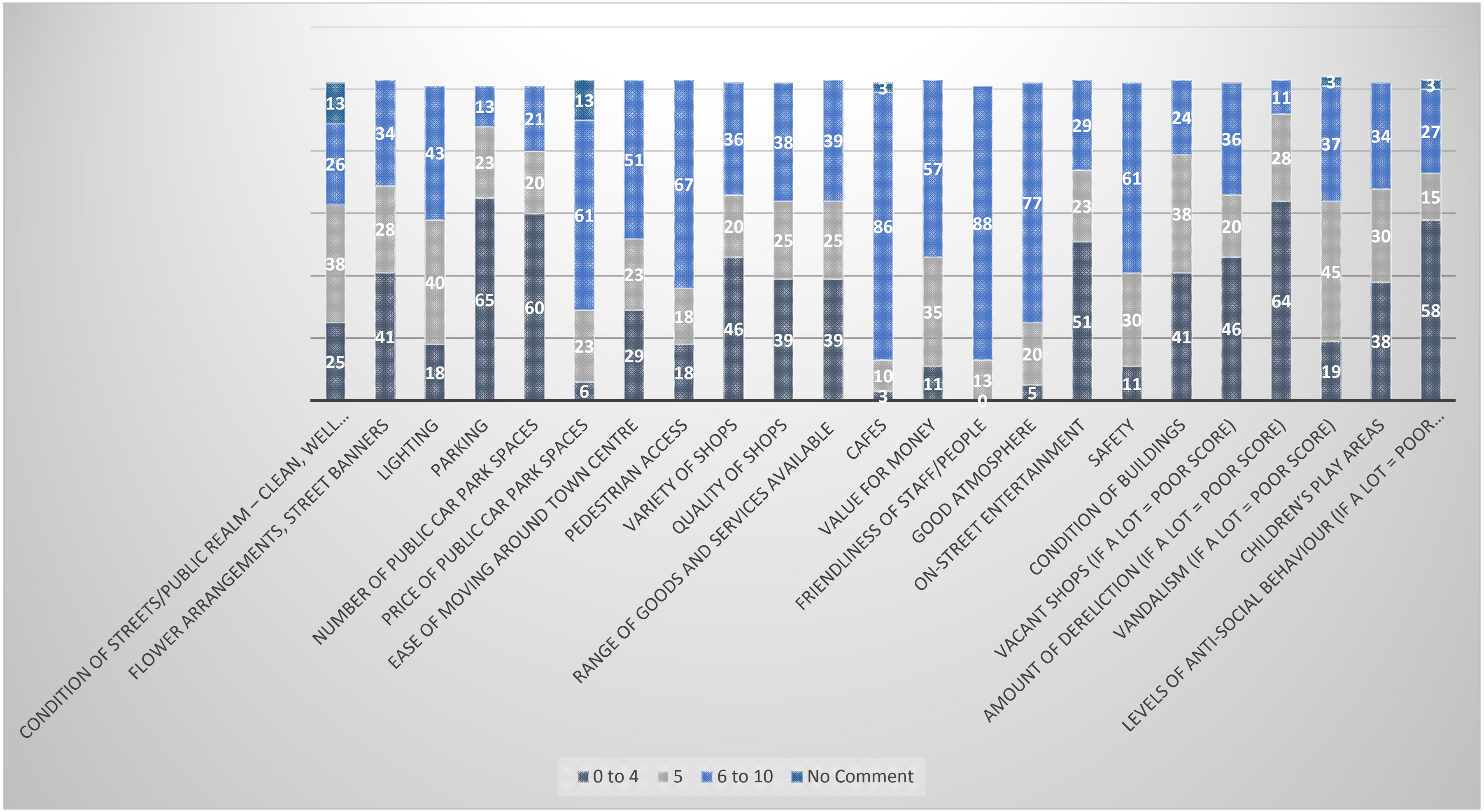


TABLE 21: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Grouped Scores (n=40)

	0 to 4	**5**	**6 to 10**	**No Comment**	***Rounded to 100**
Condition of streets/public realm – clean, well maintained, attractive	*25*	38	25	13	100
Flower arrangements, street banners	*40*	28	33	0	100
Lighting	*18*	40	43	0	100
Parking	*65*	23	13	0	100
Number of public car park spaces	*60*	20	20	0	100
Price of public car park spaces	*5*	23	60	13	100
Ease of moving around town centre	*28*	23	50	0	100
Pedestrian access	*18*	18	65	0	100
Variety of shops	*45*	20	35	0	100
Quality of shops	*38*	25	38	0	100
Range of goods and services available	*38*	25	38	0	100
Cafes	*3*	10	85	3	100
Value for money	*10*	35	55	0	100
Friendliness of staff/people	*0*	13	88	0	100
Good atmosphere	*5*	20	75	0	100
On-street entertainment	*50*	23	23	5	100
Safety	*10*	30	60	0	100
Condition of buildings	*40*	38	23	0	100
Vacant shops (if a lot = poor score)	*45*	20	35	0	100
Amount of dereliction (if a lot = poor score)	*63*	28	10	0	100
Vandalism (if a lot = poor score)	*18*	45	35	3	100
Levels of anti-social behaviour (if a lot = poor score)	*38*	30	33	0	100
Children's play areas	*58*	15	25	3	100
TOTAL	720	590	967	35	-

Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Grouped Scores (n=40)



4.10 WHAT THREE ASPECTS OF THE TOWN COULD BE IMPROVED?

Respondents were asked to rank their top three priorities for improvement in Portrush. Table 22 provides a comprehensive breakdown of the findings. These included:

4.10.1 FIRST PRIORITY – IMPROVEMENT

- Better parking – number of spaces (25%);
- Better maintained buildings (20%);
- Better quality of shops (10%); and,
- More public toilets (8%).

4.10.2 SECOND PRIORITY - IMPROVEMENT

- More for children / teenagers (18%);
- Wider variety of shops (15%);
- Better maintained public spaces (10%);
- More shops (10%);
- More public toilets (10%); and,
- More recreational facilities (10%).

4.10.3 THIRD PRIORITY - IMPROVEMENT

- More public toilets (15%);
- Better parking – number of spaces (13%);
- Better maintained buildings (10%);
- More recreation facilities (10%); and,
- Improved street lighting (10%).

The combined highest (1st, 2nd and 3rd) priority included: better parking – number of spaces (43); better maintained buildings (35) and more public toilets (33).

TABLE 22: What three aspects of the town could be improved? (n=40)

	1st	2nd	3rd	TOTAL
Wider variety of shops	5	15	5	25
More shops	8	10	5	23
Better quality of shops	10	0	8	18
Better maintained buildings	20	5	10	35
Better maintained public spaces	3	10	0	13
Better parking – cost	0	3	0	3
Better parking – number of spaces	25	5	13	43
More for children/teenagers	5	18	5	28
More recreation facilities	5	10	10	25
More Public toilets	8	10	15	33
Better bus service	0	0	0	0
Improved safety	0	0	5	5
Improved street lighting	0	0	10	10
Improved signage	0	3	3	6
NA/No Comment	13	13	13	39
TOTAL	110	89	115	-

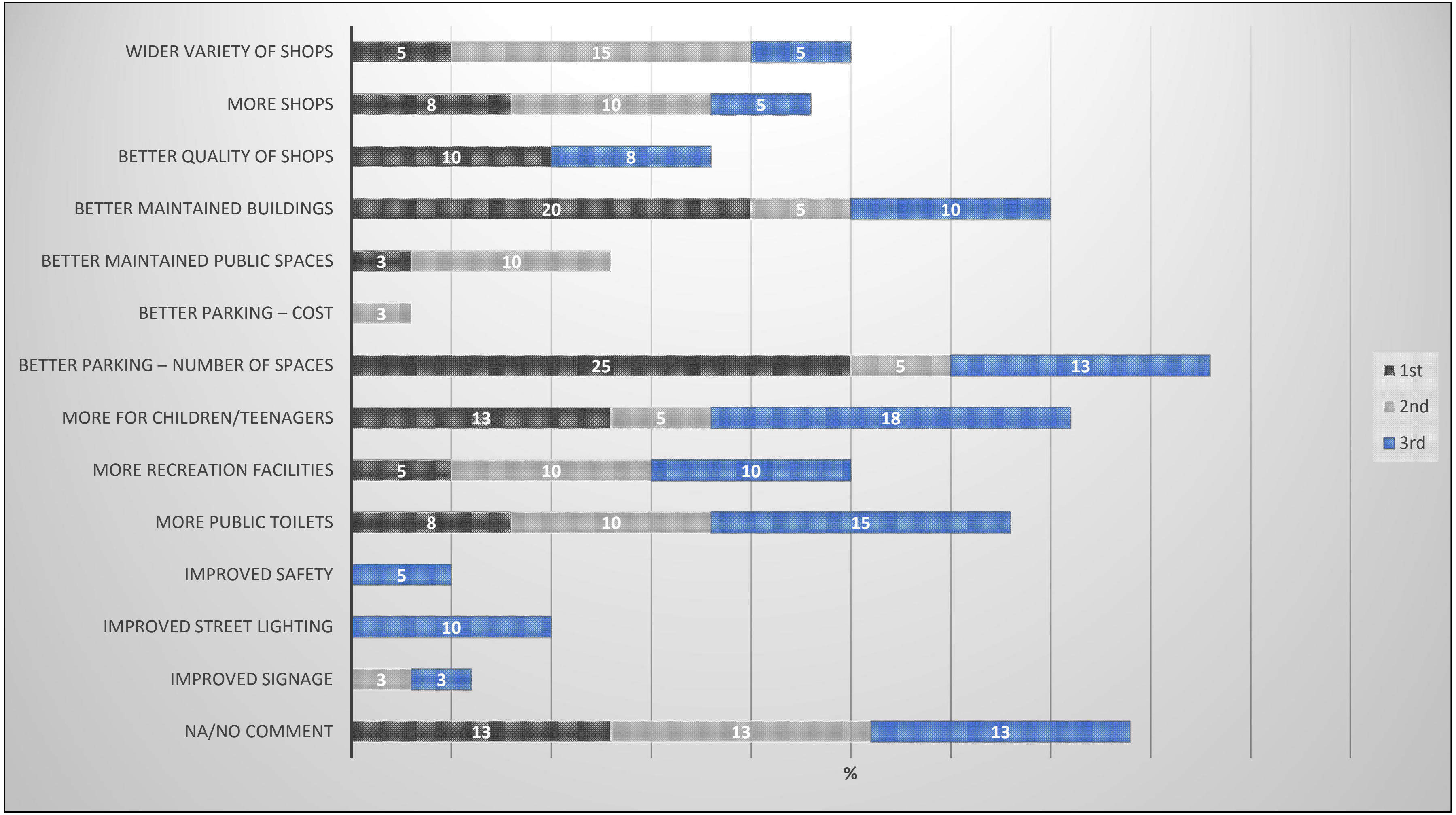
4.11 OTHER COMMENTS

Other comments are set out in Table 23.

TABLE 23: Any other comments (n=3)

Better disabled access	1
Speed bumps	1
Town centre map should include Antrim Gardens	1

What three aspects of the town could be improved? (n=40)



APPENDIX 1: Business Questionnaire Portrush and Map of Town Centre Area

BUSINESS SURVEY

February 2017

Causeway Coast and Glens Borough Council would like to invite you to participate in a Business Survey to enable it to better understand business owners'/managers' perceptions of the town centre.

The findings from this research will be used by the Council to inform its Local Development Plan and may include the identification of lands for future retail development and the production of land use policies to guide development proposals.

The Business Survey will take approximately 4 minutes to complete. All responses will be treated with strict confidentiality.

The town centre area is shown on the map attached.

If you have any queries, please contact Sharon Mulhern from Causeway Coast & Glens Borough Council using telephone number 028 70347244 or Dr Jenny Sproule from *Sproule Consulting* on 07860 342493.

Yours Faithfully

Sharon Mulhern

Local Development Plan Manager

Causeway Coast & Glens Borough Council

Date: ________

Business Profile

1. Business Name: ___________________________
2. Business Address: ___________________________
3. Type of Main Business: **[PLEASE CIRCLE ONE ONLY]**

Clothing/footwear/jewellery/accessories	1
Health & beauty	2
Hairdressing	3
Homeware	4
Pet food/accessories	5
Books/newsagent/stationery	6
Pharmacy	7
Optician	8
Doctor/Dentist	9
Entertainment or leisure (gym, arcade, etc)	10
Charity	11
Department store	12
Groceries	13
Other: **Please Specify**	14

4. How many years have you traded in these premises? _________________________________

5. What is the ownership of your business? **[PLEASE CIRCLE ONE ONLY]**

Independent trader/retailer	1
Local chain	2
National chain	3
Multi national chain	4
Franchise	5
Other: **Please Specify**	6

6. How would you describe your current turnover / turnover in last year? **[PLEASE CIRCLE ONE ONLY]**

Well below average	1
Below average	2
Average (normal)	3
Above average	4
Well above average	5

7. Have you/the business owner invested capital in improvements to your business in the last year? **[PLEASE CIRCLE ONE ONLY]**

Yes	1
No	2

8. How many people are currently involved in running your business (including any working owners)? **[PLEASE INSERT FOR EACH]**

Full time (more than 30 hours)	
Part time (up to 30 hours)	
Volunteers (16 hours+)	
Volunteers (16 hours or less)	

Town Centre Perceptions

9. Overall, what is your perception of the town centre? **[PLEASE CIRCLE ONE ONLY]**

Very poor	1
Poor	2
Average	3
Good	4
Very good	5

Please comment: _______________________________

10. Please score your current opinion of the following aspects of the town centre (Scale 1 – 10, 1 very poor, 5 average, 10 – very good) **[PLEASE INSERT FOR EACH]**

Range of goods and services available	
Condition of buildings	
Condition of streets/public realm – clean, well maintained, attractive	
Number of public car park spaces	
Price of public car park spaces	
Safety	
Lighting	
On-street entertainment	
Levels of anti-social behaviour	
Vandalism	
Vacant shops	
Amount of dereliction	
Convenience	
Friendliness of staff/people	
Variety of shops	
Good atmosphere	
Quality of shops	
Cafes	
Children's play areas	
Parking	
Value for money	
Presence of pedestrian area	
Flower arrangements, street banners	

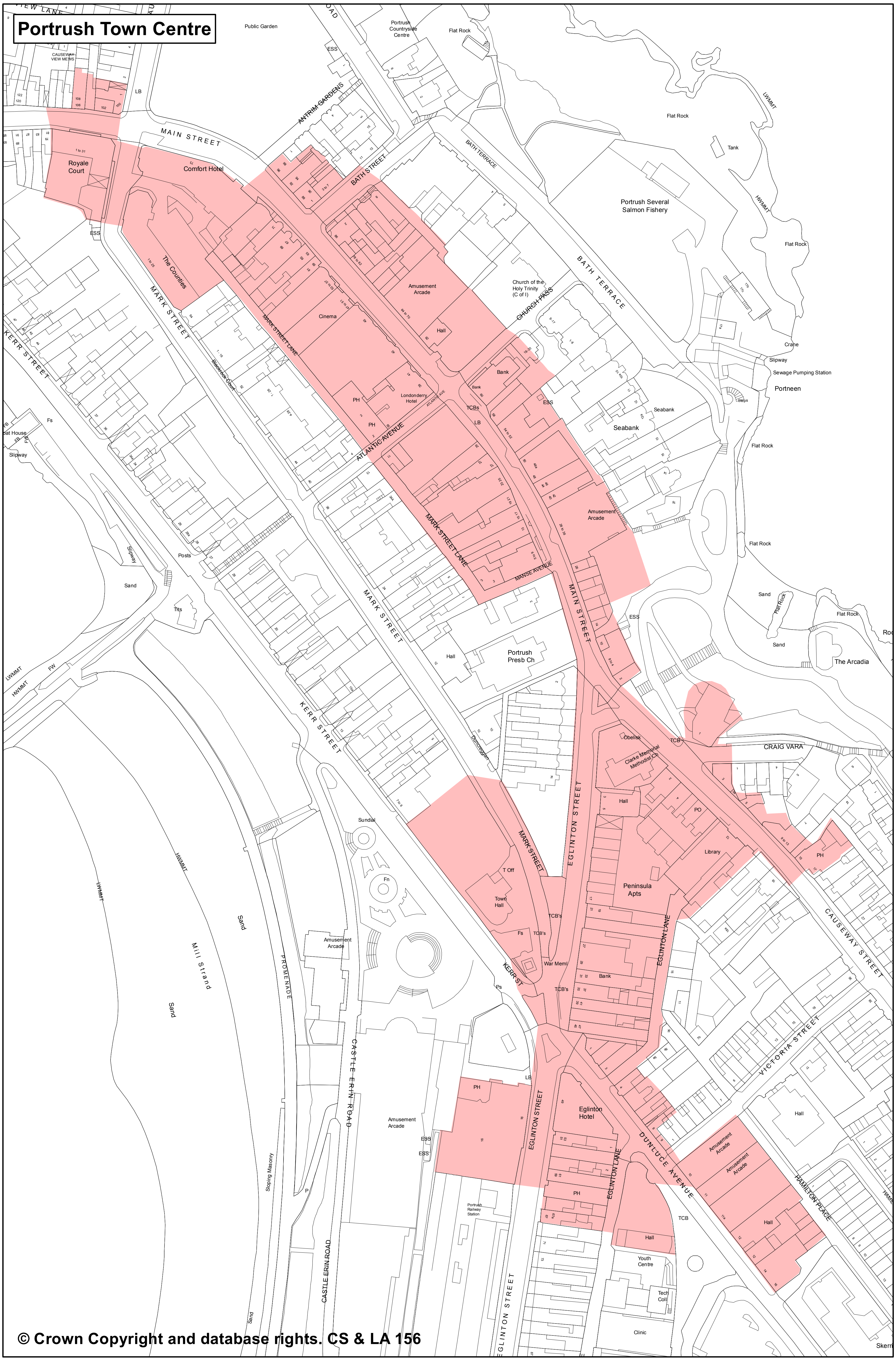
11. What three aspects of the town could be improved? **[PLEASE RANK 1,2,3]**

Wider variety of shops	
More shops	
Better quality of shops	
Better maintained buildings	
Better maintained public spaces	
Better parking – cost	
Better parking – number of spaces	
More for children/teenagers	
More recreation facilities	
More Public toilets	
Better bus service	
Improved safety	
Improved street lighting	
Improved signage	

Background Information

Male	1	Female	2
Age (Years)			

Thank you for your participation.


Portrush Town Centre
Public Garden
Portrush Countryside Centre
Flat Rock
ANTRIM GARDENS
MAIN STREET
BATH STREET
BATH TERRACE
Royale Court
Comfort Hotel
Portrush Several Salmon Fishery
Tank
The Countless
MARK STREET
MARK STREET LANE
Cinema
Amusement Arcade
Hall
Church of the Holy Trinity (C of I)
CHURCH PASS
Bank
Londonderry Hotel
ATLANTIC AVENUE
KERR STREET
Crane
Slipway
Sewage Pumping Station
Portneen
Seabank
Sand
MANSE AVENUE
Portrush Presb Ch
The Arcadia
CRAIG VARA
Obelisk
Clarke Memorial Methodist Ch
EGLINTON STREET
PO
Library
Peninsula Apts
T Off
Town Hall
War Meml
KERR ST
EGLINTON LANE
Sundial
Amusement Arcade
PROMENADE
CASTLE ERIN ROAD
Mill Strand
CAUSEWAY STREET
VICTORIA STREET
PH
Eglinton Hotel
DUNLUCE AVENUE
HAMILTON PLACE
Portrush Railway Station
Youth Centre
Tech Coll
Clinic
Sloping Masonry

Sproule Consulting

FINAL REPORT:

21st April 2017

Causeway Coast & Glens Borough Council

Dr Jenny Sproule

EMAIL: jenny.sproule@btinternet.com

EXECUTIVE SUMMARY

- 54% of respondents were visitors to Portrush, the remaining 46% were residents of the town.

- 32% visited Portrush town centre daily; 27% visited the town centre less than once a month; 21% visited the town centre at least once a week, 14% visited at least once a month, whilst 6% visited at least once a fortnight.

- 38% were in Portrush town centre for 'other' reasons; 29% had visited Portrush for leisure; 23% had visited the town to eat / drink at local cafes, restaurants and pubs; 10% were at work / school in the area; 7% were shopping for books, visiting a newsagents or purchasing stationery; 7% were in Portrush town centre for entertainment purposes; 6% were clothes shopping.

- 58% intended to stay two hours or more in the town; 15% intended staying for at least one hour but less than two hours; 14% planned staying for at least thirty minutes but less than one hour; only 6% planned staying for less than ten minutes whilst a further 6% intended to stay at least 10 minutes but less than 30 minutes.

- 38% had travelled from the Portrush area to visit the town centre; this was followed by 6% from Coleraine and 3% from Ballymoney.

- 58% travelled by car to Portrush town centre; 29% walked to the area; 10% travelled by train and 3% by bus.

- 23% spent over £50 during their visit to the town centre; a further 21% spent between £0.01 and £10; 20% spent between £20.01 and £30, whilst 14% spent between £10.01 and £20; 11% spent nothing during their visit; 7% spent £30.01 and £40 and the remaining 3% spent between £40.01 and £50.

- 79% had been visiting the town for more than 5 years.

- 43% stated that their overall perception of Portrush town centre was very good/good; 32% described their perception as very poor/poor, 25% described it as average.

- Residents were statistically significantly more likely than visitors to describe their perception of the town centre as poor / very poor.

- Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Portrush town centre (1 very poor and 10 very good).

The highest level of 'good' scores were for the following aspects:

- Friendliness of staff / people (86%);
- Cafes (78%);
- Good atmosphere (76%); and,
- Ease of moving around the town centre (71%).

The highest level of 'average' scores were for the following aspects:

- Condition of streets / cleanliness (41%);
- Quality of shops (28%); and,
- Range of goods and services (22%).

The highest level of 'poor' scores were for the following aspects:

- Dereliction (66%);
- On-street entertainment (58%);
- Vacant shops (54%);
- Variety of shops (52%); and,
- Condition of buildings (52%).

Respondents were asked to rank their top three priorities for improvement in Portrush. These included:

- 1st PRIORITY: Wider variety of shops (21%);
More shops (21%); and,
More public toilets (13%).

- 2nd PRIORITY: More shops (17%);
Better maintained buildings (15%);
More public toilets (14%); and,
Wider variety of shops (13%).

- 3rd PRIORITY: More public toilets (22%);
Better maintained buildings (15%);
Wider variety of shops (14%); and,
More shops (9%).

- The combined highest (1st, 2nd and 3rd) priority included: more public toilets - 49%; wider variety of shops – 48%; and, more shops – 47%.

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1. INTRODUCTION

Causeway Coast and Glens Borough Council (CCGBC) commissioned Sproule Consulting to conduct general public and business surveys in the six main towns within the Borough. Table 1 provides a comprehensive breakdown of the number of surveys completed.

TABLE 1: Completed Surveys

	On-Street (General Public)	Business
Coleraine	100	100
Ballymoney	100	90
Portrush	100	40
Portstewart	100	40
Limavady	100	78
Ballycastle	100	54
TOTAL	600	402

The purpose of this Report is to provide empirical data to inform CCGBC's Local Development Plan for the Portrush area.

The survey findings set out in this General Public Report, together with the data collated from the Business Report, will therefore be instrumental in establishing users' and stakeholders' attitudes and perceptions of Portrush town centre.

2. RESEARCH: KEY OBJECTIVES

The key objectives of this research are shown in Figure 1.

3. DEMOGRAPHIC PROFILE

Forty-five per cent of the general public survey respondents were male, 44% were male (Table 2). Eleven per cent made no comment.

TABLE 2: Gender (n=100)

Male	45
Female	44
No comment	11

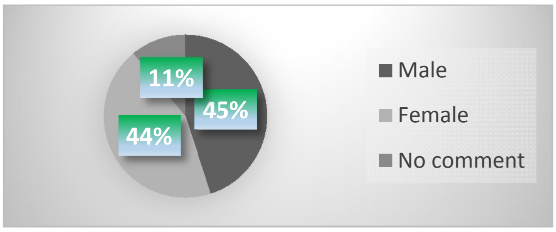
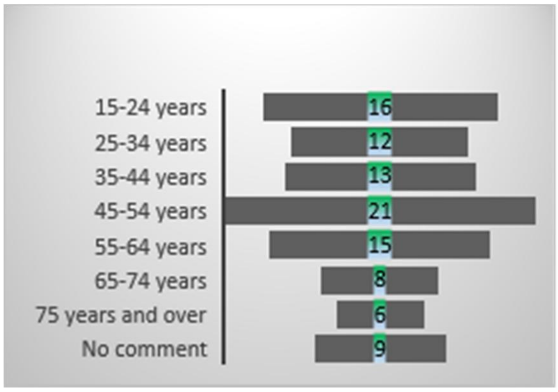
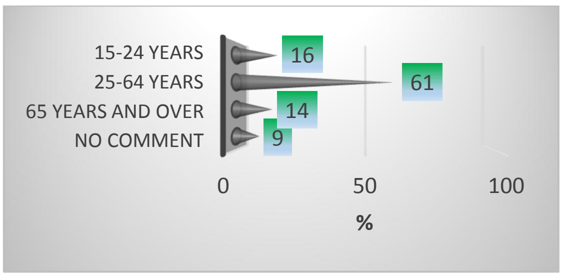


Table 3 sets out the achieved age profile.

TABLE 3: Age (n=100)

15-24 years	16
25-34 years	12
35-44 years	13
45-54 years	21
55-64 years	15
+65-74 years	8
75 years and over	6
No comment	9





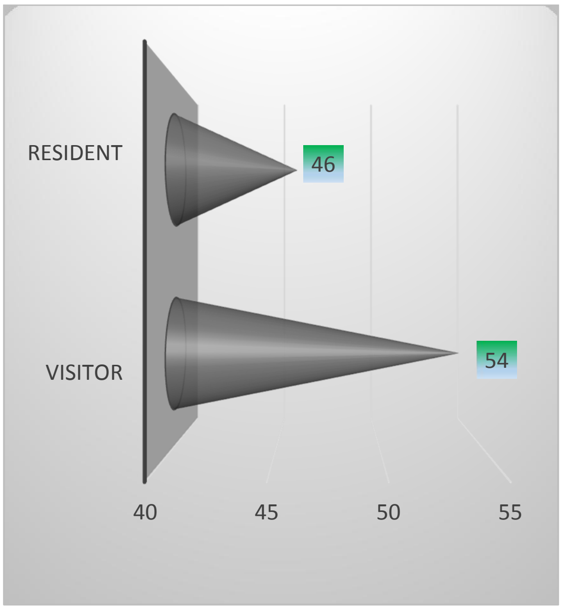
4. GENERAL PUBLIC SURVEY FINDINGS - PORTRUSH TOWN CENTRE

4.1 ARE YOU A RESIDENT OF COLERAINE OR VISITOR TODAY?

As shown in Table 4, just over half the respondents (54%) were visitors to Portrush, the remaining 46% were residents of the town.

TABLE 4: Are you a resident of Portrush or visitor today? (n=100)

	%
Resident	46
Visitor	54
TOTAL	100

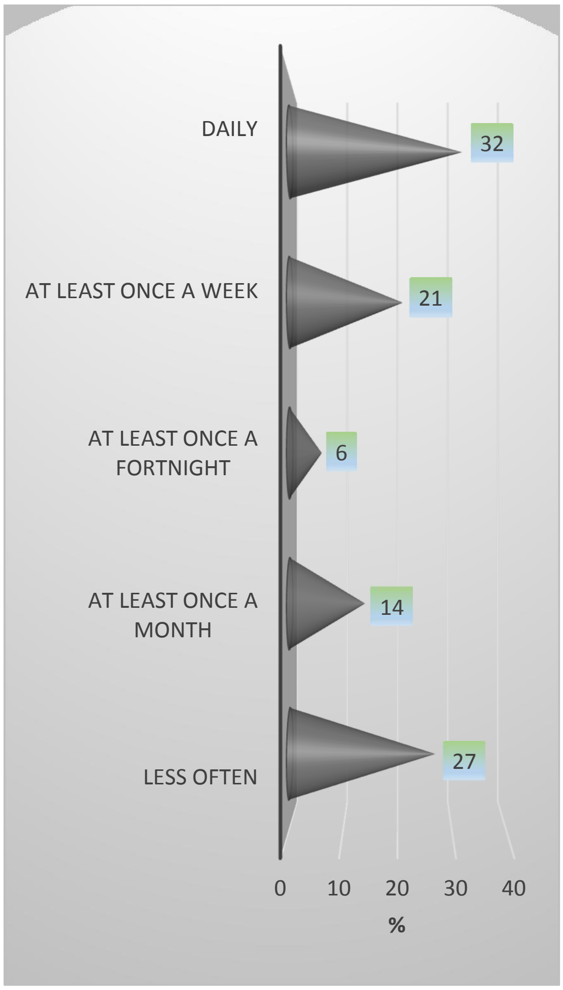


4.2 HOW OFTEN DO YOU VISIT THE TOWN CENTRE?

Almost a third of respondents (32%) reported that they visited Portrush town centre daily (Table 5); 27% stated that they visited the town centre less than once a month; 21% visited the town centre at least once a week, a further 14% visited at least once a month, whilst 6% visited at least once a fortnight.

TABLE 5: How often do you visit the town centre? (n=100)

	%
Daily	32
At least once a week	21
At least once a fortnight	6
At least once a month	14
Less often	27
TOTAL	100

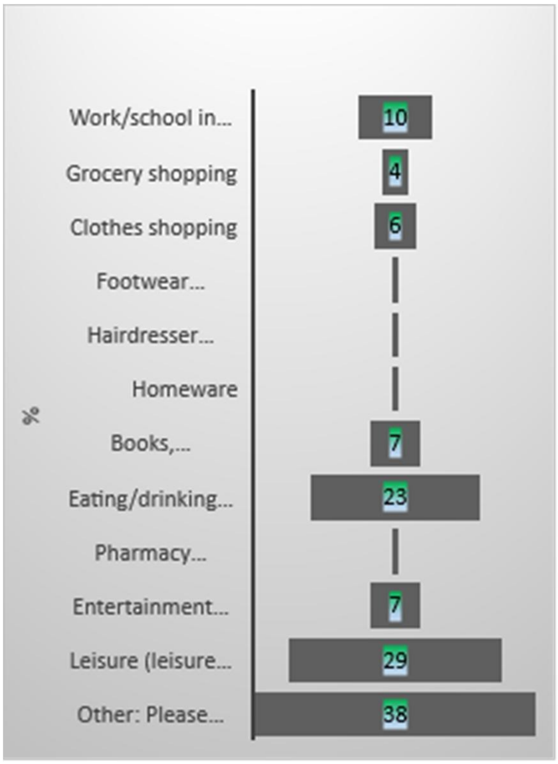


4.3 WHY HAVE YOU COME TO THE TOWN TODAY?

Almost three out of ten respondents (29%) stated that they had visited Portrush for leisure (Table 6); 23% had visited the town to eat / drink at local cafes, restaurants and pubs; 10% were at work / school in the area; 7% were shopping for books, visiting a newsagents or purchasing stationery. A further 7% were in Portrush town centre for entertainment purposes; 6% were clothes shopping.

TABLE 6: Why have you come to the town today? (multiple responses)

	%
Work/school in the area	10
Grocery shopping	4
Clothes shopping	6
Footwear shopping	1
Hairdresser/barber	1
Homeware	1
Books, newsagent, stationery	7
Eating/drinking (cafes, restaurants, pubs)	23
Pharmacy/optician	1
Entertainment (arcade)	7
Leisure (leisure centre, park)	29
Other: Please Specify	38



Thirty-eight per cent of respondents were in Portrush town centre for 'other' reasons.

TABLE 7: Other Reason for Coming to Town - Please Specify (n=38)

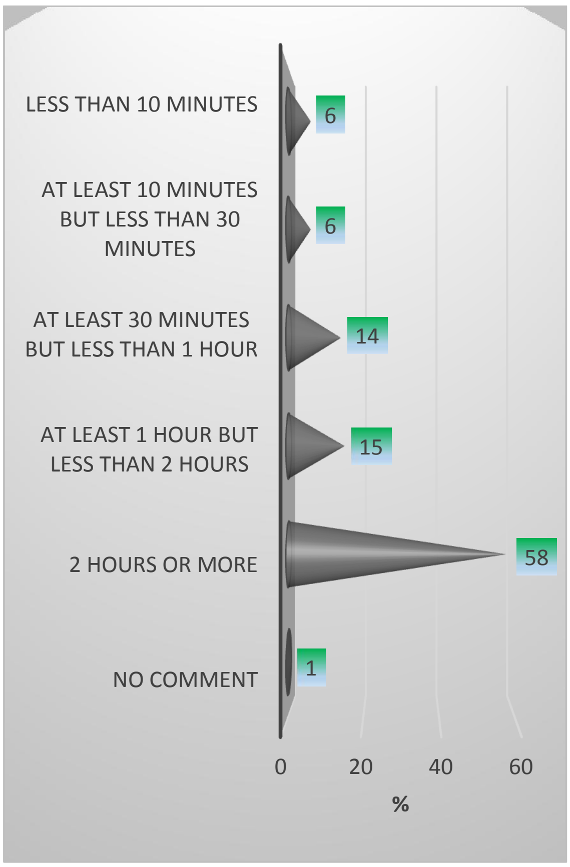
Live/House here/Holiday house/Apartment here	6
Walk dog/Walk/Dander beach/Dander/Walk beach	9
Visiting Friends/Meeting friends/Hanging out with friends/Visiting girlfriend/Meeting daughter	5
Caravan stay	1
Birthday	1
Break away	1
Break, browsing	1
Day away/Day out	4
Friends weekend	1
Rugby as well	1
Browse/Browsing	2
Browsing, live here	1
Holiday	1
Babysitting	1
Messages	1
Fishing gear	1
Staying	1

4.4 HOW LONG DO YOU INTEND TO SPEND HERE FOR THIS VISIT?

Almost three fifths of respondents (58%) confirmed that they intended to stay two hours or more in the town (Table 8); 15% intended staying for at least one hour but less than two hours; 14% planned staying for at least thirty minutes but less than one hour; only 6% planned staying for less than ten minutes whilst a further 6% intended to stay at least 10 minutes but less than 30 minutes.

TABLE 8: How long do you intend to spend here for this visit? (n=100)	
Less than 10 minutes	6
At least 10 minutes but less than 30 minutes	6
At least 30 minutes but less than 1 hour	14
At least 1 hour but less than 2 hours	15
2 hours or more	58
No comment	1
TOTAL	100

99



4.5 WHERE HAVE YOU TRAVELLED FROM TO GET TO PORTRUSH TOWN CENTRE TODAY?

As shown in Table 9, almost two fifths of respondents (38%) stated that they had travelled from the Portrush area to visit the town centre; this was followed by 6% from Coleraine and 3% from Ballymoney.

TABLE 9: Where have you travelled from to get to Portrush town centre today? (n=100)	
Coleraine	6
Ballymoney	3
Portrush	38
Portstewart	2
Garvagh	1
Kilrea	2
Bushmills	2
Other: Please Specify	46
TOTAL	100

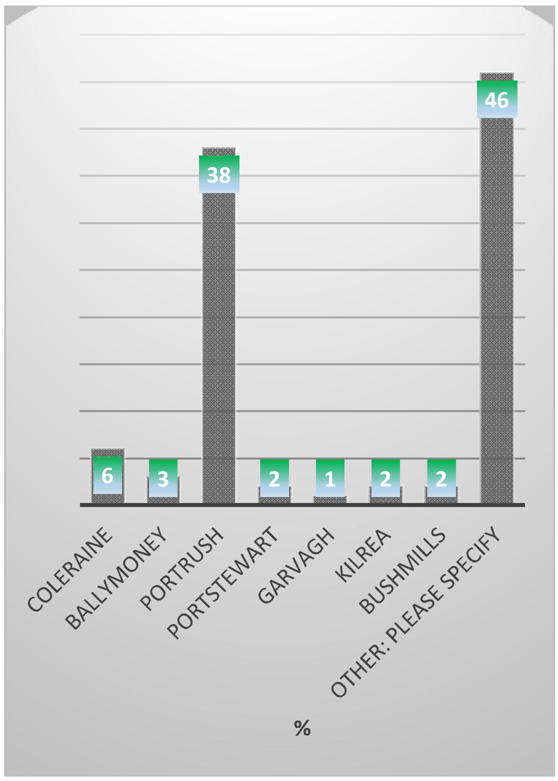


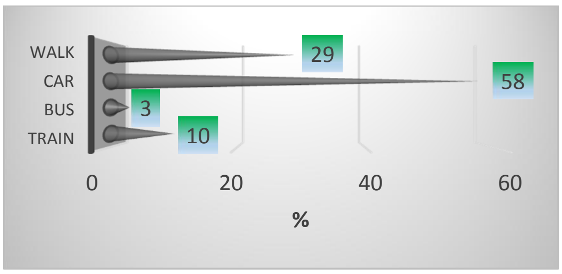
Table 10 provides a breakdown of the other areas respondents travelled from to visit Portrush town centre.

TABLE 10: Where have you travelled from to get to Portrush today? Other (n=46)	
Ballinderry	4
Belfast	15
Wirtons	1
Dundee	1
Groomsport	1
Broughshane	1
Comber	1
Fermanagh	2
Derry	2
Newtownabbey	1
Donaghadee	1
Ballyclare	1
Bangor	1
Dromore	1
Ballymena	4
Omagh	2
Articlave	1
Carrickfergus	1
Tyrone	2
Antrim	1
Cookstown	1
Cullybackey	1
TOTAL	46

4.6 HOW DID YOU TRAVEL TO THE AREA?

Almost three fifths of respondents (58%) travelled by car to Portrush town centre; just over a quarter (29%) walked to the area; 10% travelled by train and 3% by bus (Table 11).

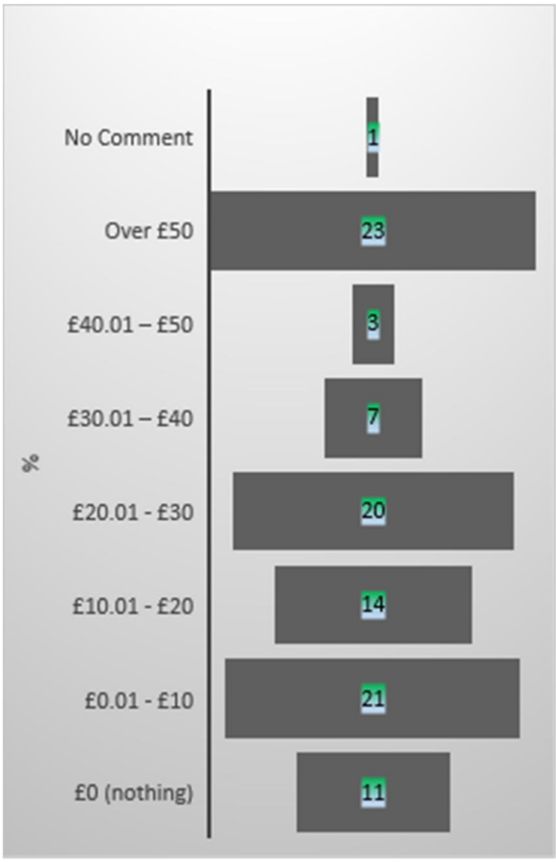
TABLE 11: How did you travel to the area? (n=100)	
Walk	29
Bus	3
Car	58
Train	10
TOTAL	100



4.7 IN TOTAL, HOW MUCH DO YOU INTEND TO SPEND/HAVE YOU SPENT DURING YOUR VISIT TODAY?

Twenty-three per cent of respondents reported that they spent over £50 during their visit to the town centre; a further 21% spent between £0.01 and £10; 20% spent between £20.01 and £30, whilst 14% spent between £10.01 and £20 (Table 12); 11% of respondents spent nothing during their visit; 7% spent £30.01 and £40 and the remaining 3% spent between £40.01 and £50.

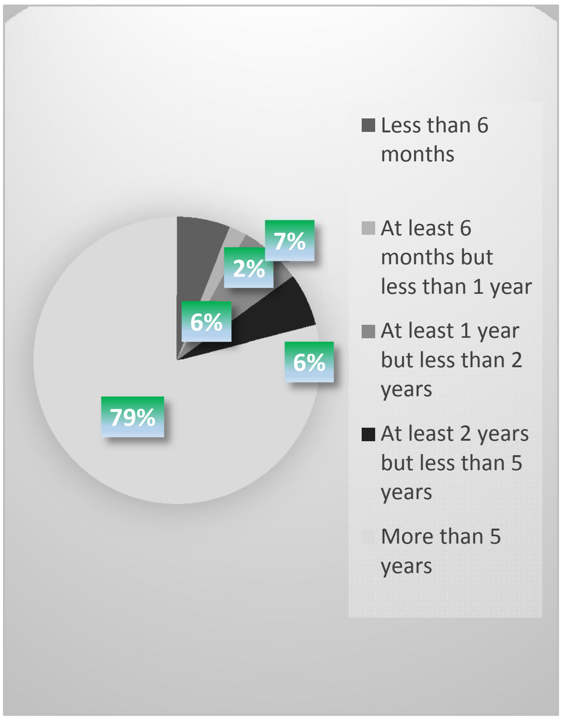
TABLE 12: In total, how much do you intend to spend / have you spent during your visit today? (n=100)	
£0 (nothing)	11
£0.01 - £10	21
£10.01 - £20	14
£20.01 - £30	20
£30.01 – £40	7
£40.01 – £50	3
Over £50	23
No Comment	1



4.8 HOW LONG HAVE YOU BEEN VISITING THE TOWN?

The majority of respondents (79%) confirmed they had been visiting the town for more than 5 years (Table 13).

TABLE 13: How long have you been visiting the town? (n=100)	
Less than 6 months	6
At least 6 months but less than 1 year	2
At least 1 year but less than 2 years	7
At least 2 years but less than 5 years	6
More than 5 years	79
TOTAL	100



4.9 OVERALL, WHAT IS YOUR PERCEPTION OF THE TOWN CENTRE?

Over two-fifths of respondents (43%) stated that their overall perception of Portrush town centre was very good/good; almost a third (32%) described their perception as very poor/poor, whilst a quarter (25%) described it as average (Tables 14 and 15).

TABLE 14: Overall, what is your perception of the town centre? (n=100)	
Very poor	11
Poor	21
Average	25
Good	34
Very good	9
TOTAL	100

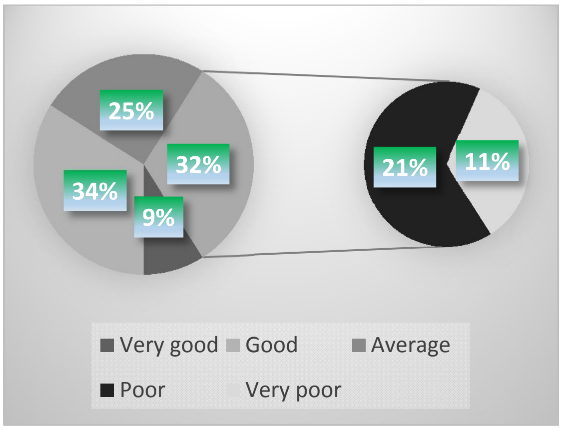
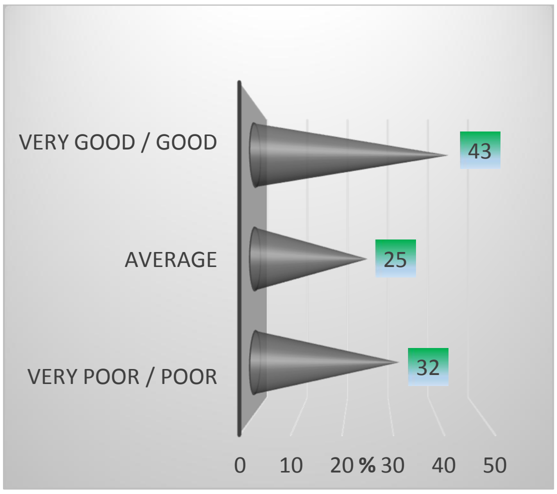


TABLE 15: Overall, what is your perception of the town centre (Grouped)? (n=100)	
Very poor / poor	32
Average	25
Very good / good	43



Residents were statistically significantly more likely than visitors to describe their perception of the town centre as poor / very poor.

TABLE 16: Overall, what is your perception of the town centre? Other (n=34)	
No train station	1
Summer - hate. Winter - deserted.	1
Dog litter/leads	1
Revamp the toilets	1
Vandalism, no toilets, clean toilets, parking	1
Quiet/Very quiet	2
Streets dirty, toilets	1
Childhood	1
Clean streets, improve	1
Shops too expensive	1
Games with friends	1
Place needs a facelift	1
Summers good	1
Better than it used to be/Improving	2
Nice area, friendly	1
Not at lot to do	1
One way system is terrible	1
Friends live in area	1
Buildings need tidied up	1
Streets need maintained	1
Needs bigger grocery shop	1
So far enjoyable	1
Dull	1
Streets need cleaned	1
Close to beach	1
Lots to do	1
Improvement to buildings	1
Deserted area	1
Depends	1
Unfinished building work	1
No night life	1
Good atmosphere	1
TOTAL	34

4.11 PLEASE SCORE YOUR CURRENT OPINION OF THE FOLLOWING ASPECTS OF THE TOWN CENTRE (SCALE 1 – 10, 1 VERY POOR, 5 AVERAGE, 10 - VERY GOOD)

Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Portrush town centre (1 very poor and 10 very good). The results are shown in detail in Table 16. For further clarity Table 17 sets out a summary of poor scores (1-4), average (5) and good scores (6-10).

As shown, the highest level of 'good' scores were for the following aspects:

- Friendliness of staff / people (86%);
- Cafes (78%);
- Good atmosphere (76%); and,
- Ease of moving around the town centre (71%).

The highest level of 'average' scores were for the following aspects:

- Condition of streets / cleanliness (41%);
- Quality of shops (28%); and,
- Range of goods and services (22%).

The highest level of 'poor' scores were for the following aspects:

- Dereliction (66%);
- On-street entertainment (58%);
- Vacant shops (54%);
- Variety of shops (52%); and,
- Condition of buildings (52%).

4.12 WHAT THREE ASPECTS OF THE TOWN COULD BE IMPROVED?

Respondents were asked to rank their top three priorities for improvement in Portrush. Table 18 provides a comprehensive breakdown of the findings. These included:

4.12.1 FIRST PRIORITY – IMPROVEMENT

- Wider variety of shops (21%);
- More shops (21%); and,
- More public toilets (13%).

4.12.2 SECOND PRIORITY - IMPROVEMENT

- More shops (17%);
- Better maintained buildings (15%);
- More public toilets (14%); and,
- Wider variety of shops (13%).

4.12.3 THIRD PRIORITY - IMPROVEMENT

- More public toilets (22%);
- Better maintained buildings (15%);
- Wider variety of shops (14%); and,
- More shops (9%).

The combined highest (1st, 2nd and 3rd) priority included: more public toilets - 49%; wider variety of shops – 48%; and, more shops – 47%.

TABLE 17: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) (n=100)												
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**No Comment**	***Rounded to 100**
Condition of streets/public realm – clean, well maintained, attractive	6	3	4	12	41	13	7	5	1	3	5	100
Flower arrangements, street banners	11	9	4	6	20	9	13	8	3	5	12	100
Lighting	2	2	3	4	19	13	22	15	7	5	8	100
Parking	6	6	9	4	17	6	13	15	6	3	15	100
Number of public car park spaces	6	2	7	6	16	4	14	16	10	8	11	100
Price of public car park spaces	3	0	1	2	13	3	11	12	10	25	20	100
Ease of moving around town centre	3	1	1	6	13	5	20	8	10	28	5	100
Pedestrian access	3	1	1	9	15	4	23	8	5	26	5	100
Variety of shops	5	10	24	13	16	8	7	4	1	7	5	100
Quality of shops	2	7	12	14	28	12	7	6	3	4	5	100
Range of goods and services available	3	4	12	12	22	8	19	5	3	6	6	100
Cafes	0	0	1	3	14	2	16	28	7	25	4	100
Value for money	0	4	3	5	13	4	30	13	4	14	10	100
Friendliness of staff/people	0	0	0	1	10	1	13	20	19	33	3	100
Good atmosphere	0	1	2	8	9	2	16	26	8	24	4	100
On-street entertainment	30	11	9	8	7	7	8	2	0	2	16	100
Safety	1	2	5	3	19	7	20	8	6	21	8	100
Condition of buildings	3	7	21	21	21	6	9	4	1	1	6	100
Vacant shops (if a lot = poor score)	10	13	21	10	21	11	5	0	2	1	6	100
Amount of dereliction (if a lot = poor score)	13	16	19	18	21	2	4	2	1	0	4	100
Vandalism (if a lot = poor score)	7	8	14	12	18	7	13	7	2	5	7	100
Levels of anti-social behaviour (if a lot = poor score)	8	17	7	7	14	5	9	9	2	4	18	100
Children's play areas	2	4	9	10	13	6	8	5	3	9	31	100
TOTAL	124	128	189	194	400	145	307	226	114	259	214	-

Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) (n=100)

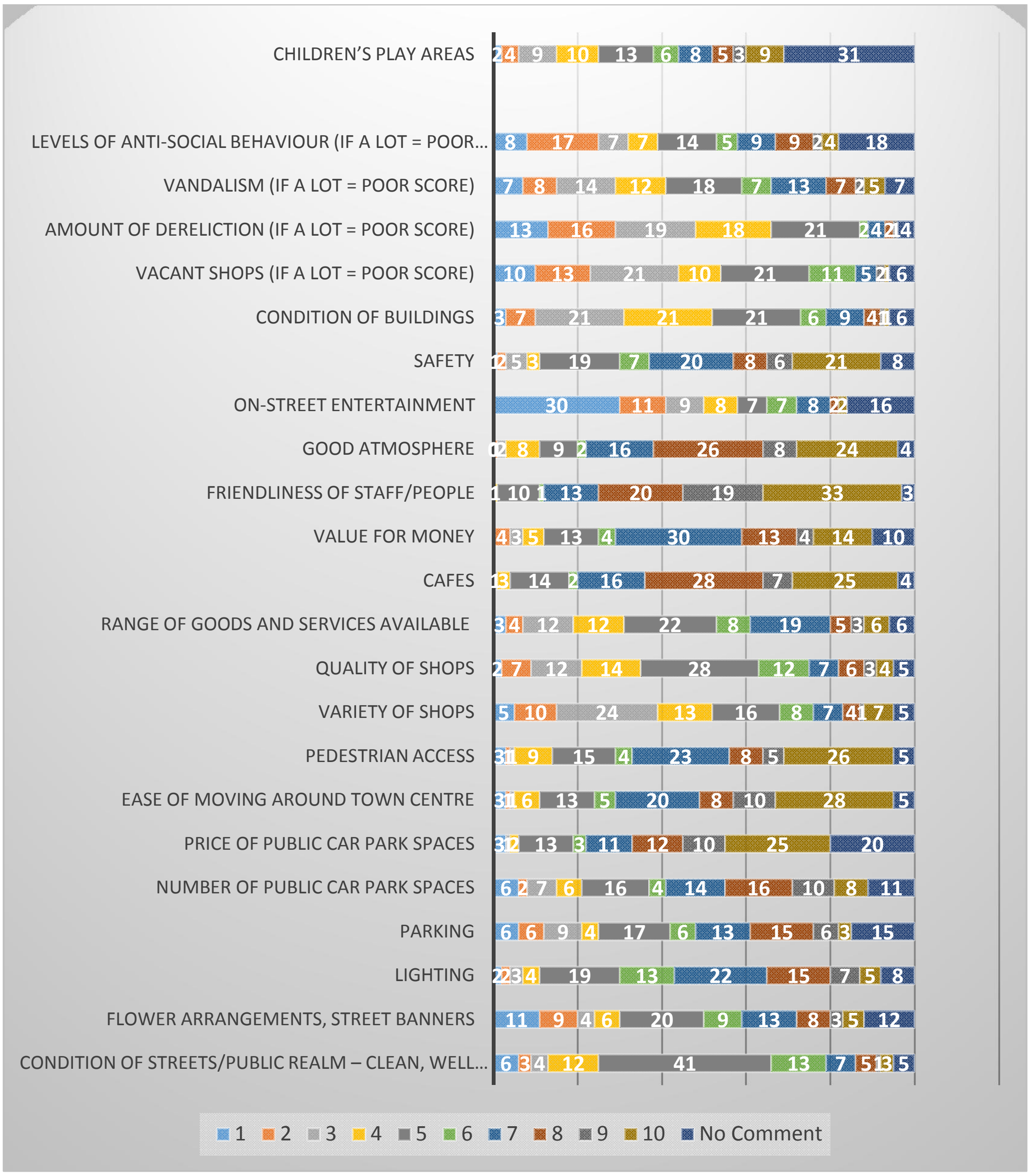


TABLE 18: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) Grouped Scores (n=10					
	1 – 4	**5**	**6 – 10**	**No Comment**	***Rounded to 100**
Condition of streets/public realm – clean, well maintained, attractive	25	41	29	5	100
Flower arrangements, street banners	30	20	38	12	100
Lighting	11	19	62	8	100
Parking	25	17	43	15	100
Number of public car park spaces	21	16	52	11	100
Price of public car park spaces	6	13	61	20	100
Ease of moving around town centre	11	13	71	6	100
Pedestrian access	14	15	66	5	100
Variety of shops	52	16	27	5	100
Quality of shops	35	28	32	5	100
Range of goods and services available	31	22	41	6	100
Cafes	4	14	78	4	100
Value for money	12	13	65	10	100
Friendliness of staff/people	1	10	86	3	100
Good atmosphere	11	9	76	4	100
On-street entertainment	58	7	19	16	100
Safety	11	19	62	8	100
Condition of buildings	52	21	21	6	100
Vacant shops (if a lot = poor score)	54	21	19	6	100
Amount of dereliction (if a lot = poor score)	66	21	9	4	100
Vandalism (if a lot = poor score)	41	18	34	7	100
Levels of anti-social behaviour (if a lot = poor score)	39	14	29	18	100
Children's play areas	25	13	31	31	100
TOTAL	635	400	1051	214	-

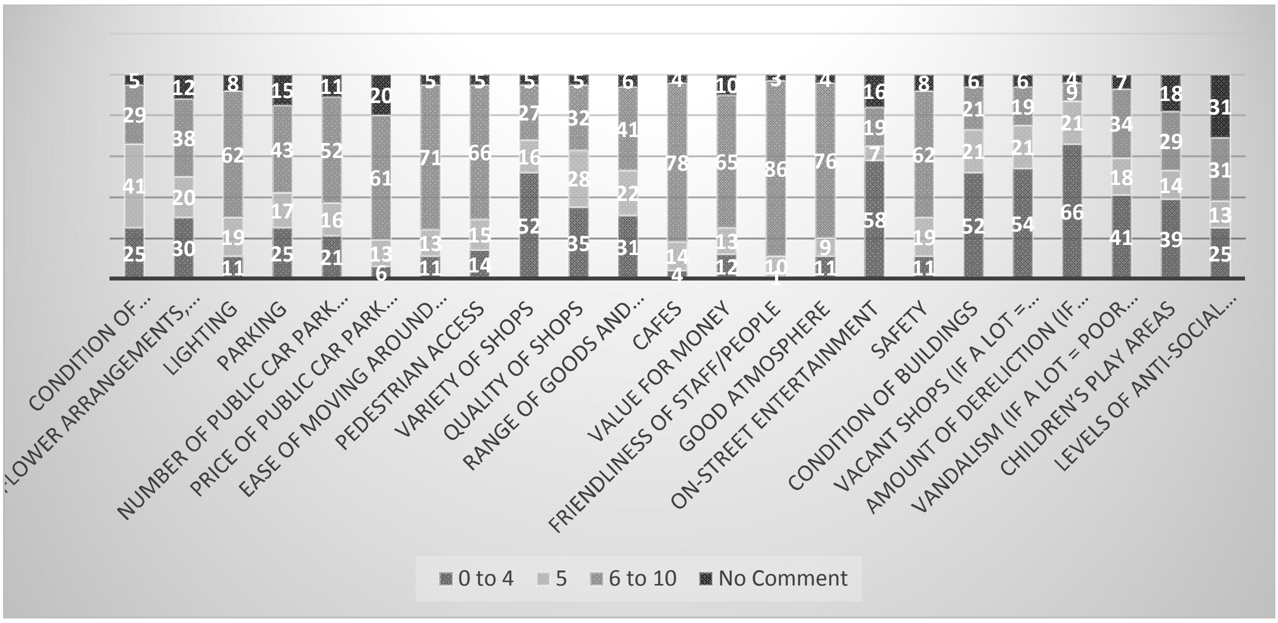
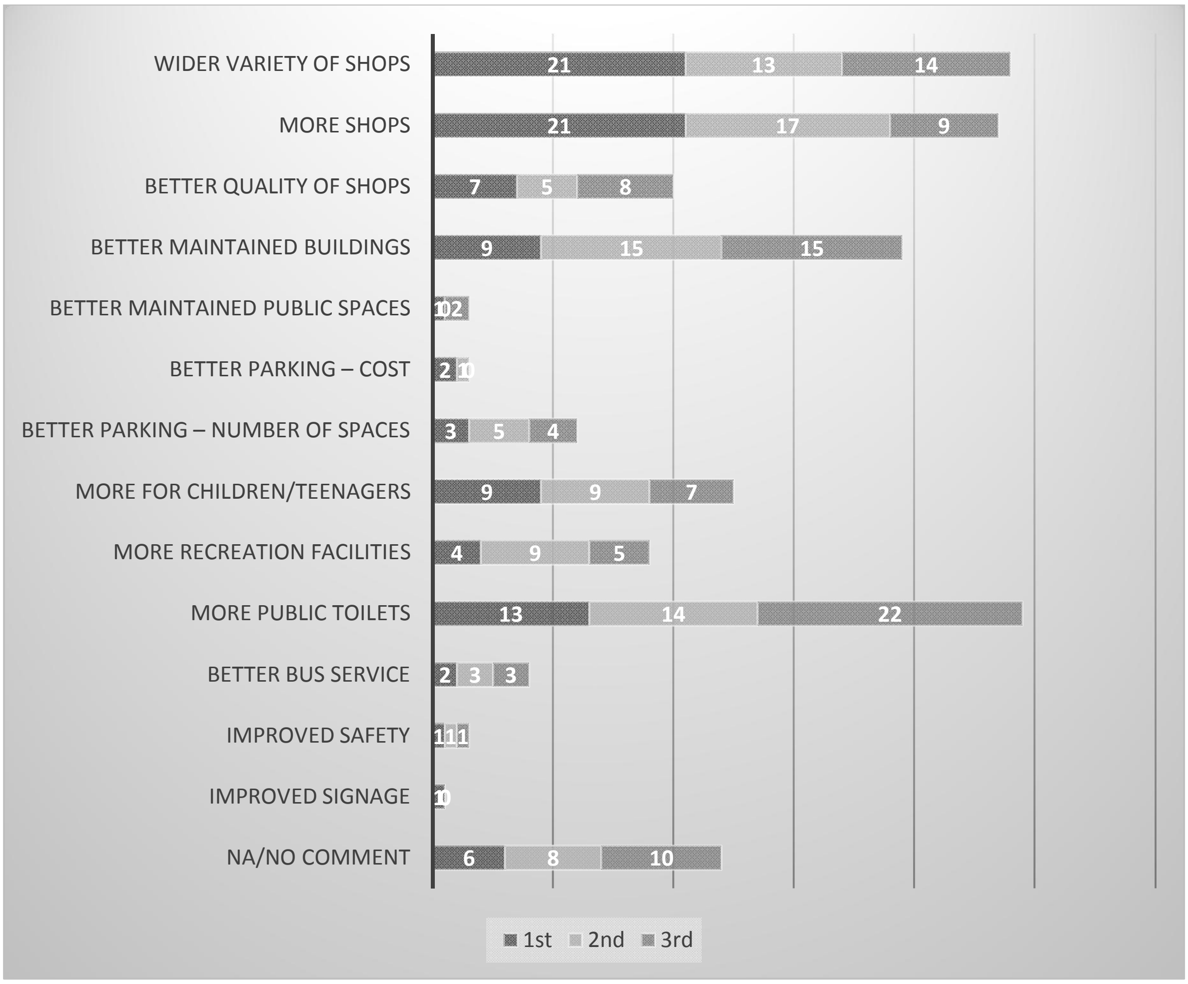


TABLE 19: What three aspects of the town could be improved?				
	1st (n=100)	**2nd (n=100)**	**3rd (n=100)**	**TOTAL**
Wider variety of shops	*21*	13	14	48
More shops	*21*	17	9	47
Better quality of shops	*7*	5	8	20
Better maintained buildings	*9*	15	15	39
Better maintained public spaces	*1*	0	2	3
Better parking – cost	*2*	1	0	3
Better parking – number of spaces	*3*	*5*	4	12
More for children/teenagers	*9*	9	7	25
More recreation facilities	*4*	9	5	18
More Public toilets	*13*	14	22	49
Better bus service	*2*	3	3	8
Improved safety	*1*	1	1	3
Improved signage	*1*	0	0	1
NA	*6*	8	10	24
TOTAL	100	100	100	300



APPENDIX 1: General Public Questionnaire Portrush and Map of Town Centre Area

GENERAL PUBLIC SURVEY

February 2017

Causeway Coast and Glens Borough Council would like to invite you to participate in a Survey to enable it to better understand the general public's perception of the town centre.

The findings from this research will be used by the Council to inform its Local Development Plan and may include the identification of lands for future retail development and the production of land use policies to guide development proposals.

The General Public Survey will take approximately 4 minutes to complete. All responses are anonymous and will be treated with strict confidentiality.

The town centre area is shown on the map attached.

If you have any queries, please contact Sharon Mulhern from Causeway Coast & Glens Borough Council using telephone number 028 70347244 or Dr Jenny Sproule from *Sproule Consulting* on 07860 342493.

Yours Faithfully

Sharon Mulhern
Local Development Plan Manager

Causeway Coast & Glens Borough Council

1. Are you a resident of _____________ or visitor today?
[PLEASE CIRCLE ONE ONLY]

Resident	1	Visitor	2

2. How often do you visit the town centre?
[PLEASE CIRCLE ONE ONLY]

Daily	1
At least once a week	2
At least once a fortnight	3
At least once a month	4
Less often	5

3. Why have you come to the town today?
[PLEASE CIRCLE ALL THAT APPLY]

Work/school in the area	1	Books, newsagent, stationery	10
Grocery shopping	2	Eating/drinking (cafes, restaurants, pubs)	11
Clothes shopping	3	Pharmacy/optician	12
Footwear shopping	4	Doctor/dentist	13
Jewellery shopping	5	Using financial, legal or insurance services	14
Health and beauty	6	Entertainment (arcade)	15
Hairdresser/barber	7	Leisure (leisure centre, park)	16
Homeware	8	Other: **Please Specify**	17
Electrical goods	9		

4. How long do you intend to spend here for this visit?
[PLEASE CIRCLE ONE ONLY]

Less than 10 minutes	1
At least 10 minutes but less than 30 minutes	2
At least 30 minutes but less than 1 hour	3
At least 1 hour but less than 2 hours	4
2 hours or more	5

5. Where have you travelled from to get to __________ today?
[PLEASE CIRCLE ONE ONLY]

Coleraine	1	Garvagh	7
Ballymoney	2	Kilrea	8
Limavady	3	Bushmills	9
Ballycastle	4	Dungiven	10
Portrush	5	Other: **Please Specify**	11
Portstewart	6		

6. How did you travel to the area? **[PLEASE CIRCLE ONE ONLY]**

Walk	1	Train	6
Bus	2	Cycle	7
Car	3	Other: **Please Specify**	8
Taxi	4		
Electrical goods	5		

7. In total, how much do you intend to spend/have you spent during your visit today? **[PLEASE CIRCLE ONE ONLY]**

£0	1	£31 – 40	6
£0 - £10	2	£41 – 50	7
£11 - £20	3	£51 or more	8
£21 - £30	4		

8. How long have you been visiting the town?
[PLEASE CIRCLE ONE ONLY]

Less than 6 months	1
At least 6 months but less than 1 year	2
At least 1 year but less than 2 years	3
At least 2 years but less than 5 years	4
More than 5 years	5

Town Centre

9. Overall, what is your perception of the town centre?
[PLEASE CIRCLE ONE ONLY]

Very poor	1
Poor	2
Average	3
Good	4
Very good	5

Please comment: ______________________________

10. Please score your current opinion of the following aspects of the town centre (Scale 1 – 10, 1 very poor, 5 average, 10 – very good) **[PLEASE INSERT FOR EACH]**

Range of goods and services available	
Condition of buildings	
Condition of streets/public realm – clean, well maintained, attractive	
Number of public car park spaces	
Price of public car park spaces	
Safety	
Lighting	
On-street entertainment	
Levels of anti-social behaviour	
Vandalism	
Vacant shops	
Amount of dereliction	
Convenience	
Friendliness of staff/people	
Variety of shops	
Good atmosphere	
Quality of shops	
Cafes	
Children's play areas	
Parking	
Value for money	
Presence of pedestrian area	
Flower arrangements, street banners	

11. What three aspects of the town could be improved?
[PLEASE RANK 1,2,3]

Wider variety of shops	
More shops	
Better quality of shops	
Better maintained buildings	
Better maintained public spaces	
Better parking – cost	
Better parking – number of spaces	
More for children/teenagers	
More recreation facilities	
More Public toilets	
Better bus service	
Improved safety	
Improved street lighting	
Improved signage	

Background Information

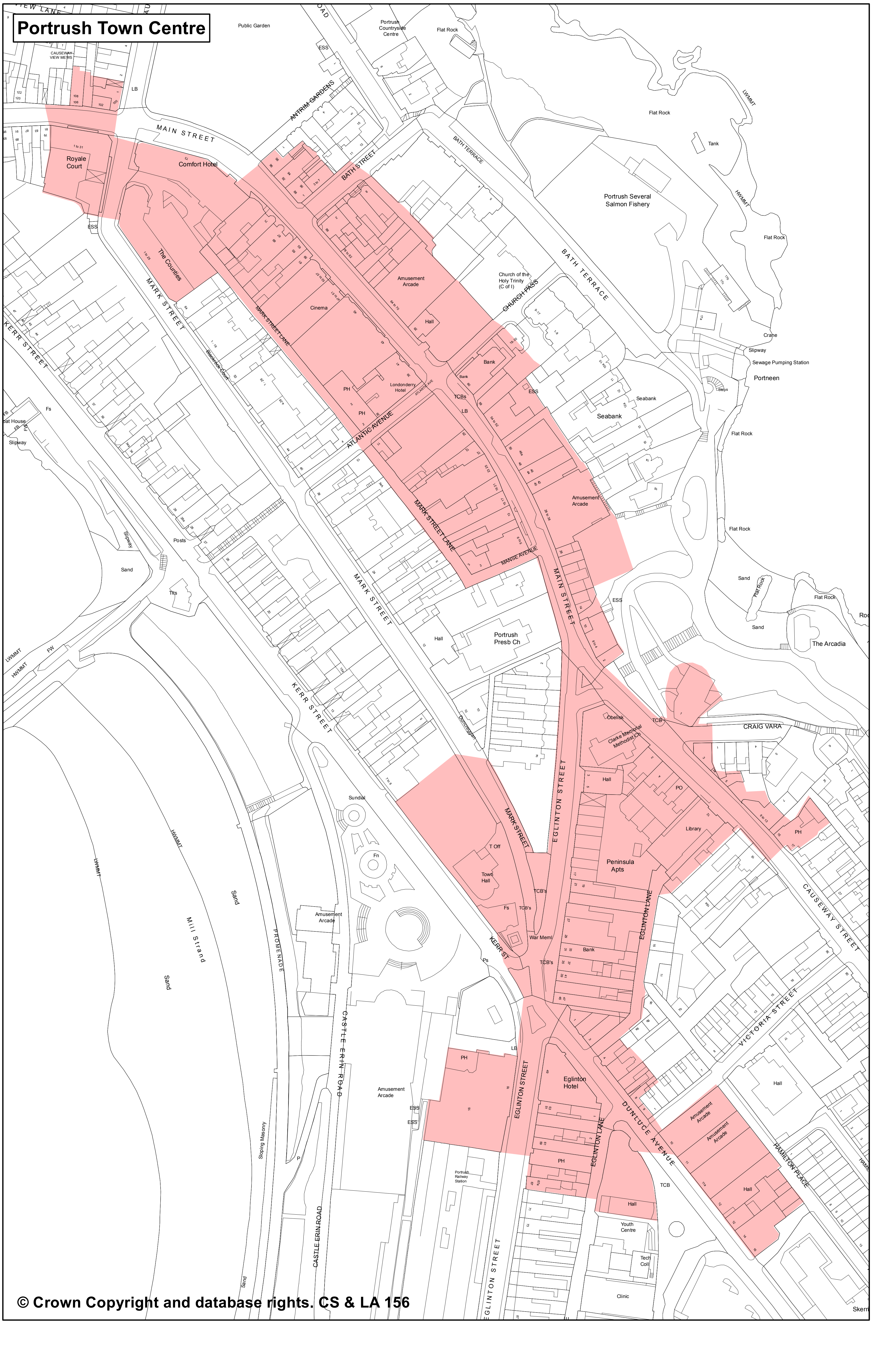
Male	1	Female	2
Age (Years)			

Thank you for your participation.

Date: _____________

Location: _____________

Portrush Town Centre



Sproule Consulting

FINAL REPORT:

21st April 2017

Causeway Coast & Glens Borough Council

Dr Jenny Sproule

EMAIL: jenny.sproule@btinternet.com

EXECUTIVE SUMMARY

- 55% of business owners / managers described their main business type as ‘other’ – these included: estate agent (n=3); food takeaway / hot food (n=3); restaurant (n=2); butcher (n=2); 18% described their main business type as clothing / footwear/ jewellery and accessories.

- 35% had traded in their current premises for between 1-10 years; 15% had been trading in their current premises for between 11-20 years; 8% have been in existence in the town centre for 50+ years.

- 85% described their business ownership as being an independent trader / retailer; 5% were part of a local chain; 5% confirmed they were part of a national chain; 3% were part of a multi-national chain; and, 3% were part of a franchise.

- 58% described their turnover in the last business year as average (normal); 23% reported that their turnover was below average; 8% described their turnover as above average, whilst 5% confirmed that their turnover was well below average; 3% reported their turnover was well above average.

- 80% confirmed that they had invested money in improvements to their business in the last year.

- 55% confirmed that they had invested in technology, 48% in building works and 50% in staff development.

- 93% had full-time staff, 75% had part-time staff, 3% had volunteers working more than 16 hours per week and 5% had volunteers working less than 16 hours per week.

- 165 staff were employed on a full-time basis, 157 were employed on a part-time basis, giving a total of 322 staff employed in either a full-time or part-time capacity; 1 person was involved as a volunteer (n=1) for more than 16 hours per week, whilst a further 7 people (n=2) volunteered for less than 16 hours.

- 83% employed between 1-10 full-time staff, 7% of businesses employed between 11-20 full-time staff; and 3% employed between 31-40 full-time staff.

- 70% employed between 1-10 part-time staff, 3% employed between 21-30, 3% employed between 31-40.

- 3% of businesses reported having between 1-10 people volunteer 16+ hours per week.

- 3% reported having between 1-10 volunteers involved for less than 16 hours each per week.

- 45% described their overall perception of Portstewart town centre as average; 40% reported that their perception of the town centre was good / very good, whilst 15% stated that it was poor.

- Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Portstewart town centre (1 very poor and 10 very good). The results are shown in detail in Table 19. For further clarity Table 20 sets out a summary of poor scores (1-4), average (5) and good scores (6-10).

➢ As shown, the highest level of 'good' scores were for the following aspects:

  - Friendliness of staff / people (89%);
  - Good atmosphere (87%);
  - Safety (84%);
  - Lighting (79%);
  - Quality of shops (78%); and,
  - Pedestrian access (76%),

➢ The highest level of 'average' scores were for the following aspects:

  - On street entertainment (33%);
  - Condition of buildings (30%); and,
  - Range of goods and services available (30%).

➢ The highest level of 'poor' scores were for the following aspects:

  - Vacant shops (56%);
  - Parking (52%);
  - Number of car parking - spaces (50%); and,
  - Variety of shops (48%).

- Female respondents were statistically more likely than male respondents to describe vacant shops as poor/very poor.

- Respondents were asked to rank their top three priorities for improvement in Portstewart. These included:

1st PRIORITY:	Better parking – number of spaces (25%); Wider variety of shops (20%); More children/teenagers (13%); and, More shops (8%).
2nd PRIORITY:	Better parking – spaces (25%); More children/teenagers (13%); More recreation facilities (13%); and, Wider variety of shops (10%).
3rd PRIORITY:	More recreation facilities (25%); Wider variety of shops (15%); More shops (15%); and, More children/teenagers (10%).

- The combined highest (1st, 2nd and 3rd) priority included: better parking – spaces (55); wider variety of shops (45); and, more recreation facilities (41).

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LIST OF FIGURES:

LIST OF TABLES:

***PLEASE NOTE THAT DUE TO ROUNDING SOME TABLES MAY NOT TOTAL 100.**

1. INTRODUCTION

Causeway Coast and Glens Borough Council (CCGBC) commissioned Sproule Consulting to conduct business and general public surveys in each of the six main towns within the Borough. Table 1 provides a comprehensive breakdown of the number of surveys completed.

TABLE 1: Completed Surveys

	On-Street (General Public)	Business
Coleraine	100	100
Ballymoney	100	90
Portrush	100	40
Portstewart	100	40
Limavady	100	78
Ballycastle	100	54
TOTAL	600	402

The purpose of this Report is to provide empirical data to inform CCGBC's Local Development Plan for the Portstewart area. The survey findings set out in this Business Report, together with the data collated from the general public, will be instrumental in establishing stakeholders' and users' attitudes and perceptions of Portstewart town centre.

2. RESEARCH: KEY OBJECTIVES

The key objectives of this research are shown in Figure 1.

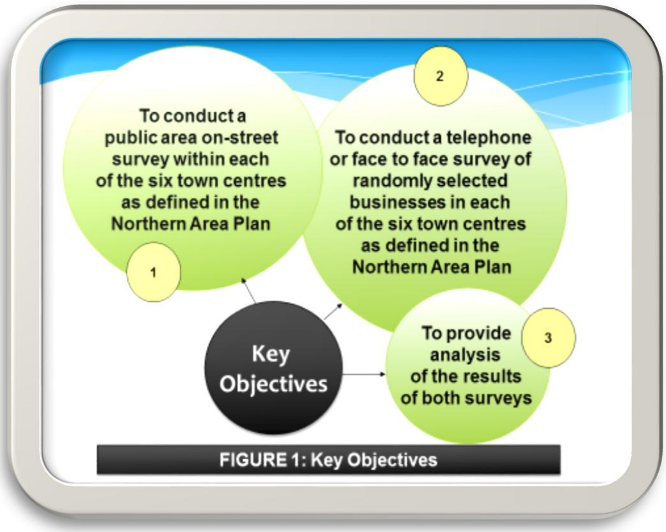


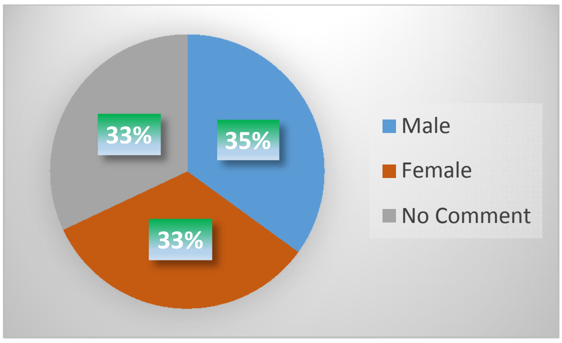
FIGURE 1: Key Objectives

3. DEMOGRAPHIC PROFILE OF BUSINESS OWNERS / MANAGERS SURVEYED

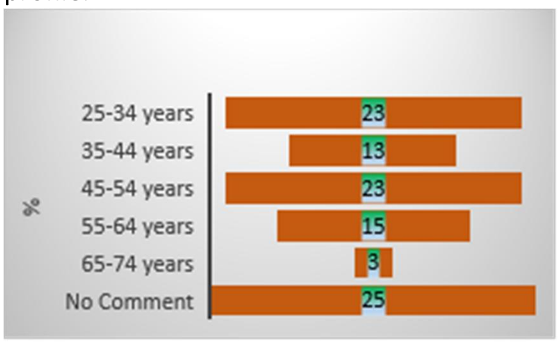
Thirty-five per cent of the business owners / managers surveyed were male, 33% were female; the remaining 33% made no comment (Table 2).

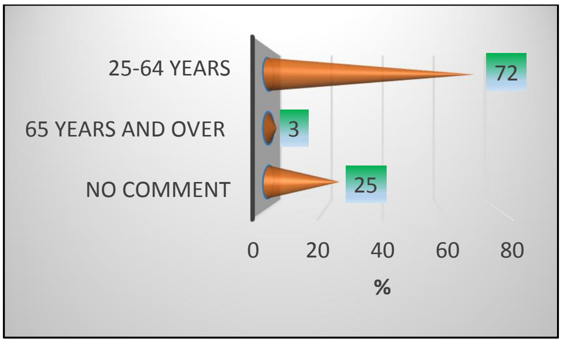
TABLE 2: Gender (n=40)

Male	35
Female	33
No Comment	33



The chart below sets out the achieved age profile.





4. BUSINESS SURVEY FINDINGS – PORTSTEWART TOWN CENTRE

4.1 TYPE OF MAIN BUSINESS?

Fifty-five per cent of business owners / managers described their main business type as 'other'; almost a fifth (18%) described their main business type as clothing / footwear/ jewellery and accessories (Table 3).

TABLE 3: Type of Main Business (n=40)	
Clothing / footwear / jewellery / accessories	18
Health & beauty	5
Homeware	5
Hairdressing	3
Pharmacy	5
Optician	3
Entertainment or leisure (gym, arcade, etc)	3
Charity	3
Groceries	3
Other: Please Specify	55

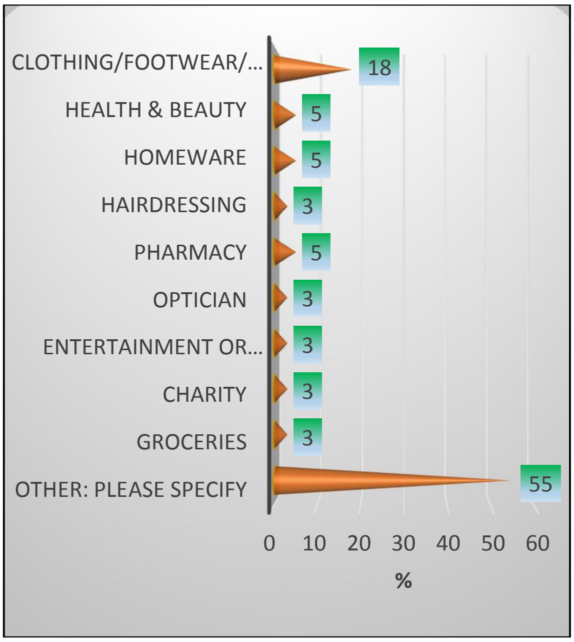


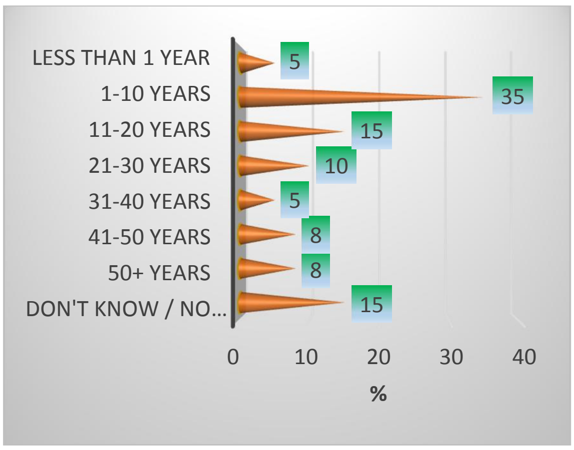
Table 4 provides a comprehensive breakdown of the range of other business types included.

TABLE 4: Type - Other (n=22)	
Estate Agent	3
Accommodation	1
Restaurant	2
Food takeaway / Hot food	3
ice-cream / cards / news	1
Butcher	2
Deli/Café	1
Confectionery	1
Art	1
Picture framer	1
Pub	1
Coffee shop	1
Hospitality	1
Sports retail	1
Gift shop	1
Electrical retail	1

4.2 HOW MANY YEARS HAVE YOU TRADED IN THESE PREMISES?

Thirty-five per cent had traded in their current premises for between 1-10 years (Table 5); 15% had been trading in their current premises for between 11-20 years; 8% have been in existence in the town centre for 50+ years.

TABLE 5: How many years have you traded in these premises – Grouped (N=40)	
Less than 1 year	5
1-10 years	35
11-20 years	15
21-30 years	10
31-40 years	5
41-50 years	8
50+ years	8
Don't Know / No Comment	15

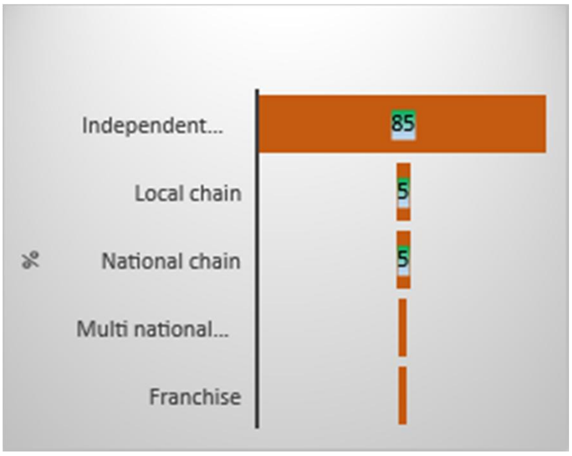


4.3 WHAT IS THE OWNERSHIP OF YOUR BUSINESS

Over four fifths of business respondents (85%) described their business ownership as being an independent trader / retailer; 5% were part of a local chain; 5% confirmed they were part of a national chain; 3% were part of a multi-national chain; and, 3% were part of a franchise (Table 6).

TABLE 6: What is the ownership of your business? (n=40)

Independent trader/retailer	85
Local chain	5
National chain	5
Multi national chain	3
Franchise	3

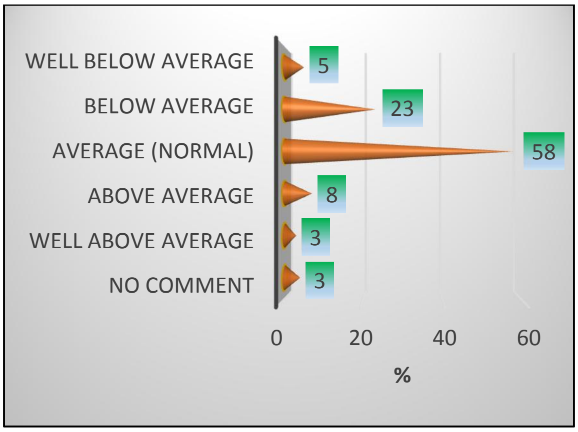


4.4 HOW WOULD YOU DESCRIBE YOUR TURNOVER IN THE LAST BUSINESS YEAR?

Fifty-eight per cent of respondents described their turnover in the last business year as average (normal); almost a quarter of respondents (23%) reported that their turnover was below average; 8% described their turnover as above average, whilst 5% confirmed that their turnover was well below average. Three per cent reported their turnover was well above average (Table 7).

TABLE 7: How would you describe your turnover in the last business year? (n=40)

Well below average	5
Below average	23
Average (normal)	58
Above average	8
Well above average	3
No Comment	3

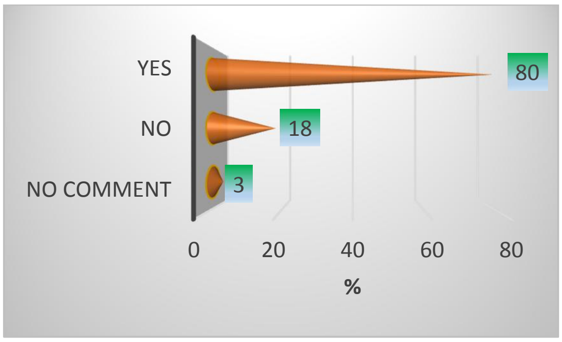


4.5 HAVE YOU INVESTED MONEY IN IMPROVEMENTS TO YOUR BUSINESS IN THE LAST YEAR?

Eighty per cent of respondents confirmed that they had invested money in improvements to their business in the last year (Table 9).

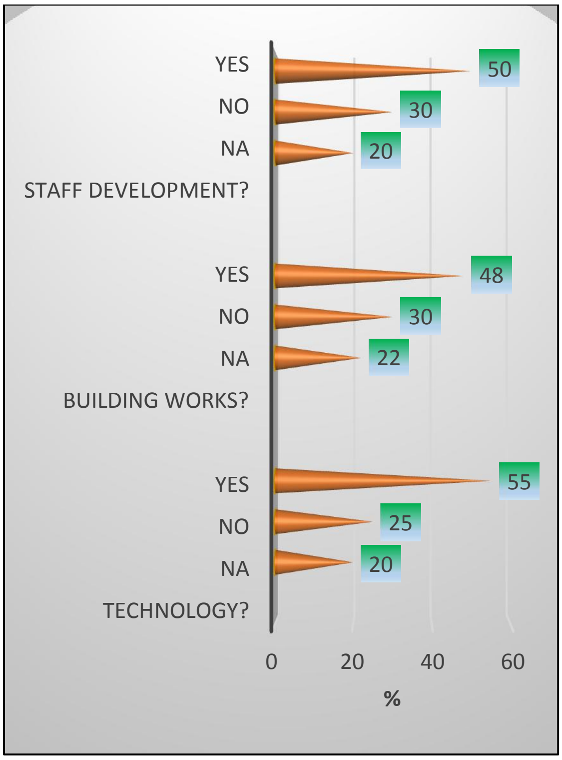
TABLE 8: Have you invested money in improvements to your business in the last year? (n=40)

Yes	80
No	18
No Comment	3



Some 55% confirmed that they had invested in technology, 48% in building works and 50% in staff development (Table 9).

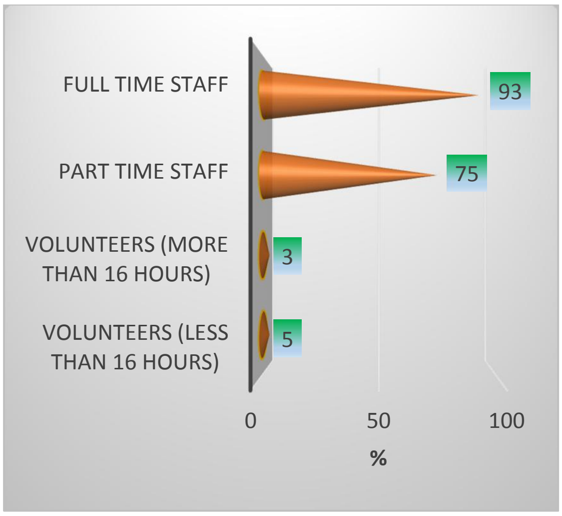
TABLE 9: Invested in…? (n=40)	
Technology	55
Building Works	48
Staff Development	50



4.6 HOW MANY PEOPLE ARE CURRENTLY INVOLVED IN YOUR BUSINESS (INCLUDING ANY WORKING OWNERS)?

Ninety-three percent of businesses had full-time staff, 75% had part-time staff, 3% had volunteers working more than 16 hours per week and 5% had volunteers working less than 16 hours per week.

TABLE 10: Businesses with... (n=40)	
Full time staff	93
Part time staff	75
Volunteers (more than 16 hours)	3
Volunteers (less than 16 hours)	5



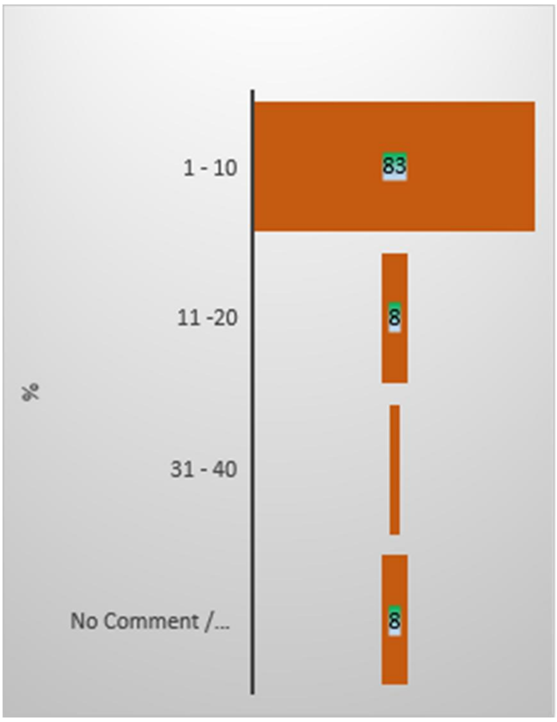
As shown in Table 11, 165 staff were employed on a full-time basis, 157 were employed on a part-time basis, giving a total of 322 staff employed in either a full-time or part-time capacity. One person was involved as a volunteer (n=1) for more than 16 hours per week, whilst a further 7 people (n=2) volunteered for less than 16 hours.

TABLE 11: How many people are currently involved in your business (including any working owners) (n=40)		
		Total
Full time (more than 30 hours)	165	322
Part time (up to 30 hours)	157	
Volunteers (more than 16 hours)	1	8
Volunteers (less than 16 hours)	7	
		330

4.6.1 FULL TIME (MORE THAN 30 HOURS)

Eighty-three percent of businesses employed between 1-10 full-time staff, 7% of businesses employed between 11-20 full-time staff; and 3% employed between 31-40 full-time staff (Table 12).

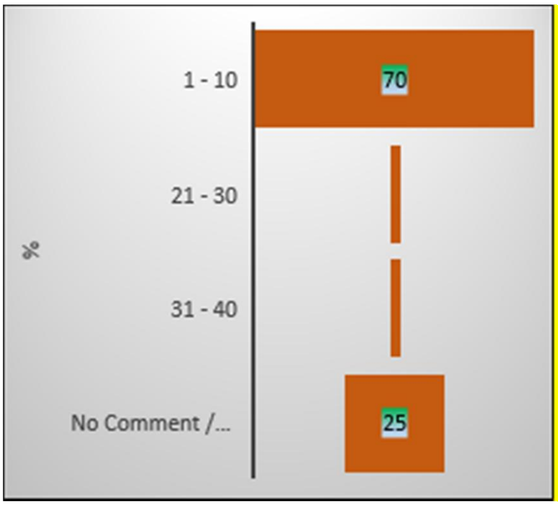
TABLE 12: How many people are currently involved in your business (Full-Time) (including any working owners) (n=40)	
1 - 10	83
11 -20	8
31 - 40	3
No Comment / NA	8



4.6.2 PART TIME (UP TO 30 HOURS)

Seventy per cent of businesses employed between 1-10 part-time staff, 3% employed between 21-30, 3% employed between 31-40 (Table 13).

TABLE 13: How many people are currently involved in your business (Part-Time) (including any working owners) (n=40)	
1 - 10	70
21 - 30	3
31 - 40	3
No comment/NA	25



4.6.3 VOLUNTEERS (MORE THAN 16 HOURS PER WEEK)

As shown in Table 14, 3% of businesses reported having between 1-10 people volunteer 16+ hours per week.

TABLE 14: How many people are currently involved in your business (volunteers 16+ hours) (including any working owners) (n=40)	
1 - 10	3
No Comment / NA	97

4.6.4 VOLUNTEERS (LESS THAN 16 HOURS PER WEEK)

Three per cent of businesses reported having between 1-10 volunteers involved for less than 16 hours each per week (Table 15).

TABLE 15: How many people are currently involved in your business (volunteers less than 16 hours) (including any working owners) (n=40)	
1 - 10	3
No Comment / NA	97

4.7 OVERALL, WHAT IS YOUR PERCEPTION OF THE TOWN CENTRE?

Forty-five per cent of respondents described their overall perception of Portstewart town centre as average (Tables 16 and 17). Two fifths of respondents (40%) reported that their perception of the town centre was good / very good, whilst 15% stated that it was poor.

TABLE 16: Overall, what is your perception of the town centre? (n=40)	
Poor	15
Average	45
Good	35
Very good	5

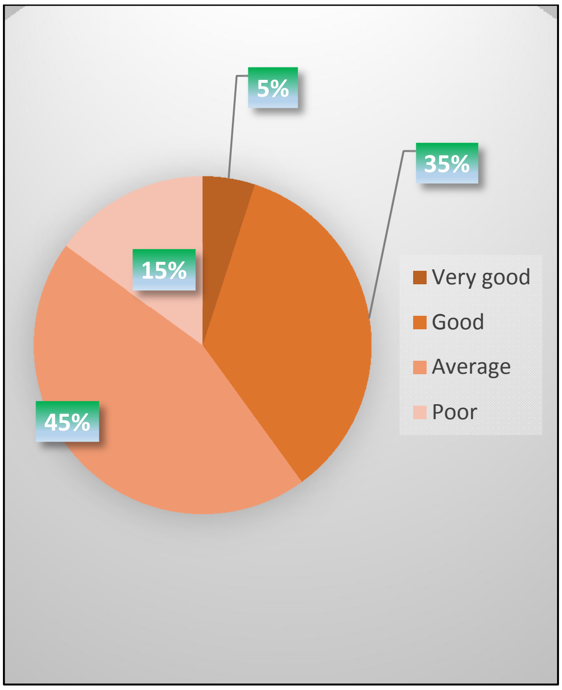
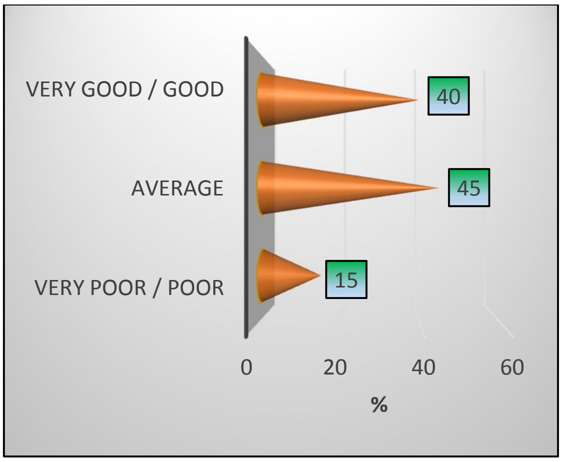


TABLE 17: Overall, what is your perception of the town centre? (n=40)	
Very poor / poor	15
Average	45
Very good / good	40



4.8 OTHER COMMENTS - PERCEPTION

Table 18 sets out a comprehensive breakdown of other comments relating to perception.

TABLE 18: Perception town centre - Other (n=12)	
Once the developments are finished it will be very good	1
Far too many expensive coffee shops / cafes	1
New pavement, lights, railings	1
New footpaths look very good	1
Unfinished buildings	1
To many cafes, would like to see more gift type shops to encourage shoppers	1
Always seems an afterthought after Portrush / Coleraine	1
Dereliction	1
New Prom looks great	1
This (poor) for Diamond area	1
It is a pleasant place to visit	1
Dog fouling (should be) removed - all areas; Children's play areas drawng people from the Promenade	1

4.9 PLEASE SCORE YOUR CURRENT OPINION OF THE FOLLOWING ASPECTS OF THE TOWN CENTRE (SCALE 1 – 10, 1 VERY POOR, 5 AVERAGE, 10 - VERY GOOD)

Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Portstewart town centre (1 very poor and 10 very good). The results are shown in detail in Table 19. For further clarity Table 20 sets out a summary of poor scores (1-4), average (5) and good scores (6-10).

As shown, the highest level of 'good' scores were for the following aspects:

- Friendliness of staff / people (89%);
- Good atmosphere (87%);
- Safety (84%);
- Lighting (79%);
- Quality of shops (78%); and,
- Pedestrian access (76%),

The highest level of 'average' scores were for the following aspects:

- On street entertainment (33%);
- Condition of buildings (30%); and,
- Range of goods and services available (30%).

The highest level of 'poor' scores were for the following aspects:

- Vacant shops (56%);
- Parking (52%);
- Number of car parking - spaces (50%); and,
- Variety of shops (48%).

TABLE 19: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Scores (n=40)													
	0	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**No Comment**	*Rounded to 100
Condition of streets/public realm – clean, well maintained, attractive	*0*	3	0	3	3	18	10	18	20	3	8	18	100
Flower arrangements, street banners	*0*	15	8	5	10	23	8	15	13	3	3	0	100
Lighting	*0*	5	0	0	0	15	8	18	30	8	15	3	100
Parking	*0*	13	8	18	13	25	10	10	3	0	0	3	100
Number of public car park spaces	*0*	15	15	15	5	28	5	5	8	0	5	0	100
Price of public car park spaces	*0*	5	3	3	3	10	3	3	8	0	50	15	100
Ease of moving around town centre	*0*	8	8	3	10	23	8	13	15	0	15	0	100
Pedestrian access	*0*	5	3	0	3	15	15	13	25	8	15	0	100
Variety of shops	*0*	13	10	15	10	18	8	20	5	3	0	0	100
Quality of shops	*0*	0	0	0	5	15	5	25	23	15	10	3	100
Range of goods and services available	*0*	5	3	8	10	30	13	18	8	8	0	0	100
Cafes	*0*	3	3	0	10	20	3	5	15	10	28	5	100
Value for money	*0*	0	5	5	13	15	5	13	20	13	10	3	100
Friendliness of staff/people	*0*	3	0	0	0	10	8	8	25	20	28	0	100
Good atmosphere	*0*	3	0	0	0	13	8	8	33	13	25	0	100
On-street entertainment	*5*	10	10	5	5	33	5	8	13	5	3	0	100
Safety	*0*	3	0	0	0	15	15	23	28	10	8	0	100
Condition of buildings	*0*	3	3	3	10	30	15	20	15	3	0	0	100
Vacant shops (if a lot = poor score)	*0*	13	10	18	15	18	10	8	5	3	0	3	100
Amount of dereliction (if a lot = poor score)	*0*	10	10	10	15	25	10	13	3	0	0	5	100
Vandalism (if a lot = poor score)	*0*	3	0	8	5	28	8	20	15	8	5	3	100
Levels of anti-social behaviour (if a lot = poor score)	*0*	8	5	5	5	15	10	23	13	8	5	5	100
Children's play areas	*0*	8	3	15	15	20	10	8	18	3	3	0	100
	5	154	107	139	165	462	200	315	361	144	236	66	-

Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Scores

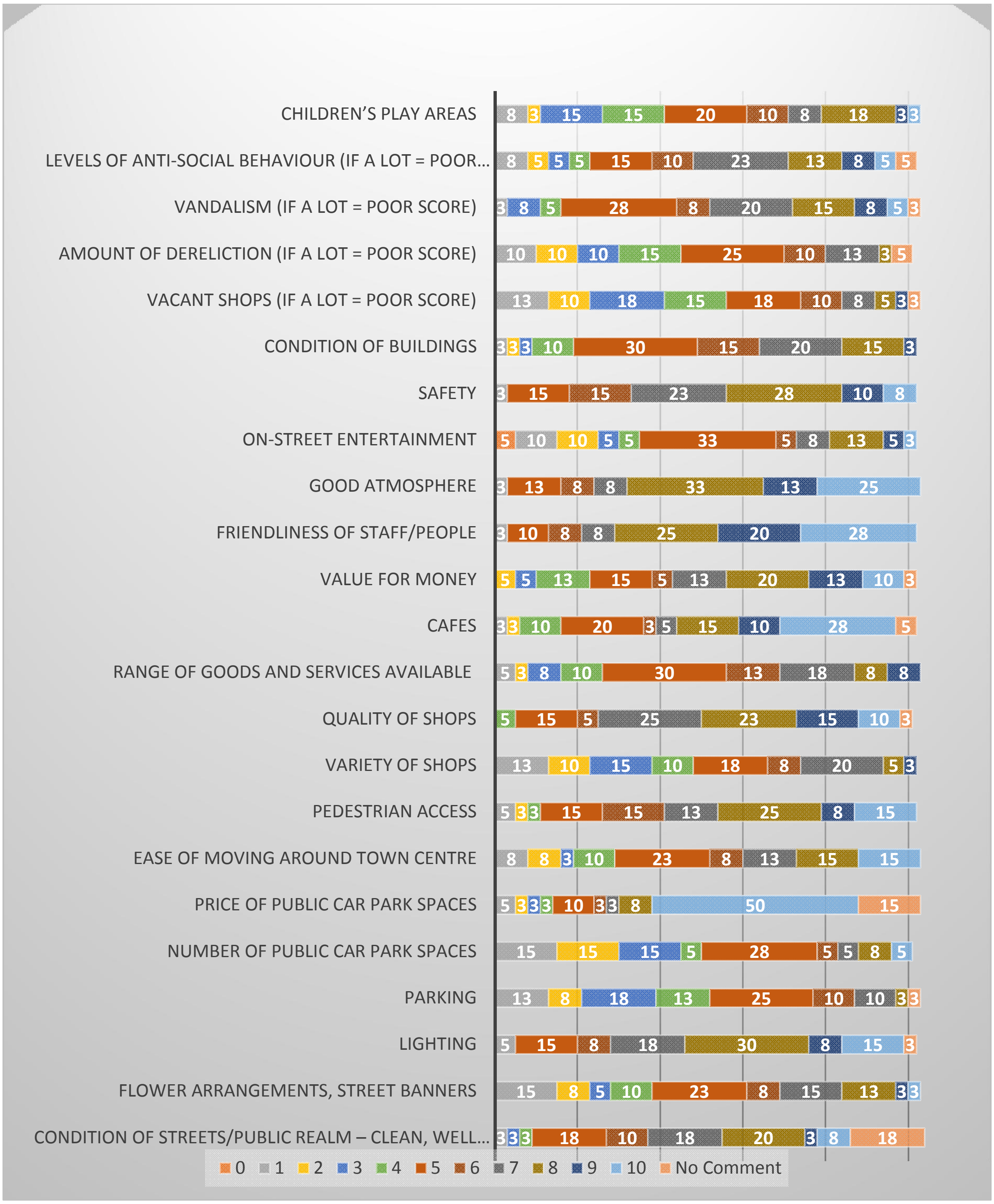
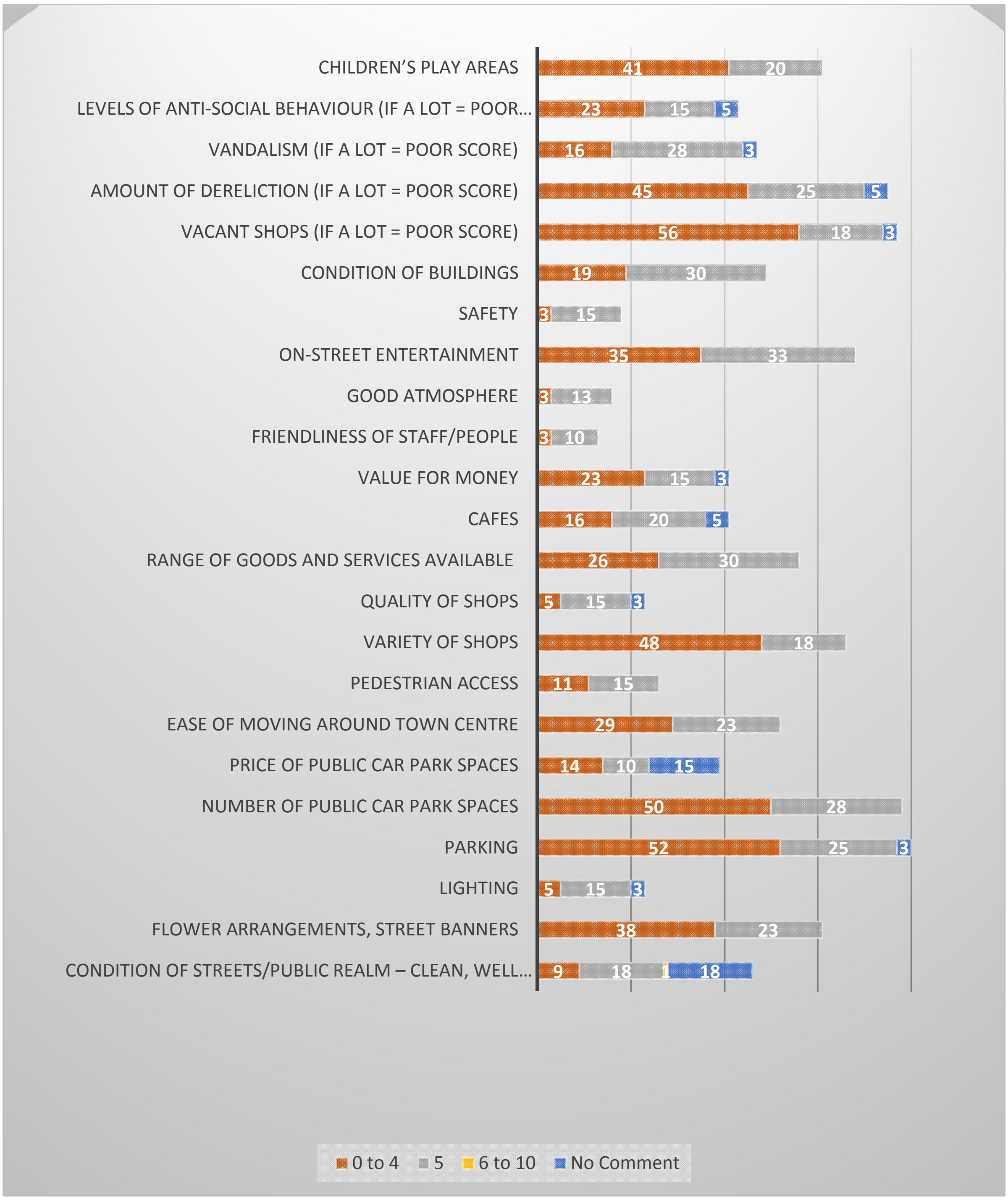


TABLE 20: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Grouped Scores (n=40)					
	0 to 4	**5**	**6 to 10**	**No Comment**	*Rounded to 100
Condition of streets/public realm – clean, well maintained, attractive	9	18	59	18	100
Flower arrangements, street banners	38	23	42		100
Lighting	5	15	79	3	100
Parking	52	25	23	3	100
Number of public car park spaces	50	28	23		100
Price of public car park spaces	14	10	64	15	100
Ease of moving around town centre	29	23	51		100
Pedestrian access	11	15	76		100
Variety of shops	48	18	36		100
Quality of shops	5	15	78	3	100
Range of goods and services available	26	30	47		100
Cafes	16	20	61	5	100
Value for money	23	15	61	3	100
Friendliness of staff/people	3	10	89		100
Good atmosphere	3	13	87		100
On-street entertainment	35	33	34		100
Safety	3	15	84		100
Condition of buildings	19	30	53		100
Vacant shops (if a lot = poor score)	56	18	26	3	100
Amount of dereliction (if a lot = poor score)	45	25	26	5	100
Vandalism (if a lot = poor score)	16	28	56	3	100
Levels of anti-social behaviour (if a lot = poor score)	23	15	59	5	100
Children's play areas	41	20	42		100
TOTAL	*570*	462	1256	66	-

Female respondents were statistically more likely than male respondents to describe vacant shops as poor/very poor.

Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) - Grouped Scores (n=40)



4.10 WHAT THREE ASPECTS OF THE TOWN COULD BE IMPROVED?

Respondents were asked to rank their top three priorities for improvement in Portstewart. Table 21 provides a comprehensive breakdown of the findings.

These included:

4.10.1 FIRST PRIORITY – IMPROVEMENT

- Better parking – number of spaces (25%);
- Wider variety of shops (20%);
- More children/teenagers (13%); and,
- More shops (8%).

4.10.2 SECOND PRIORITY - IMPROVEMENT

- Better parking – spaces (25%);
- More children/teenagers (13%);
- More recreation facilities (13%); and,
- Wider variety of shops (10%).

4.10.3 THIRD PRIORITY - IMPROVEMENT

- More recreation facilities (25%);
- Wider variety of shops (15%);
- More shops (15%); and,
- More children/teenagers (10%).

The combined highest (1^{st}, 2^{nd} and 3^{rd}) priority included: better parking – spaces (55); wider variety of shops (45); and, more recreation facilities (41).

TABLE 21: What three aspects of the town could be improved? (n=40)

	1st	2nd	3rd	TOTAL
Wider variety of shops	20	10	15	45
More shops	8	5	15	28
Better quality of shops	3	8	5	16
Better maintained buildings	3	8	3	14
Better maintained public spaces	0	3	0	3
Better parking – cost	5	0	0	5
Better parking – number of spaces	25	25	5	55
More for children/teenagers	13	13	10	36
More recreation facilities	3	13	25	41
More Public toilets	0	3	0	3
Better bus service	0	0	0	0
Improved safety	0	0	3	3
Improved street lighting	3	0	0	3
Improved signage	3	0	3	6
NA/No Comment	18	15	18	51

4.11 OTHER COMMENTS

Other comments are set out in Table 22.

What three aspects of the town could be improved? (n=40)

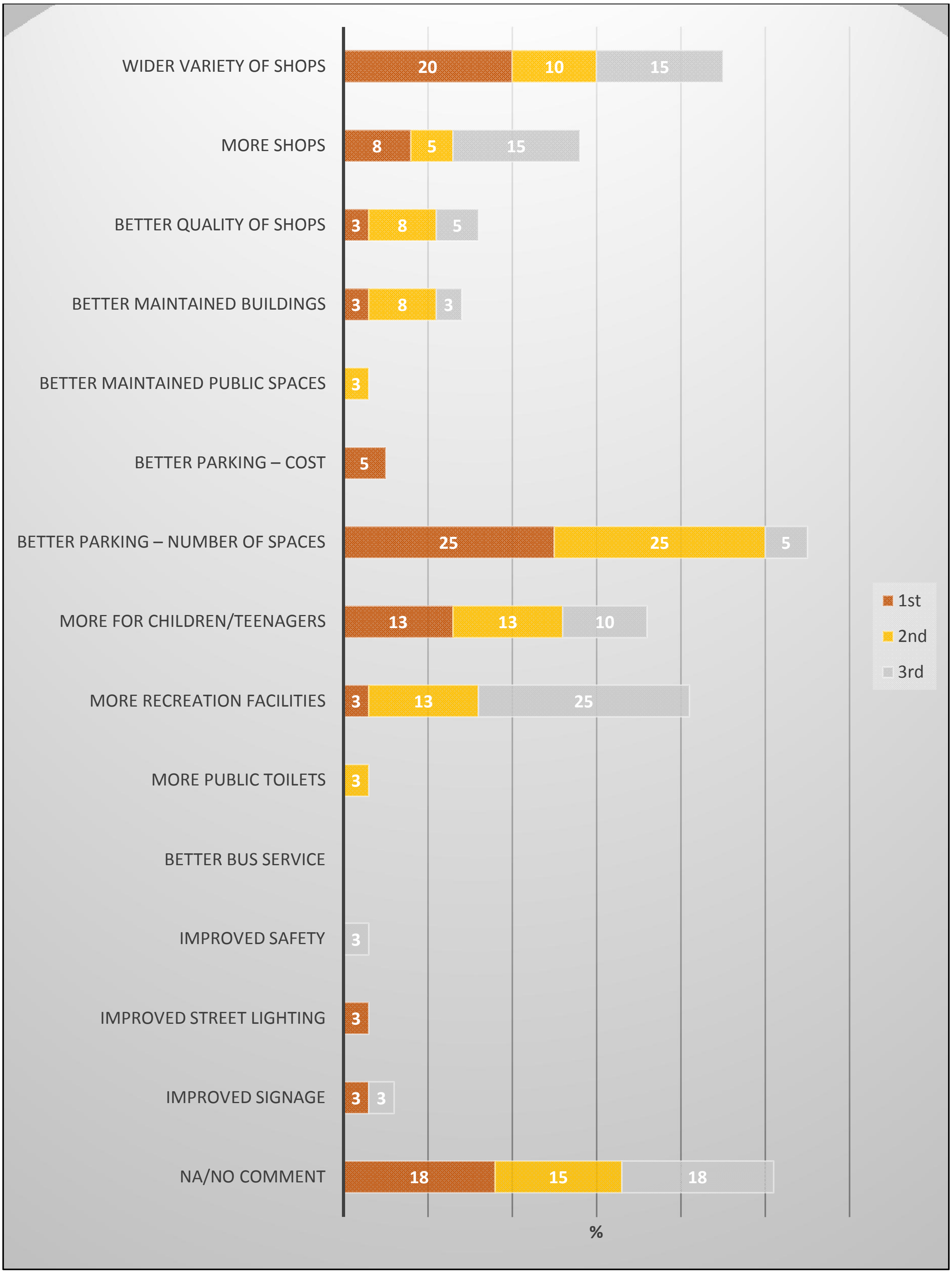


TABLE 22: Any other comments (n=7)	
Developments completed would be good	1
Too many cafes/too many coffee shops, not enough variety / far too many coffee shops and too expensive	1
Portstewart needs a hotel / dog dirt on streets / crescent needs upgraded	1
Not enough retail in town / too many cafes	1
New lighting poor as half the lights are not working - have reported / too many cafes	1
Diamond area of Portstewart is always neglected and this is what any visitor / local sees first! parking spaces taken away from here also and taxi drivers allowed to sit from 7pm - is not beneficial to all; lighting and pavements in diamond area very poor also	1
Dog fouling on pavements / children's play areas needed / toilets should be opened for longer hours in the summer / improved signage for public toilets / need dog fouling notices / Flowerfield play area took from prom play area	1

APPENDIX 1: Business Questionnaire Portstewart and Map of Town Centre Area

BUSINESS SURVEY

February 2017

Causeway Coast and Glens Borough Council would like to invite you to participate in a Business Survey to enable it to better understand business owners'/managers' perceptions of the town centre.

The findings from this research will be used by the Council to inform its Local Development Plan and may include the identification of lands for future retail development and the production of land use policies to guide development proposals.

The Business Survey will take approximately 4 minutes to complete. All responses will be treated with strict confidentiality.

The town centre area is shown on the map attached.

If you have any queries, please contact Sharon Mulhern from Causeway Coast & Glens Borough Council using telephone number 028 70347244 or Dr Jenny Sproule from *Sproule Consulting* on 07860 342493.

Yours Faithfully

Sharon Mulhern

Local Development Plan Manager

Causeway Coast & Glens Borough Council

Date: ________

Business Profile

1. Business Name: ___________________________
2. Business Address: ___________________________
3. Type of Main Business: **[PLEASE CIRCLE ONE ONLY]**

Clothing/footwear/jewellery/accessories	1
Health & beauty	2
Hairdressing	3
Homeware	4
Pet food/accessories	5
Books/newsagent/stationery	6
Pharmacy	7
Optician	8
Doctor/Dentist	9
Entertainment or leisure (gym, arcade, etc)	10
Charity	11
Department store	12
Groceries	13
Other: **Please Specify**	14

4. How many years have you traded in these premises? _________________________________

5. What is the ownership of your business? **[PLEASE CIRCLE ONE ONLY]**

Independent trader/retailer	1
Local chain	2
National chain	3
Multi national chain	4
Franchise	5
Other: **Please Specify**	6

6. How would you describe your current turnover / turnover in last year? **[PLEASE CIRCLE ONE ONLY]**

Well below average	1
Below average	2
Average (normal)	3
Above average	4
Well above average	5

7. Have you/the business owner invested capital in improvements to your business in the last year? **[PLEASE CIRCLE ONE ONLY]**

Yes	1
No	2

8. How many people are currently involved in running your business (including any working owners)? **[PLEASE INSERT FOR EACH]**

Full time (more than 30 hours)	
Part time (up to 30 hours)	
Volunteers (16 hours+)	
Volunteers (16 hours or less)	

Town Centre Perceptions

9. Overall, what is your perception of the town centre? **[PLEASE CIRCLE ONE ONLY]**

Very poor	1
Poor	2
Average	3
Good	4
Very good	5

Please comment: _______________________________

10. Please score your current opinion of the following aspects of the town centre (Scale 1 – 10, 1 very poor, 5 average, 10 – very good) **[PLEASE INSERT FOR EACH]**

Range of goods and services available	
Condition of buildings	
Condition of streets/public realm – clean, well maintained, attractive	
Number of public car park spaces	
Price of public car park spaces	
Safety	
Lighting	
On-street entertainment	
Levels of anti-social behaviour	
Vandalism	
Vacant shops	
Amount of dereliction	
Convenience	
Friendliness of staff/people	
Variety of shops	
Good atmosphere	
Quality of shops	
Cafes	
Children's play areas	
Parking	
Value for money	
Presence of pedestrian area	
Flower arrangements, street banners	

11. What three aspects of the town could be improved? **[PLEASE RANK 1,2,3]**

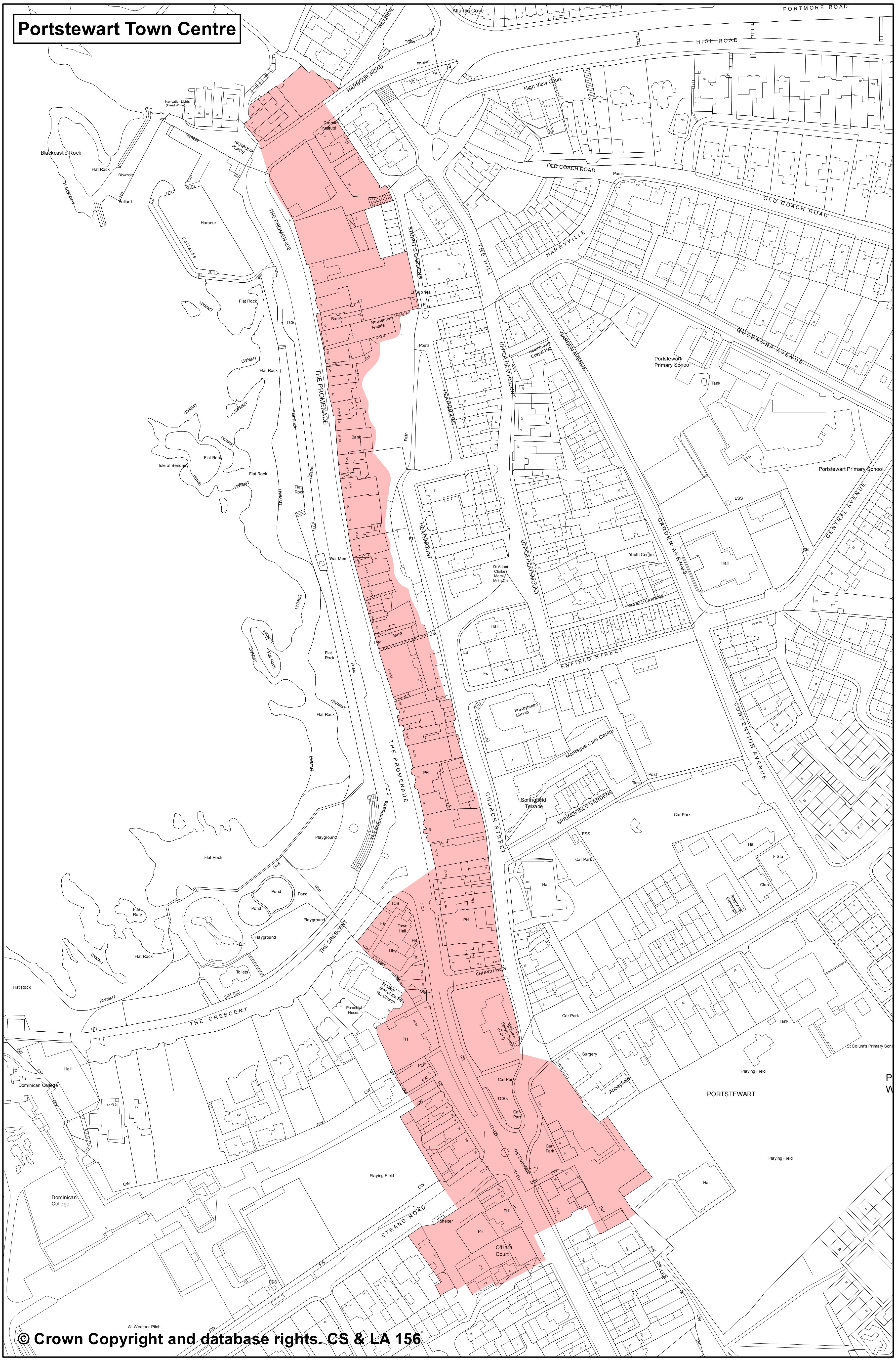
Wider variety of shops	
More shops	
Better quality of shops	
Better maintained buildings	
Better maintained public spaces	
Better parking – cost	
Better parking – number of spaces	
More for children/teenagers	
More recreation facilities	
More Public toilets	
Better bus service	
Improved safety	
Improved street lighting	
Improved signage	

Background Information

Male	1	Female	2
Age (Years)			

Thank you for your participation.

Portstewart Town Centre



Sproule Consulting

FINAL REPORT:

21st April 2017

Causeway Coast & Glens Borough Council

Dr Jenny Sproule

EMAIL: jenny.sproule@btinternet.com

EXECUTIVE SUMMARY

- 50% of respondents were visitors to Portstewart, the remaining 50% were residents of the town.

- 54% were in Portstewart town centre for 'other' reasons; 24% had visited Portstewart to eat / drink at local cafes, restaurants and pubs; 13% were at work / school in the area; 11% were shopping for books, visiting a newsagent or purchasing stationery; 6% were in Portstewart town centre for leisure purposes; 5% were clothes shopping.

- 33% visited Portstewart town centre at least once a week; 26% stated that they visited the town centre daily; 21% visited the town centre less often than once a month, a further 11% visited at least once a fortnight, whilst 9% visited at least once a month.

- Residents were statistically significantly more likely than visitors to report visiting the town centre less often than monthly.

- 34% intended to stay two hours or more in the town; 23% intended staying for at least one hour but less than two hours; 22% planned staying for at least thirty minutes but less than one hour; 18% planned staying between 10 and 30 minutes and a further 1% intended to stay less than 10 minutes.

- 41% had travelled from the Portstewart area to visit the town centre; this was followed by 17% from Coleraine and 3% from Portrush.

- 71% travelled by car to Portstewart town centre; 21% walked to the area; 4% travelled by bus and 3% by train.

- 34% reported that they spent between £0.01 and £10 during their visit to the town centre; 24% spent between £10.01 and £20; 18% spent between £20.01 and £30, whilst 8% spent over £50; 6% of respondents spent £30.01 and £40 and 5% spent nothing.

- 73% had been visiting the town for more than 5 years.

- 83% stated that their overall perception of Portstewart town centre was very good/good; 13% described their perception as average, whilst 3% described it as very poor/poor.

- Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Portrush town centre (1 very poor and 10 very good); the highest level of 'good' scores were for the following aspects:

  - Friendliness of staff / people (94%);
  - Cafes (90%);
  - Good atmosphere (90%); and,
  - Condition of streets / cleanliness (90%).

The highest level of 'average' scores were for the following aspects:

- Vacant shops (27%);
- Dereliction (284%); and,
- Condition of buildings (23%).

The highest level of 'poor' scores were for the following aspects:

- Dereliction (34%);
- Amount of carpark spaces (32%);
- Anti-social behaviour (29%); and,
- On-street entertainment (29%).

- Female respondents were statistically significantly more likely than male respondents to describe condition of streets/cleanliness as good.

- Male respondents were statistically significantly more likely than female respondents to describe variety of shops as poor.

- Female respondents were statistically significantly more likely than male respondents to describe quality of shops as good.

- Female respondents were statistically significantly more likely than male respondents to describe cafes as good.

- Female respondents were statistically significantly more likely than male respondents to describe friendliness as good.

- Female respondents were statistically significantly more likely than male respondents to describe vacant shops as poor.

- Male respondents were statistically significantly more likely than female respondents to describe dereliction as poor.

- Female respondents were statistically significantly more likely than male respondents to describe vandalism as poor.

- Respondents were asked to rank their top three priorities for improvement in Portstewart. Table 18 provides a comprehensive breakdown of the findings. These included:

1st PRIORITY:	Better maintained buildings (23%); Wider variety of shops (18%); and, More shops (11%).
2nd PRIORITY:	Better maintained buildings (16%); More for children/teenagers (14%); Wider variety of shops (10%); and, Better parking - spaces (10%).
3rd PRIORITY:	Better maintained buildings (19%); Wider variety of shops (15%); and, More public toilets (14%).

The combined highest (1st, 2nd and 3rd) priority included: better maintained buildings – 58%; wider variety of shops - 43%; and, more for children/teenagers – 33%.

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1. INTRODUCTION

Causeway Coast and Glens Borough Council (CCGBC) commissioned Sproule Consulting to conduct general public and business surveys in the six main towns within the Borough. Table 1 provides a comprehensive breakdown of the number of surveys completed.

TABLE 1: Completed Surveys		
	On-Street (General Public)	Business
Coleraine	100	100
Ballymoney	100	90
Portrush	100	40
Portstewart	100	40
Limavady	100	78
Ballycastle	100	54
TOTAL	600	402

The purpose of this Report is to provide empirical data to inform CCGBC's Local Development Plan for the Portstewart area.

The survey findings set out in this General Public Report, together with the data collated from the Business Report, will therefore be instrumental in establishing users' and stakeholders' attitudes and perceptions of Portstwart town centre.

2. RESEARCH: KEY OBJECTIVES

The key objectives of this research are shown in Figure 1.

3. DEMOGRAPHIC PROFILE

Fifty-four per cent of the general public survey respondents were female, 43% were male (Table 2). Three per cent made no comment.

TABLE 2: Gender (n=100)	
Male	43
Female	54
No comment	3

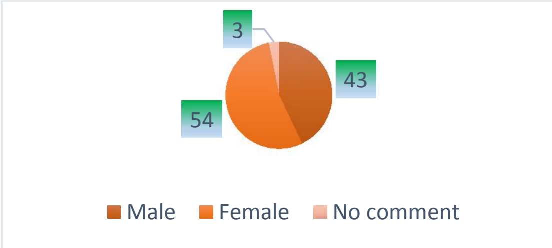
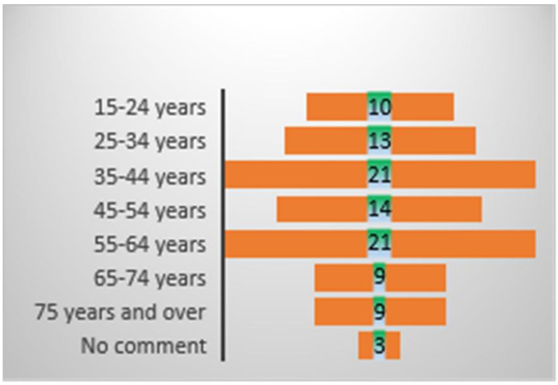
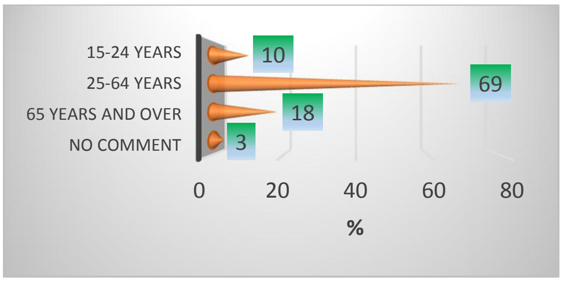


Table 3 sets out the achieved age profile.

TABLE 3: Age (n=100)	
15-24 years	10
25-34 years	13
35-44 years	21
45-54 years	14
55-64 years	21
+65-74 years	9
75 years and over	9
No comment	3





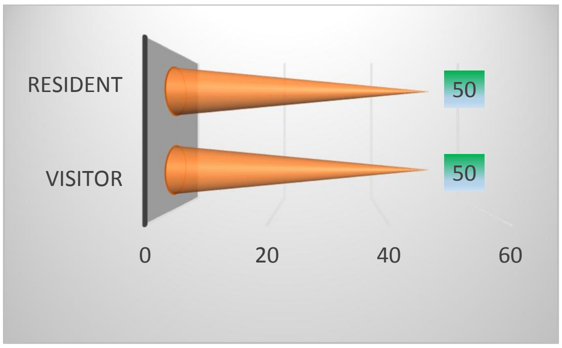
4. GENERAL PUBLIC SURVEY FINDINGS - PORTSTEWART TOWN CENTRE

4.1 ARE YOU A RESIDENT OF PORTSTEWART OR VISITOR TODAY?

As shown in Table 4, just over half the respondents (50%) were visitors to Portstewart, the remaining 50% were residents of the town.

TABLE 4: Are you a resident of Portstewart or visitor today? (n=100)

	%
Resident	50
Visitor	50
TOTAL	100

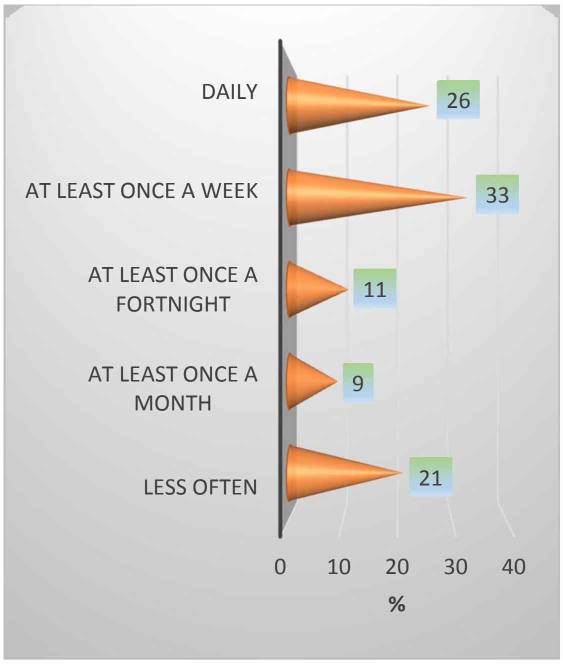


4.2 HOW OFTEN DO YOU VISIT THE TOWN CENTRE?

A third of respondents (33%) reported that they visited Portstewart town centre at least once a week (Table 5); 26% stated that they visited the town centre daily; 21% visited the town centre less often than once a month, a further 11% visited at least once a fortnight, whilst 9% visited at least once a month.

TABLE 5: How often do you visit the town centre? (n=100)

	%
Daily	26
At least once a week	33
At least once a fortnight	11
At least once a month	9
Less often	21
TOTAL	100



4.3 WHY HAVE YOU COME TO THE TOWN TODAY?

Almost a quarter of respondents (24%) stated that they had visited Portstewart to eat / drink at local cafes, restaurants and pubs (Table 6); 13% were at work / school in the area; 11% were shopping for books, visiting a newsagent or purchasing stationery. A further 6% were in Portstewart town centre for leisure purposes. Five per cent were clothes shopping.

TABLE 6: Why have you come to the town today? (multiple responses)

	%
Work/school in the area	13
Grocery shopping	3
Clothes shopping	5
Health and beauty	2
Homeware	3
Books, newsagent, stationery	11
Eating/drinking (cafes, restaurants, pubs)	24
Leisure (leisure centre, park)	6
Other (please specify)	54

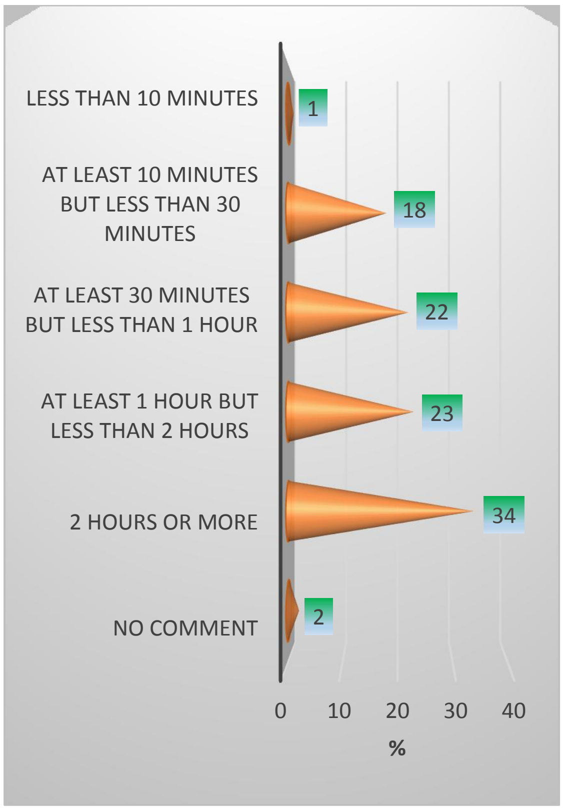
Fifty-four per cent of respondents were in Portstewart town centre for 'other' reasons.

TABLE 7: Other Reason for Coming to Town - Please Specify (n=54)	
Meat/scones	1
Art gallery	1
Family/sister/girlfriends/friends/meet friends/staying at friends	6
Walk/walk dogs/family walk	17
Walks, coffee	1
Walking, visitor	1
Ice cream	1
Walking, ice cream	1
Staying in Portrush	1
Birthday	2
Day out/family day	12
Visiting	2
Like area	1
Staying at Smugglers/staying weekend	2
Exercise	1
Property	1
Bus	1
Holiday	1
Post	1
TOTAL:	54

4.4 HOW LONG DO YOU INTEND TO SPEND HERE FOR THIS VISIT?

A third of respondents (34%) confirmed that they intended to stay two hours or more in the town (Table 8); almost a quarter (23%) intended staying for at least one hour but less than two hours; 22% planned staying for at least thirty minutes but less than one hour; 18% planned staying between 10 and 30 minutes and a further 1% intended to stay less than 10 minutes.

TABLE 8: How long do you intend to spend here for this visit? (n=100)	
Less than 10 minutes	1
At least 10 minutes but less than 30 minutes	18
At least 30 minutes but less than 1 hour	22
At least 1 hour but less than 2 hours	23
2 hours or more	34
No comment	2
TOTAL	100



4.5 WHERE HAVE YOU TRAVELLED FROM TO GET TO PORTSTEWART TOWN CENTRE TODAY?

As shown in Table 9, two fifths of respondents (41%) stated that they had travelled from the Portstewart area to visit the town centre; this was followed by 17% from Coleraine and 3% from Portrush.

TABLE 9: Where have you travelled from to get to Portstewart town centre today? (n=100)	
Coleraine	14
Ballymoney	5
Portrush	7
Portstewart	41
Kilrea	2
Bushmills	1
Other: Please Specify	28
No comment	2
TOTAL	100

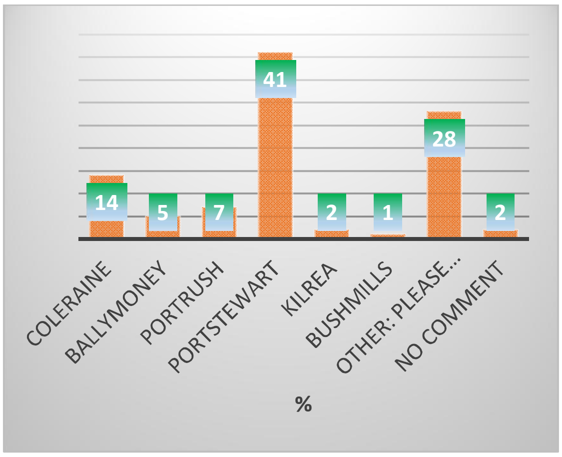


Table 10 provides a breakdown of the other areas respondents travelled from to visit Portstewart town centre.

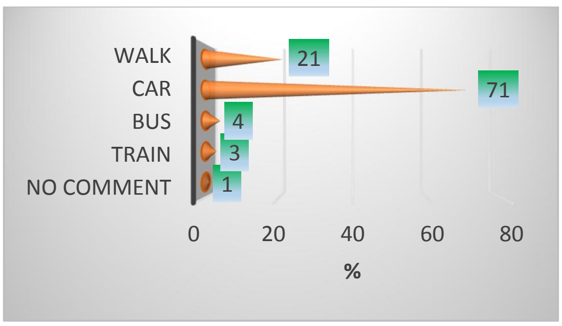
TABLE 10: Where have you travelled from to get to Portstewart today? Other (n=28)	
Carrickfergus	2
Armagh	2
Belfast	5
Fermanagh	2
Scotland	1
Craigavon	1
Randalstown	1
Banbridge	1
Londonderry	1
Ballymena	5
Donegal	2
East Belfast	1
Broughshane	1
Portadown	1
Castlerock	1
Bangor	1
TOTAL	28

4.6

4.6 HOW DID YOU TRAVEL TO THE AREA?

Seventy-one per cent of respondents travelled by car to Portstewart town centre; just over a fifth (21%) walked to the area; 4% travelled by bus and 3% by train (Table 11).

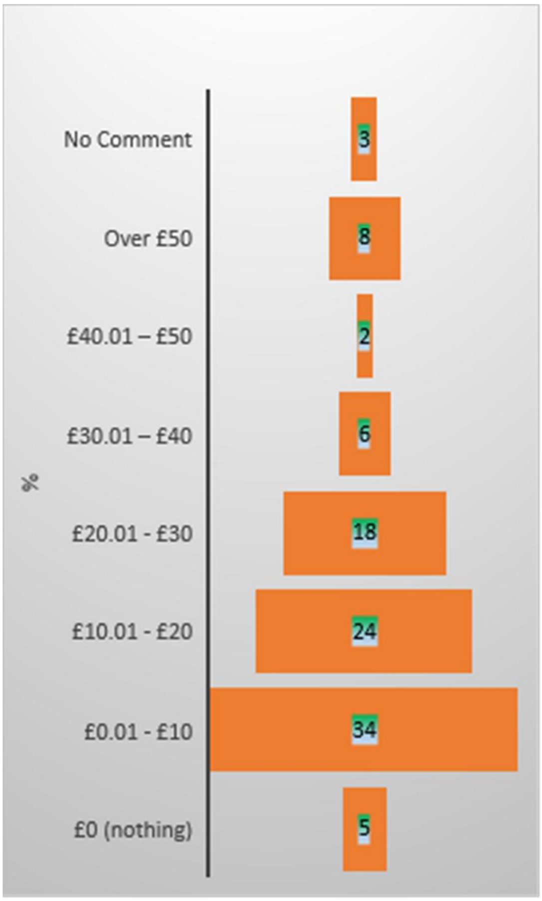
TABLE 11: How did you travel to the area? (n=100)	
Walk	21
Car	71
Bus	4
Train	3
No comment	1
TOTAL	100



4.7 IN TOTAL, HOW MUCH DO YOU INTEND TO SPEND/HAVE YOU SPENT DURING YOUR VISIT TODAY?

Thirty-four per cent of respondents reported that they spent between £0.01 and £10 during their visit to the town centre; a further 24% spent between £10.01 and £20; 18% spent between £20.01 and £30, whilst 8% spent over £50 (Table 12). Only 6% of respondents spent £30.01 and £40 and 5% spent nothing.

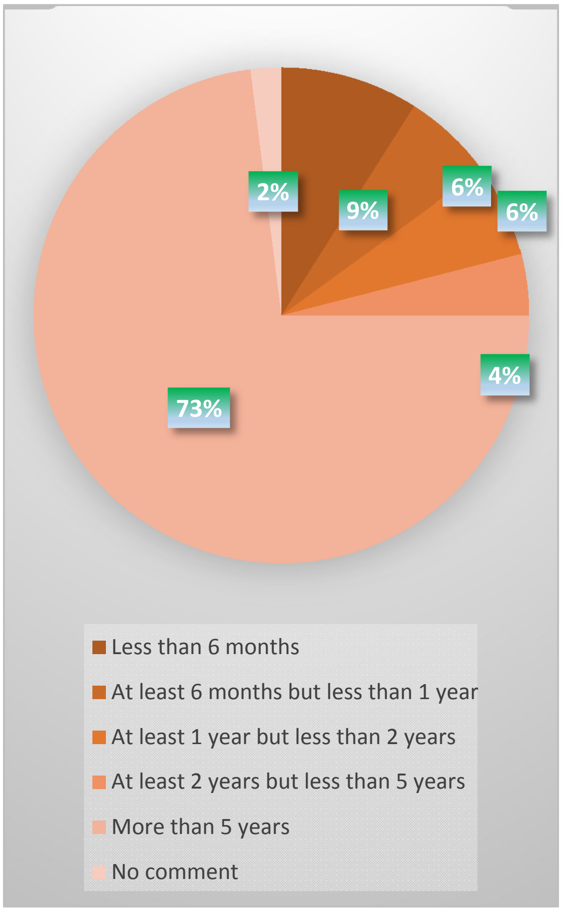
TABLE 12: In total, how much do you intend to spend / have you spent during your visit today? (n=100)	
£0 (nothing)	5
£0.01 - £10	34
£10.01 - £20	24
£20.01 - £30	18
£30.01 – £40	6
£40.01 – £50	2
Over £50	8
No Comment	3



4.8 HOW LONG HAVE YOU BEEN VISITING THE TOWN?

The majority of respondents (73%) confirmed they had been visiting the town for more than 5 years (Table 13).

TABLE 13: How long have you been visiting the town? (n=100)	
Less than 6 months	9
At least 6 months but less than 1 year	6
At least 1 year but less than 2 years	6
At least 2 years but less than 5 years	4
More than 5 years	73
No comment	2
TOTAL	100



Residents were statistically significantly more likely than visitors to report visiting the town centre less often than monthly.

4.9 OVERALL, WHAT IS YOUR PERCEPTION OF THE TOWN CENTRE?

Just over four fifths of respondents (83%) stated that their overall perception of Portstewart town centre was very good/good; 13% described their perception as average, whilst 3% described it as very poor/poor (Tables 14 and 15).

TABLE 14: Overall, what is your perception of the town centre? (n=100)	
Very poor	1
Poor	2
Average	13
Good	40
Very good	43
No comment	1
TOTAL	100

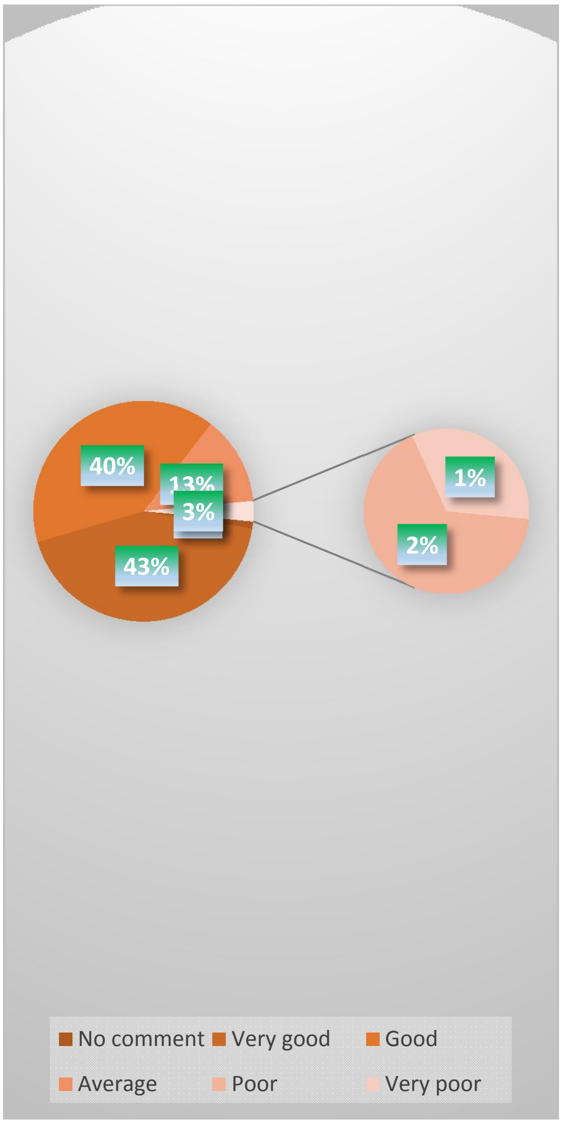
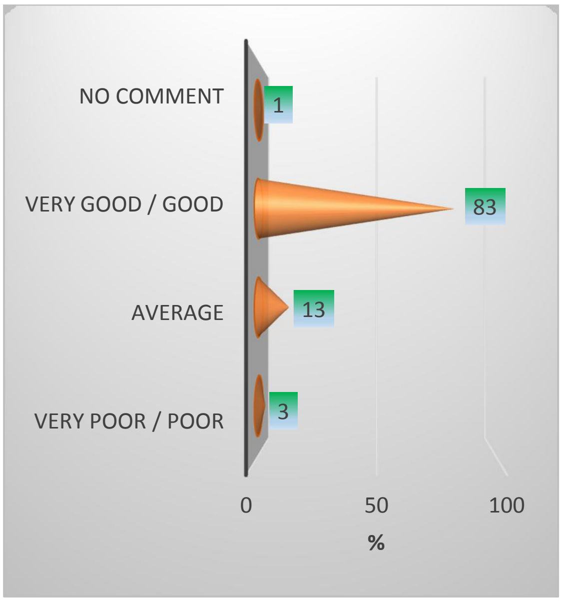


TABLE 15: Overall, what is your perception of the town centre (Grouped)? (n=100)	
Very poor / poor	3
Average	13
Very good / good	83
No comment	1



4.10 OTHER COMMENTS

TABLE 16: Overall, what is your perception of the town centre? Other (n=32)	
Plenty of shops	1
Buildings fixed not allowed to sold	1
Buildings tidied up. One newsagent.	1
Improve bank/buildings	1
Good atmosphere. Summer customer	1
Nice to walk/view/nice views/sea view	5
Nice people	1
Peaceful. Nice coffee.	1
Good customers - Anchor	1
Good views/people/atm	1
Friends in area - nice ice cream/coffee	1
Nice bars/walk	1
Atmosphere/students	1
Ice cream/walk	1
Shops/buildings look bad	1
Nice atmosphere, views/Friendly atmosphere	2
Apart from empty shops	1
Park for children	1
Enjoyable town	1
Friendly, nice views	1
Friendly town, nice food	1
Nice seating, views, plenty coffee shops	1
Everything needed	1
Good atmosphere, improve buildings	1
Friends, family, pubs students	1
Vastly improved	1
Should be pedestrianised	1
TOTAL	32

4.11 PLEASE SCORE YOUR CURRENT OPINION OF THE FOLLOWING ASPECTS OF THE TOWN CENTRE (SCALE 1 – 10, 1 VERY POOR, 5 AVERAGE, 10 - VERY GOOD)

Using a scale of 1 – 10, respondents were asked to score their opinion of a number of aspects of Portstewart town centre (1 very poor and 10 very good). The results are shown in detail in Table 16. For further clarity Table 17 sets out a summary of poor scores (1-4), average (5) and good scores (6-10).

As shown, the highest level of 'good' scores were for the following aspects:

- Friendliness of staff / people (94%);
- Cafes (90%);
- Good atmosphere (90%); and,
- Condition of streets / cleanliness (90%).

The highest level of 'average' scores were for the following aspects:

- Vacant shops (27%);
- Dereliction (24%); and,
- Condition of buildings (23%).

The highest level of 'poor' scores were for the following aspects:

- Dereliction (34%);
- Number of carpark spaces (32%);
- Anti-social behaviour (29%); and,
- On-street entertainment (29%).

Female respondents were statistically significantly more likely than male respondents to describe condition of streets/cleanliness as good.

Male respondents were statistically significantly more likely than female respondents to describe variety of shops as poor.

Female respondents were statistically significantly more likely than male respondents to describe quality of shops as good.

Female respondents were statistically significantly more likely than male respondents to describe cafes as good.

Female respondents were statistically significantly more likely than male respondents to describe friendliness as good.

Female respondents were statistically significantly more likely than male respondents to describe vacant shops as poor.

Male respondents were statistically significantly more likely than female respondents to describe dereliction as poor.

Female respondents were statistically significantly more likely than male respondents to describe vandalism as poor.

4.12 WHAT THREE ASPECTS OF THE TOWN COULD BE IMPROVED?

Respondents were asked to rank their top three priorities for improvement in Portstewart. Table 18 provides a comprehensive breakdown of the findings. These included:

4.12.1 FIRST PRIORITY – IMPROVEMENT

- Better maintained buildings (23%);
- Wider variety of shops (18%); and,
- More shops (11%).

4.12.2 SECOND PRIORITY - IMPROVEMENT

- Better maintained buildings (16%);
- More for children/teenagers (14%);
- Wider variety of shops (10%); and,
- Better parking - spaces (10%).

4.12.3 THIRD PRIORITY - IMPROVEMENT

- Better maintained buildings (19%);
- Wider variety of shops (15%); and
- More public toilets (14%).

The combined highest (1^{st}, 2^{nd} and 3^{rd}) priority included: better maintained buildings – 58%; wider variety of shops - 43%; and, more for children/teenagers – 33%.

TABLE 17: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) (n=100)												
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**No Comment**	***Rounded to 100**
Condition of streets/public realm – clean, well maintained, attractive	0	1	0	0	6	7	24	37	10	12	3	100
Flower arrangements, street banners	5	4	2	0	13	11	21	13	11	8	12	100
Lighting	0	1	0	2	4	2	28	22	15	15	11	100
Parking	5	7	7	6	12	6	23	5	8	5	16	100
Number of public car park spaces	5	8	9	10	13	6	12	11	7	4	15	100
Price of public car park spaces	0	0	0	2	4	2	12	8	5	25	42	100
Ease of moving around town centre	3	0	0	1	1	5	17	14	14	37	8	100
Pedestrian access	2	2	0	1	2	7	21	22	13	25	5	100
Variety of shops	2	3	9	7	18	8	23	13	6	6	5	100
Quality of shops	1	0	0	3	12	12	23	21	10	9	9	100
Range of goods and services available	1	1	1	7	18	12	21	18	4	9	8	100
Cafes	1	1	1	0	1	4	16	23	16	31	6	100
Value for money	0	1	0	2	6	12	24	34	7	4	10	100
Friendliness of staff/people	0	0	0	0	2	2	10	21	10	51	4	100
Good atmosphere	0	0	0	0	4	4	15	21	13	37	6	100
On-street entertainment	9	12	4	4	16	6	8	6	3	1	31	100
Safety	0	2	0	1	4	6	33	22	10	15	7	100
Condition of buildings	1	2	5	17	23	11	18	12	2	4	5	100
Vacant shops (if a lot = poor score)	4	8	3	12	27	13	11	12	3	0	7	100
Amount of dereliction (if a lot = poor score)	5	9	4	16	24	14	13	6	1	0	8	100
Vandalism (if a lot = poor score)	3	10	8	3	6	7	21	15	8	2	17	100
Levels of anti-social behaviour (if a lot = poor score)	1	15	10	3	6	9	11	17	3	12	13	100
Children's play areas	4	3	4	3	2	6	12	12	4	10	40	100
TOTAL	52	90	67	100	224	172	417	385	183	322	288	2300

Please score your current opinion of the following aspects of the town centre
(Scale 1-10, 1 very poor, 5 average, 10 - very good) (n=100)

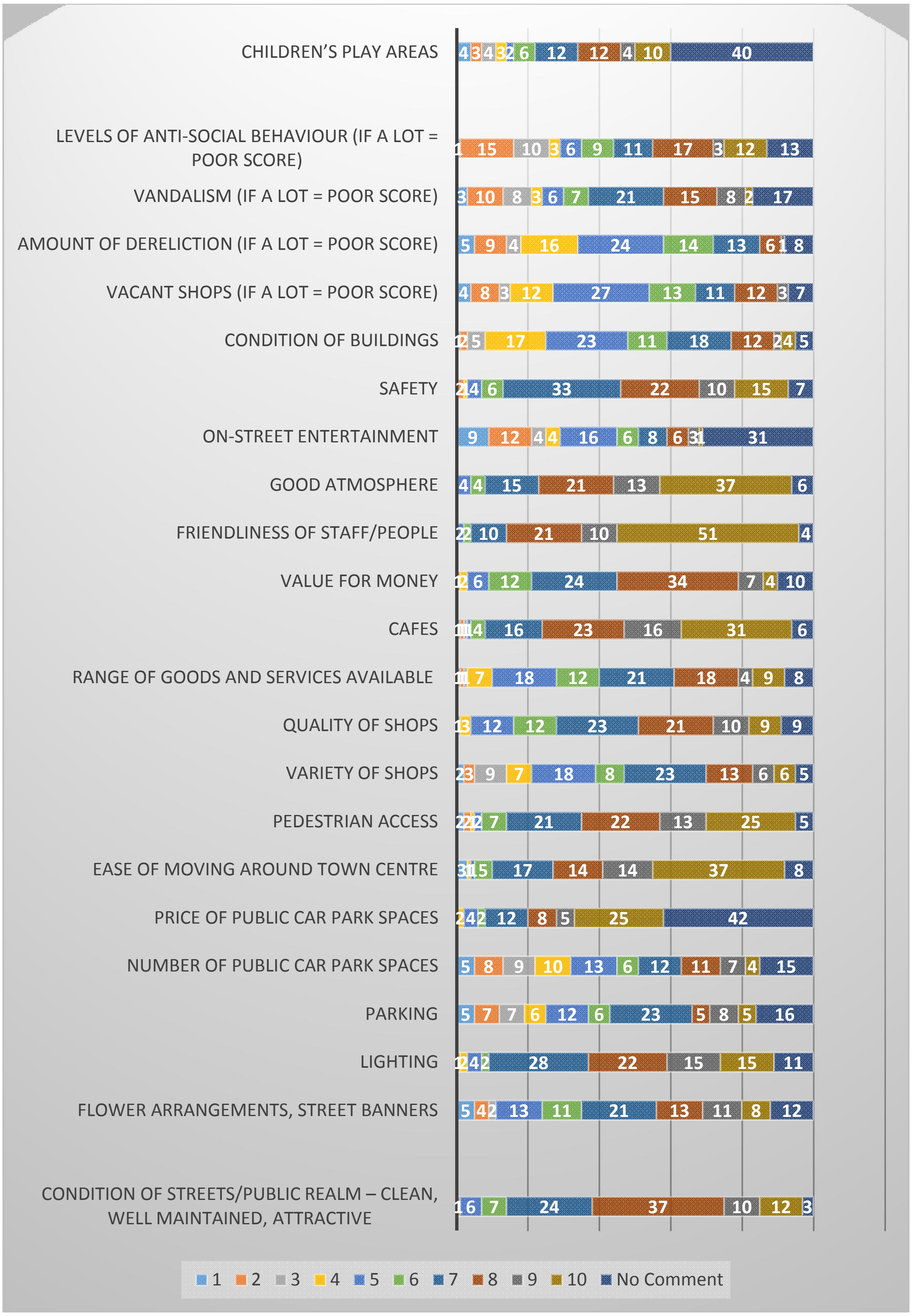


TABLE 18: Please score your current opinion of the following aspects of the town centre (Scale 1-10, 1 very poor, 5 average, 10 - very good) Grouped Scores (n=100)					
	1 – 4	**5**	**6 – 10**	**No Comment**	***Rounded to 100**
Condition of streets/public realm – clean, well maintained, attractive	1	6	90	3	100
Flower arrangements, street banners	11	13	64	12	100
Lighting	3	4	82	11	100
Parking	25	12	47	16	100
Number of public car park spaces	32	13	40	15	100
Price of public car park spaces	2	4	52	42	100
Ease of moving around town centre	4	1	87	8	100
Pedestrian access	5	2	88	5	100
Variety of shops	21	18	56	5	100
Quality of shops	4	12	75	9	100
Range of goods and services available	10	18	64	8	100
Cafes	3	1	90	6	100
Value for money	3	6	81	10	100
Friendliness of staff/people	0	2	94	4	100
Good atmosphere	0	4	90	6	100
On-street entertainment	29	16	24	31	100
Safety	3	4	86	7	100
Condition of buildings	25	23	47	5	100
Vacant shops (if a lot = poor score)	27	27	39	7	100
Amount of dereliction (if a lot = poor score)	34	24	34	8	100
Vandalism (if a lot = poor score)	24	6	53	17	100
Levels of anti-social behaviour (if a lot = poor score)	29	6	52	13	100
Children's play areas	14	2	44	40	100
TOTAL	309	224	1479	288	2300

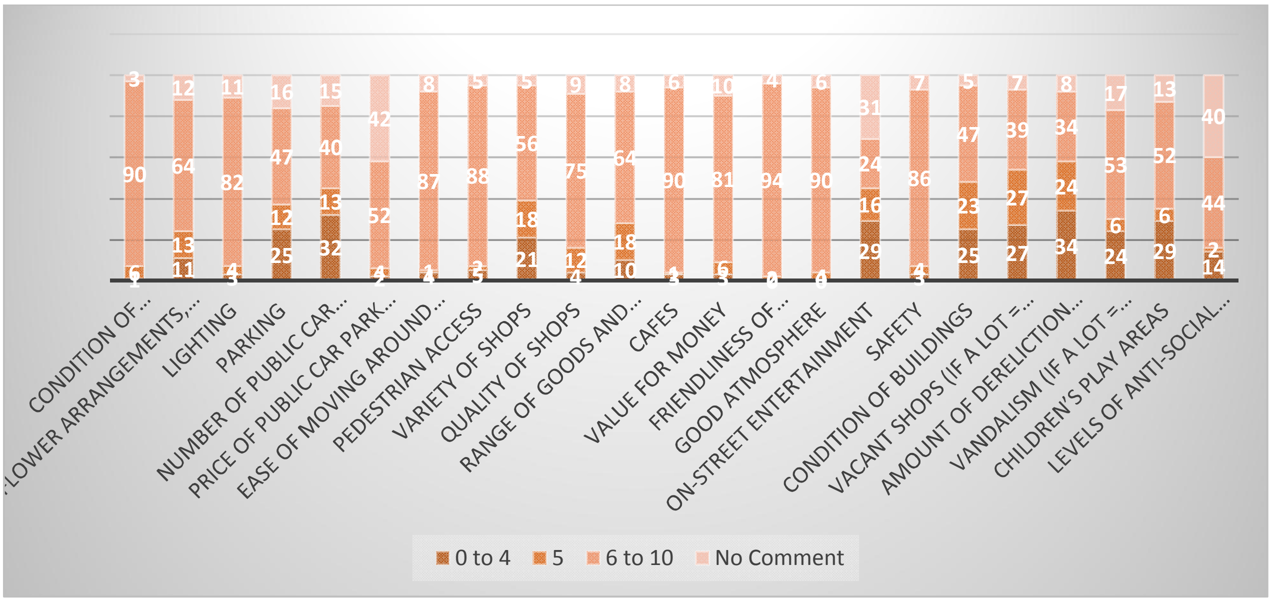
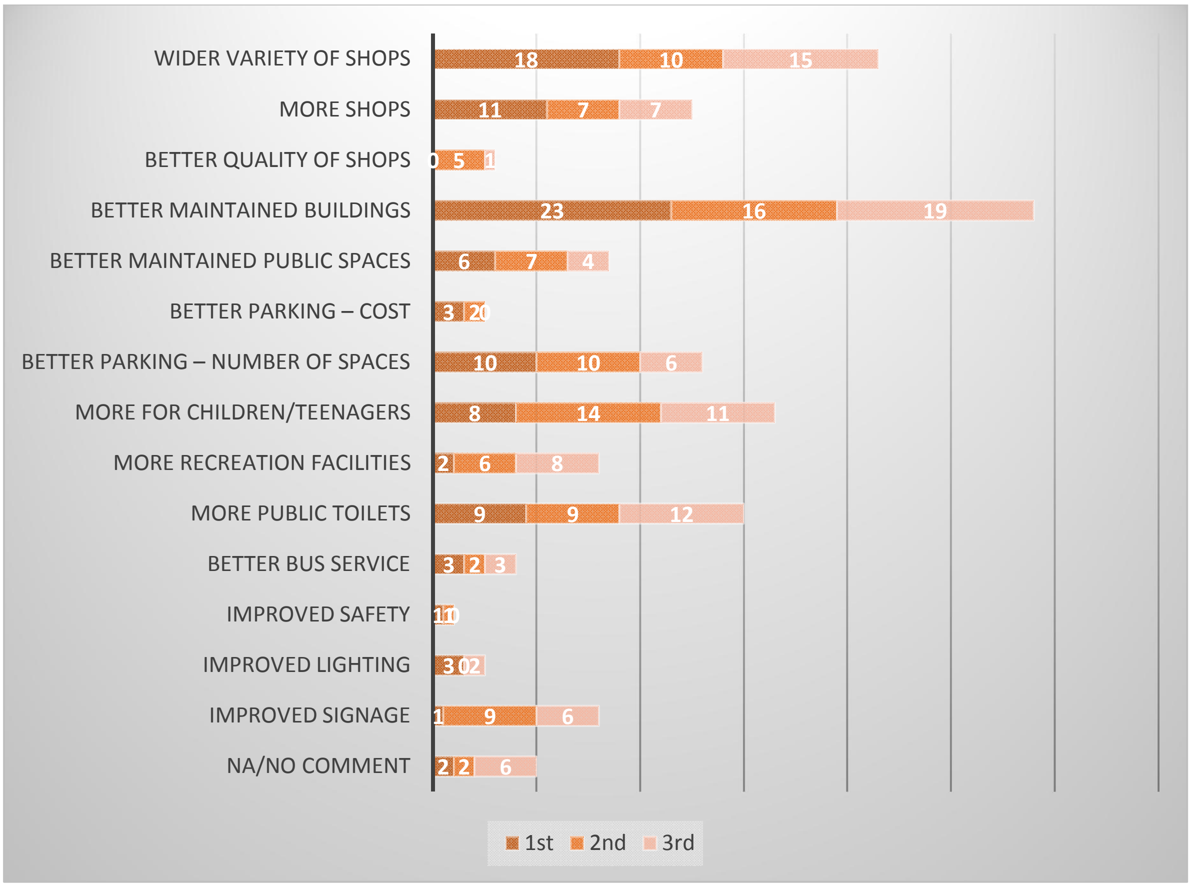


TABLE 19: What three aspects of the town could be improved?				
	1st (n=100)	**2nd (n=100)**	**3rd (n=100)**	**TOTAL**
Wider variety of shops	*18*	10	15	43
More shops	*11*	7	7	25
Better quality of shops	*0*	5	1	6
Better maintained buildings	*23*	16	19	58
Better maintained public spaces	*6*	7	4	17
Better parking – cost	*3*	2	0	5
Better parking – number of spaces	*10*	*10*	6	26
More for children/teenagers	*8*	14	11	33
More recreation facilities	*2*	6	8	16
More Public toilets	*9*	9	12	30
Better bus service	*3*	2	3	8
Improved safety	*1*	1	0	2
Improved lighting	*3*	0	2	5
Improved signage	*1*	9	6	16
NA	2	2	6	10
TOTAL	100	100	100	300



APPENDIX 1: General Public Questionnaire Portstewart and Map of Town Centre Area

GENERAL PUBLIC SURVEY

February 2017

Causeway Coast and Glens Borough Council would like to invite you to participate in a Survey to enable it to better understand the general public's perception of the town centre.

The findings from this research will be used by the Council to inform its Local Development Plan and may include the identification of lands for future retail development and the production of land use policies to guide development proposals.

The General Public Survey will take approximately 4 minutes to complete. All responses are anonymous and will be treated with strict confidentiality.

The town centre area is shown on the map attached.

If you have any queries, please contact Sharon Mulhern from Causeway Coast & Glens Borough Council using telephone number 028 70347244 or Dr Jenny Sproule from *Sproule Consulting* on 07860 342493.

Yours Faithfully

Sharon Mulhern
Local Development Plan Manager

Causeway Coast & Glens Borough Council

1. Are you a resident of _____________ or visitor today? **[PLEASE CIRCLE ONE ONLY]**

Resident	1	Visitor	2

2. How often do you visit the town centre? **[PLEASE CIRCLE ONE ONLY]**

Daily	1
At least once a week	2
At least once a fortnight	3
At least once a month	4
Less often	5

3. Why have you come to the town today? **[PLEASE CIRCLE ALL THAT APPLY]**

Work/school in the area	1	Books, newsagent, stationery	10
Grocery shopping	2	Eating/drinking (cafes, restaurants, pubs)	11
Clothes shopping	3	Pharmacy/optician	12
Footwear shopping	4	Doctor/dentist	13
Jewellery shopping	5	Using financial, legal or insurance services	14
Health and beauty	6	Entertainment (arcade)	15
Hairdresser/barber	7	Leisure (leisure centre, park)	16
Homeware	8	Other: **Please Specify**	17
Electrical goods	9		

4. How long do you intend to spend here for this visit? **[PLEASE CIRCLE ONE ONLY]**

Less than 10 minutes	1
At least 10 minutes but less than 30 minutes	2
At least 30 minutes but less than 1 hour	3
At least 1 hour but less than 2 hours	4
2 hours or more	5

5. Where have you travelled from to get to __________ today? **[PLEASE CIRCLE ONE ONLY]**

Coleraine	1	Garvagh	7
Ballymoney	2	Kilrea	8
Limavady	3	Bushmills	9
Ballycastle	4	Dungiven	10
Portrush	5	Other: **Please Specify**	11
Portstewart	6		

6. How did you travel to the area? **[PLEASE CIRCLE ONE ONLY]**

Walk	1	Train	6
Bus	2	Cycle	7
Car	3	Other: **Please Specify**	8
Taxi	4		
Electrical goods	5		

7. In total, how much do you intend to spend/have you spent during your visit today? **[PLEASE CIRCLE ONE ONLY]**

£0	1	£31 – 40	6
£0 - £10	2	£41 – 50	7
£11 - £20	3	£51 or more	8
£21 - £30	4		

8. How long have you been visiting the town? **[PLEASE CIRCLE ONE ONLY]**

Less than 6 months	1
At least 6 months but less than 1 year	2
At least 1 year but less than 2 years	3
At least 2 years but less than 5 years	4
More than 5 years	5

Town Centre

9. Overall, what is your perception of the town centre? **[PLEASE CIRCLE ONE ONLY]**

Very poor	1
Poor	2
Average	3
Good	4
Very good	5

Please comment: ______________________________

10. Please score your current opinion of the following aspects of the town centre (Scale 1 – 10, 1 very poor, 5 average, 10 – very good) **[PLEASE INSERT FOR EACH]**

Range of goods and services available	
Condition of buildings	
Condition of streets/public realm – clean, well maintained, attractive	
Number of public car park spaces	
Price of public car park spaces	
Safety	
Lighting	
On-street entertainment	
Levels of anti-social behaviour	
Vandalism	
Vacant shops	
Amount of dereliction	
Convenience	
Friendliness of staff/people	
Variety of shops	
Good atmosphere	
Quality of shops	
Cafes	
Children's play areas	
Parking	
Value for money	
Presence of pedestrian area	
Flower arrangements, street banners	

11. What three aspects of the town could be improved? **[PLEASE RANK 1,2,3]**

Wider variety of shops	
More shops	
Better quality of shops	
Better maintained buildings	
Better maintained public spaces	
Better parking – cost	
Better parking – number of spaces	
More for children/teenagers	
More recreation facilities	
More Public toilets	
Better bus service	
Improved safety	
Improved street lighting	
Improved signage	

Background Information

Male	1	Female	2
Age (Years)			

Thank you for your participation.

Date: _____________

Location: _____________

Portstewart Town Centre