

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Portstewart

August 2021



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

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

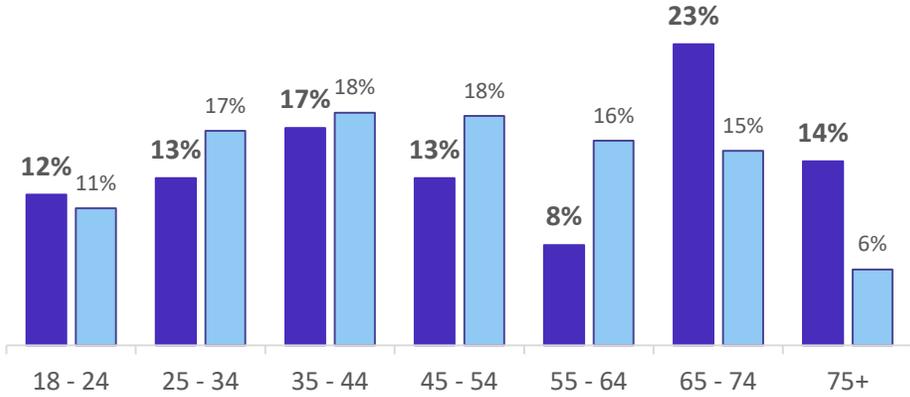
- The visitor results are based on an overall sample of **77** respondents;
- The trader's results are based on a sample of **30** traders within the town centre.

Sampling for visitors and traders in Portstewart took place between 29th March and 15th April 2021. It is important to note that during this period, there were a range of continuing restrictions in place owing to the ongoing Coronavirus pandemic. The specific restrictions at the time are outlined in Appendix 1, however it is important to be cognisant of the impact these restrictions will have had on both visitors (restrictions on area movement, what shops / activities they have come to use etc.) and traders (loss of revenue, periods of closure etc.) in the area.

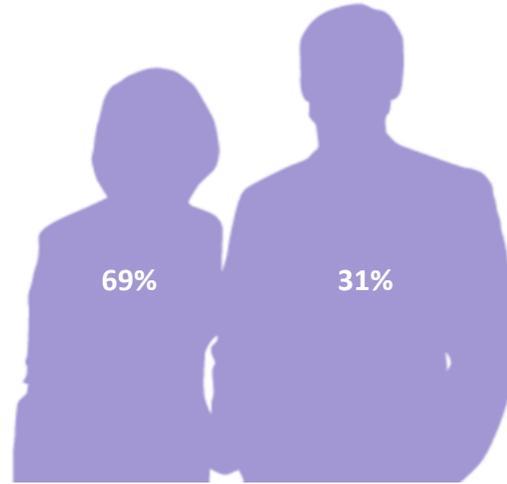
Visitors

Respondents by Age Group

■ Portstewart Sample ■ All Towns

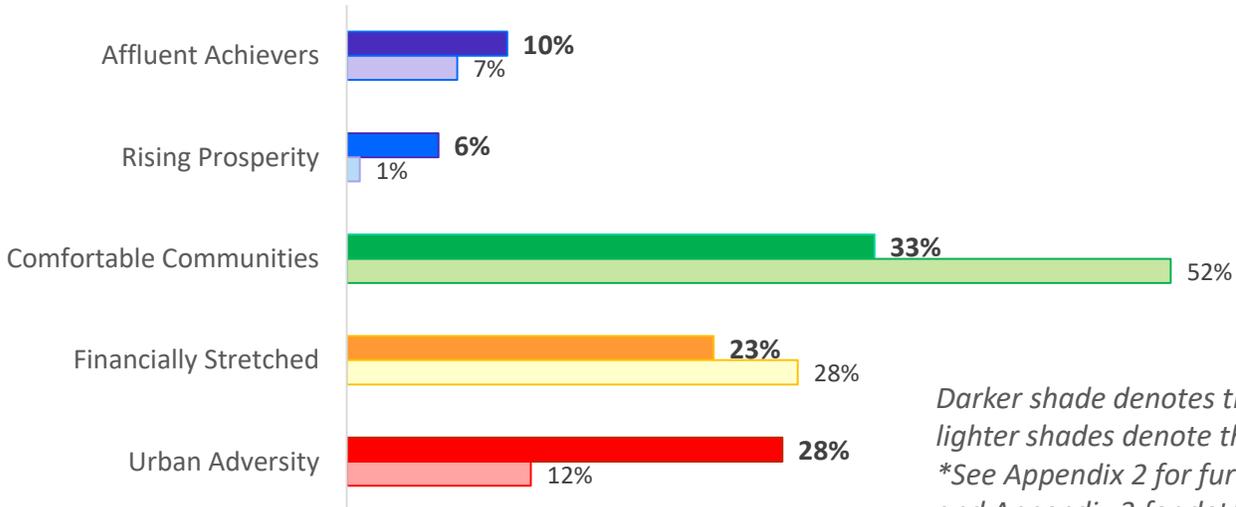


Respondent Gender Split



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

Portstewart ACORN Profile* vs Overall Sample

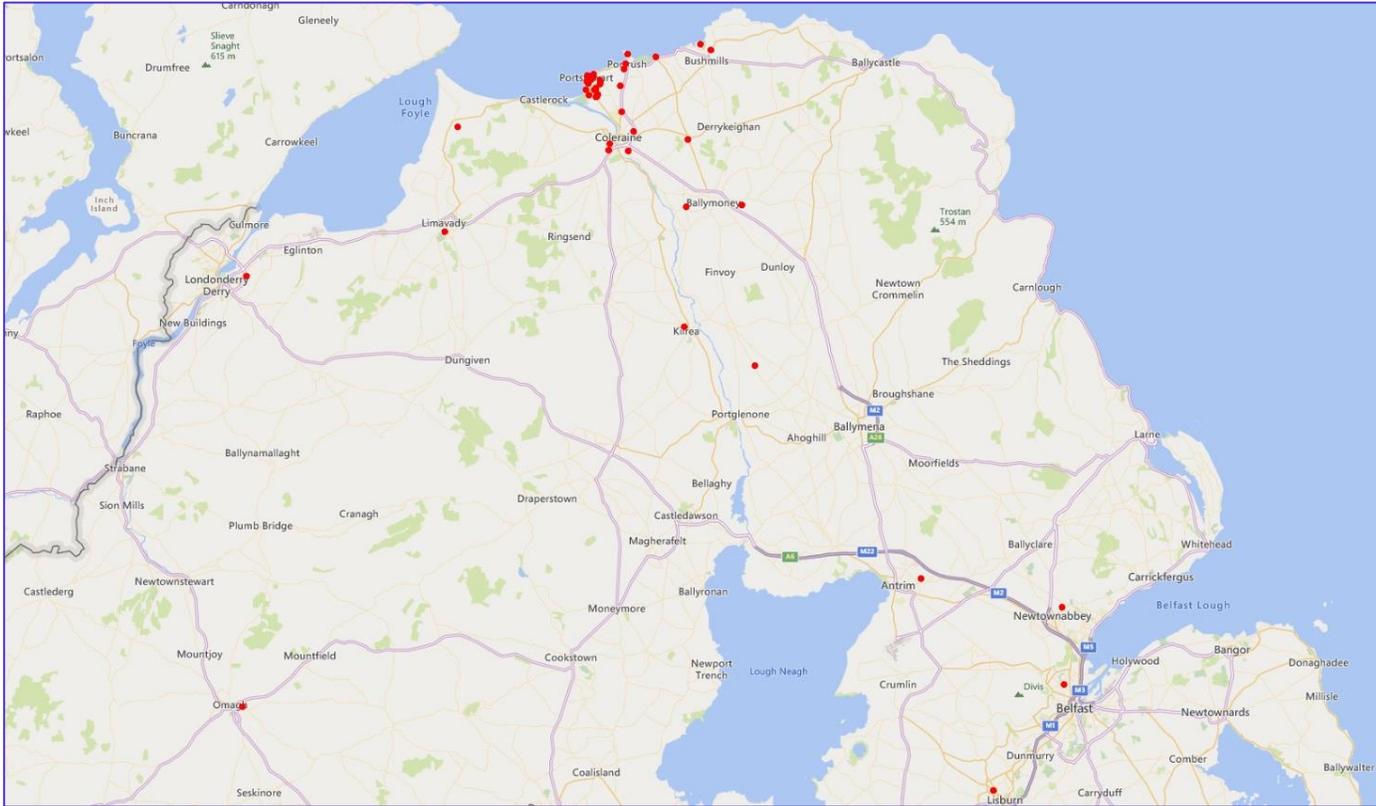


Darker shade denotes the Portstewart respondent profile while lighter shades denote the borough baseline.

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

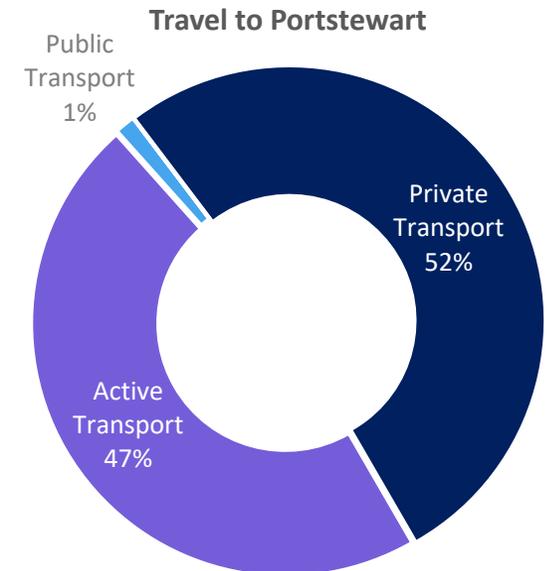
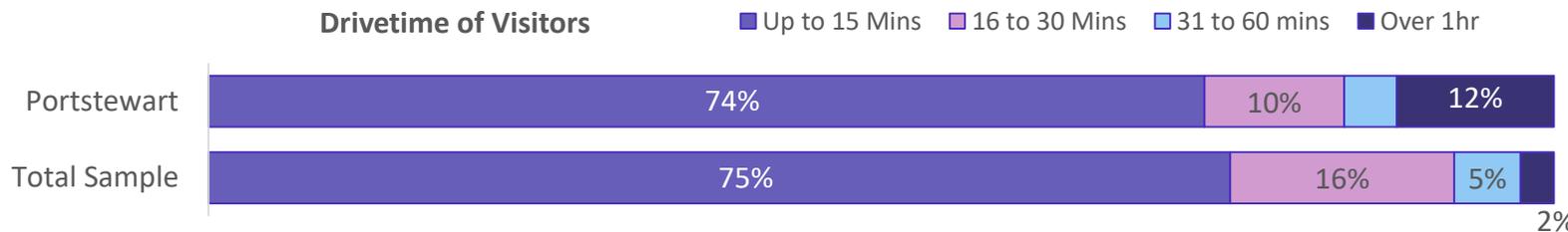
The ACORN profile is also notable for having a much lower representation of the 'Countryside Communities' sub category.

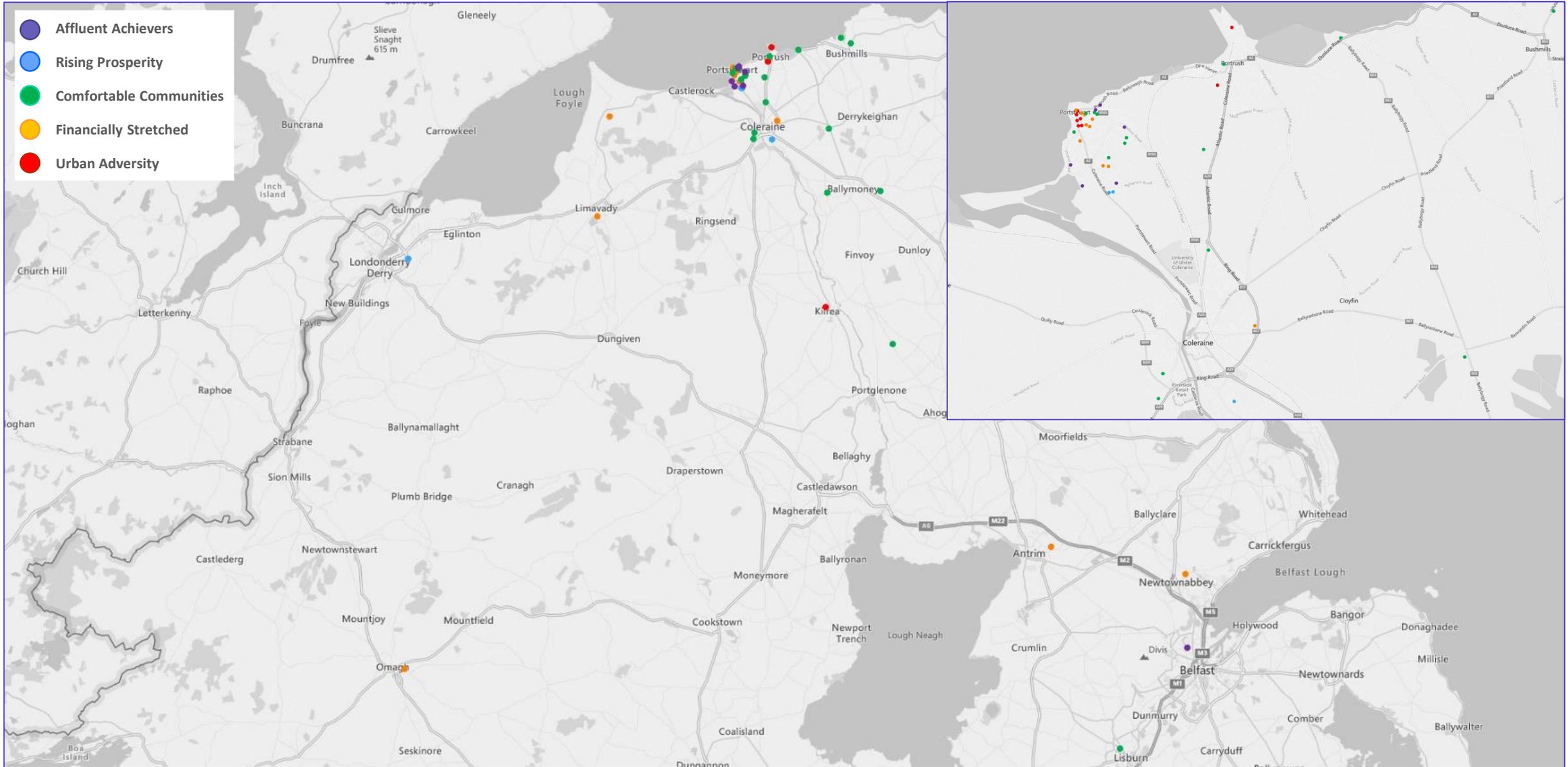
Slightly paradoxically, it is both more affluent and lesser affluent, particularly Urban Adversity, groups that have filled this deficit.

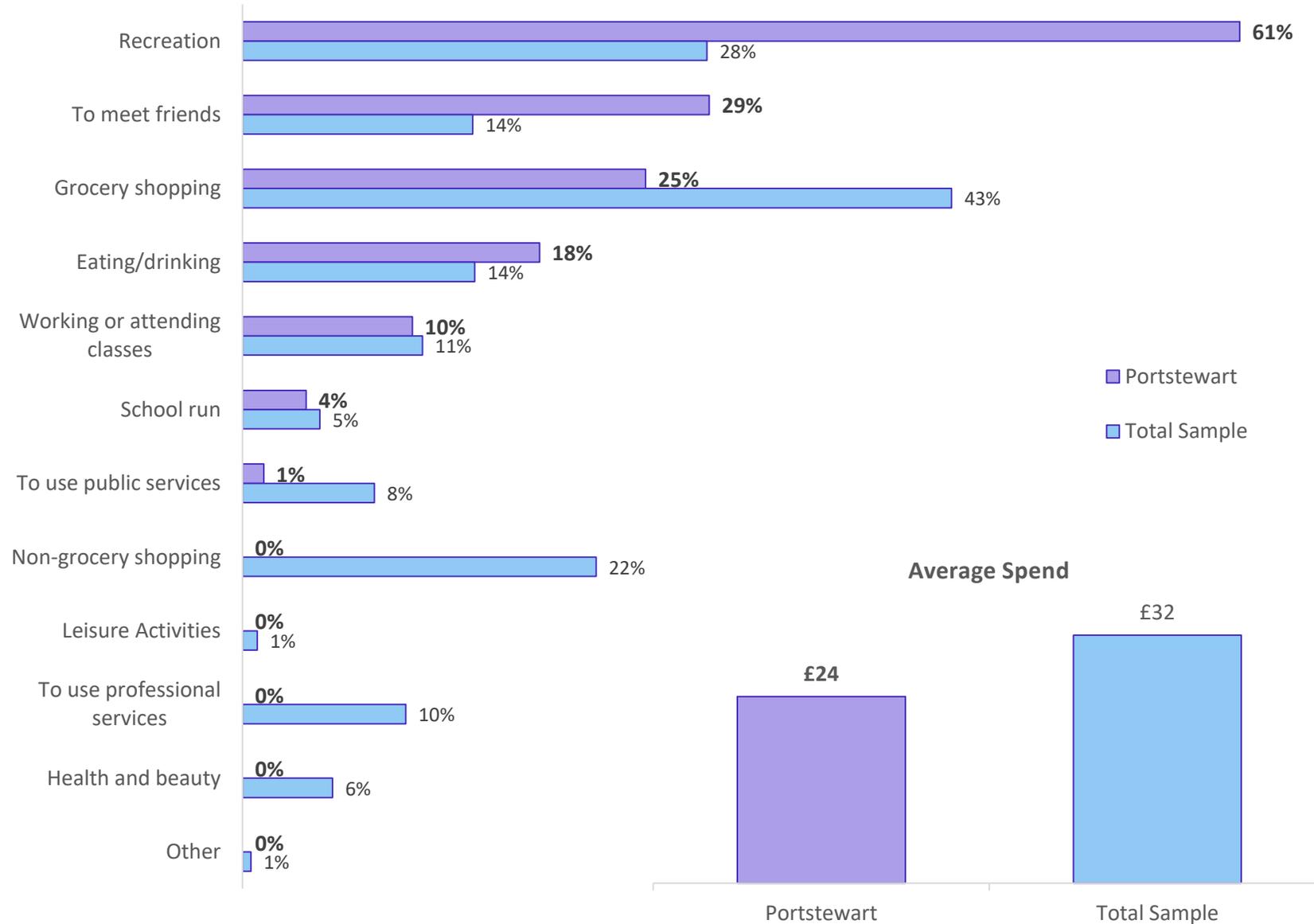


The visitor profile appears to be polarised between those from the very immediate vicinity and those who visit from a fairly significant distance away. 66% actually were only a 5 minute drivetime from the town centre.

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







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

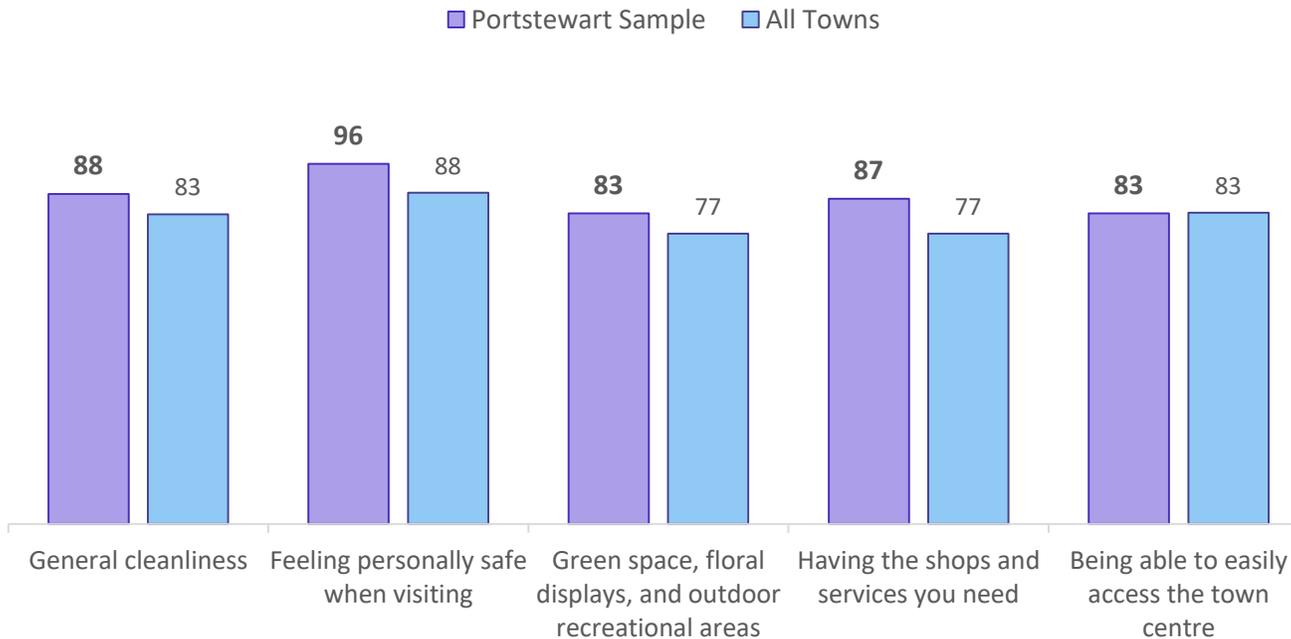
This disparity in visitor types has persisted when we look at reasons for visit and actual interactions. For the most part people come into the town for recreational purposes.

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

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

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

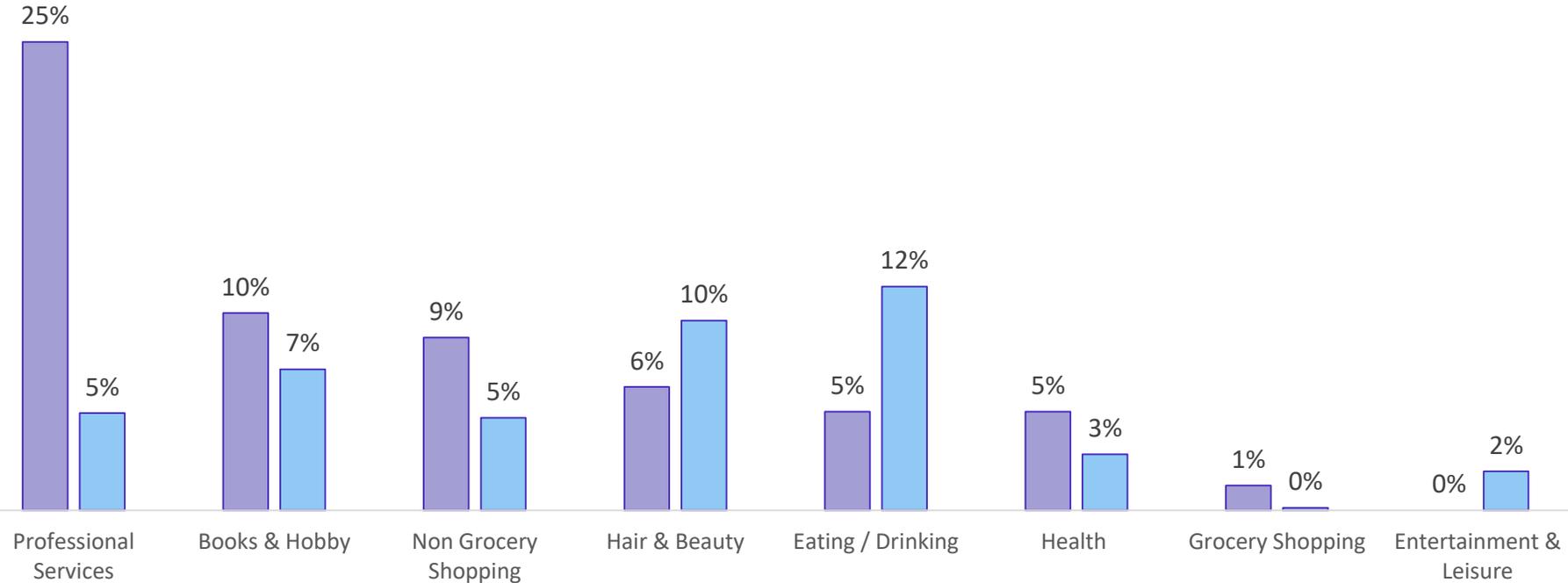
Average Rating Portstewart Town Centre (out of 100)



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

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

■ Portstewart ■ Total Sample



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

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

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

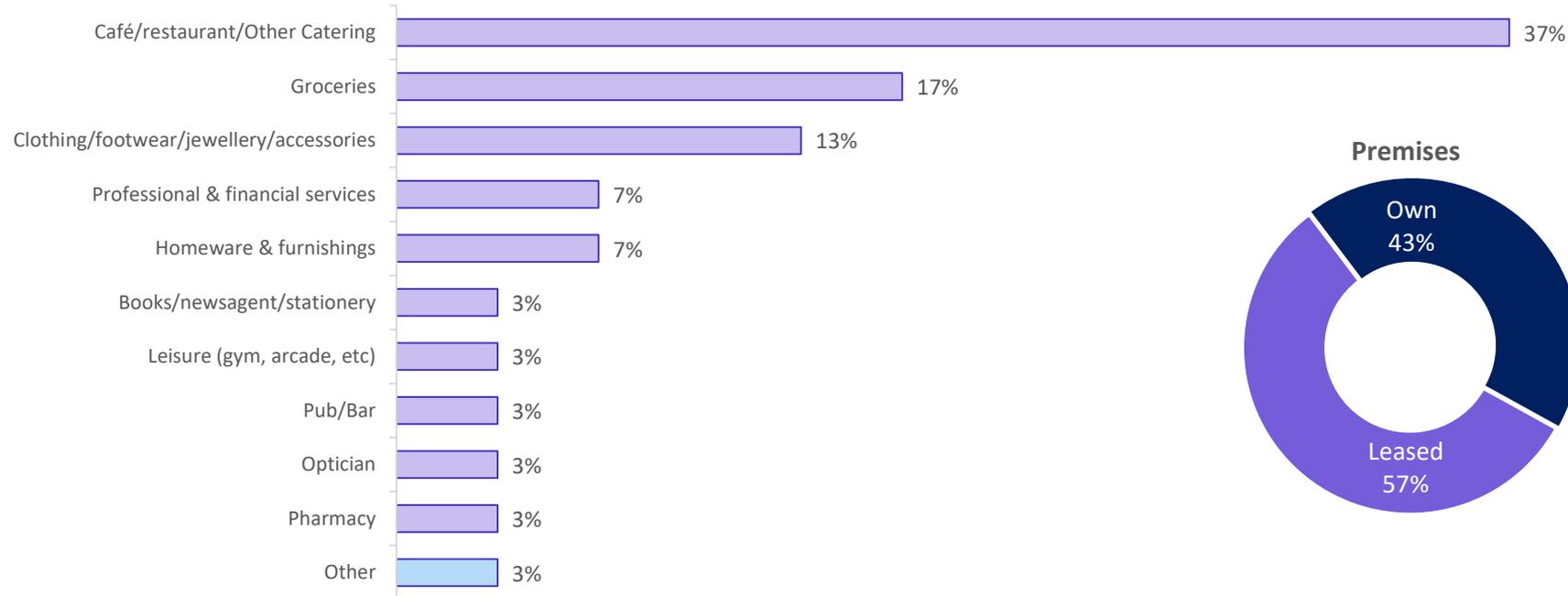
Almost two thirds of visitors (64%) identified no issues preventing them from visiting the town centre.

However a significant minority (34%) did flag up traffic and parking as a barrier to visits.

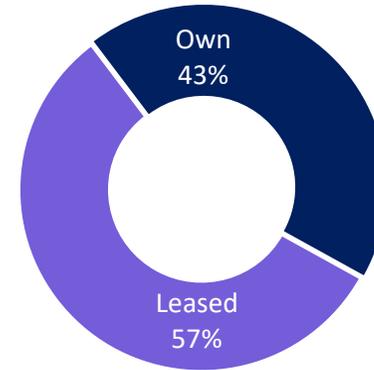
What prevents you from visiting the town centre more?	Portstewart	Total Sample
Congestion and traffic	32%	19%
Parking	14%	15%
Evening economy options	5%	7%
Unappealing retailers	1%	13%
Habit	1%	8%
Café and restaurant offer	0%	7%
Visually unappealing area	0%	7%
Safety	0%	3%
None of these	64%	52%

Traders

Business Sector



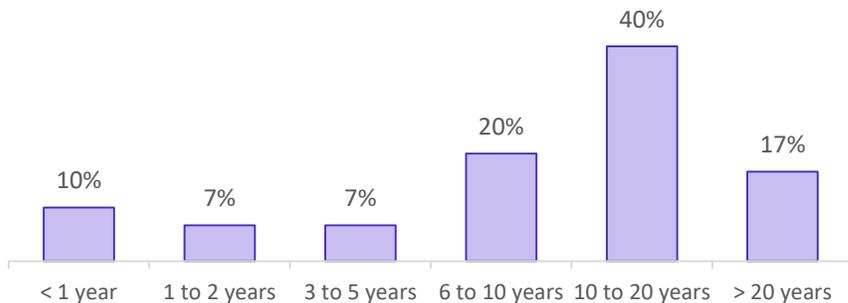
Premises



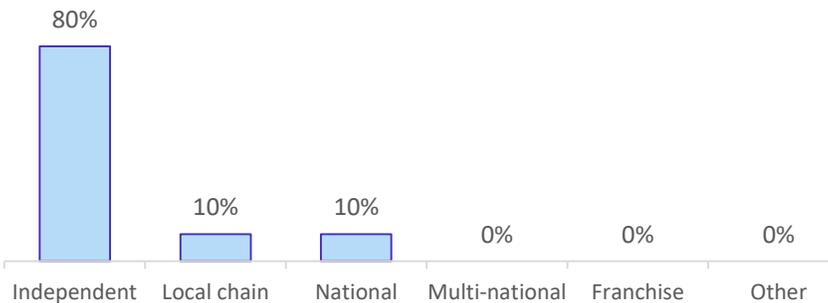
The relatively lower enthusiasm for Catering post-Covid may be of some concern to businesses given how weighted the town appears to be towards that sector.

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

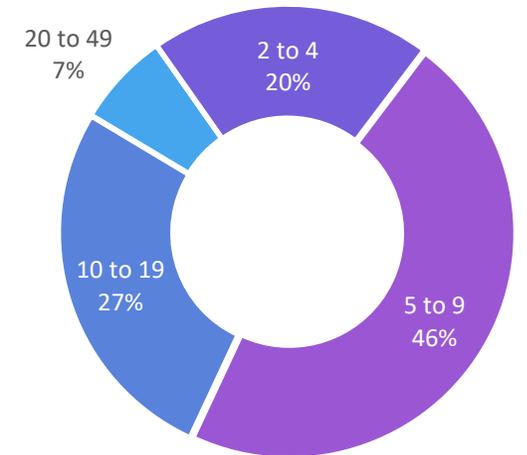
Business Age



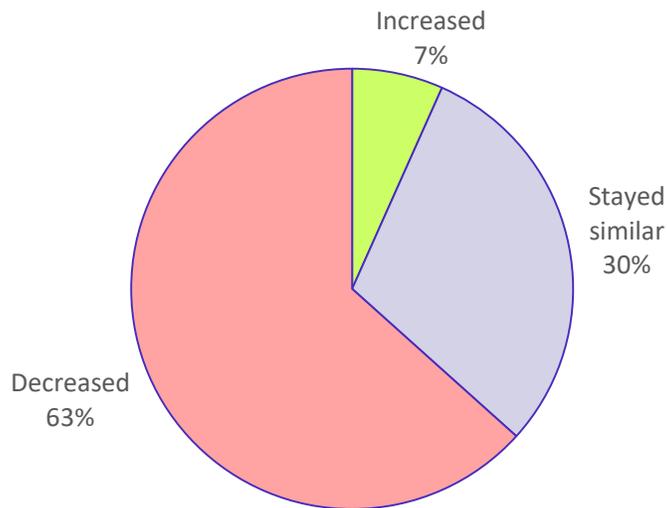
Business Ownership



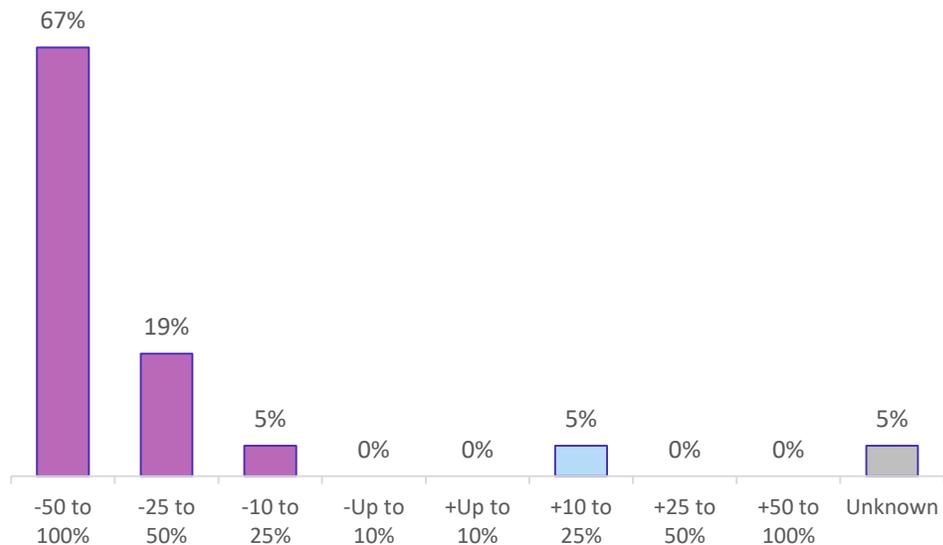
Current Staffing Levels



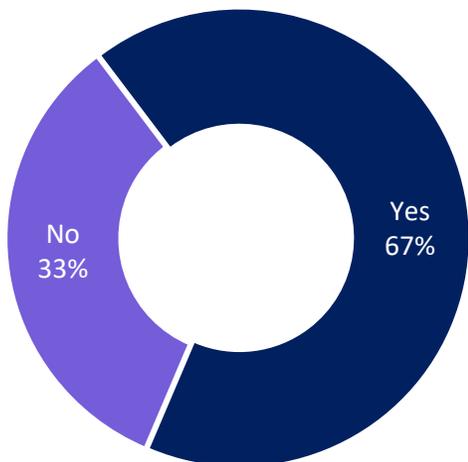
Impact on Turnover



Level of Impact



Were you forced to close operations at any point?



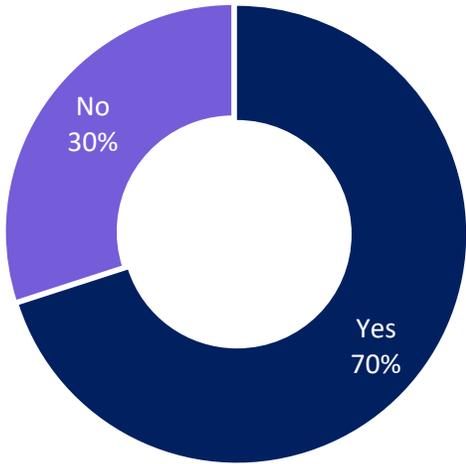
Did the business pivot to provide alternative services during the COVID lockdown ...	%
No	83%
Yes	17%
<i>Of those who said yes ...</i>	
Online selling & delivery	40%
Click & collect	60%
New services tailored to new circumstances	20%
New products tailored to new circumstances	0%

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

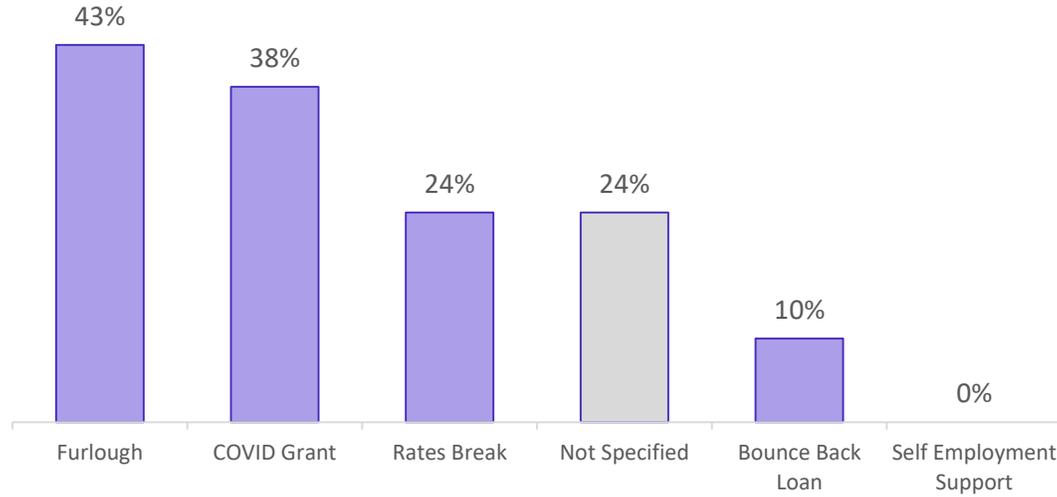
Almost two thirds of traders (63%) saw a decrease in their revenue, and of these, a further two thirds (67%) noted this decrease to be a reduction of 50% or more of their normal earnings.

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

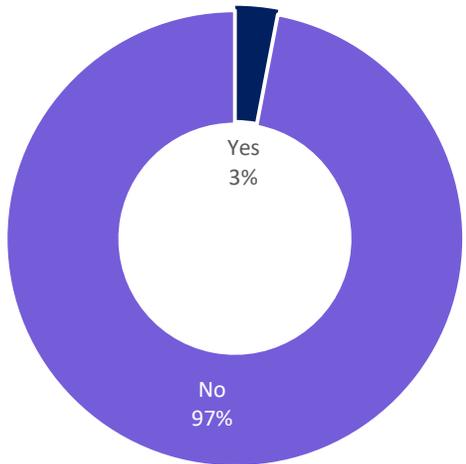
Did you avail of any Government support?



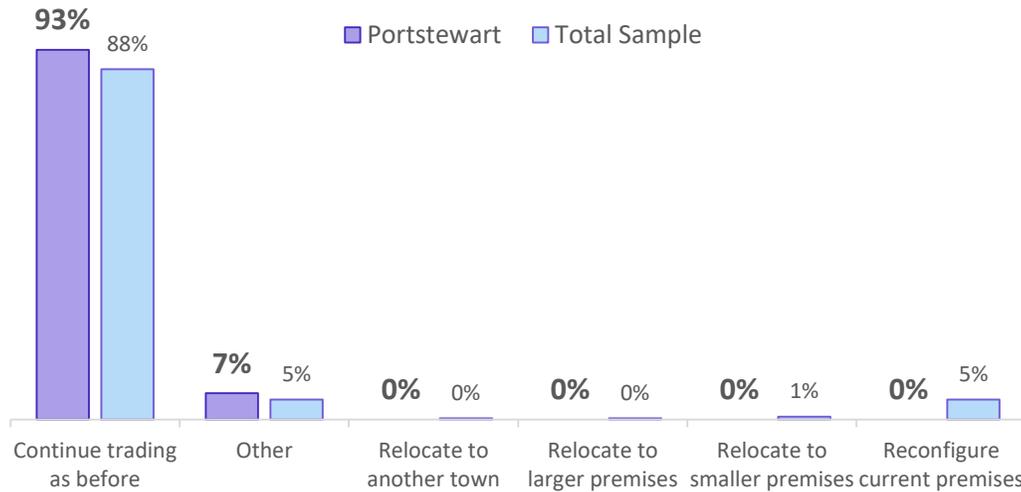
What kind of Government Support ...



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



Trading intentions going forward ...



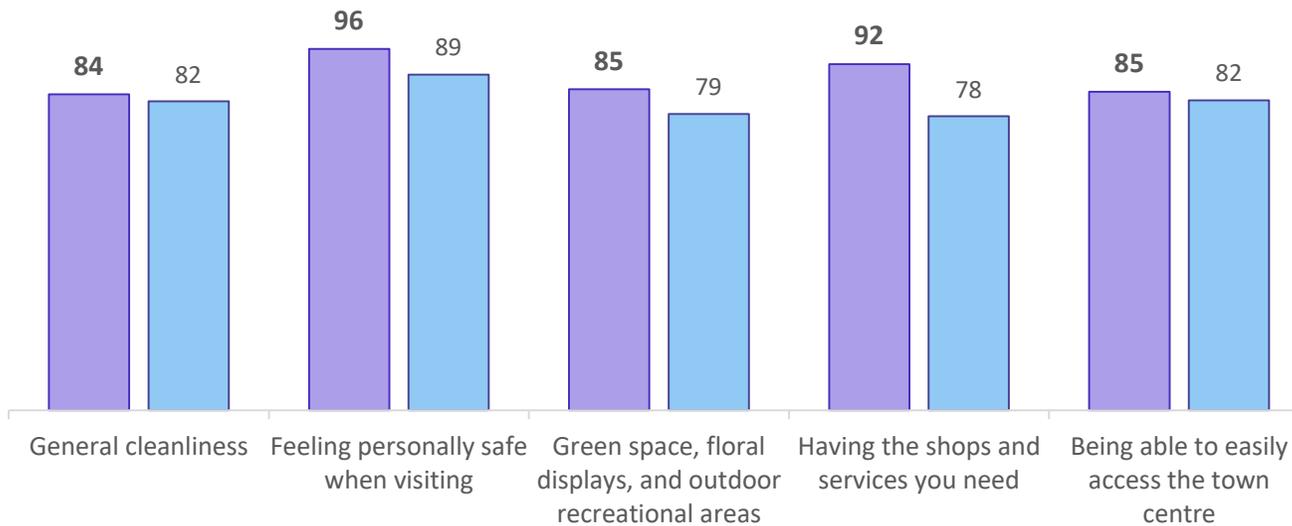
Portstewart also saw a higher rate of utilisation of government support on offer.

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

	Portstewart Traders				Score: +100					
	Dislike				Passive		Like			
Description	Hate	Dislike	Avoid	Not ok	Not for me	Ok	Like	Enjoy	One of my favourites	My favourite town
Score	1	2	3	4	5	6	7	8	9	10
Sample	0%	0%	0%	0%	0%	0%	0%	53%	13%	33%
Calculation	Total of 'Like' (100) – Total of Dislike (0) = Portstewart Traders Score = 100									

Average Rating Portstewart Town Centre (out of 100)

■ Portstewart ■ All Towns



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

Appendix 1 – Terminology & Clarifications

Margin of Error

Our overall sample of 781 samples was sufficient to achieve a margin of error of +/- 3.5% @95% confidence when looking at the borough as a whole. For each individual town, greater caution should be placed on the results as the sample gets more segmented the margin of error increases. For Portstewart a sample size of 77 was achieved which provides us with a margin of error of +/- 11.2% @ 95% confidence. In simple terms, our margin of error of means that were the study to be replicated 20 times, we would expect the results to vary by no more than + or – 11.2% in 19 (95%) of the subsequent studies.

Coronavirus Restrictions

At the end of March, beginning of April 2020 – Northern Ireland was still under some of the most restrictive COVID regulations since the beginning of the pandemic. This included restrictions on which traders were allowed to open / operate, as well as restrictions on the movement of the general public. The removal of these restrictions only really began in late April.

<https://www.executiveoffice-ni.gov.uk/news/executive-agrees-relaxations-covid-restrictions>

This is likely to have had significant ramifications on both our visitor and trader sampling as the profile of each will have been dramatically altered from what would be considered ‘the norm’.

Weather & Climate

According to the Met Office, the UK experienced one of the coldest Aprils since 1922, and the highest level of air frost in 60 year.

<https://www.metoffice.gov.uk/about-us/press-office/news/weather-and-climate/2021/lowest-average-minimum-temperatures-since-1922-as-part-of-dry-april>

The inclement weather, in combination with the aforementioned Coronavirus restrictions, are likely to have had a significant impact on visitor footfall and composition in comparison to what would normally be expected for the time of year.

Appendix 2 – ACORN & Sentiment Explained

About ACORN

ACORN is a geodemographic segmentation of the UK's population. It segments households, postcodes & neighbourhoods into 6 categories and 18 associated sub-groups. Through analysis of demographic data, social factors & individual consumer behaviour, it provides precise information and an in-depth understanding of different types of people at a postcode level.

Categorisation

ACORN Groups			Sub-Categories	
1	Affluent Achievers	These are some of the most financially successful people in the UK. They live in affluent, high status areas of the country. They are healthy, wealthy and confident consumers.	Lavish Lifestyles	The most affluent people in the UK who live comfortable lifestyles with few financial concerns.
			Executive Wealth	High income people, successfully combining jobs and families.
			Mature Money	Older, affluent people with the money and time to enjoy life.
2	Rising Prosperity	These are generally younger, well educated, professionals moving up the career ladder, living in our major towns and cities. Singles or couples, some are yet to start a family, others will have younger children.	City Sophisticates	Younger individuals enjoying the city lifestyle with lots of opportunities to socialise and spend.
			Career Climbers	Younger singles and couples, some with young children, living in more urban locations.
3	Comfortable Communities	This category contains much of middle-of-the-road UK, whether in the suburbs, smaller towns or the countryside. They are stable families and empty nesters in suburban or semirural areas.	Countryside Communities	Older people with leisure interests reflecting rural locations.
			Successful Suburbs	Home-owning families living comfortably in stable areas in suburban and semi-rural locations
			Steady Neighbourhoods	These working families form the bedrock of many towns across the UK.
			Comfortable Seniors	Older people with sufficient investments and pensions for a secure future.
			Starting Out	Young couples and early career climbers in their first homes.

ACORN Groups			Sub-Categories	
4	Financially Stretched	This category contains a mix of traditional areas of the UK, including social housing developments specifically for the elderly. It also includes student term-time areas.	Student Life	Students and young people with little income living in halls of residence or shared houses
			Modest Means	Younger families in smaller homes with below average incomes.
			Striving Families	Struggling families on limited incomes in urban areas.
			Poorer Pensioners	Older people and pensioners, the majority of whom live in social housing.
5	Urban Adversity	This category contains the most deprived areas of towns and cities across the UK. Household incomes are low, nearly always below the national average.	Young Hardship	People with a modest lifestyle who may be struggling in the economic climate.
			Struggling Estates	Large, low income families surviving with benefits.
			Difficult Circumstances	Young adults, many of whom are single parents, enduring hardship.

Sentiment Scoring

The Sentiment Score tracks how people feel about a brand or place and ranges from -100 to +100. The score is calculated by taking the percentage who do not like the town away from the percentage who do like the town. The average score for all towns is +71. The table below provides a contextual overview for how sentiment scores should be viewed.

Score Range	Result	Rationale
-100 to -1	Very Poor	The town is actively disliked by its residents/traders. This should be the first targets for change
0 to 24	Poor	Overall the residents/traders have a low opinion of the town.
25 to 49	Neutral	a score between 25 and 50 indicates 25-50% more people like rather than dislike the town
50 to 74	Good	The town is receiving very high scores meaning very few people dislike the town
75 to 89	Very Good	The town has few people who dislike or feel neutral about the town
90 to 100	Excellent	Almost the entire population likes/enjoys the town

Appendix 3 – Results Expanded

Empowering accurate consumer understanding

Detailed ACORN Results for Portstewart Visitors

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

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