



Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Ballymoney

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 **Ballymoney**;

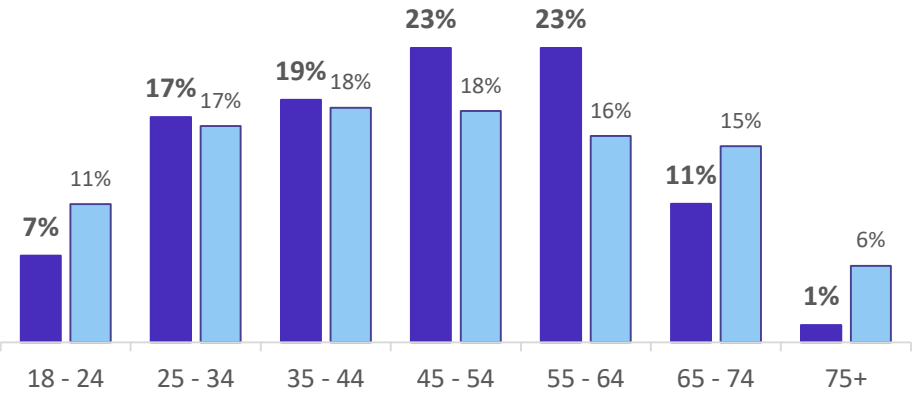
- The visitor results are based on an overall sample of **75** respondents;
- The trader's results are based on a sample of **31** traders within the town centre.

Sampling for visitors and traders in Ballymoney took place between 29th March and 19th April 2021. It is important to note that during this period, there were a range of continuing restrictions in place owing to the ongoing Coronavirus pandemic. The specific restrictions at the time are outlined in Appendix 1, however it is important to be cognisant of the impact these restrictions will have had on both visitors (restrictions on area movement, what shops / activities they have come to use etc.) and traders (loss of revenue, periods of closure etc.) in the area.

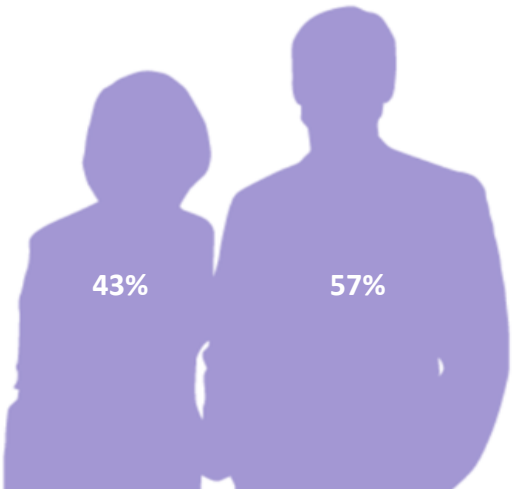
Visitors

Respondents by Age Group

■ Ballymoney Sample ■ All Towns



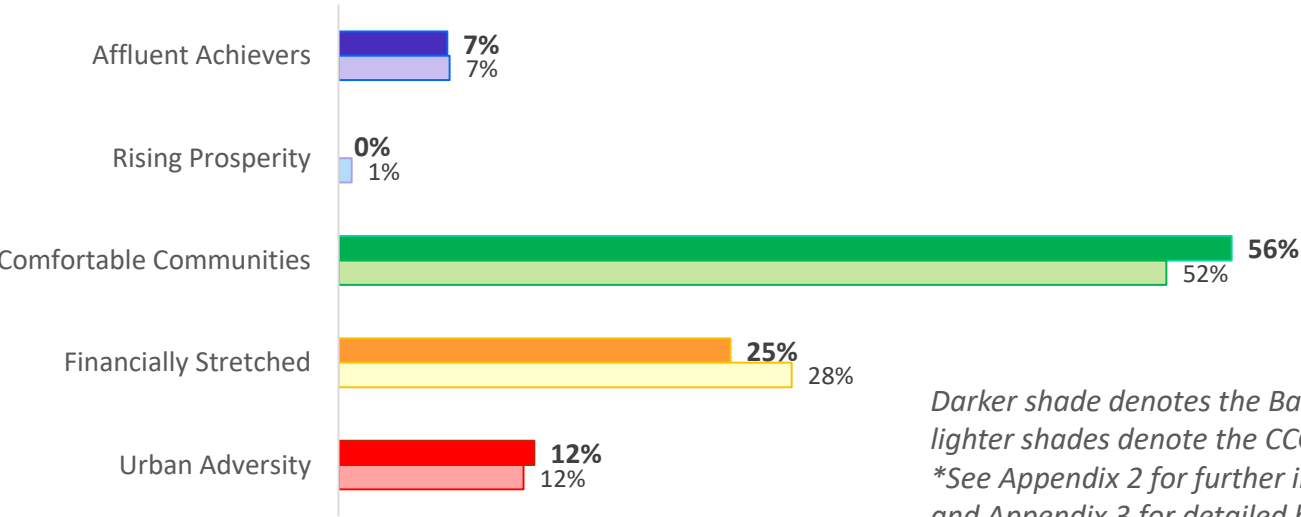
Respondent Gender Split



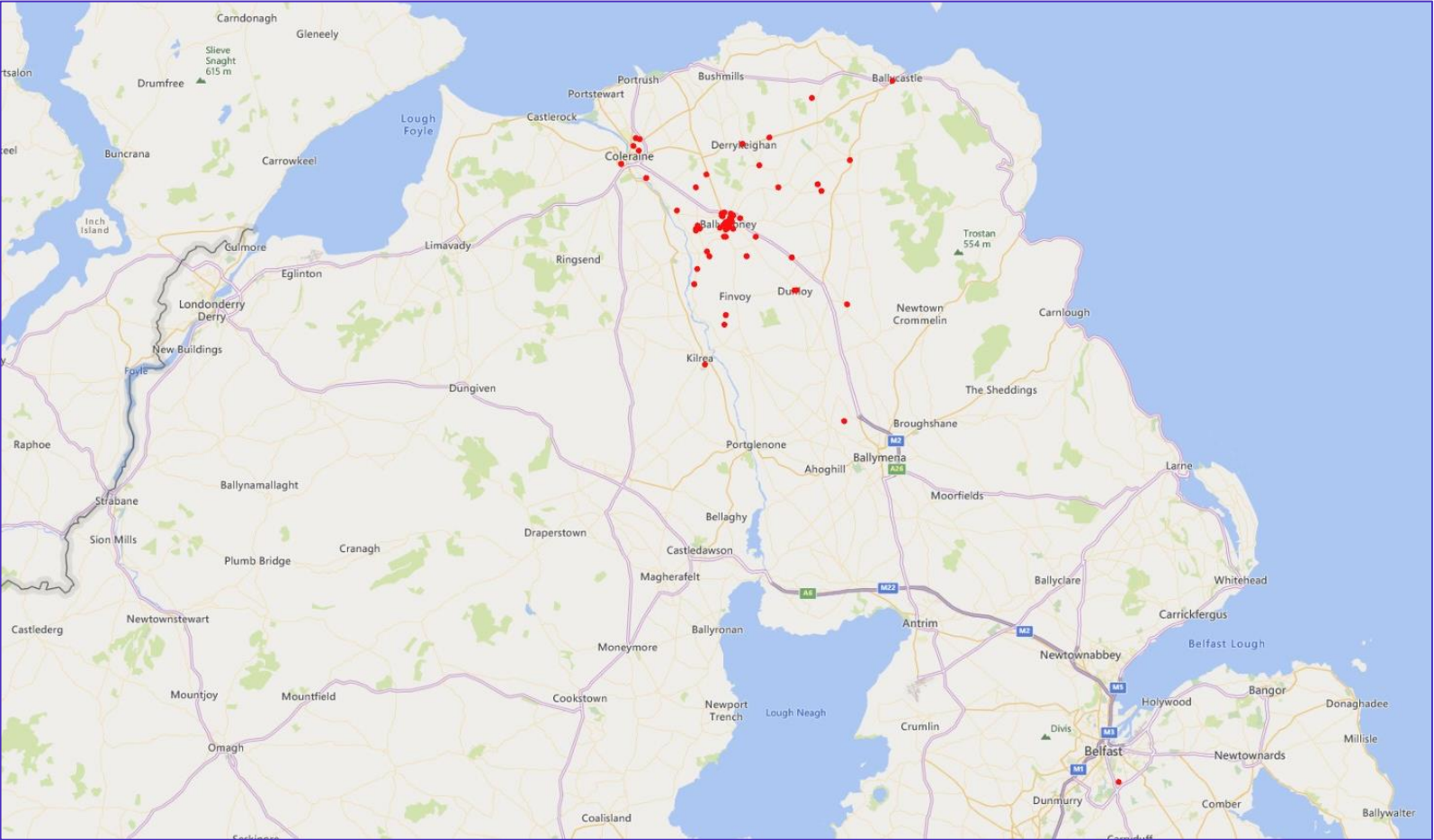
Our sample collected in Ballymoney appeared to show a greater prevalence of middle aged visitors in the town (46%) followed by younger adults (36%).

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

Ballymoney ACORN Profile* vs Overall Sample



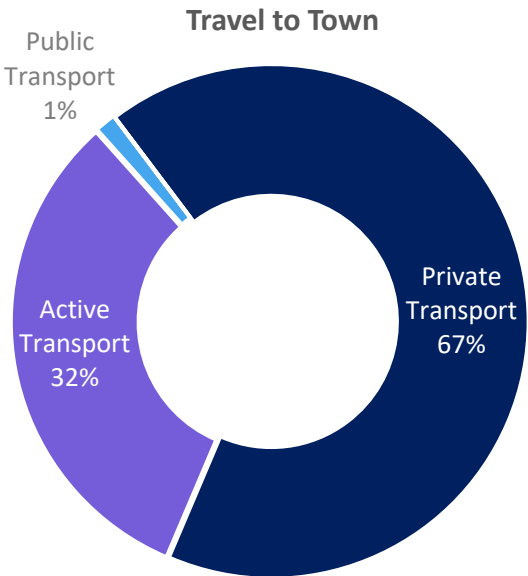
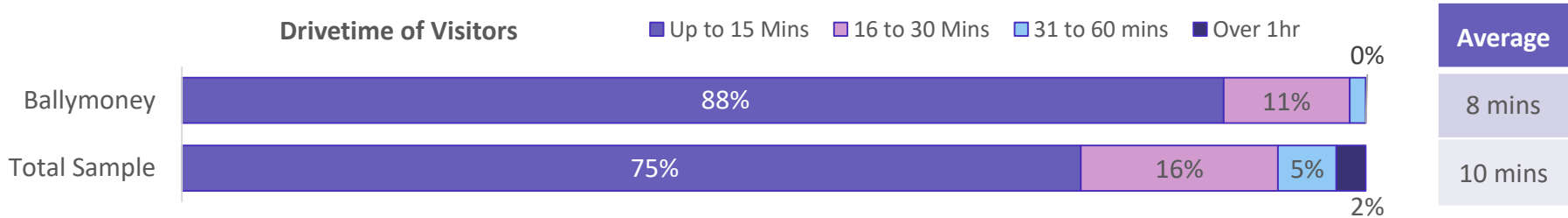
*Darker shade denotes the Ballymoney respondent profile while lighter shades denote the CCGBC baseline.
See Appendix 2 for further information on ACORN classifications and Appendix 3 for detailed breakdown

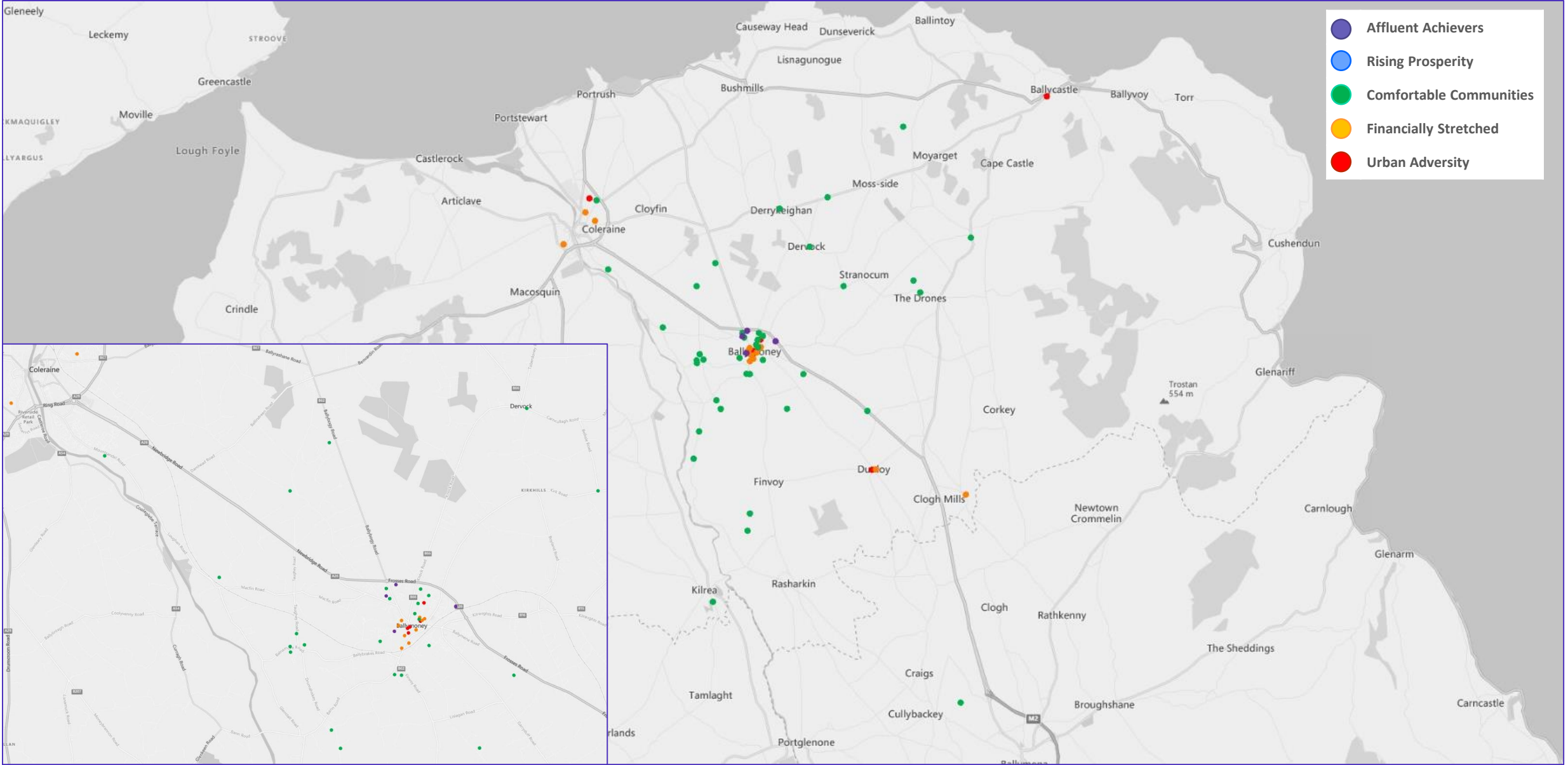


Visitors to the town are more concentrated to the immediate area, as evidenced by the lower average drivetime.

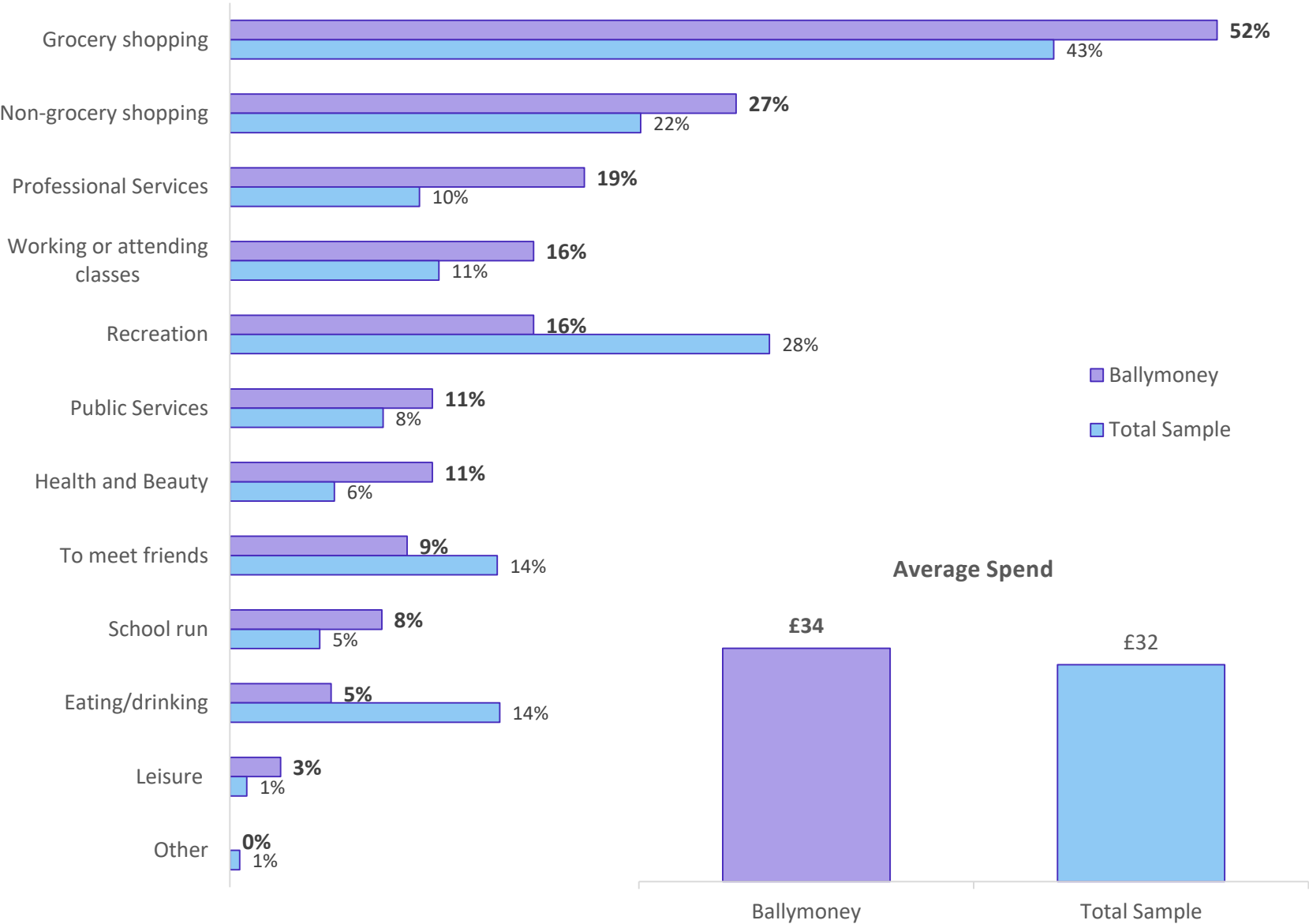
Visitors appears to come from a general triangular catchment ranging between Coleraine, Ballycastle and Kilrea.

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





Why are people going to the town centres?



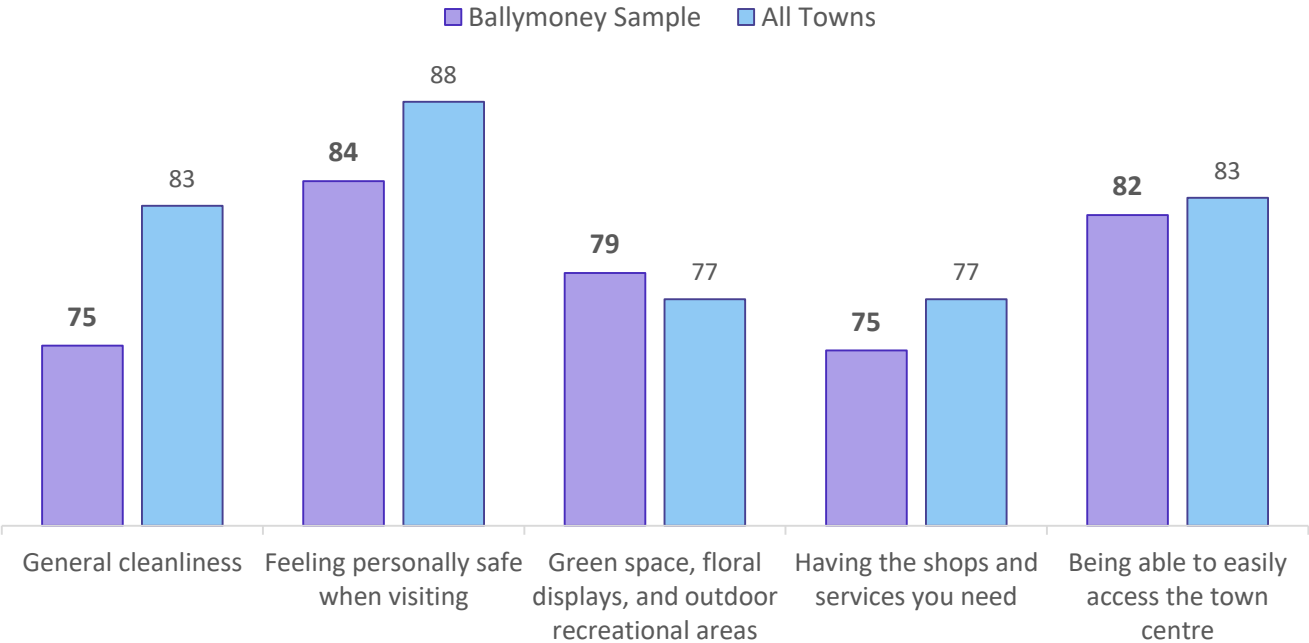
Location	Average Dwell Time	Average Spend per Minute
Ballymoney	128 mins	£0.27
Total Sample	109 mins	£0.29

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

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

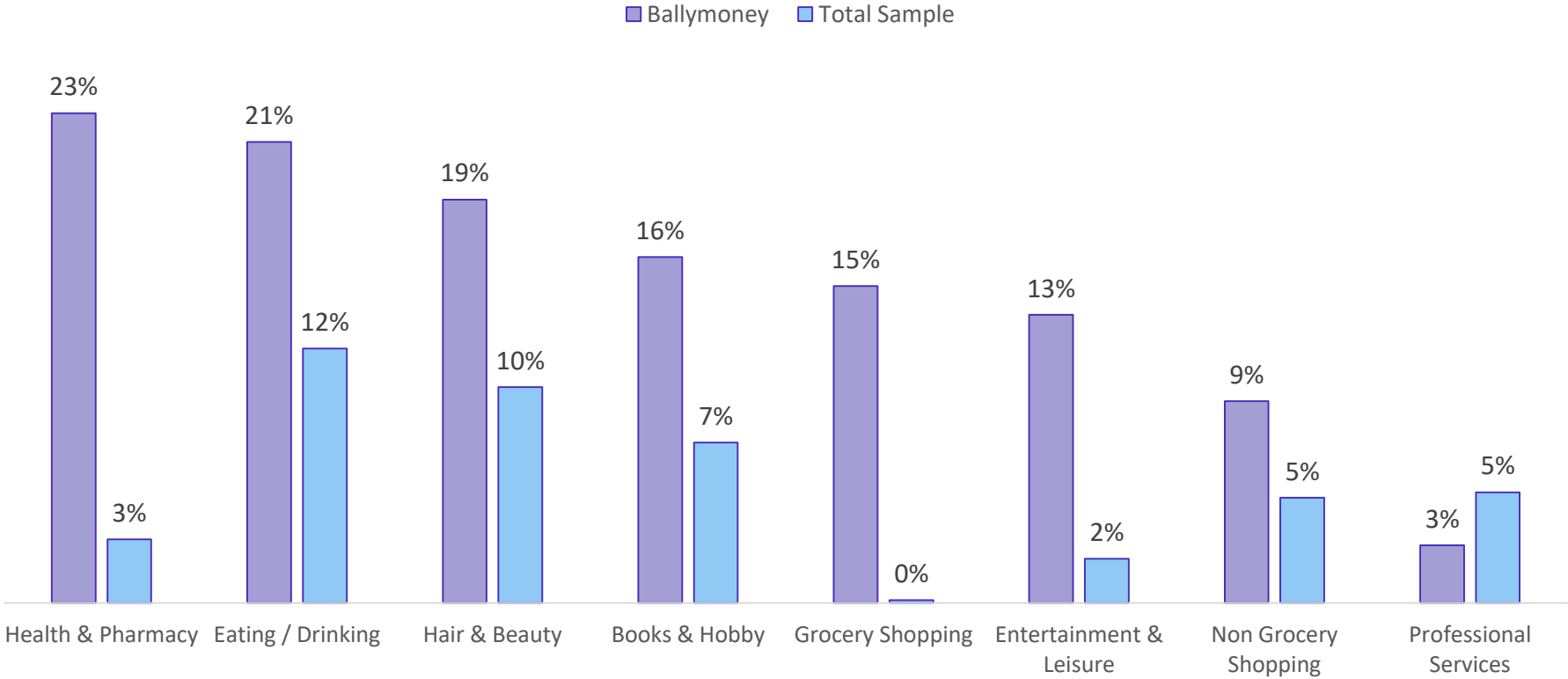
	Ballymoney Visitors				Score: +80					
	Dislike				Passive		Like			
Description	Hate	Dislike	Avoid	Not ok	Not for me	Ok	Like	Enjoy	One of my favourites	My favourite town
Score	1	2	3	4	5	6	7	8	9	10
Sample	1%	0%	0%	4%	1%	7%	1%	69%	12%	4%
Calculation	Total of 'Like' (86) – Total of Dislike (5) = +80									

Average Rating Ballymoney Town Centre (out of 100)



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

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



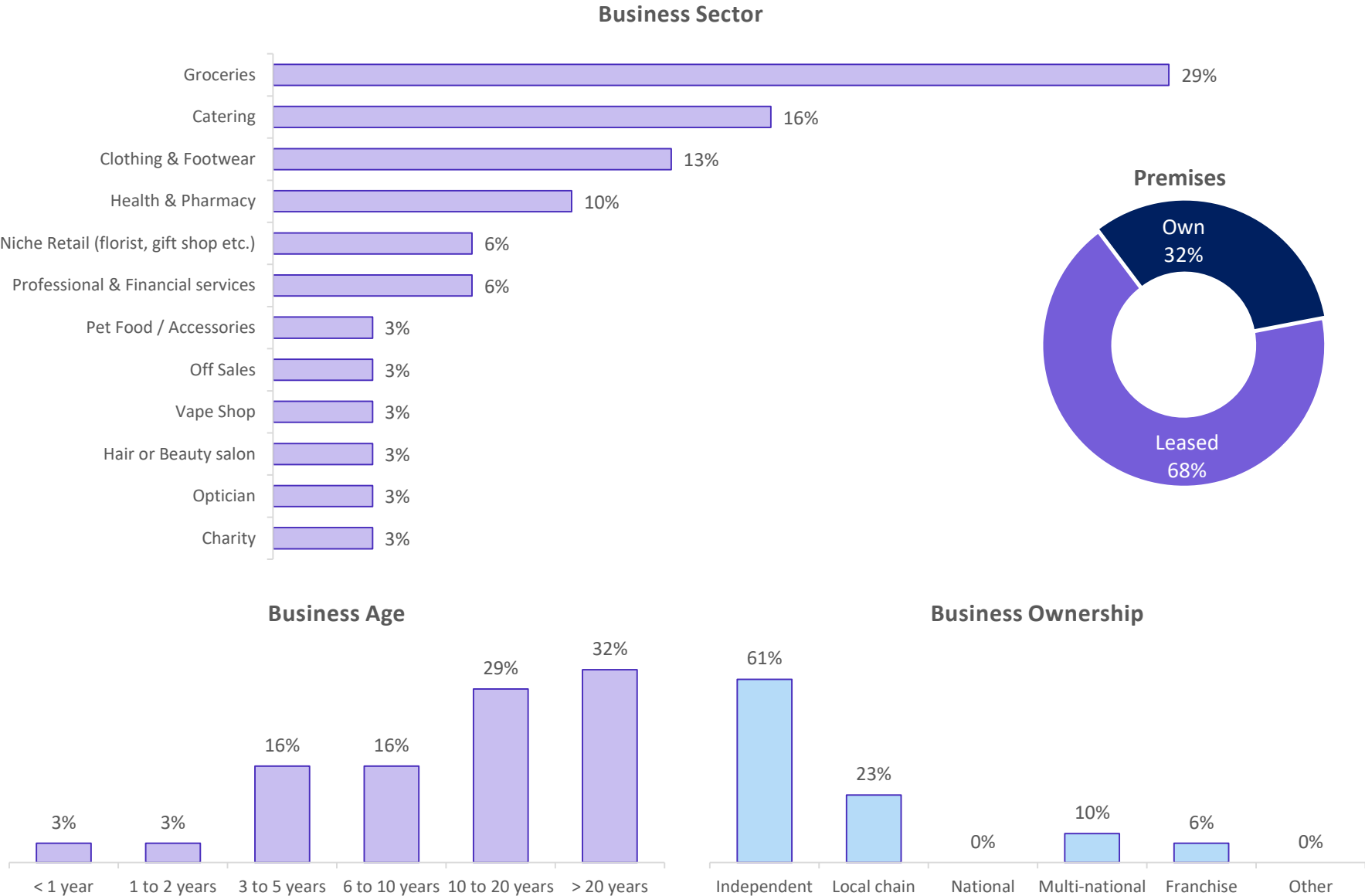
While the usual candidates (Catering and Beauty) were expected to see a strong upturn in use post-COVID, the rebound for use of most services (with the exception of Professional Services) was surprisingly high in the town.

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

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

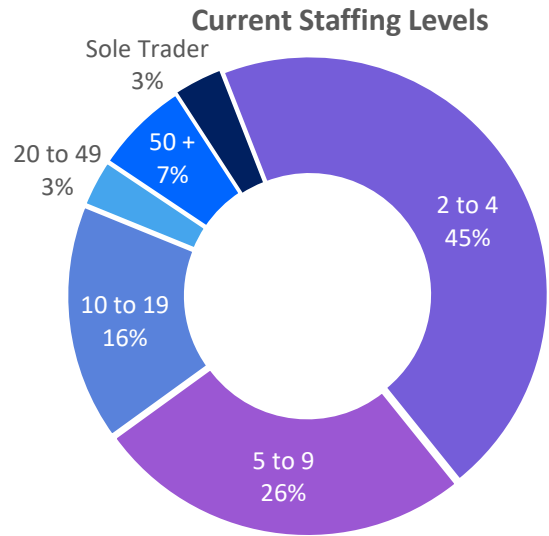
Ballymoney TC Use	Health & Pharmacy	Eating / Drinking	Hair & Beauty	Books & Hobby	Grocery Shopping	Entertainment & Leisure	Non Grocery Shopping	Professional Services
Before COVID	62.7%	72.0%	61.3%	57.3%	70.7%	8.0%	33.3%	29.3%
After COVID	85.3%	93.3%	80.0%	73.3%	85.3%	21.3%	42.7%	32.0%
Difference	+22.7%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

Traders

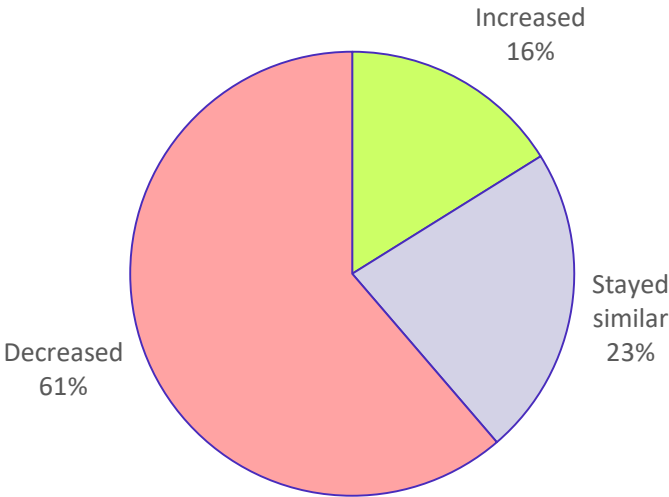


The extent of use of the town for shopping purposes is further demonstrated by the sectoral breakdown of our trader’s sample, with the proportion in the grocery sector relegating catering to second, in stark contrast to the trend within the overall borough.

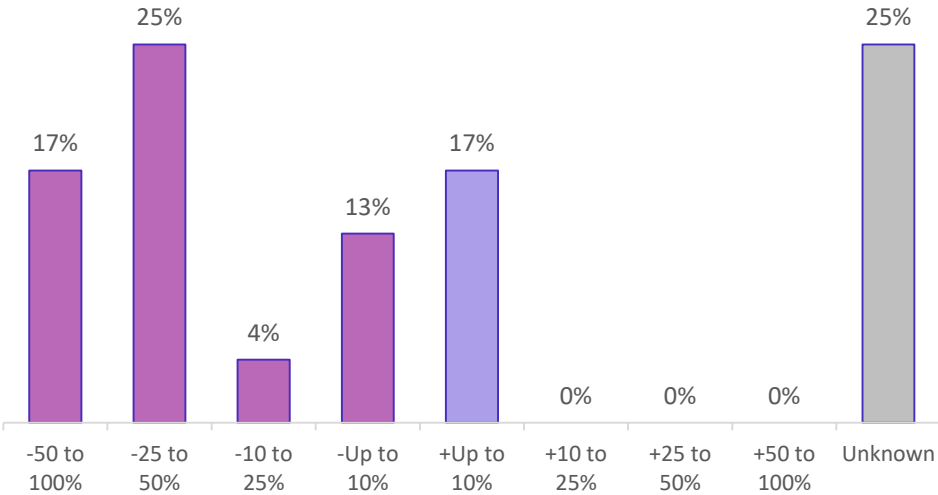
The businesses profile of the town seems quite mature, with almost two thirds (61%) over 10 years old.



Impact on Turnover



Level of Impact

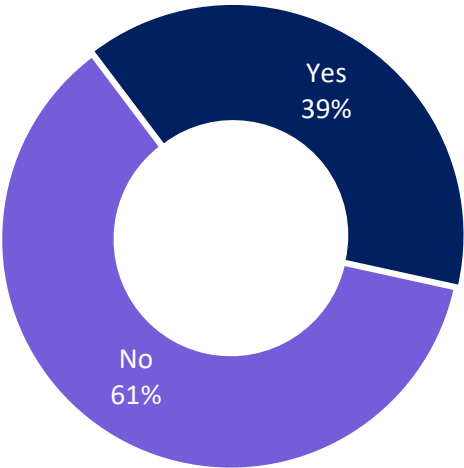


Ballymoney was strongly impacted by the lockdown restrictions with almost two thirds of traders noting a reduction in income.

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

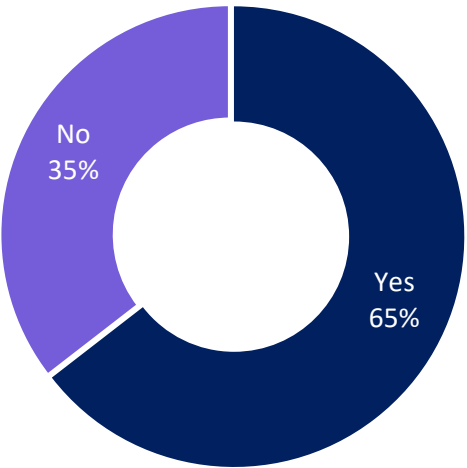
Those businesses who did adjust to provide alternative services over lockdown made significant use of online methods, either via delivery or click and collect.

Were you forced to close operations at any point?

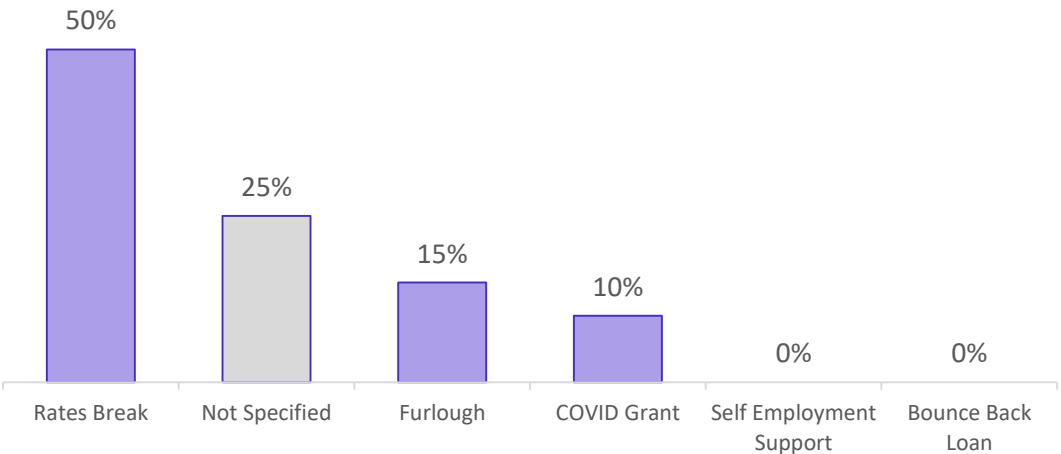


Did the business pivot to provide alternative services during the COVID lockdown ...	%
No	55%
Yes	45%
Of those who said yes ...	
Online selling & delivery	64%
Click & collect	86%
New services tailored to new circumstances	14%
New products tailored to new circumstances	0%

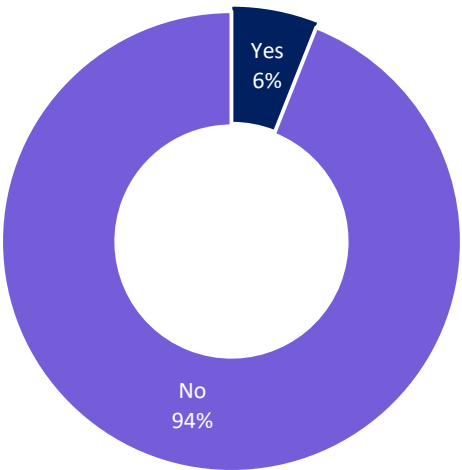
Did you avail of any Government support?



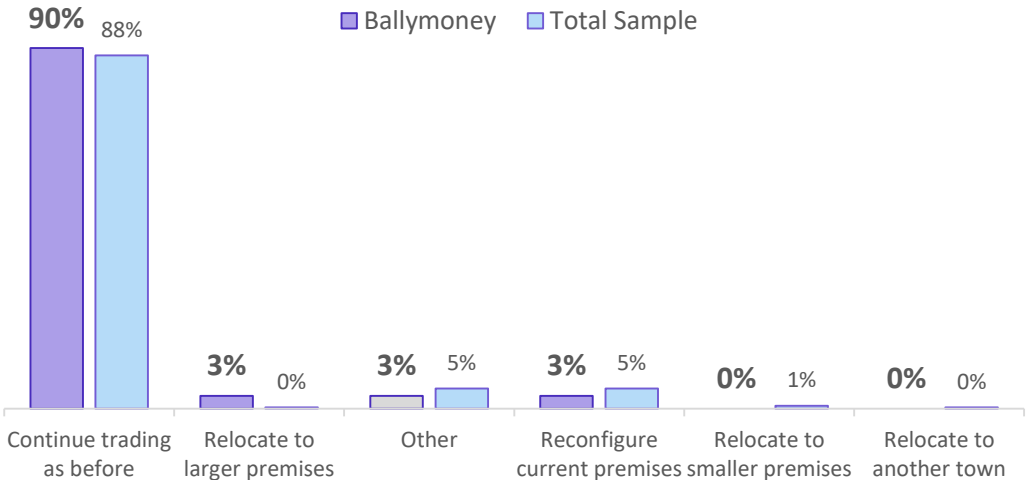
What kind of Government Support ...



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



Trading intentions going forward ...

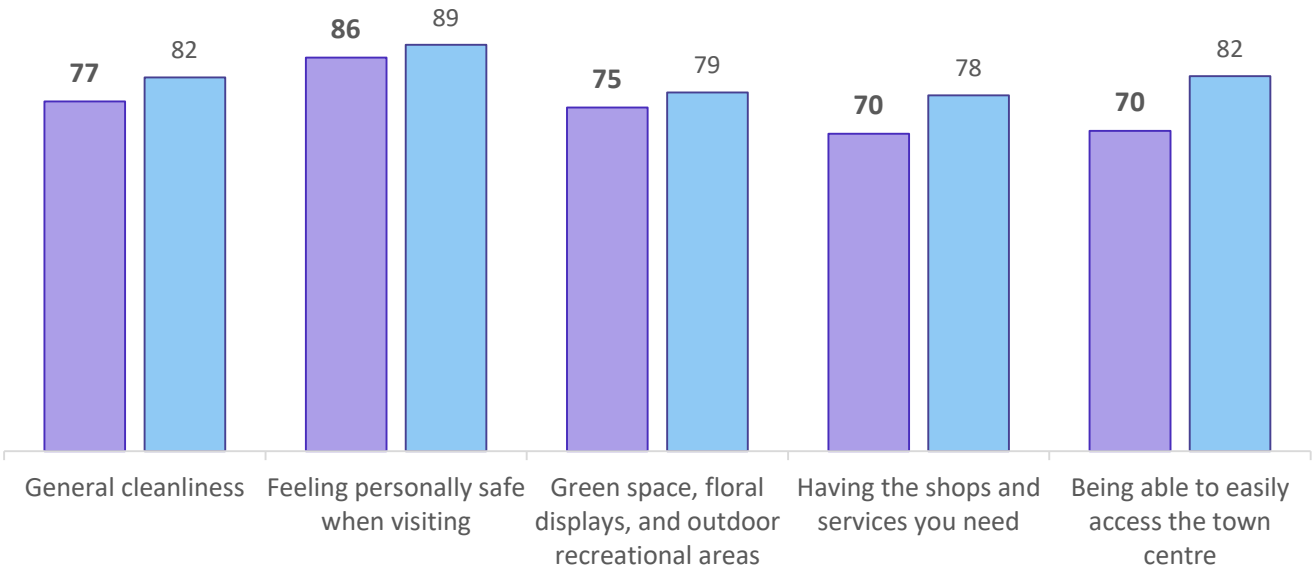


In keeping with trends across other towns, there was significant uptake of support offered by the government over the lockdown period, while uptake of support offered by the Council was much lower.

	Ballymoney Traders				Score: +48					
	Dislike				Passive		Like			
Description	Hate	Dislike	Avoid	Not ok	Not for me	Ok	Like	Enjoy	One of my favourites	My favourite town
Score	1	2	3	4	5	6	7	8	9	10
Sample	3%	3%	3%	10%	4%	10%	12%	45%	6%	3%
Calculation	Total of 'Like' (67) – Total of Dislike (19) = Ballymoney Traders Score = 48									

Average Rating Ballymoney Town Centre (out of 100)

Ballymoney All Towns



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

“not a lot of great shops or variety, better variety needed”

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

Appendix 1 – Terminology & Clarifications

Margin of Error

Our overall sample of 781 samples was sufficient to achieve a margin of error of +/- 3.5% @ 95% confidence when looking at the borough as a whole. For each individual town, greater caution should be placed on the results as the sample gets more segmented the margin of error increases. For Ballymoney a sample size of 75 was achieved which provides us with a margin of error of +/- 11.3% @ 95% confidence. In simple terms, our margin of error of means that were the study to be replicated 20 times, we would expect the results to vary by no more than + or – 11.3% in 19 (95%) of the subsequent studies.

Coronavirus Restrictions

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

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

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

Weather & Climate

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

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

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

Appendix 2 – ACORN & Sentiment Explained

About ACORN

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

Categorisation

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

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

Sentiment Scoring

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

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

Appendix 3 – Results Expanded

Detailed ACORN Results for Ballymoney Visitors

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

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