Causeway Coast & Glens Borough Council

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Garvagh

August 2021

card
Client Analysis & Relationship Development

Introduction

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

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

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

Sampling for visitors and traders in Garvagh took place between 27th March and 13th April 2021. It is important to note that during this period, there were a range of continuing restrictions in place owing to the ongoing Coronavirus pandemic. The specific restrictions at the time are outlined in Appendix 1, however it is important to be cognisant of the impact these restrictions will have had on both visitors (restrictions on area movement, what shops / activities they have come to use etc.) and traders (loss of revenue, periods of closure etc.) in the area.

Visitors

Respondent Profile

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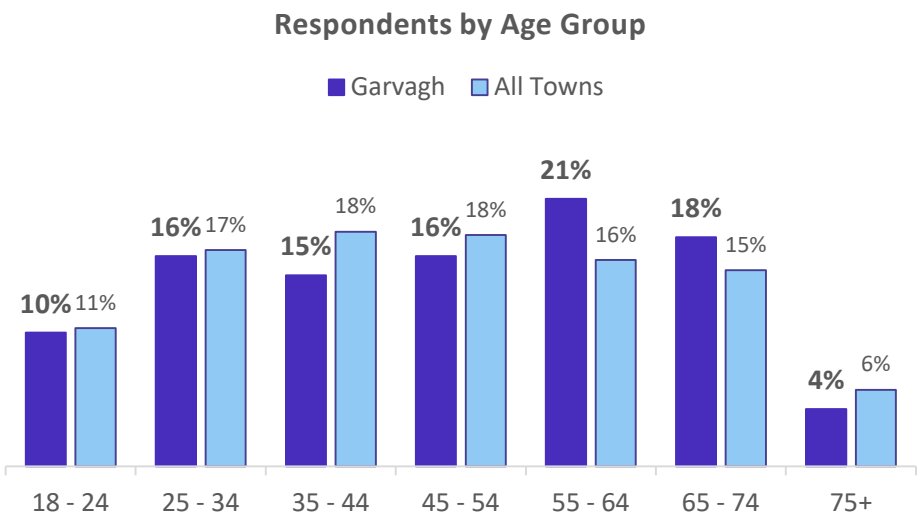
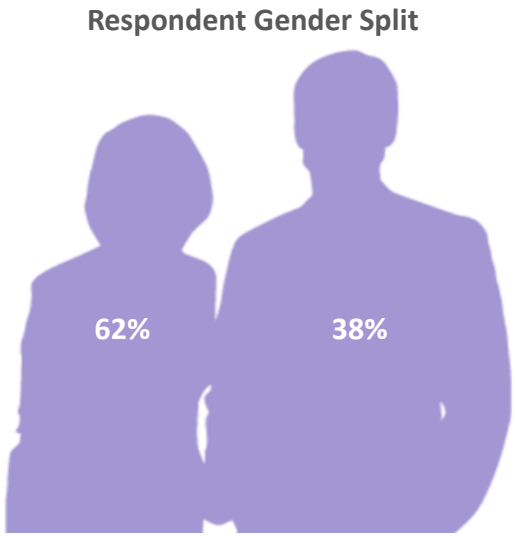
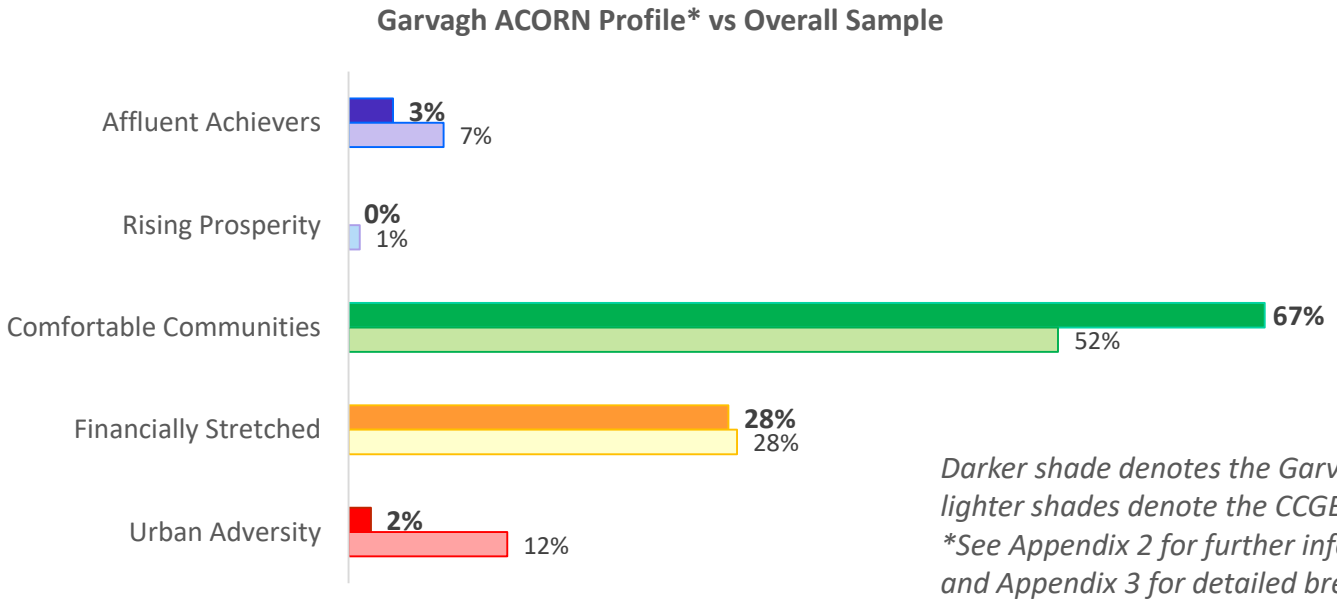






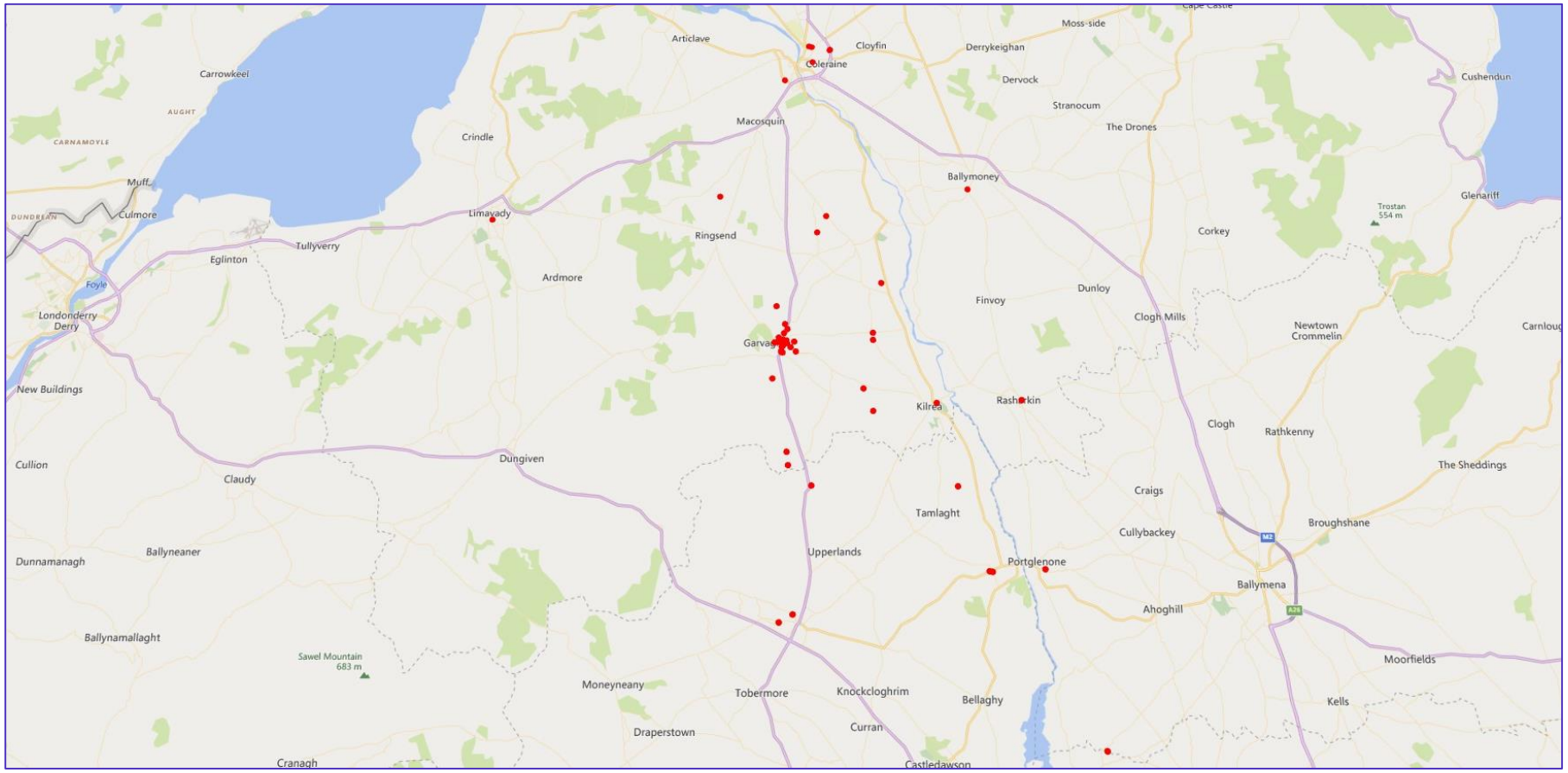
Darker shade denotes the Garvagh respondent profile while lighter shades denote the CCGBC baseline.
**See Appendix 2 for further information on ACORN classifications and Appendix 3 for detailed breakdown*

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

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

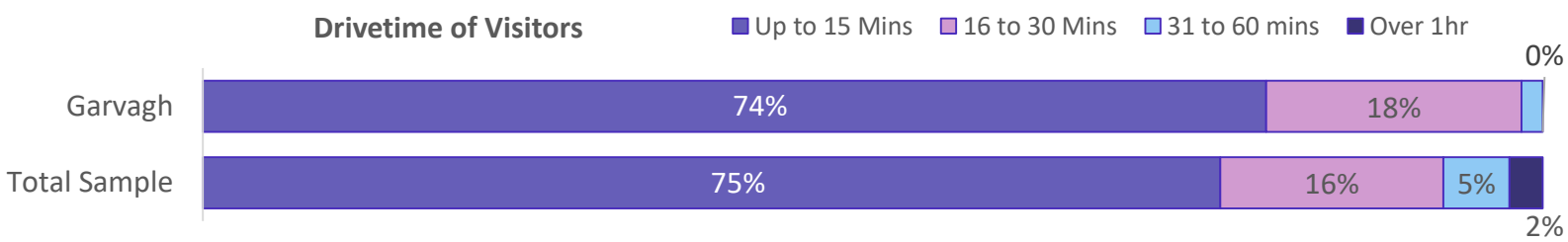
There was however significantly greater representation of the 'Comfortable Seniors' sub-category (8.2%) compared to our borough wide sample (1.4%).

Origins & Travel

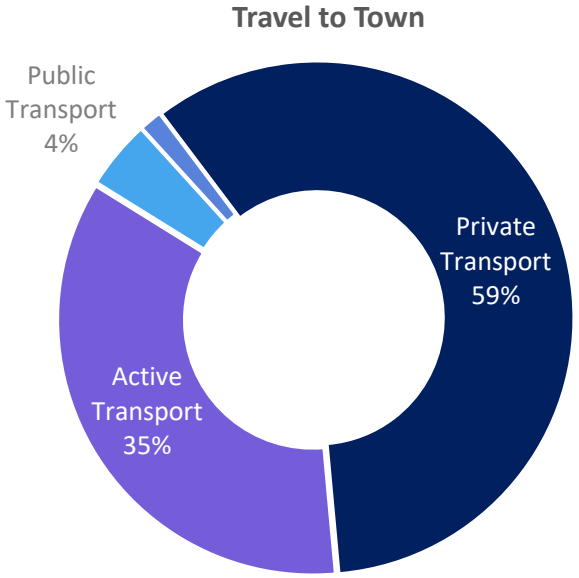


Similar to other smaller towns like Kilrea, the vast majority of sampled visitors originated from within the town themselves, with some small draw from the immediate surrounding countryside.

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

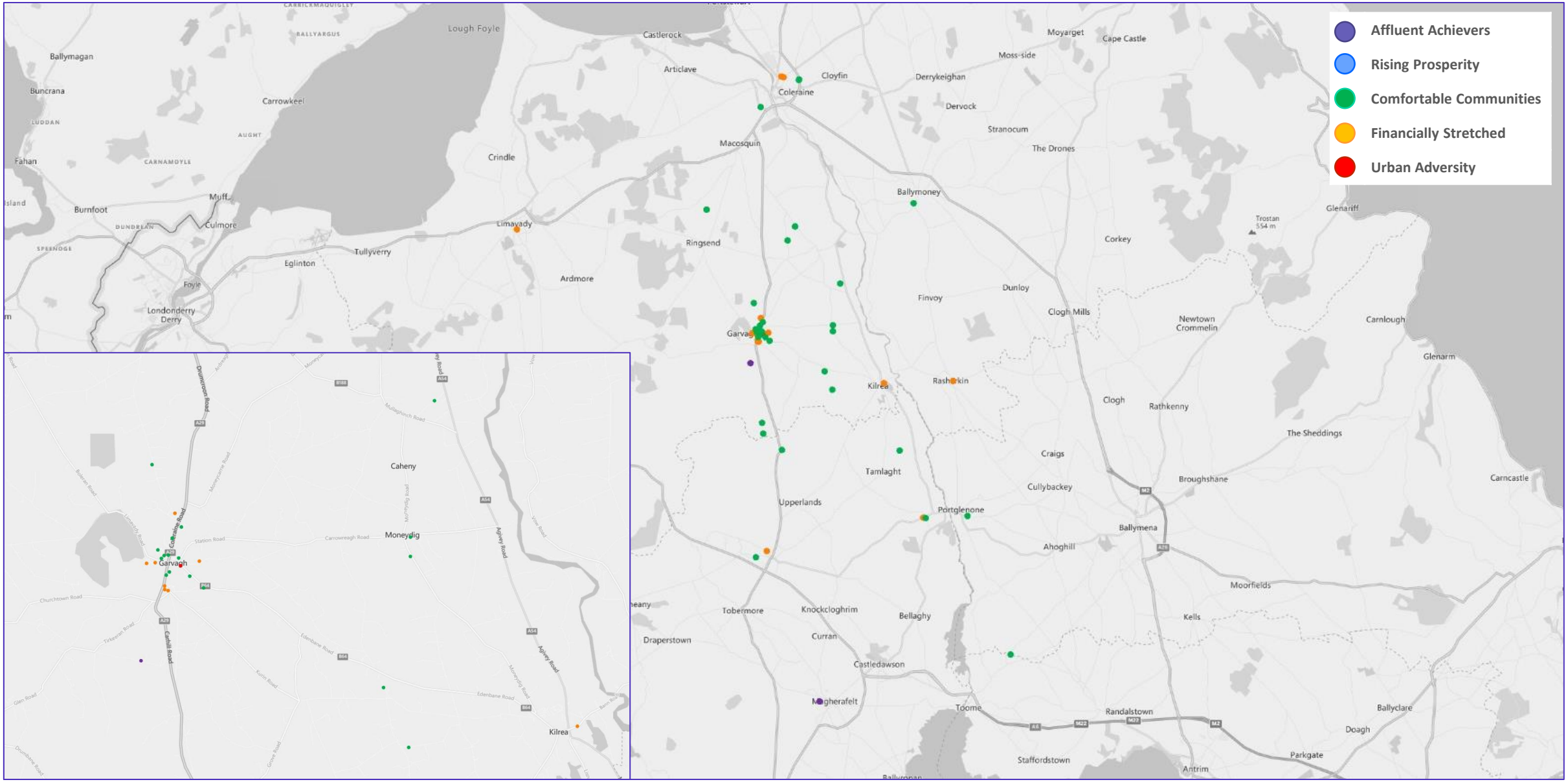


	Average
Garvagh	7 mins
Total Sample	10 mins



ACORN Mapping

Causeway Coast & Glens Borough Council



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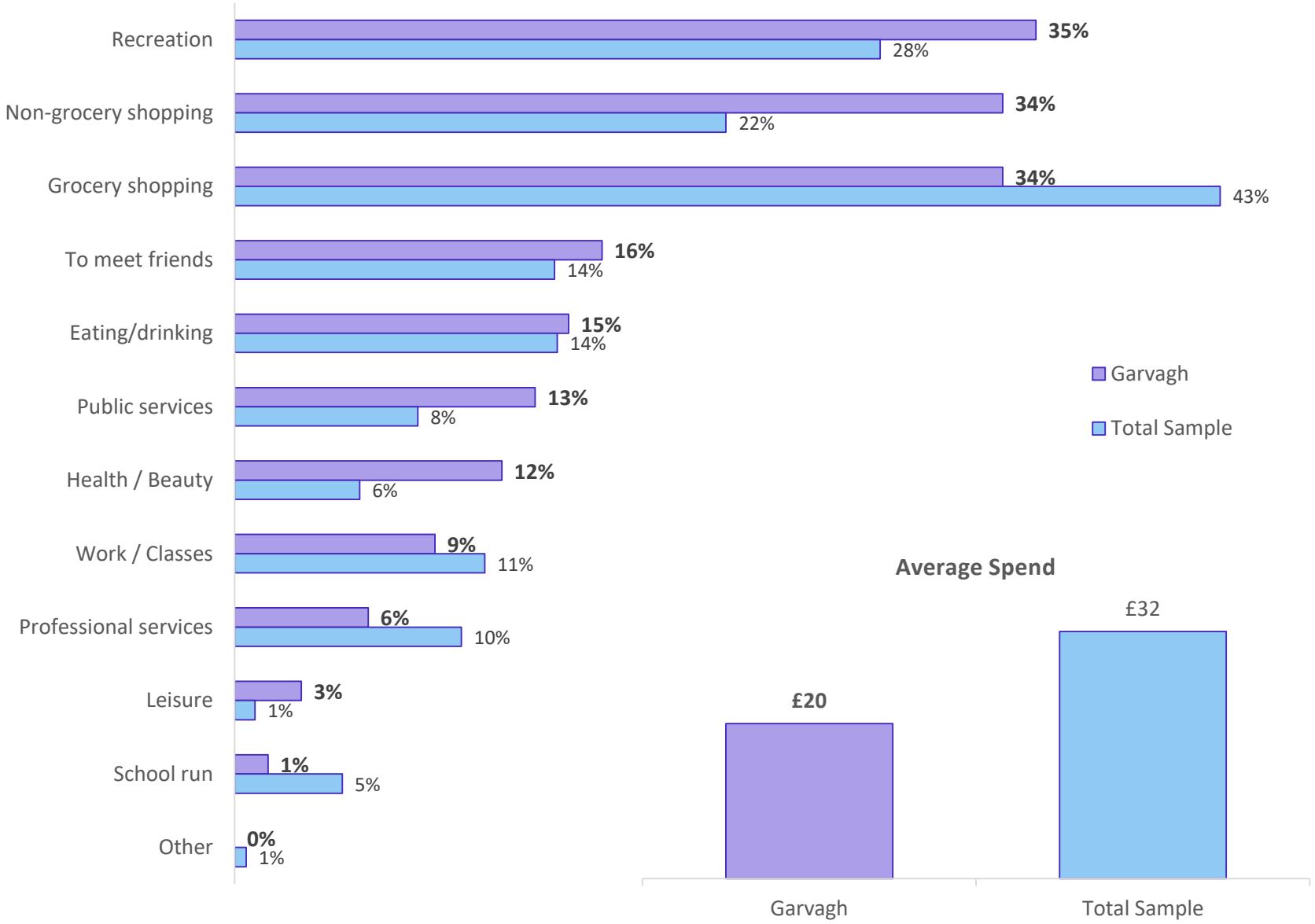
Why are people going to the town centres?



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

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

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

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

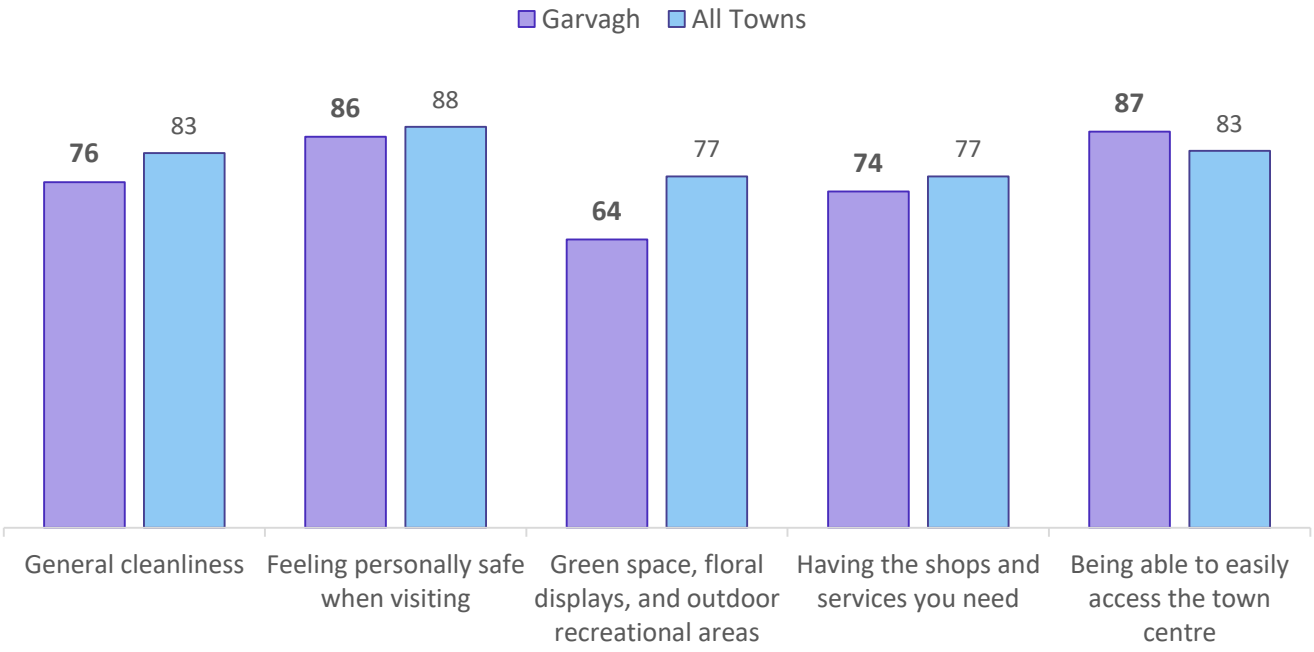
For this reason average spend, as well as average spend by dwell time, is below the borough average.

What is your opinion of the town centre?

Causeway Coast & Glens Borough Council

	Garvagh Visitors									Score: +51
	Dislike				Passive		Like			
Description	Hate	Dislike	Avoid	Not ok	Not for me	Ok	Like	Enjoy	One of my favourites	My favourite town
Score	1	2	3	4	5	6	7	8	9	10
Sample	0%	1%	4%	7%	4%	18%	1%	51%	6%	6%
Calculation	Total of 'Like' (**65**) – Total of Dislike (**13**) = **+51**									

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



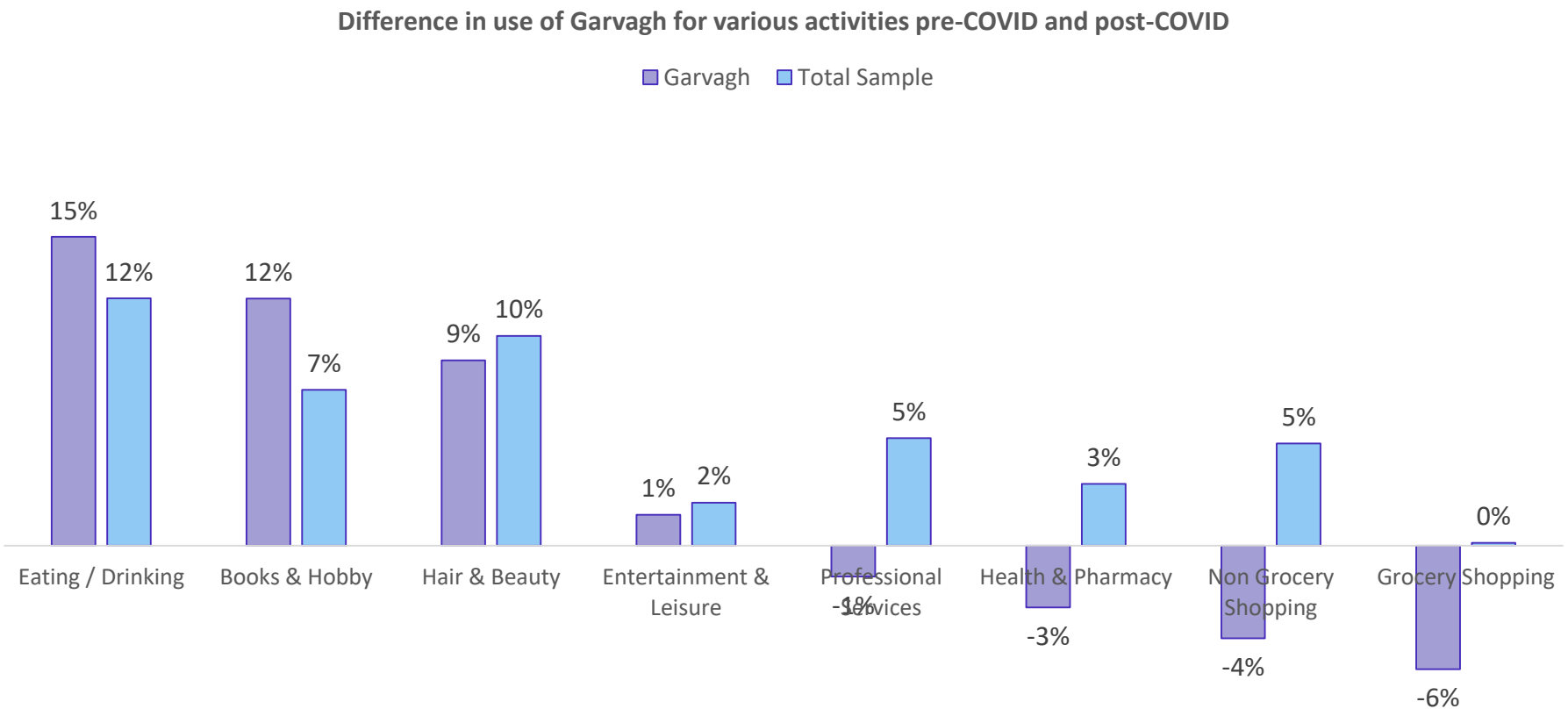
- Above is the combined Sentiment Score for Garvagh. The rationale for Sentiment Scoring it outlined in Appendix 2.
- In keeping with other towns, the sentiment score for Garvagh is generally positive but in this case does sit relatively low (ranked 10th) compared to the other towns sampled.
- Around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

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

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

"A lot of it is derelict"

Pre & Post-COVID Use



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

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

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

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

Traders

Trader Profile

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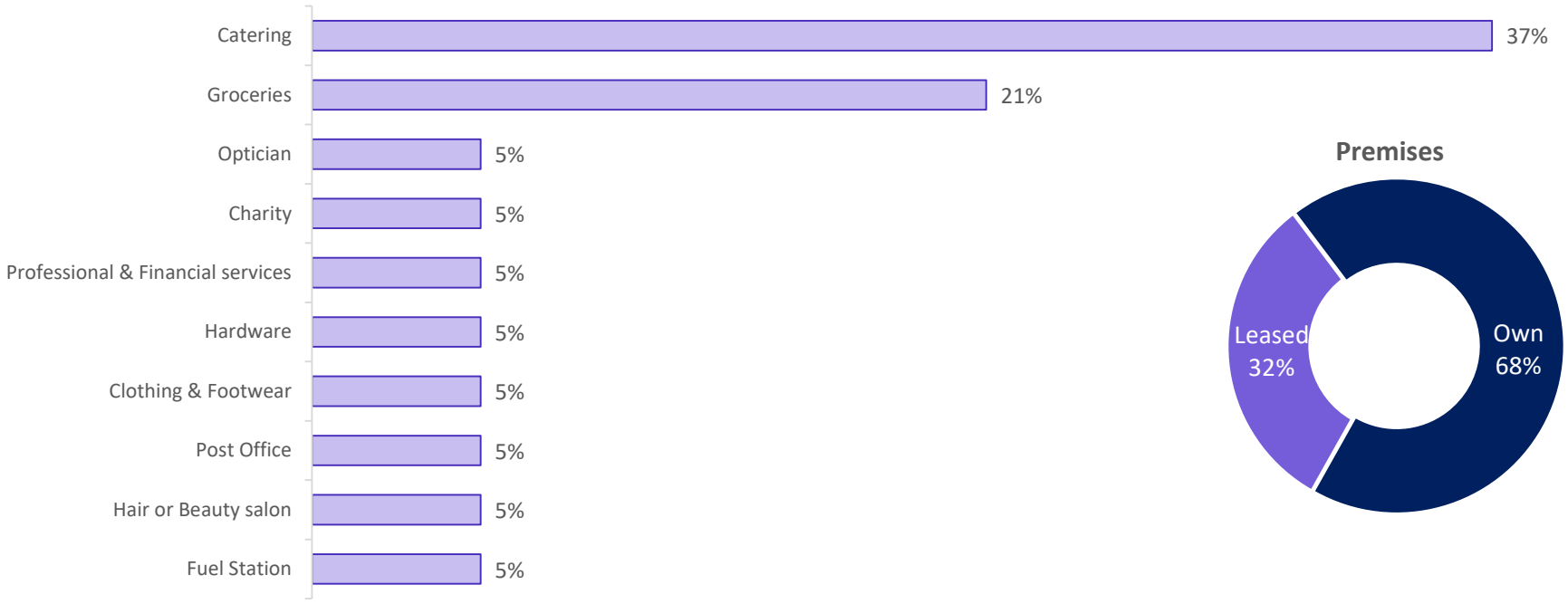
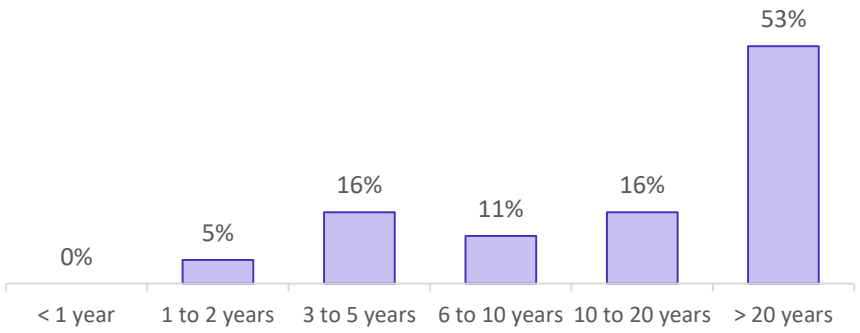
Business Sector

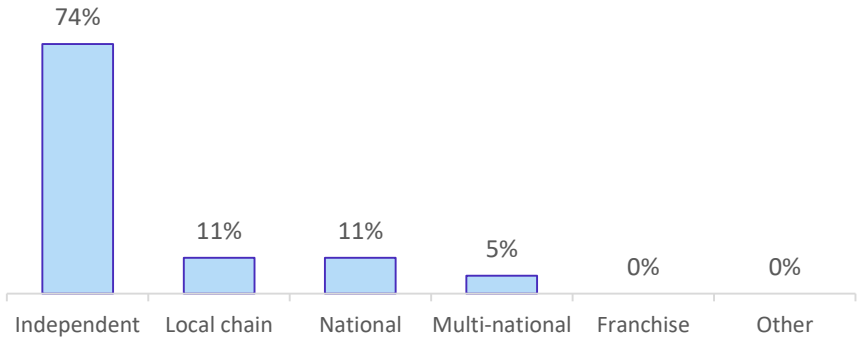


Premises

Business Age



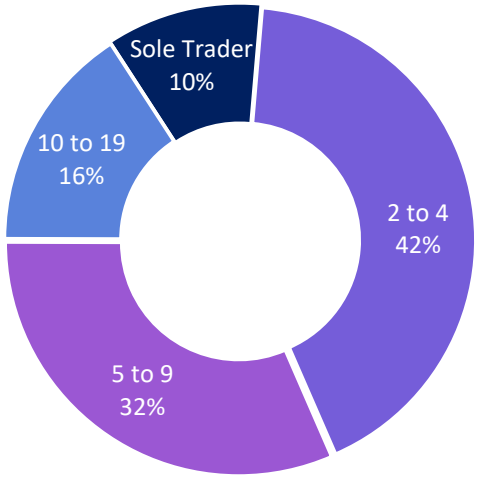
Business Ownership



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

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

Current Staffing Levels



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COVID Impact

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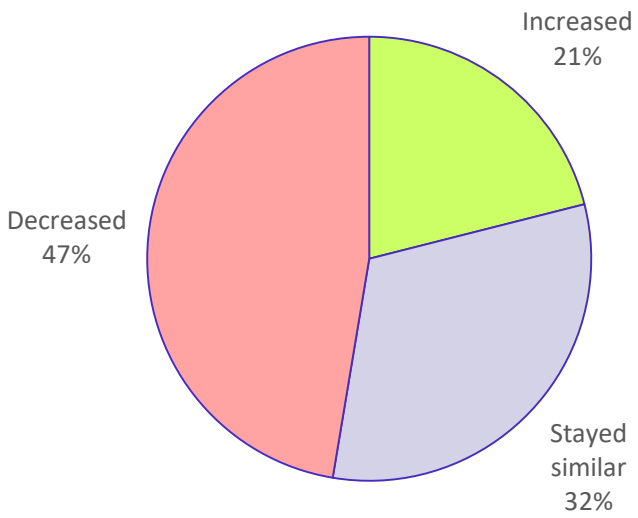
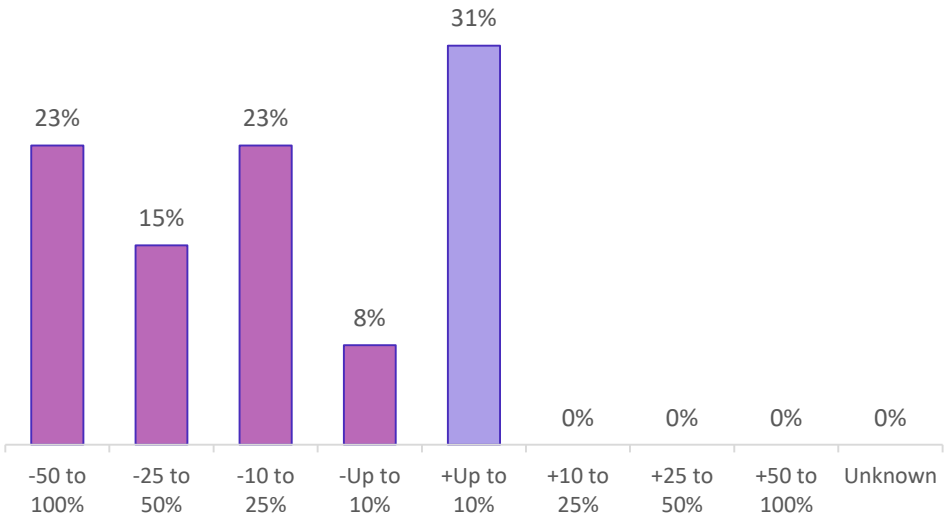
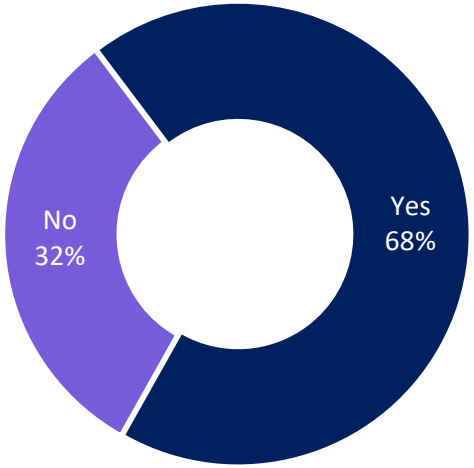
Impact on Turnover



Level of Impact



Were you forced to close operations at any point?



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

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

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

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

COVID Impact continued

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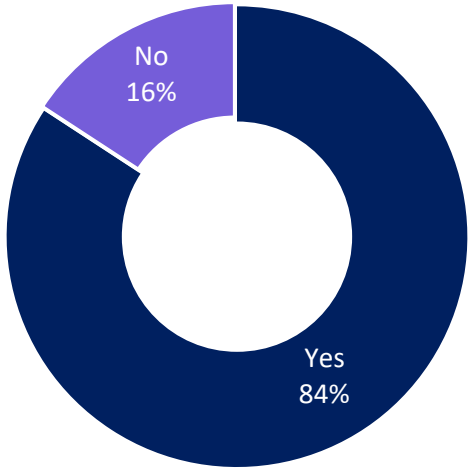
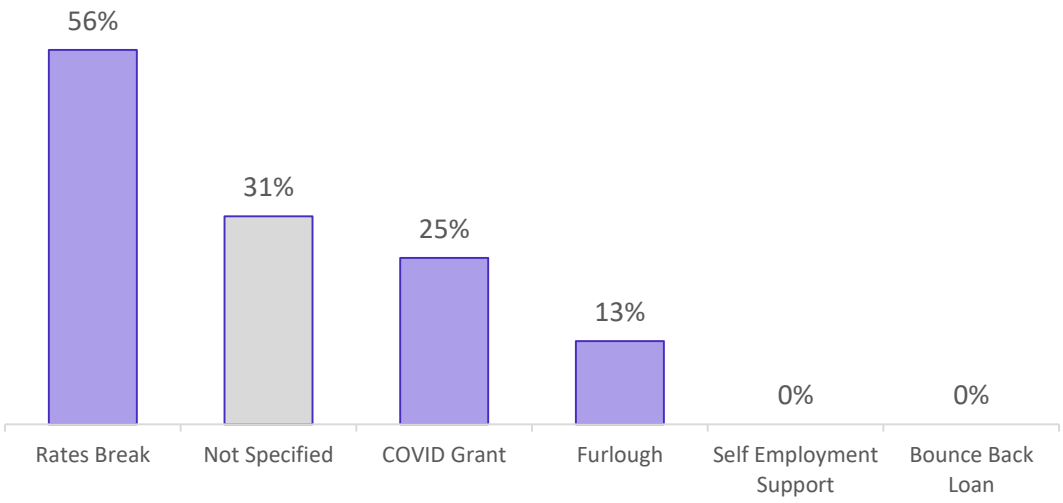
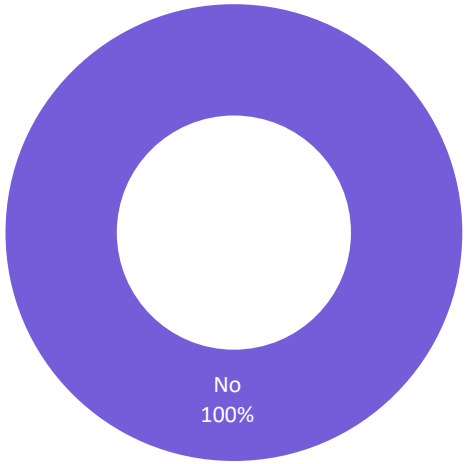
Did you avail of any Government support?



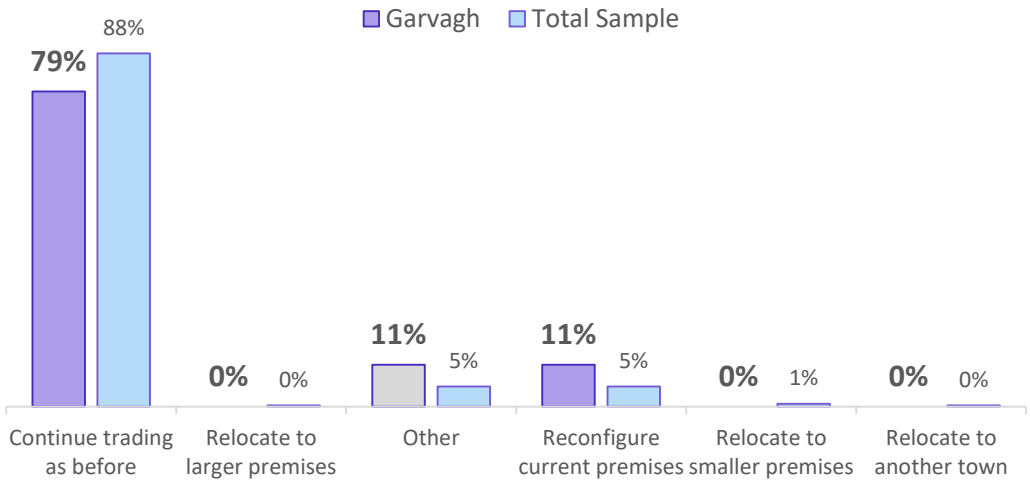
What kind of Government Support …



Did you avail of any CC&G Business Support …



Trading intentions going forward …



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

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

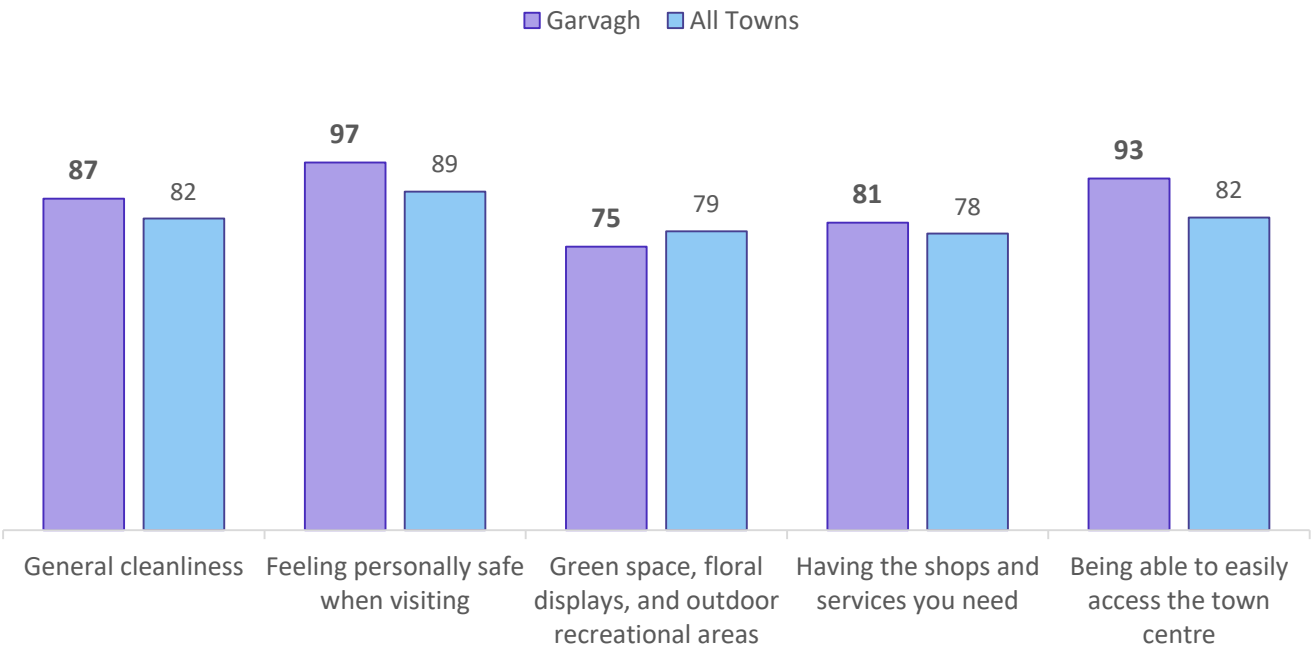
It is entirely possible that the uptake of government support was the reason many of these businesses didn't report a reduction in income.

What is your opinion of the town centre?

Causeway Coast & Glens Borough Council

	Garvagh Traders									Score: +68
	Dislike				Passive		Like			
Description	Hate	Dislike	Avoid	Not ok	Not for me	Ok	Like	Enjoy	One of my favourites	My favourite town
Score	1	2	3	4	5	6	7	8	9	10
Sample	0%	0%	0%	0%	5%	26%	5%	53%	0%	11%
Calculation	Total of 'Like' (**68**) – Total of Dislike (**0**) = **Garvagh Traders Score = +68**									

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



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

Appendix 1 – Terminology & Clarifications

Margin of Error

Our overall sample of 781 samples was sufficient to achieve a margin of error of +/- 3.5% @95% confidence when looking at the borough as a whole. For each individual town, greater caution should be placed on the results as the sample gets more segmented the margin of error increases. For Garvagh a sample size of 68 was achieved which provides us with a margin of error of +/- 11.9% @ 95% confidence. In simple terms, our margin of error of means that were the study to be replicated 20 times, we would expect the results to vary by no more than + or – 11.9% in 19 (95%) of the subsequent studies.

Coronavirus Restrictions

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

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

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

Weather & Climate

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

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

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

Appendix 2 – ACORN & Sentiment Explained

Causeway Coast & Glens Borough Council

About ACORN

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

Categorisation

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

Annex 2 – ACORN & Sentiment Explained

Causeway Coast & Glens Borough Council

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

Sentiment Scoring

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

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

Appendix 3 – Results Expanded

Causeway Coast & Glens Borough Council

Detailed ACORN Results for Garvagh Visitors

No.	ACORN Group	Garvagh	Total Sample	Sub-Category		Garvagh	Total Sample
1	Affluent Achievers	**3%**	7%	A	Lavish Lifestyles	**0%**	0%
				B	Executive Wealth	**3.3%**	4.1%
				C	Mature Money	**0%**	2.9%
2	Rising Prosperity	**0%**	1%	D	City Sophisticates	**0%**	0%
				E	Career Climbers	**0%**	0.8%
3	Comfortable Communities	**67%**	52%	F	Countryside Communities	**55.7%**	45.6%
				G	Successful Suburbs	**3.3%**	2.3%
				H	Steady Neighbourhoods	**0%**	1.6%
				I	Comfortable Seniors	**8.2%**	1.4%
				J	Starting Out	**0%**	1.1%
4	Financially Stretched	**28%**	28%	K	Student Life	**0%**	0.4%
				L	Modest Means	**13.1%**	8.4%
				M	Striving Families	**6.6%**	12.1%
				N	Poorer Pensioners	**8.2%**	7.7%
5	Urban Adversity	**2%**	12%	O	Young Hardship	**0%**	7.1%
				P	Struggling Estates	**1.6%**	3.0%
				Q	Difficult Circumstances	**0%**	1.5%

Disclaimer

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