Causeway Coast & Glens Borough Council

Understanding Businesses & Visitors in towns within Causeway Coast & Glens

Portrush

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 **Portrush**;

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

Sampling for visitors and traders in Portrush took place between 24th March and 15th April 2021. It is important to note that during this period, there were a range of continuing restrictions in place owing to the ongoing Coronavirus pandemic. The specific restrictions at the time are outlined in Appendix 1, however it is important to be cognisant of the impact these restrictions will have had on both visitors (restrictions on area movement, what shops / activities they have come to use etc.) and traders (loss of revenue, periods of closure etc.) in the area.

Visitors

Respondent Profile

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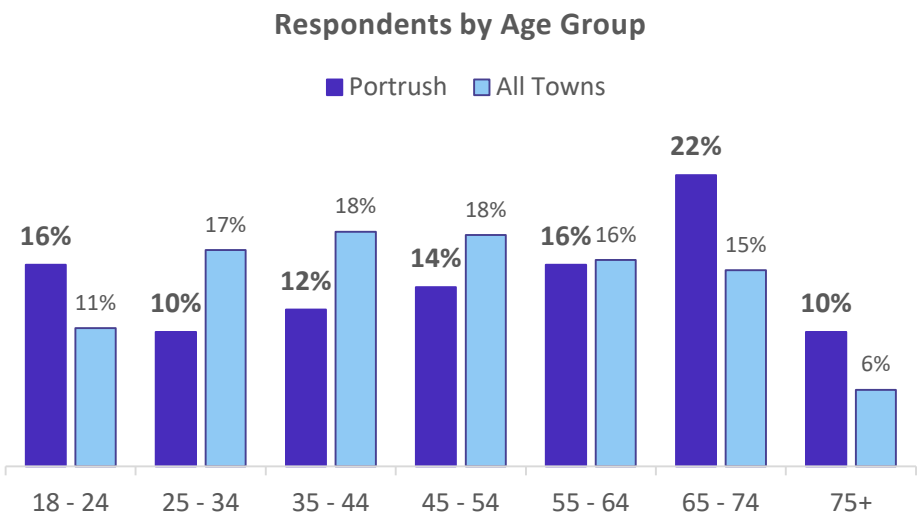
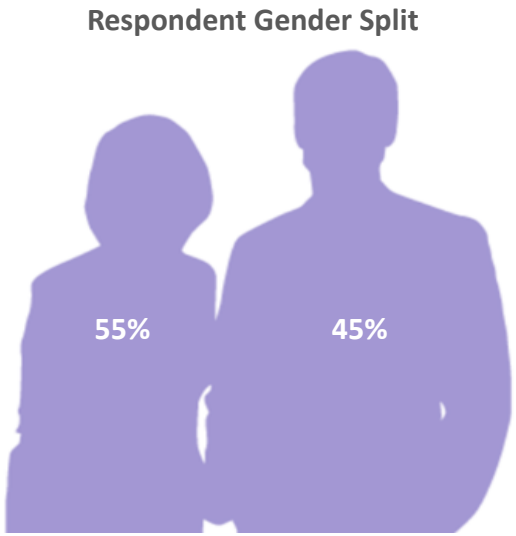
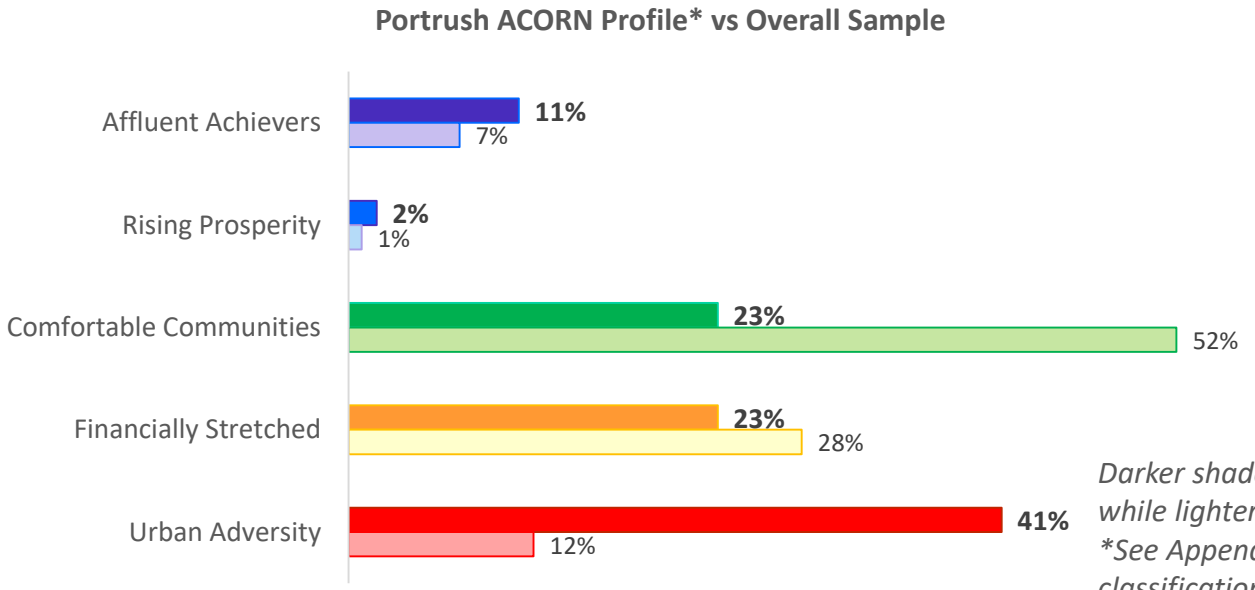






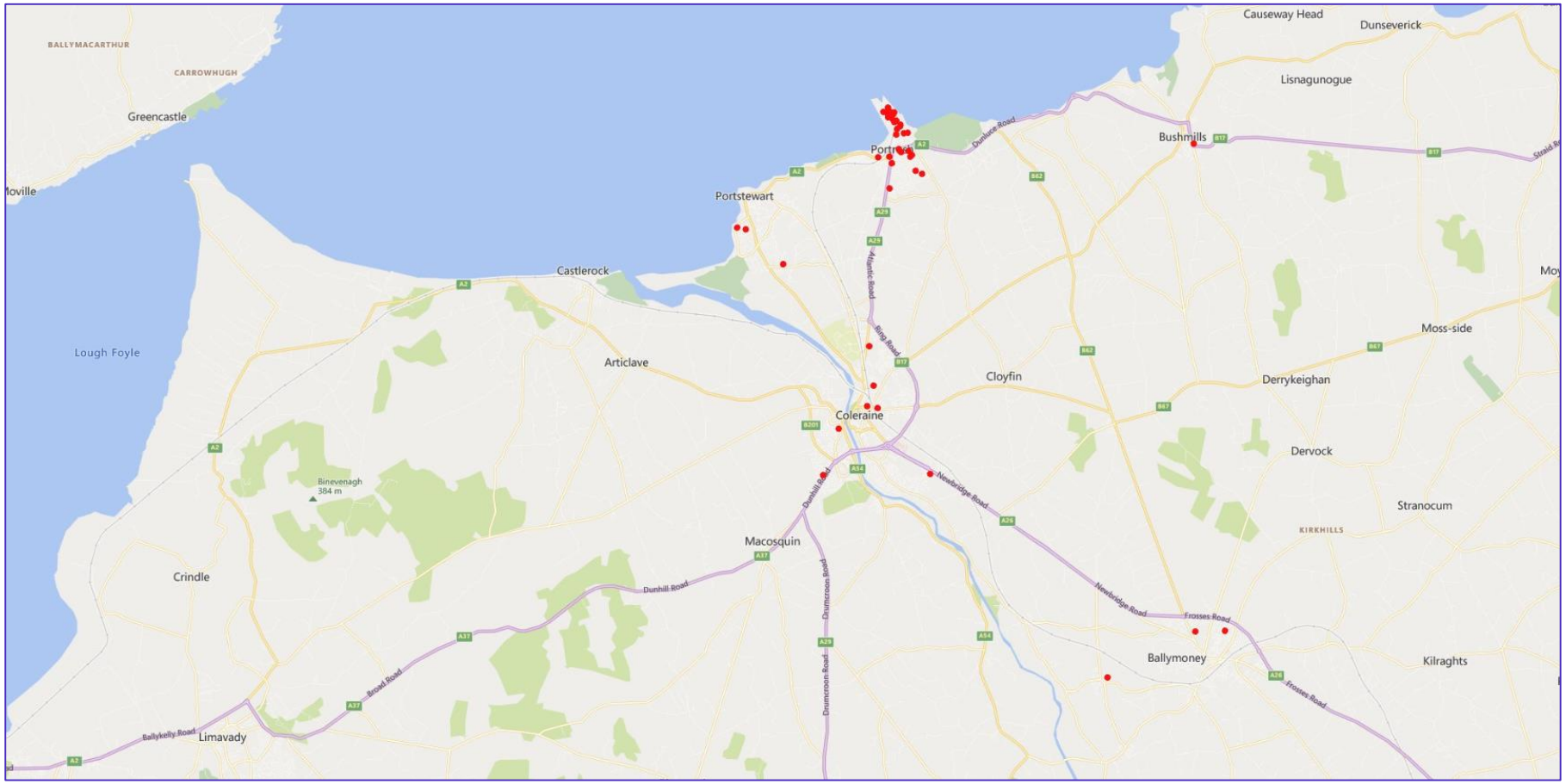
Darker shade denotes the Portrush respondent profile while lighter shade denotes the CCGBC baseline.
**See Appendix 2 for further information on ACORN classifications and Appendix 3 for detailed breakdown*

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

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

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

Origins & Travel

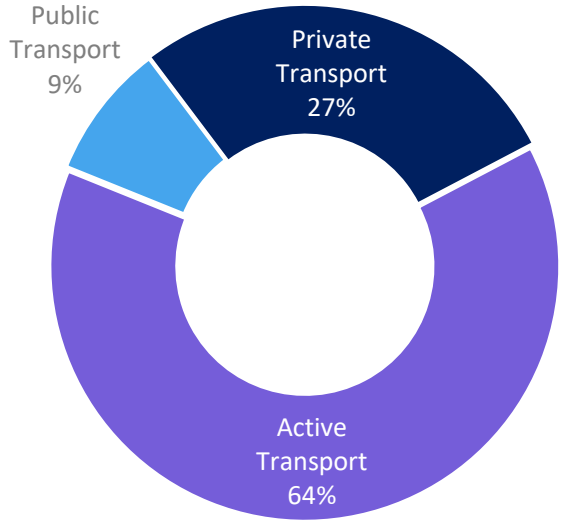


The concentration of visitors from the local area is high for Portrush.

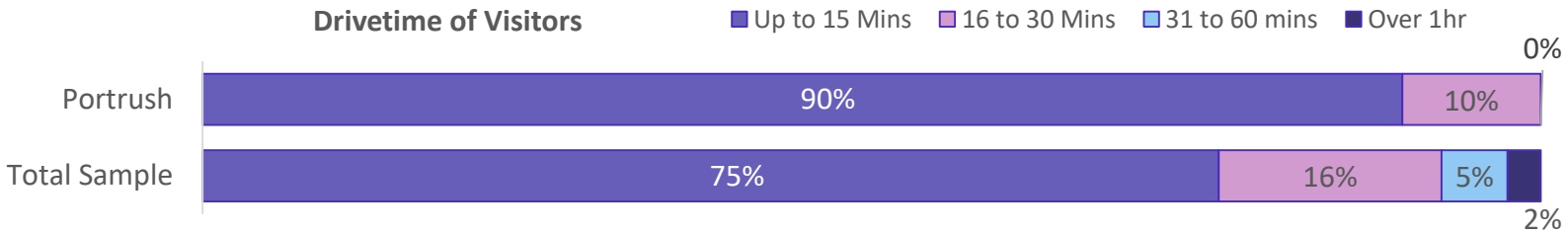
The average drivetime is the third lowest of the towns with no one having travelled more than 30 minutes from the surrounding towns.

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

Travel to Town



Drivetime of Visitors



Average
7 mins
10 mins

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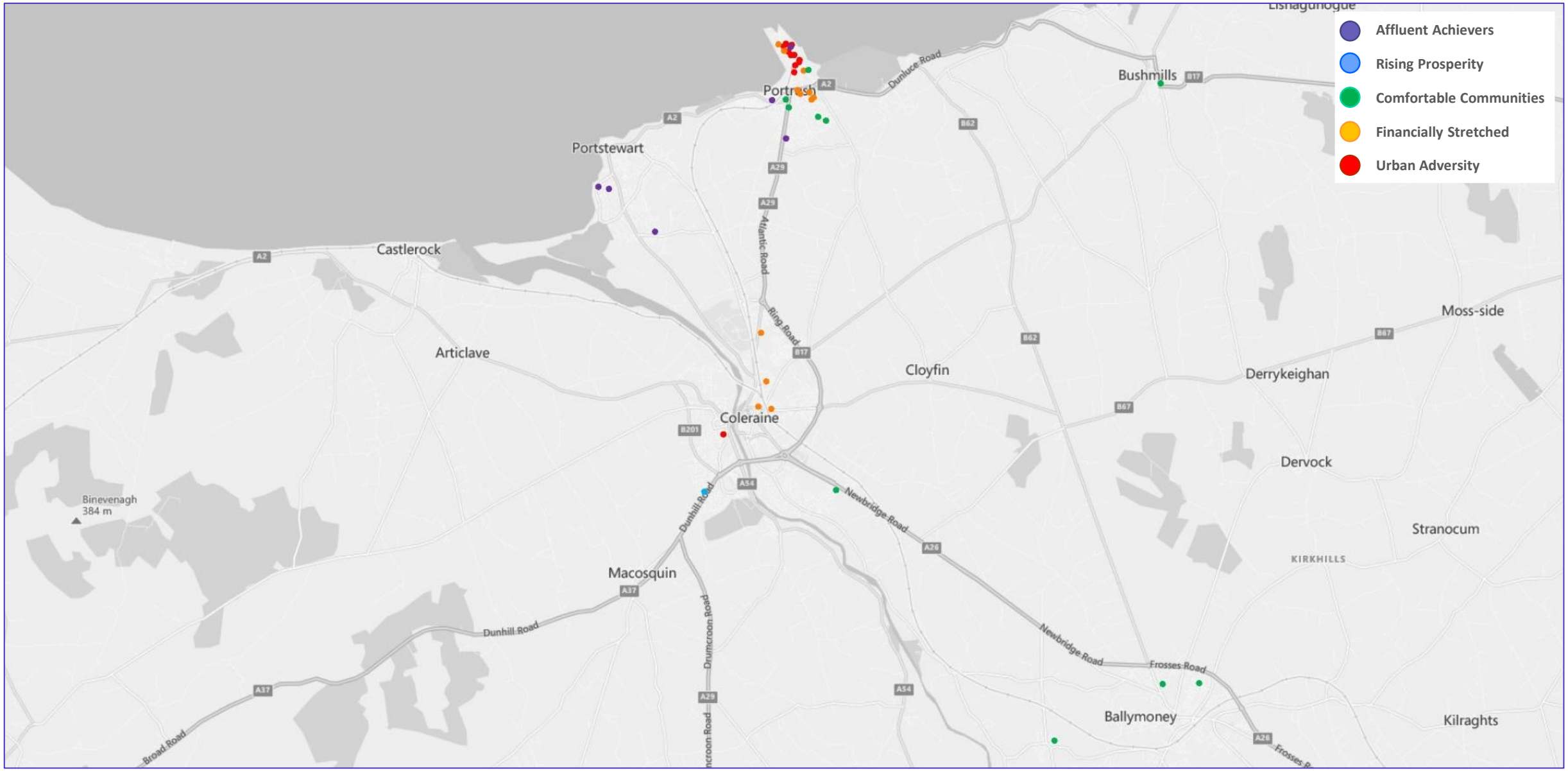
ACORN Mapping



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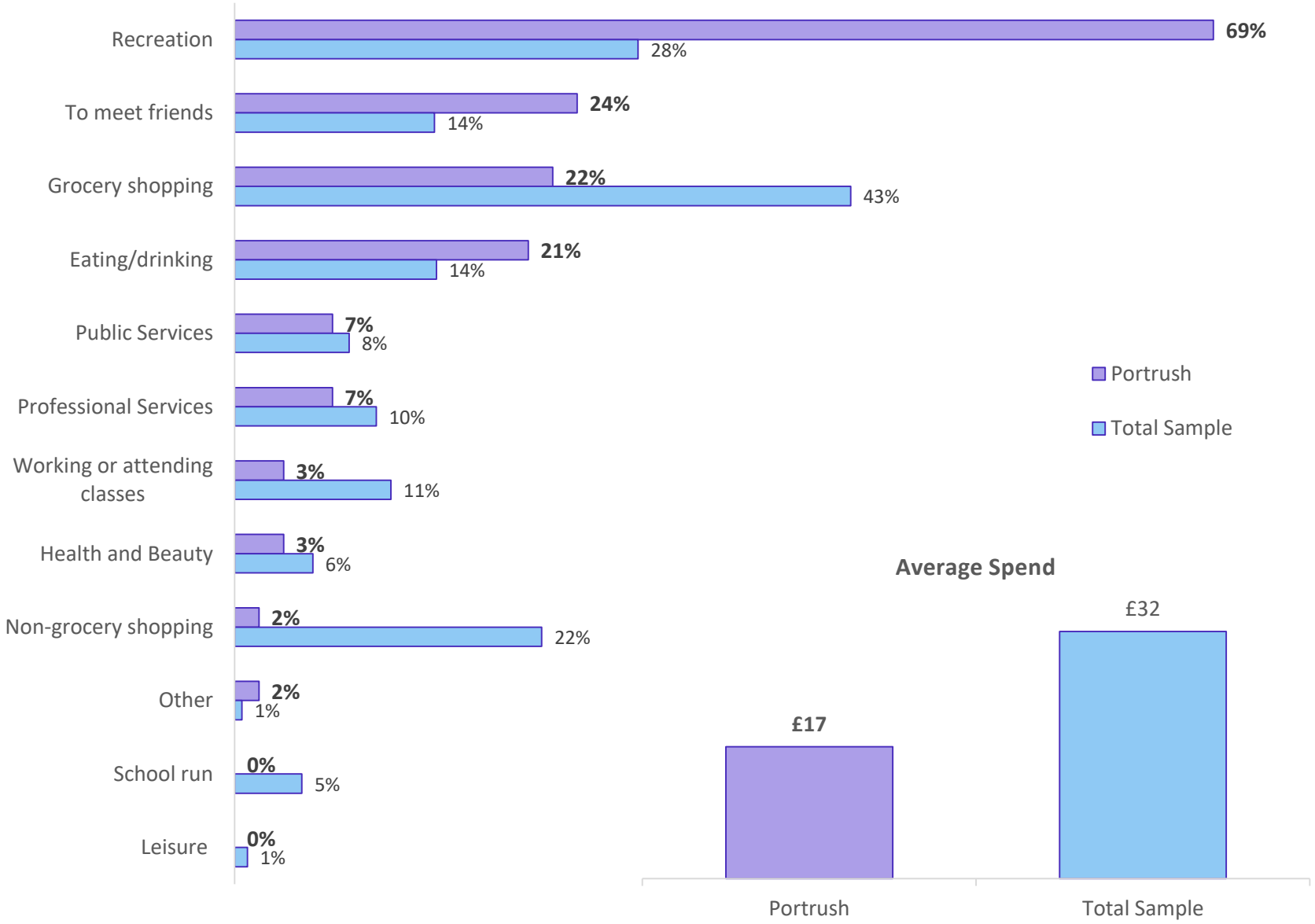
Why are people going to the town centres?



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

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

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

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

What is your opinion of the town centre?

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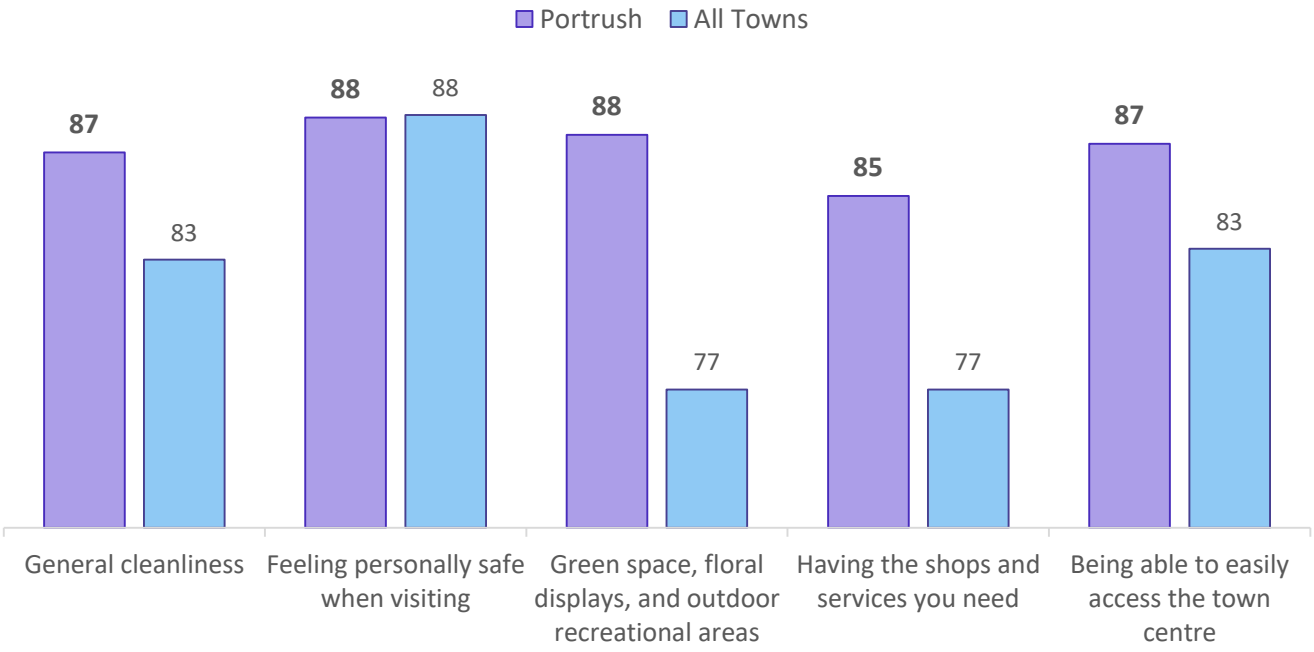
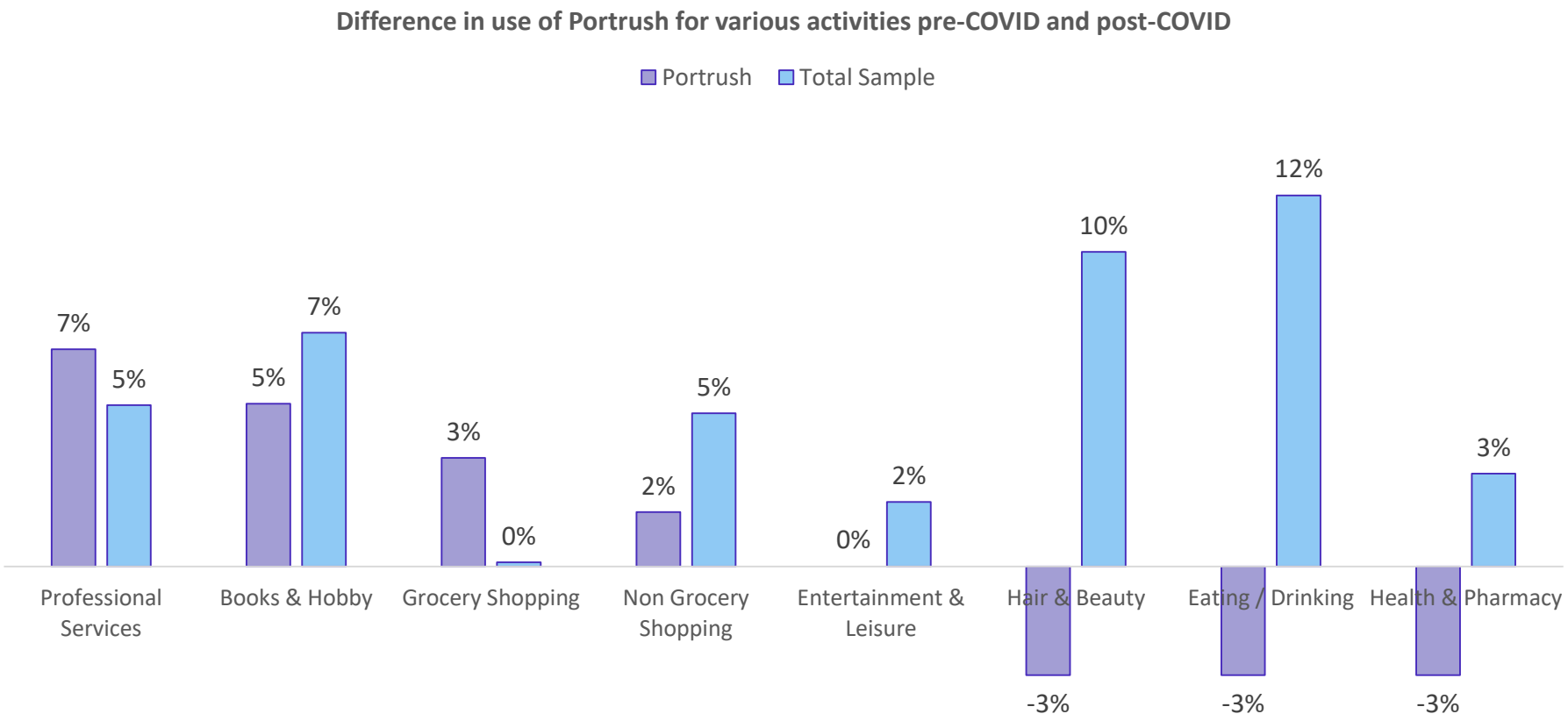
	Portrush Visitors									Score: +98
	Dislike				Passive		Like			
Description	Hate	Dislike	Avoid	Not ok	Not for me	Ok	Like	Enjoy	One of my favourites	My favourite town
Score	1	2	3	4	5	6	7	8	9	10
Sample	0%	0%	0%	0%	0%	2%	7%	38%	16%	38%
Calculation	Total of 'Like' (**98**) – Total of Dislike (**0**) =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

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



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

Pre & Post-COVID Use



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

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

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

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

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

Traders

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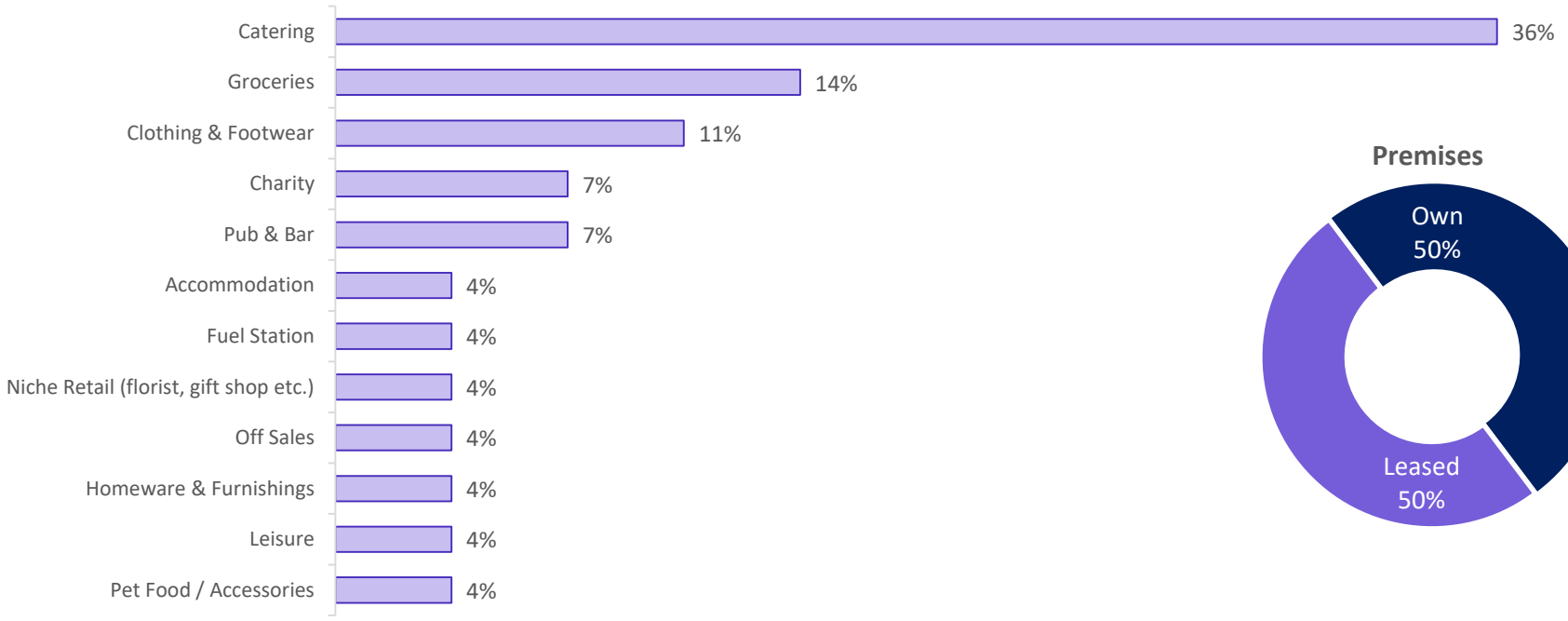
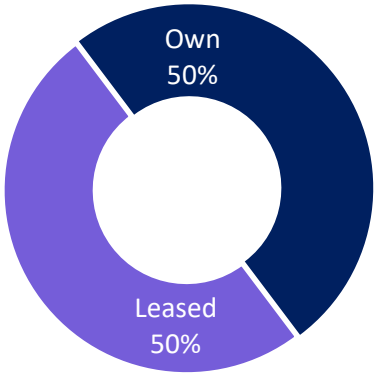
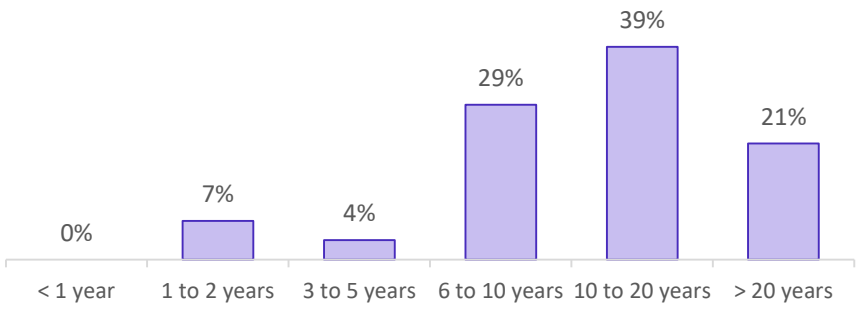
Business Sector



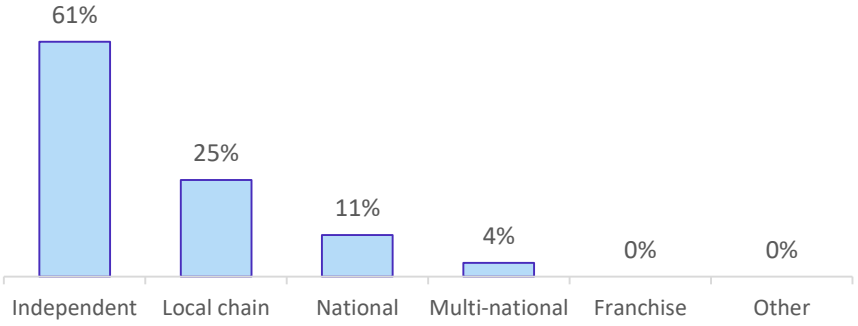
Premises



Business Age



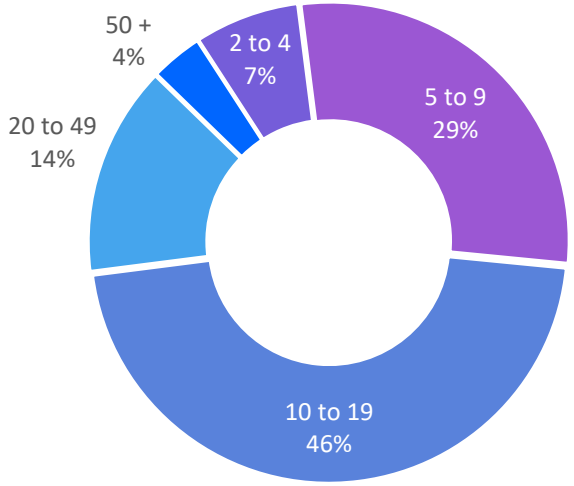
Business Ownership



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

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

Current Staffing Levels



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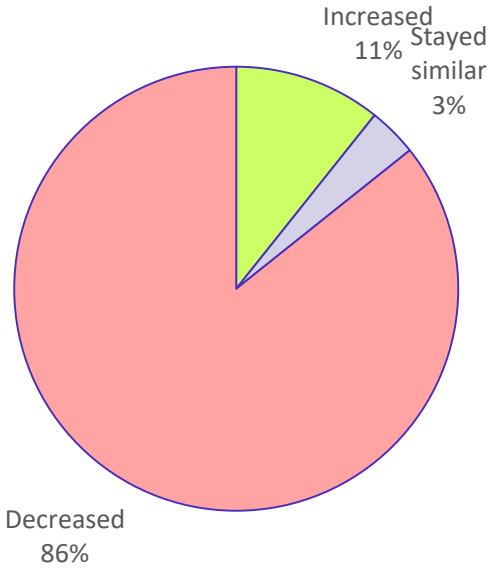
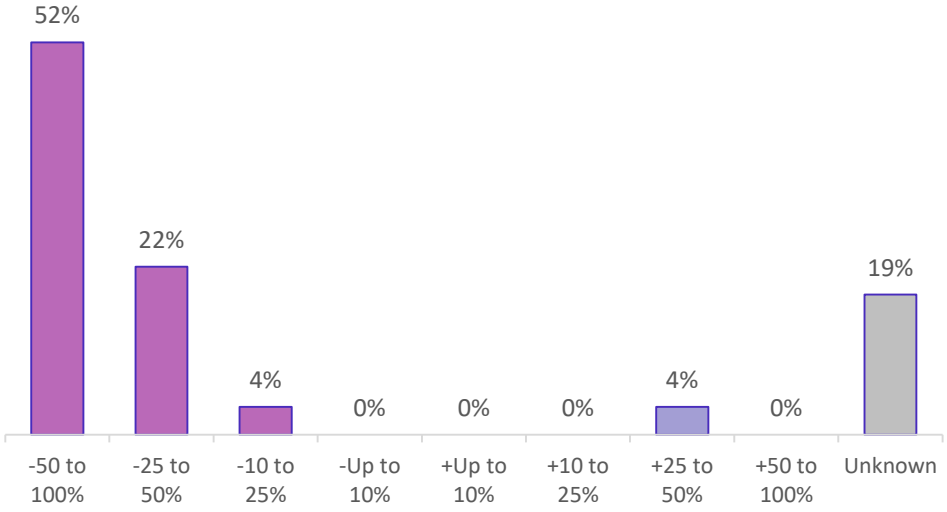
COVID Impact

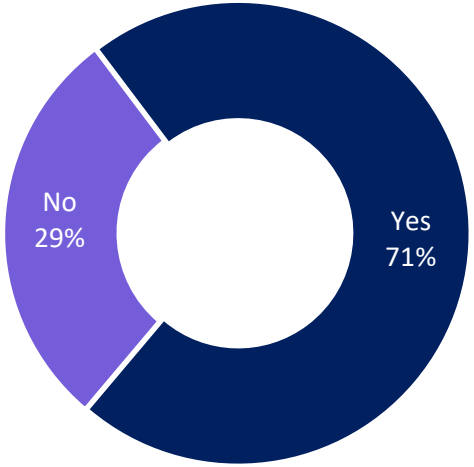
Impact on Turnover



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	**54%**
Yes	**46%**
Of those who said yes …	
Online selling & delivery	69%
Click & collect	23%
New services tailored to new circumstances	8%
New products tailored to new circumstances	0%

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

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

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

COVID Impact continued

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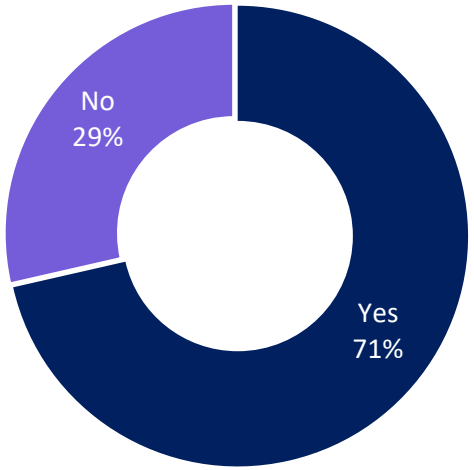
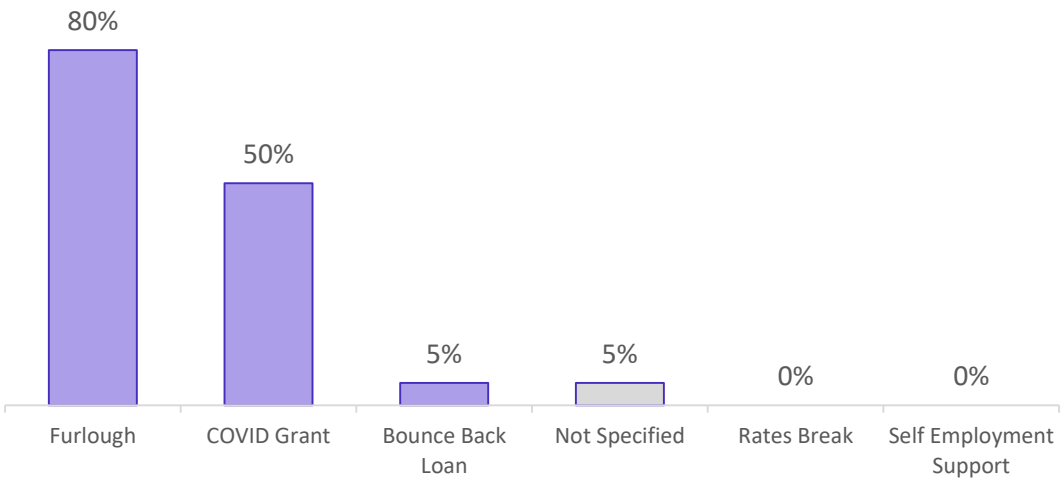
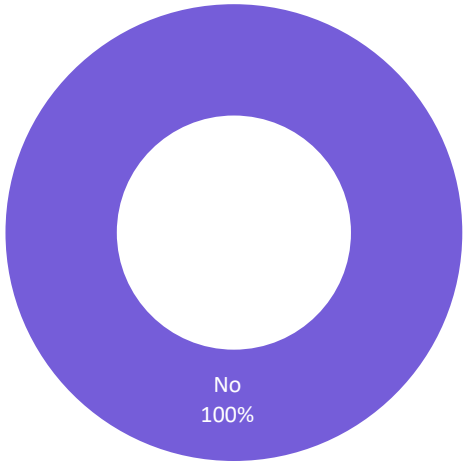
Did you avail of any Government support?



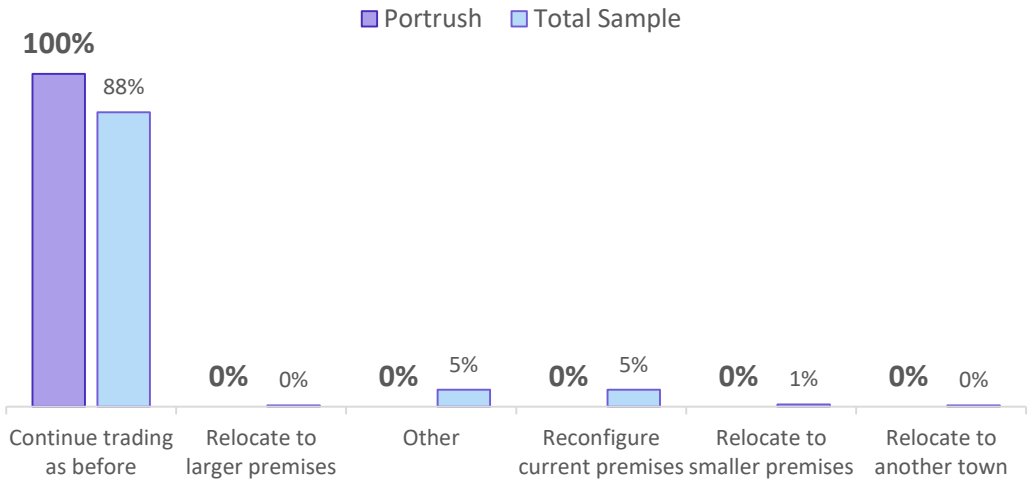
What kind of Government Support …



Did you avail of any CC&G Business Support …



Trading intentions going forward …



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

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

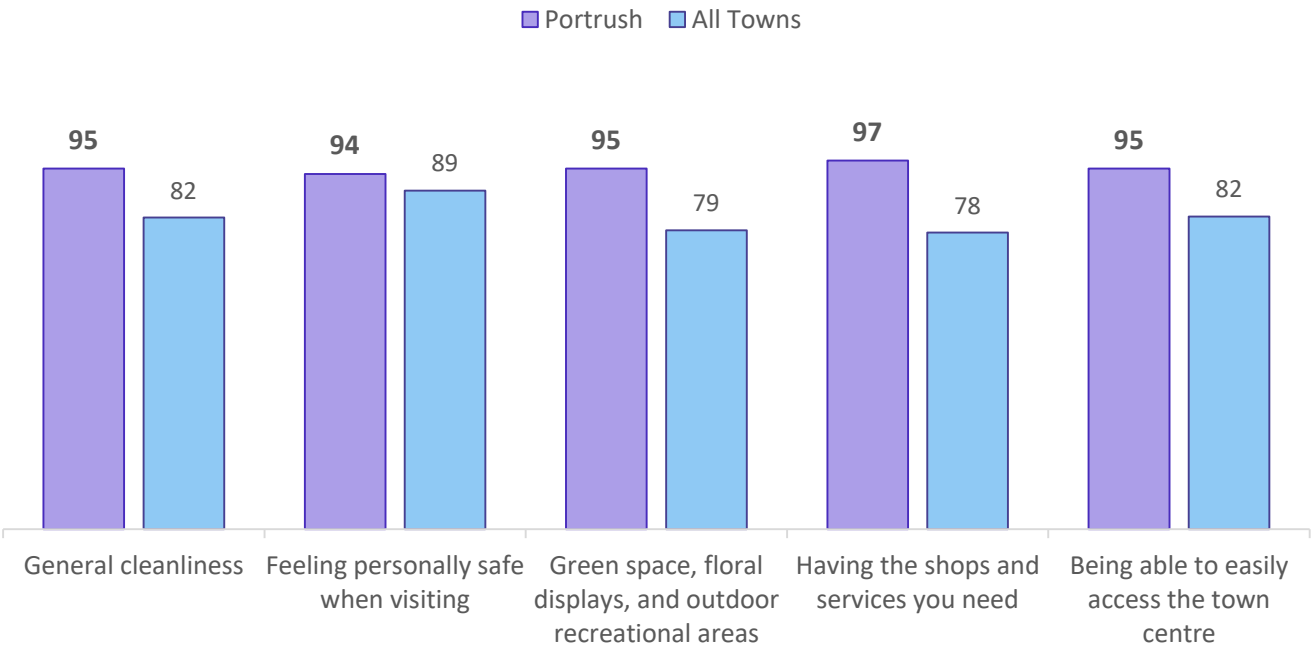
The use of council support is virtually non-existent and all traders surveyed plan to continue trading as before.

What is your opinion of the town centre?

Causeway Coast & Glens Borough Council

	Portrush Traders									Score: +100
	Dislike				Passive		Like			
Description	Hate	Dislike	Avoid	Not ok	Not for me	Ok	Like	Enjoy	One of my favourites	My favourite town
Score	1	2	3	4	5	6	7	8	9	10
Sample	0%	0%	0%	0%	0%	0%	7%	29%	54%	11%
Calculation	Total of 'Like' (**100**) – Total of Dislike (**0**) = **Portrush Traders Score = +100**									

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



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

"Hopefully we get open for the summer again"

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

Appendix 1 – Terminology & Clarifications

Margin of Error

Our overall sample of 781 samples was sufficient to achieve a margin of error of +/- 3.5% @95% confidence when looking at the borough as a whole. For each individual town, greater caution should be placed on the results as the sample gets more segmented the margin of error increases. For Portrush a sample size of 58 was achieved which provides us with a margin of error of +/- 12.9% @ 95% confidence. In simple terms, our margin of error of means that were the study to be replicated 20 times, we would expect the results to vary by no more than + or – 12.9% in 19 (95%) of the subsequent studies.

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

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About ACORN

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

Categorisation

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

Annex 2 – ACORN & Sentiment Explained

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

Sentiment Scoring

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

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

Appendix 3 – Results Expanded

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Detailed ACORN Results for Portrush Visitors

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

Disclaimer

For further information please contact:

Albert Hamilton

Chief Executive

albert.hamilton@card-group.com

+44 (0) 78 1211 1262

Niall Murphy

Head of Insight

niall.murphy@card-group.com

+44 (0) 78 4939 6385

Aedan Beatty

Analyst

aedan.beatty@card-group.com