



Naturally
North Coast & Glens

More Than A Market!

Supporting Artisans & Making People Happy

Impact Report 2019

Melanie Brown



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"Friendly atmosphere, samples to try, lovely local food and produce, a great meeting spot."

(Customer)

Executive Summary

Naturally North Coast and Glens Community Interest Company (NNCG) is a social enterprise supporting local artisans, crafters, producers and artists to bring their products to market.

It is based in Ballycastle, on the North Coast of County Antrim and started life as 'Ballycastle Town Market' in 2012 with a membership of 15—which grew to 64 members, and 200 casual traders by 2019, running unique, vibrant, artisan markets all across the Causeway Coast and Glens region.

In a bid for continual improvement NNCG embarked on its first detailed impact research project in 2019, to explore what kinds of differences, both positive and negative, it was making to different stakeholders—and to develop an understanding of their value.

A Social Return on Investment (SROI) evaluation approach was used to help provide

a sense of the value of the social, personal and environmental differences NNCG makes, as well as the economic differences. This includes determining a monetary value for non-monetary outcomes—things like artisans having increased confidence or customers feeling more like part of a community.

"SROI is about value, rather than money.

Money is simply a common unit and as such is a useful and widely accepted way of conveying value."

(The SROI Network)

Ballycastle was the main focus for the study but the results have been extrapolated out in a proportionate way to the wider region.

The research methods used were qualitative and quantitative, involving focus groups, interviews and surveys with stakeholders.

Main Findings

The individuals who are impacted most by NNCG's activities are its 64 members—the local artisan producers, makers and artists that NNCG supports to bring their products to market, with advice, training and mentoring.

They experienced:

- financial and business benefits related to business start-up and development, increased business skills, knowledge, confidence and turnover, and
- significant personal and social benefits, including increased self-confidence, life-satisfaction and wellbeing, a supportive social network and a sense of belonging.

The average value of these benefits in monetary terms (above and beyond income), was £5,882, to each member. The average living wage income earned from 2019's NNCG markets per member was £4,273.

Business Impact On Members

| | |
|-----|--|
| 98% | say NNCG increased their business-related confidence |
| 98% | say NNCG helped their business develop |
| 97% | say NNCG increased the financial viability of their business |
| 67% | say NNCG helped their business get started |
| 34% | say their business <i>would not exist</i> without NNCG |
| 92% | say NNCG increased their turnover |

(On average our members say **HALF** their business turnover is due to being involved with NNCG.)

Social Impact On Members

| | |
|-----|---|
| 92% | have become more confident in dealing with the public |
| 68% | have an improved social life |
| 90% | have an increased sense of belonging |
| 48% | have reported reduced loneliness |
| 86% | have a social support network |

Personal Impact On Members

| | |
|-----|---|
| 88% | have become more self-confident generally |
| 80% | have an improved sense of wellbeing |
| 62% | have improved mental health |
| 84% | have increased levels of happiness |
| 84% | have an increased sense of satisfaction with life |
| 80% | have increased self-esteem |
| 84% | are in a stronger financial position |

The 'community' was the stakeholder group that benefited most—accounting for 58-59% of the total value of the impact created by the organisation:

- Individuals community members (2991 at Ballycastle markets, 5369 at all NNCG's markets across the region) experienced benefits to their wellbeing (with a total value of £1,161 per person, on average)—gained from:
 - attending the markets as enjoyable artistic and cultural events,
 - socialising and feeling more like part of the community, and
 - feeling optimistic about the future of the area—which they feel has an improved reputation, influenced by the market.

Local customers at the market:

| | |
|-----|---|
| 94% | say the market brings people together |
| 88% | say the market has improved the reputation of their area |
| 88% | say it makes them feel optimistic about the future of their area |
| 86% | say the market makes them feel proud of their town/area |
| 84% | say it gives them a chance to socialise |
| 78% | say going to the market makes them feel more like part of the local community |
| 60% | say they have learnt more about the local community because of the market |

- The community also benefitted from increased support and funding for community groups and non-profit organisations directly through the operation of the market as well as indirectly through the artisan businesses

| How members contributed to the local community and voluntary sector in 2019 | |
|---|---|
| 87% | contributed prizes for charity raffles |
| 36% | provided sponsorship for local events, organisations, teams and groups |
| 66% | actively promoted their town/area |
| 45% | volunteered their time (as a business) in some way (e.g. to help organise local business or community events) |
| 26% | provided volunteering or training opportunities |

supported by NNCG's existence.

- The total social value created specifically for the community in the Ballycastle area, in monetary terms, was almost £3.5 million—becoming over £6.2 million when extrapolated out to local communities (including Ballycastle) across the region

Visitors to the market, who lived more than 10 miles from the market venue, benefited in large numbers from the atmosphere and sense of enjoyment gained from attending the markets as artistic and cultural experience.

- 8274 attended Ballycastle markets, while 14,855 attended all NNCG's markets across the region.
- They did not benefit from the local community values, however, of feeling like part of the community, or a sense of local pride and optimism, so the monetary value to the individual was £213 on average.
- The total value experienced by visitors (day trippers and domestic tourists) to the Ballycastle markets, was over £1.76 million in monetary terms, and the total across the region was over £3.16 million, accounting for 29-30% of the total value.

| Market customers visitors the area: | |
|-------------------------------------|--|
| 96% | enjoyed chatting with the traders |
| 95% | said it was a real experience with real people doing real things |
| 88% | said it was an authentic North Coast cultural experience |
| 88% | got good insight into local culture and heritage |
| 80% | learnt more about the local community because of the market |

The research also highlighted how NNCG benefits tourism, local businesses and the economy.

- Domestic tourists and day trippers from other parts of Northern Ireland (most of NNCG's visiting customers), as well as local customers, are attracted to NNCG markets and as a result spend money in the local area.
- Market customers reported spending money in local businesses (other than market stalls) when they attended the market, and said that over 48% of it was spending they wouldn't otherwise have done.
- Over a third of NNCG's visiting customers said they had come to the area specifically because of the market, and 10% were staying overnight (4 nights on average). 5% of visiting customers said they had decided to stay at least one more night because of the market.

| What visitors to the area said at the market | |
|--|---|
| 80% | said they would recommend the market/area to others |
| 57% | said they would come back to the area because of the market |
| 36% | had come to the area specifically because of the market |
| 33% | had decided to stay longer because of the market |

- The local economy also benefits from the artisan businesses that are supported by the market, as they purchase raw materials and

services in the local area. More customers and successful businesses 'shopping local' supports the local economy. During 2019 NNCG also supported at least 19 emerging artisans and entrepreneurs through training and mentoring, thereby helping to build new businesses in the region.

- The direct financial value to businesses/the economy in the Ballycastle area for 2019 was estimated at £404,655 and for the region as a whole, £756,590 (or £126 for every registered business in the Causeway Coast and Glens Borough Council (CCAGBC) area).

NNCG impacts on the local authorities/councils in a number of ways.

- Promoting tourism, supporting entrepreneurialism, boosting the local economy, and community development are all responsibilities of local authorities, and are all being enhanced by NNCG's activities.
- NNCG has worked well with local authorities (Causeway Coast and Glens Borough Council, and to a much smaller extent Mid and East Antrim Borough Council) to run markets at their request.
- The benefit to local authorities is the ease, cost-effectiveness, and reassurance of a professional, self-contained and self-managing, efficient market delivery service that consistently provides high-quality, unique local products to customers and event-goers, supporting local businesses and communities.
- The net value of this service to local authorities is £8,900 for the Ballycastle area and £37,200 across the region as a whole.

The environmental impacts of NNCG are less clear at this stage than the economic, social or personal impacts.

- The scope of this impact study tentatively included an exploration of environmental impacts—and although NNCG does not (in 2019) have any explicitly stated aims in relation to desirable environmental outcomes, its 'shop local' ethos, focus on locally produced, grown or sourced products and raw materials, and its policy on "no single-use plastics", all express a desire for positive environmental outcomes.
- This study has shown that there is an unintended negative impact on the environment from Greenhouse Gas (GHG) (including Carbon Dioxide (CO2)) emissions, due to the transport of people and goods to and from NNCG markets.
- The 'value' of this in 2019 was a social cost to the environment of -£6,460 relating to the Ballycastle markets and -£11,437 relating to all NNCG markets. This has not been balanced out in this analysis by any valuation of the difference made by the positive ethos and policy outlined above. A more comprehensive analysis, beyond the scope of this project, would be required to analyse that further.

NNCG Made People Happy!

Perhaps the most wonderful impact NNCG has is that it makes people feel happy!

| Making People Happy | |
|--|--|
| 14,245 (96%) Customers visiting the area | "Being at this market has made me feel happy!" |
| 4,527 (84%) Customers living locally | "Being at this market has made me feel happy!" |
| 54 (84%) NNCG Members (Artisan Traders) | "NNCG has increased my levels of happiness" |

Total Net Value of Impact in Monetary Terms and Social Return on Investment

| The total net value of impact created by NNCG in 2019 | Social Return On Investment (SROI) |
|---|------------------------------------|
| Ballycastle area: just over £6million—£6,013,561. | £19 for every £1 invested |
| Whole Region: just over £10.5million—£10,521,594. | £18 for every £1 invested |

A Sample of NNCG's Achievements for 2019

| | | |
|---|--|--|
| <p>Organised 43 markets and delivered 35 of these - (the 2019 weather wasn't friendly!)</p> | <p>Created £6.2 million of value to 5369 local customers and communities across the region</p> | <p>Delivered 10 workshops & seminars to traders</p> |
| <p>Contributed £756,590 to non-NNCG local businesses/economy across the region</p> | <p>Made 18,835 People HAPPY!!</p> | <p>Won Causeway Coast and Glens Person of the Year Award 2019 for Tourism & Hospitality</p> |
| <p>Increased the general self confidence of 56 Members</p> | <p>Made a significant Social Return on Investment (SROI) of £19 for every £1 invested (in Ballycastle) £18 for every £1 invested (across the region)</p> | <p>Supported some of the Borough's signature events, and community events including...Portrush Beer Festival, Airwaves, Pirates Off Portrush, Potato Festival, Rathlin Sound Maritime Festival, Heart of the Glens Festival, Ould Lammass Fair, and Salmon and Whiskey Festival.</p> |
| <p>Created £3.16 million of value for 14,855 visitors to market locations across the region</p> | <p>Took part in filming for TV programmes BBC Countryfile and with James Martin & Paul Rankin</p> | <p>Received valuable funding from the Ulster Bank and The Rank Foundation</p> |
| <p>Started a new pop-up farm shop social enterprise 'Seasons of the Glens' & a new trader-development programme 'Make it to Market'</p> | <p>Made 2632 customers from the Ballycastle area feel more optimistic about the future of the area</p> | <p>WON the UK's Best Community Market of the Year 2020 award from the National Association of British Market Authorities (NABMA) while this report was being written!</p> |



Shauna McFall, NNCG's Manager

Introduction

Naturally North Coast and Glens Community Interest Company (NNCG) is a social enterprise that supports local artisans to bring their products to market.

Its home-base is the much loved seaside town of Ballycastle, in Co. Antrim, Northern Ireland.

As this report was being written, NNCG Artisan Market won the UK's Best Community Market of the Year 2020 award from the National Association of British Market Authorities (NABMA). It won the same award in 2018.

The market has gone from strength to strength since it first began in 2012—growing from 'tiny' to 'touring'—starting with just a small number of local crafters running a handful of markets, to 64 members and 200

casual traders in 2019, travelling across the region running approximately 40 indoor and outdoor markets per year at a range of venues and events.

As the market has evolved, people have begun to talk about the transformative effect it has had on the area, on the community and on the traders—both in economic terms and in social and personal ways.

The social and personal effects have generally been 'feel-good' factors—the sort of intangible outcomes that are not traditionally, or easily, valued in financial terms—like how the market has improved artisan confidence and wellbeing, or provided enjoyment, a place to socialise, and a reason for pride and optimism in the community.

In 2019, NNCG embarked on a research project, part of which was to explore, and come to a better understanding about, the range of impacts the organisation has on different stakeholders, and to attempt to account for the value of those impacts in monetary terms.

The terms 'Social Impact' and 'Social Value' are often used to describe this more holistic view of what people value in their lives. It usually includes personal factors like a sense of life-satisfaction, environmental factors such as Greenhouse gas emissions, and the economic/financial values that we are all familiar with, as well as social factors such as feeling like part of a community.

We have used Social Return on Investment (SROI) principles and methodology¹ to undertake an outcomes evaluation of NNCG's impact. This approach takes account of the economic impact as well as those 'intangibles'.

The monetary values we have used as proxies for the 'intangibles' are, as far as possible, nationally accepted standardised monetary values from the 'Social Value Bank'², which have been developed using extensive statistical analysis of national lifestyle and wellbeing surveys.

We used both quantitative (survey) and qualitative (interview and focus group) research methods to collect relevant information.

The analysis focused initially on Ballycastle as the place the market began, and then extrapolated the data out to the wider region based on the number and size of all the different markets that it ran in 2019.

The result is an amazing picture of the kind of impact NNCG has made since it began—although the scope of this analysis is only to quantify and put a monetary value on the impact it had during 2019.

This report:

- briefly summarises the evolution of the market over time,
- describes its approach to making a difference:
 - its aims and objectives and how they relate to its activities (outputs) and impact (outcomes), in a 'Theory of Change',
 - how the impact is to be measured and valued, in an 'Outcomes Measurement Framework',
- describes, measures and values the impacts/outcomes experienced by each stakeholder
- provides an overall valuation of NNCG's impact and an overall Social Return on Investment ratio
- makes recommendations for NNCG for future action
- details the methodology used.

"Social Return on Investment (SROI) is an outcomes-based measurement tool that helps organisations to understand and quantify the social, environmental and economic value they are creating.

SROI is a participative approach that is able to capture in monetised form the value of a wide range of outcomes, whether these already have a financial value or not.

An SROI analysis produces a narrative of how an organisation creates and destroys value in the course of making change in the world, and a ratio that states how much social value (in £) is created for every £1 of investment."

(New Economics Foundation)

¹ See Appendix - Methodology for more detail.

² Title: Community investment values from the Social Value Bank, Authors: HACT and Daniel Fujiwara (www.hact.org.uk / www.simetrica.co.uk), Source: www.socialvaluebank.org, License: Creative Commons Attribution-NonCommercial-NoDerivatives license, http://creativecommons.org/licenses/by-nc-nd/4.0/deed.en_GB

From 'Tiny' to 'Touring' - How the Market Evolved

The 'Ballycastle Town Market', as it was originally known, began trading on 14th April 2012.

It started off as an initiative of the Ballycastle Chamber of Commerce, which was particularly active and keen at that time, to attract tourists and provide a boost to the town which had suffered greatly as a result of the 2008 financial and property crash—many shops and businesses had closed, including the local seafront hotel.

In the beginning, when the market was run by the Chamber of Commerce, traders had to become members of the Chamber in order to trade, and the number of traders was limited to just 15. Six markets were organised in the first year.

Quite quickly it became clear that it would be unsustainable for the Chamber to continue managing the markets, as it had no actual paid staff, and members were already busy running their own businesses.

However, the traders were enthusiastic about the prospect of becoming self-managing, so the market was handed over to them to run independently.

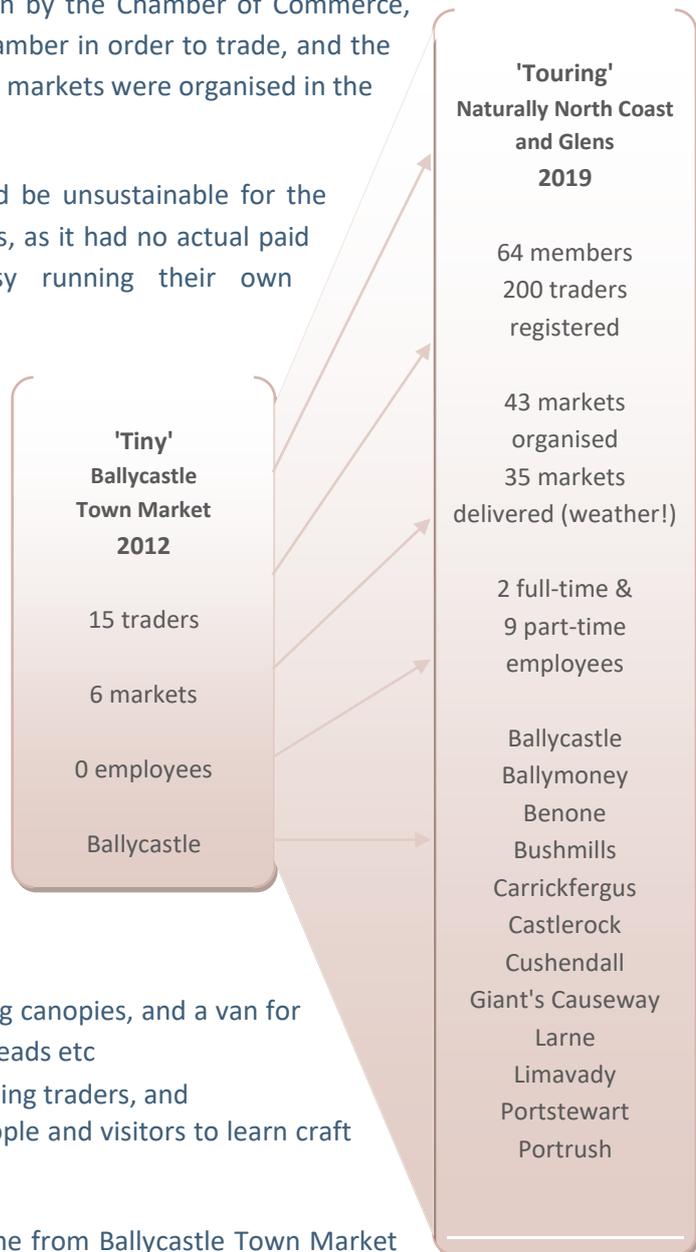
The traders formed a committee and operated the markets collectively for a number of years until 2015, when they formed a Community Interest Company (CIC) and were successful in receiving significant funding of £97,000 from the Coastal Communities Fund. This provided it with the boost it needed to upscale and become more professional.

This funding allowed the new CIC to:

- cover the costs of hiring staff, buying canopies, and a van for transporting them, insurance/overheads etc
- focus more on developing and assisting traders, and
- run a series workshops for local people and visitors to learn craft skills.

In 2018 the group formally changed its name from Ballycastle Town Market Community Interest Company (CIC) to Naturally North Coast and Glens CIC (NNCG).

Due to its visible success as a tourist attraction, and because other towns and event organisers began to request it, the Naturally North Coast and Glens Artisan Market now tours across the North Coast, setting up its stalls in a range of towns and villages and at a range of festivals and events.



Who is impacted by NNCG's activities? What difference does it make? And how does it happen?

The Impact Research project began in early 2019 with a focused NNCG Committee discussion to explore the difference made by NNCG—about **who** exactly it makes a difference for, just **what** kinds of differences it makes for them, and **how** it makes that difference.

The Committee's input, together with the organisation's comprehensive aims and objectives, helped to articulate a **Theory of Change** for Naturally North Coast and Glens CIC—a description of the changes the organisation aims to make and how—which helped to frame the focus of the impact research. A simple depiction of NNCG's Overarching Theory of Change is provided overleaf, followed by the detailed, stakeholder-specific version.

Who is impacted by NNCG's activities? (These are NNCG's 'stakeholders')

- Its artisan traders—64 members (and 200 non-member casual traders³)
- Emerging artisans - through a Make it to Market programme
- Its customers:
 - The local community
 - Visitors to the area
- Local businesses/economy
- Local authorities
- The environment

What difference does NNCG make to them?

The differences that NNCG makes are also referred to as 'impact' or 'outcomes'. They vary across the stakeholders, but can be summarised as:

- Business-related/Economic
- Social
- Personal
- Environmental

How does NNCG make a difference?

NNCG undertakes a range of activities which make a difference. These activities—the things NNCG does to make a difference—are also referred to as 'outputs', and include:

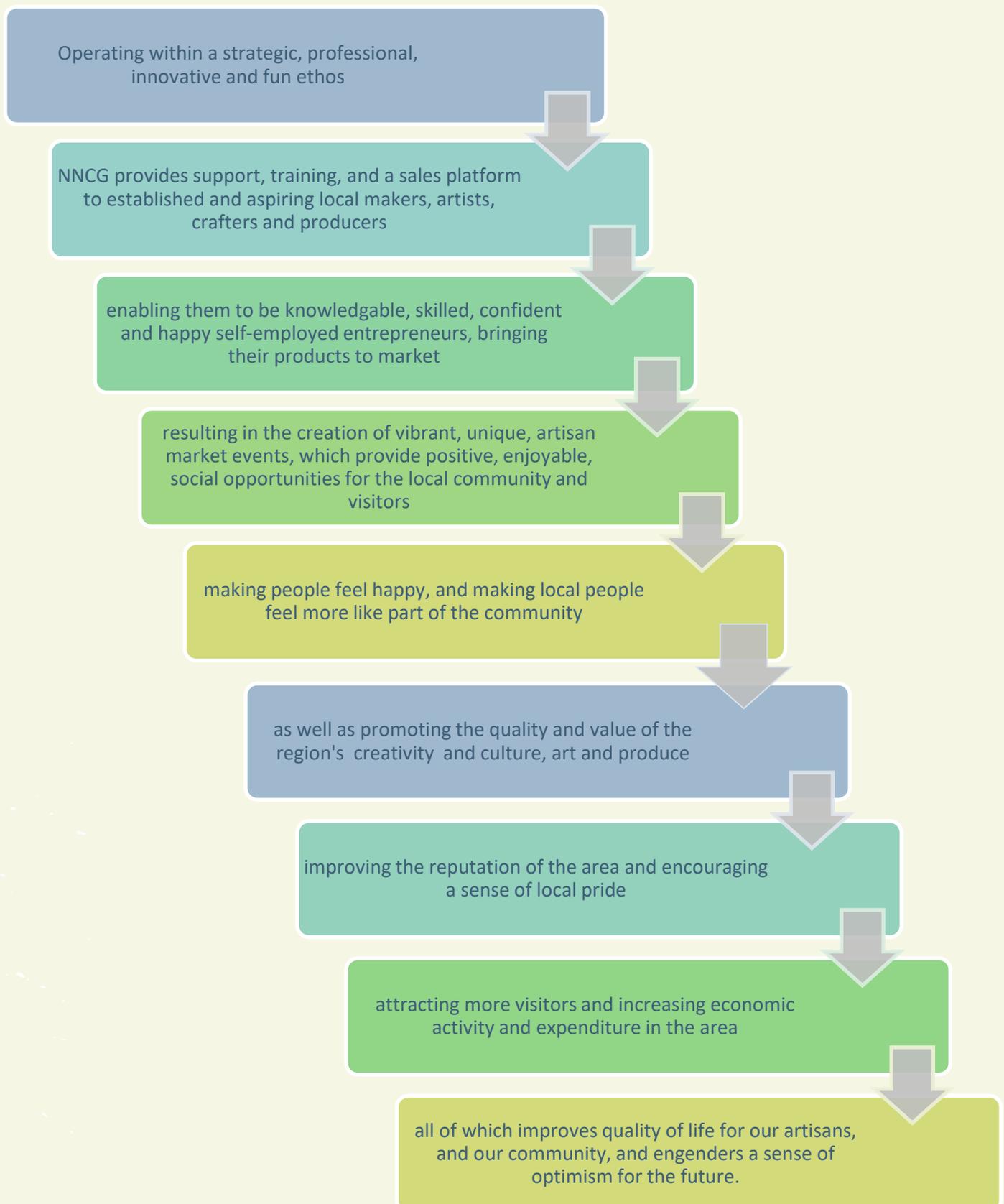
- Providing support, training and a sales outlet for artisan traders
- Running unique and vibrant markets across the region
- Undertake PR and Marketing for NNCG, it's members and any events it attends.

The details of NNCG's Outputs and Outcomes/Impact are set out in the tables below.

³ NNCG's casual traders are registered to trade at its markets—however they trade less frequently than members (average 2.5 times in 2019 compared to 13 times for members). As NNCG focuses more on providing its support and development services to members, it was decided that casual traders would not be a focused stakeholder in this research, but would be involved in a future piece of research.

NNCG's Simple Overarching Theory of Change

In simple terms, this is what NNCG does to make a difference:



**Detailed (Stakeholder-Specific) Theory of Change:
How NNCG's Aims and Objectives Relate to Outputs and Outcomes/Impact for Stakeholders**

| Stakeholders | Aims | Objectives | Outputs | Outcomes/Impact |
|--|--|--|---|---|
| Those who have a relationship with NNCG | What NNCG wants to achieve | How NNCG plans to achieve its aims | What specific activities NNCG does to make a difference for stakeholders | Changes experienced by stakeholders |
| NNCG Members/ Artisan Traders⁴ | Provide artisan producers with services, support and opportunities to develop their businesses | <p>Promote and encourage local producers, crafters and artists, with a strong 'shop local' ethos</p> <p>Provide a manageable outlet that nurtures and supports local businesses</p> | <p>Provision of trading opportunities, marketing, PR and market research opportunities through the running of 35 Artisan Markets in 2019</p> <p>Provision of relevant training through 10 workshops and seminars, marketing, social media (Instagram), visual merchandising, selling skills, branding, mobile video & photography skills, writing content skills, pricing strategies and bookkeeping</p> <p>Ongoing provision of relevant information, mentoring/support and advice through membership of a supportive group with a facebook forum</p> | Increased turnover / increased financial viability |
| | | | | Increased business knowledge, skills and experience |
| | | | | Increased self-confidence (business confidence, confidence dealing with the public, general confidence and self-esteem) |
| | | | | Increased sense of satisfaction with life (including wellbeing, happiness and mental health) |
| | | | | Increased sense of belonging (given a social life and reduced loneliness) |
| | | | | Increased social support network |
| Visitors to the Area - at markets | <p>Create welcoming, wholesome, educational, cultural, and inclusive events, that will positively improve the quality of life in our local communities</p> <p>Contribute to local economic, tourism, and community, development.</p> | <p>Provide tourists with authentic, educational and quality experiences e.g. by creating opportunities for them to interact with the local community in an unstructured, spontaneous manner</p> <p>Support NI's tourist industry by creating events promoting the local area and the quality of local artisan produce.</p> | <p>Provision of Artisan Markets (35 in 2019) where tourists/visitors and the local community can socialise, meet with others, chat to artists, crafters and producers and purchase unique, local, handmade items.</p> | <p>Visitors engage with an enjoyable and educational artistic and cultural experience, gaining a unique insight into local culture and heritage</p> <ul style="list-style-type: none"> • Increased participation in a genuinely 'local' cultural experience • Increased knowledge about the region and its people • Increased happiness! • Influence on future behaviour (e.g. decisions to recommend the market/area to others, and to return to market/area etc.) |

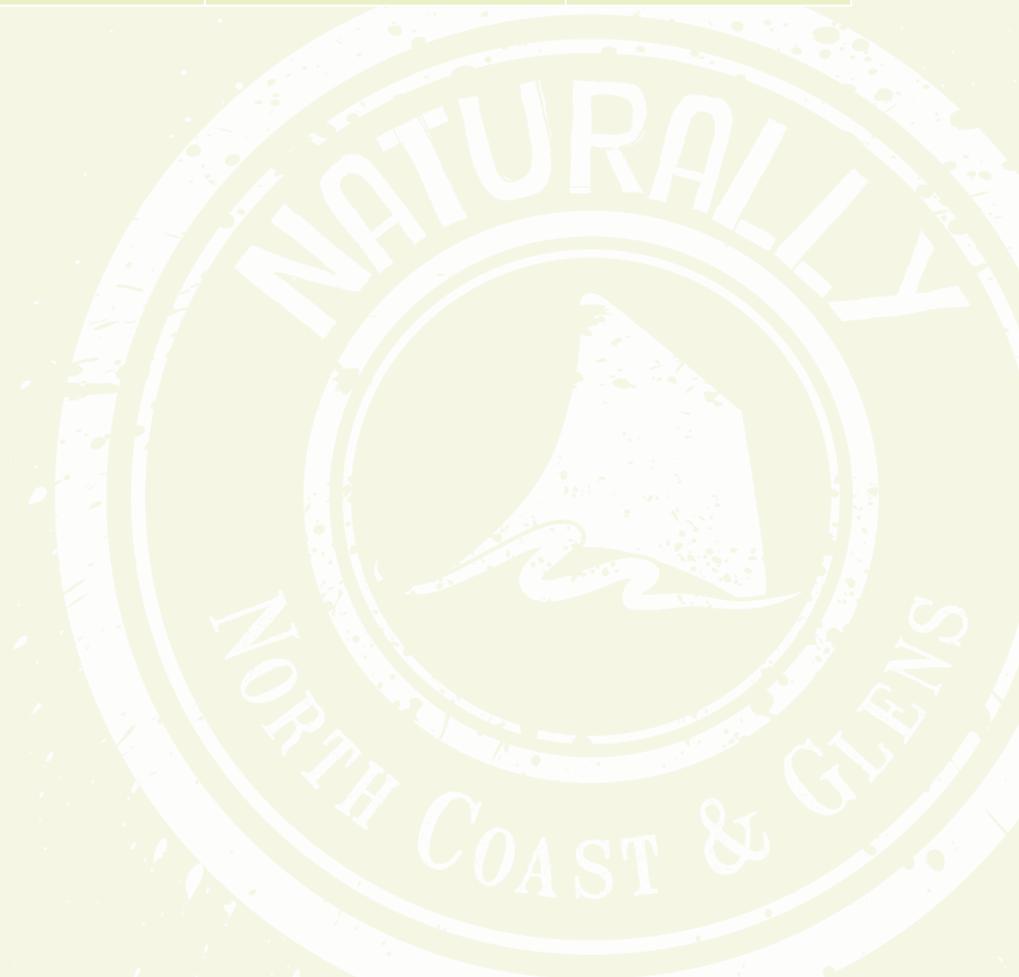
⁴ This research included the impact on artisan traders who were NNCG members in 2019 - further research will include casual traders at NNCG markets who are not NNCG members.

| Stakeholders | Aims | Objectives | Outputs | Outcomes/Impact |
|---|---|---|--|---|
| Those who have a relationship with NNCG | What NNCG wants to achieve | How NNCG plans to achieve its aims | What specific activities NNCG does to make a difference for stakeholders | Changes experienced by stakeholders |
| Local Community | <p>Create welcoming, wholesome, educational, cultural, and inclusive events, that will positively improve the quality of life in our local communities</p> <p>Contribute to local economic, tourism, and community, development.</p> | <p>Enhance the sense of community by providing a place for people to meet in a relaxed, casual environment thus fostering and promoting community spirit, cohesion and encouraging civic pride</p> | <p>Provision of Artisan Markets (35 in 2019) where tourists/visitors and the local community can socialise, meet with others, chat to artists, crafters and producers and purchase unique, local, handmade items</p> | <p>Local people engage with an artistic and cultural experience</p> |
| | | <p>Encourage the goodwill and involvement of the wider community, by providing inclusive, educational, welcoming, and wholesome events to the local communities</p> | | <p>Local area pride and optimism</p> |
| | | | | <p>Increased socialising and local people feeling more like part of the local community</p> |
| | | <p>Negative Outcome: Parking problems and Increased traffic</p> | | |
| | | <p>Increased income in local community</p> | | |
| | | <p>Enjoyable public events taking place, in partnership with local community/festival organisers, that were cost-effective, well-organised, well-advertised and well-managed - attractive to visitors as well as providing a social occasion for local communities.</p> | | |
| <p>Engage with and support local groups which work with marginalised people and provide such groups with a platform to connect with the wider community</p> | <p>Provision of 4 market events in partnership with local community based festival organisers</p> | <p>Increased funds and support for community groups/sports teams/charities etc</p> | | |
| | | <p>Engage with and support local groups which work with marginalised people and provide such groups with a platform to connect with the wider community</p> | <p>NNCG business support and trading opportunities enabled members' businesses to make contributions to the community sector</p> <p>NNCG provided Community Pitches (Free or Subsidised stalls)</p> | |



| Stakeholders | Aims | Objectives | Outputs | Outcomes/Impact |
|--|---|---|---|---|
| Those who have a relationship with NNCG | What NNCG wants to achieve | How NNCG plans to achieve its aims | What specific activities NNCG does to make a difference for stakeholders | Changes experienced by stakeholders |
| Make it to Market Programme Participants (Ulster Bank Funded) | Contribute to local economic , tourism, and community, development | <p>Provide a manageable outlet that nurtures and supports local businesses within the set criteria.</p> <p>Promote and encourage local producers, crafters and artists with a strong 'shop local' ethos</p> <p>Encourage rural diversification by offering a 'route to market' for local produce and help boost the local economy through creating opportunities for self employment</p> | <p>NNCG ran the Make it to Market Programme (funded by the Ulster Bank Skills& Opportunities Fund) which supported emerging artisans to bring their products to market - including workshops, skills training, mentoring, free market pitches and an experienced market-buddy.</p> | <p>Increased wellbeing and life satisfaction for participants (social impact of the programme) through improved business confidence and economic prospects.</p> |
| Local businesses/ economy | Contribute to local economic, tourism, and community, development | <p>Provide a manageable outlet that nurtures and supports local businesses within the set criteria.</p> <p>Promote and encourage local producers, crafters and artists with a strong 'shop local' ethos</p> <p>Encourage rural diversification by offering a 'route to market' for local produce and help boost the local economy through creating opportunities for self employment.</p> <p>Support NI's tourist industry by creating events promoting the local area and the quality of local artisan produce</p> | <p>Undertaking local, national and international Marketing and PR activities for NNCG Artisan Markets, traders, related events and locations (the whole North Coast region)</p> <p>Provision of business development support and training for new and existing artisan traders</p> <p>Participate in Young Enterprise NI mentoring programme for young people learning entrepreneurial skills.</p> <p>Established a new social enterprise (Seasons of the Glens Farm Shop) to provide an outlet and route to market.</p> <p>Provision of Artisan Markets (35 in 2019) where tourists/visitors and the local community can socialise, meet with others, chat to artists, crafters and producers and purchase unique, local, handmade items</p> | <p>Increased turnover for local (non-market) businesses / spending in local economy,</p> |

| Stakeholders | Aims | Objectives | Outputs | Outcomes/Impact |
|---|--|---|--|---|
| Those who have a relationship with NNCG | What NNCG wants to achieve | How NNCG plans to achieve its aims | What specific activities NNCG does to make a difference for stakeholders | Changes experienced by stakeholders |
| Local Authorities | <p>Contribute to local economic, tourism, and community, development</p> <p>Create welcoming, wholesome, educational, cultural, and inclusive events, that will positively improve the quality of life in our local communities.</p> | <p>Support NI's tourist industry by creating events promoting the local area and the quality of local artisan produce</p> | <p>21 markets run either at council request or as part of council-organised event/festival</p> | <p>Local authorities had enjoyable public events taking place in their borough that were cost-effective, well-organised, well-advertised and well-managed - attractive to visitors as well as providing a social occasion for local communities.</p> <p>Visitor Information Centres (VICs) - had increased footfall on market days - had increased turnover due to crafters supported by NNCG selling through VIC shops</p> |
| Environment | <p>NNCG currently has no overarching aim articulated in relation to the environment, although its objectives include reference to keeping production and shopping local which reduces the carbon footprint of products.</p> | <p>Promote and encourage local producers, crafters and artists with a strong 'shop local' ethos</p> <p>Support NI's tourist industry by creating events promoting the local area and the quality of local artisan produce</p> | <p>NNCG runs 35 markets:</p> <ul style="list-style-type: none"> - to which customers travel & traders travel, and - which, together with NNCG's overall operations as an organisation, require fuel and power. | <p>Negative outcome - - Contributing to GHG CO2 emissions</p> <p>Positive outcomes - - Increased customer awareness of environmental issues - Increased customer awareness and purchasing of locally-made products</p> |



Measuring and Valuing NNCG's Impact: How do we measure how much difference NNCG makes, and work out what it is worth?

The following outcomes framework sets out, for each outcome, how it is measured and how it is given a monetary value. Most of the measures (indicators) came from surveys, focus groups and interviews, or calculations undertaken as part of this project. The monetary valuations used to work out what the outcomes are worth are a combination of financial values calculated or estimated, and recognised 'proxy' financial values that have been found, through detailed statistical analysis by social value experts, to reflect the value of some specific social or personal changes⁵.

| Outcomes Framework for Measuring and Valuing NNCG's Impact | | | | |
|--|---|--|---|--|
| Stakeholders | Outputs | Outcomes | Indicator | Monetary valuation |
| Who NNCG has an effect on and who has an effect on NNCG | What NNCG does to make a difference for stakeholders | Changes experienced by stakeholders | How the change is measured | How the change is valued (in either actual, or proxy, financial terms) |
| NNCG Members/ Artisan Traders ⁶ | Provision of trading, marketing, PR and market research opportunities through the running of 35 Artisan Markets in 2019. Provision of relevant training through 10 workshops and seminars, marketing, social media (Instagram), visual merchandising, selling skills, branding, mobile video & photography skills, writing content skills, pricing strategies and bookkeeping. Ongoing provision of relevant information, mentoring/support and advice through membership of supportive group with a facebook forum. | Increased turnover / increased financial viability | Reported turnover per stall - Self reported in Trader Survey 2019. (Calculated from ave number of customers and ave spend per customer - with the proportion of stalls occupied by members versus non-members, and number of stalls.) | Actual financial value reported |
| | | Increased business knowledge and skills | Self report - Agreement in the Trader Survey 2019 (likert scale) that NNCG has helped them gain the knowledge and skills they need to run their business. | £1663 per qualifying member 2019 (Proxy value used: 'General Training For Job' from the Social Value Bank) |
| | | Increased self-confidence generally | Self report - Agreement in the Trader Survey 2019 (likert scale) that NNCG has helped them to be more confident generally. | £14,344.18 per qualifying member 2019 (Proxy value used: 'High Confidence' from the Social Value Bank) |
| | | Increased sense of satisfaction with life | Self report - Agreement in the Trader Survey 2019 (likert scale) that NNCG has increased their sense of satisfaction with life. | £1126.69 per qualifying member 2019 (Proxy value used: 'Willingness to Pay for course to improve life satisfaction' (from the Global Value Exchange) |
| | | Increased sense of belonging | Self report - Agreement in the Trader Survey 2019 (likert scale) that NNCG has given them a sense of belonging. | £2031.13 per qualifying member 2019 (Proxy value used: 'member of social group' from the Social Value Bank) |
| | | Increased social support network | Self report - Agreement in the Trader Survey 2019 (likert scale) that NNCG has given them a social support network. | £2170.57 per qualifying member 2019 (Proxy value used: 'able to obtain advice locally' from the Social Value Bank) |

⁵ Most are contained in the nationally recognised 'Social Value Bank' "The values are calculated through statistical analyses of four large national UK datasets that contain data on wellbeing and life circumstances: British Household Panel Survey (BHPS), Understanding Society, The Crime Survey for England and Wales, The Taking Part survey. These datasets include people's responses to wellbeing questions, and questions on a large number of aspects and circumstances of their lives such as employment status, marital status, health status, whether they volunteer, whether they play sports, whether they live in a safe area, and so on, resulting in a wide range of values. The majority of values come from the BHPS which has been completed each year by more than 10,000 of the same individuals since 1991 and so incorporates over 20 years of panel data". (<https://www.hact.org.uk/value-insight-frequently-asked-questions>)

⁶ This research included the impact on artisan traders who were NNCG members in 2019 - further research will include casual traders at NNCG markets who are not NNCG members.

| Stakeholders | Outputs | Outcomes | Indicator | Monetary valuation |
|---|---|--|--|---|
| Who NNCG has an effect on and who has an effect on NNCG | What NNCG does to make a difference for stakeholders | Changes experienced by stakeholders | How the change is measured | How the change is valued (in either actual, or proxy, financial terms) |
| Visitors to the Area - at markets | | Visitors engage with an enjoyable and educational artistic and cultural experience, gaining a unique insight into local culture and heritage | Number of visitors (2019) having the experience - calculated from footfall counts, and average number of markets visitors attend calculated from Customer Survey 2019 responses. | £286 per qualifying visiting customer 2019 (Proxy value used: 'Engaging (as an audience member) in a cultural activity' - This Wellbeing Valuation is the social value people get from attending a cultural or artistic activity (over and above any entrance fee they might pay) - Dept for Culture Media and Sport, Quantifying and Valuing the Wellbeing Impacts of Culture and Sport - Fujiwara, Kudrna, Dolan 2014 (per activity £47 adj for inflation £53 = £286 for ave 5.4 events attended by visitors) |
| Local Community | Provision of 35 Markets where the community could meet, socialise and shop. | Local people engage with an artistic and cultural experience | Number of local customers (2019) having the experience - calculated from footfall counts, and average number of markets local customers attend calculated from Customer Survey 2019 responses. | £519 per qualifying local customer 2019 (Proxy value used: 'Engaging (as an audience member) in a cultural activity' - This Wellbeing Valuation is the social value people get from attending a cultural or artistic activity (over and above any entrance fee they might pay) - Dept for Culture Media and Sport, Quantifying and Valuing the Wellbeing Impacts of Culture and Sport - Fujiwara, Kudrna, Dolan 2014 (per activity £47 adj for inflation £53 = £519 for ave 9.8 events attended by local customers) |
| | | Local people feel optimistic about the future of this area | Self report - Agreement in the Customer Survey 2019 (likert scale) that the market makes them feel optimistic about the future of the area | £195 per qualifying local customer 2019 (Proxy value used: 'Cost of Positive Psychology Short Course, module Hope, Optimism and Resilience, University of East London' - from the Global Value Exchange 'useful for valuing Hope / Aspirations / Positive Feelings for the future'. |
| | | Local people feel more like part of the local community | Self report - Agreement in the Customer Survey 2019 (likert scale) that being at the market makes them feel more like part of the local community. | £4302.70 per qualifying local customer 2019 (Proxy value used: 'Feel Belonging To Neighbourhood' from the Social Value Bank |
| | NNCG employed local people (some externally funded by The Rank Foundation) | Increased income in local community | Actual NNCG Wages from NNCG records | Actual financial value reported |



| Stakeholders | Outputs | Outcomes | Indicator | Monetary valuation |
|--|---|--|---|---|
| Who NNCG has an effect on and who has an effect on NNCG | What NNCG does to make a difference for stakeholders | Changes experienced by stakeholders | How the change is measured | How the change is valued (in either actual, or proxy, financial terms) |
| | 4 markets were run in partnership with other community/festival organisers | Local organisations/communities had enjoyable public events taking place that were cost-effective, well-organised, well-advertised and well-managed - attractive to visitors as well as providing a social occasion for local communities. | Number of markets run (4) in partnership with other community/festival organisers | £2000 per market (average cost of running a market, as calculated/outlined in various market/local authority documents) |
| | NNCG business support and trading opportunities enabled members' businesses to make contributions to the community sector | Increased funds and support for community groups/sports teams/charities etc | Members' contribution to community groups/charity raffles, team sponsorship etc in the region - as reported in Trader Survey 2019 | Actual financial value reported |
| | NNCG provided Community Pitches (Free or Subsidised stalls) | | Actual costs of providing the pitches - from NNCG records | Actual financial value reported |
| Make it to Market Programme Participants (Ulster Bank Funded) | NNCG ran the Make it to Market Programme (funded by the Ulster Bank Skills & Opportunities Fund) which supported emerging artisans to bring their products to market - including workshops, skills training, mentoring, free market pitches and an experienced market-buddy. | Increased wellbeing and life satisfaction for participants (social impact of the programme) through improved business confidence and economic prospects. | A 'Before and After' Survey was conducted, on skills, confidence, and wellbeing, using the Warwick Edinburgh Mental Wellbeing Scale (WEMWBS) was used. Ref: Mental Health and Life Satisfaction: The Relationship between the Warwick Edinburgh Mental Wellbeing Scale and Life Satisfaction, Authors: HACT and Daniel Fujiwara (www.hact.org.uk / www.simetrica.co.uk) Source: www.hact.org.uk, License: Creative Commons Attribution-onCommercial-NoDerivatives license (http://creativecommons.org/licenses/by-nc-nd/4.0/deed.en_GB) | £2406.42 (per participant, 2019) calculated using the Mental Health Social Value Calculator based on outcomes of the Warwick Edinburgh Mental Wellbeing Scale (WEMWBS). |
| Local businesses/economy | <p>NNCG ran 35 Markets which resulted in:</p> <ul style="list-style-type: none"> - market customers spending in local businesses when visiting the market - market traders buying items (coffee, fuel, etc) at local businesses when at the market - market traders buying raw materials | Increased turnover for local (non-market) businesses/ spending in economy | Customer Survey 2019 self-reports of spending in local businesses when attending markets (calculated from reported £s spent in local business for every £ spent at market (Ratio of 1.22:1)) | Actual financial value reported |
| | | | Trader Survey 2019 self-reported spending in local businesses on market days | Actual financial value reported |
| | | | Members' local spend on raw materials and services - as reported in Trader Survey 2019 | Actual financial value reported |

| Stakeholders | Outputs | Outcomes | Indicator | Monetary valuation |
|---|--|---|---|---|
| Who NNCG has an effect on and who has an effect on NNCG | What NNCG does to make a difference for stakeholders | Changes experienced by stakeholders | How the change is measured | How the change is valued (in either actual, or proxy, financial terms) |
| | and services from local businesses as a result of having NNCG support and markets to trade at | | Self reported from customer survey - proportion visiting the area specifically because of the market and also staying overnight =1486 people. | £215 spend per visitor - (ave 4 nights each @ £53.75 per night - calculated from Northern Ireland Statistics and Research Agency, Overnight Tourism Statistics 2018, Causeway Coast and Glens 2018 Local Government District ⁷) |
| | - visitors being attracted to the area by the market | | Self reported from customer survey - proportion deciding to stay a night or extra night specifically because of the market = 743 people. | £53.75 per visitor - (calculated from Northern Ireland Statistics and Research Agency, Overnight Tourism Statistics 2018, Causeway Coast and Glens 2018 Local Government District ⁸) |
| Local Authorities | 21 markets run either at councils' request or as part of council-organised event/festival | Local authorities had enjoyable public events taking place in their borough that were cost-effective, well-organised, well-advertised and well-managed - attractive to visitors as well as providing a social occasion for local communities. | Number of markets run (21) either at councils' request or as part of council-organised event/festival | £2000 per market (average cost of running a market, as calculated/outlined in various market/local authority documents) |
| Environment | NNCG runs 35 markets: - to which customers travel & traders travel, and - which, together with NNCG's overall operations as an organisation, require fuel and power. | Negative outcome - Contributing to GHG CO2 emissions | Amount of CO2 emitted by customers travelling specifically to attend the market (calculated using miles travelled) | 75 Euros per tonne - Social Cost of CO2 Emissions (75 Euros EU 2017 from Irish NESC paper) See also / IWG 2020 PAGE) |
| | | | Amount of CO2 emitted by traders travelling specifically to attend the market (calculated using miles travelled) | 75 Euros per tonne - Social Cost of CO2 Emissions (75 Euros EU 2017 from Irish NESC paper) See also / IWG 2020 PAGE) |
| | | | Amount of CO2 emitted by NNCG's overall operations (fuel, power, etc), calculated using an online Carbon Footprint Calculator | Total calculated by online Carbon Footprint Calculator |

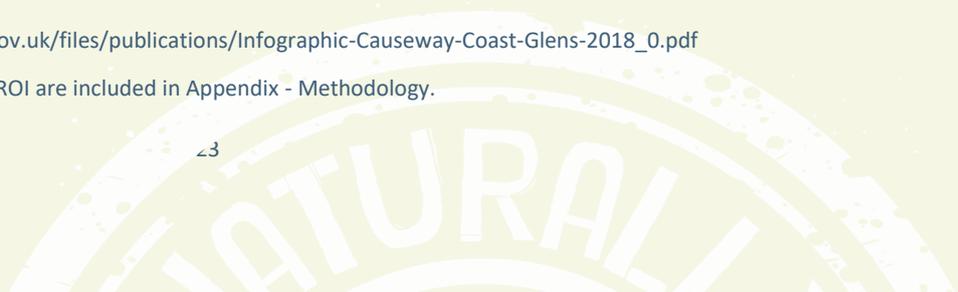
The following sections describe each stakeholder and the various differences NNCG has made to them in detail—quantifying as far as possible the extent of the differences and their monetary value.

They are followed by an assessment of the overall monetary value of the impacts for stakeholders and a calculation of NNCG's overall Social Return on Investment—taking into account any time, funding or other factors that may have contributed towards achieving the outcomes⁹.

⁷ https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/Infographic-Causeway-Coast-Glens-2018_0.pdf

⁸ *ibid.*

⁹ More detail on the methodology and SROI are included in Appendix - Methodology.





Donna Holland, Meltz, NNCG Member

Members (Artisan Traders)

NNCG actively supports its members, artisan producers and makers, to develop their businesses, by providing training, seminars, mentoring, ongoing business advice and capacity-building, as well as by providing direct sales opportunities in the form of artisan markets.

In order to explore the impact that NNCG has had on its members it undertook a research project, gathering data from:

- 2 x focus groups involving 16 traders
- 53 x completed in-depth member surveys
- 10 x member interviews
- 1 x in-depth market manager interview

What emerged was a clear picture of how NNCG has helped them to develop members' businesses, improve their skills and confidence, and given them a supportive social network.

The differences that NNCG has made to its members—the things that changed for them as a result of their involvement with NNCG—could be clearly divided into the categories of:

- business and financial
- personal, and
- social.

These impacts are detailed in the following sections—but firstly, who are NNCG's members, and what do their artisan businesses look like?

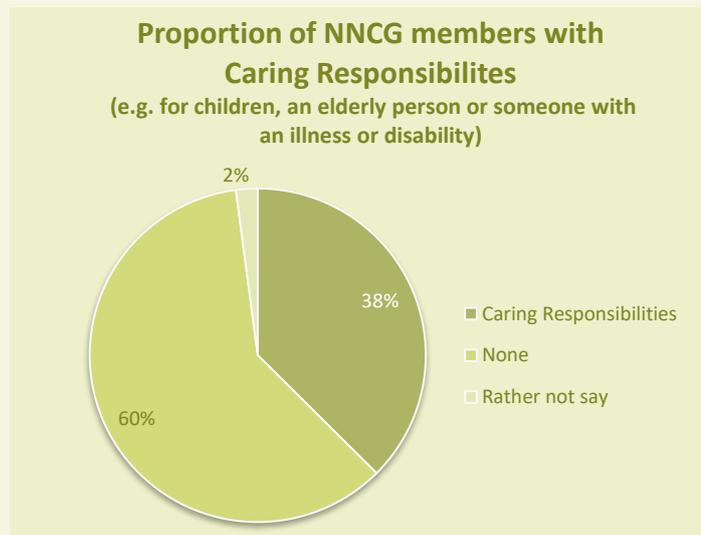
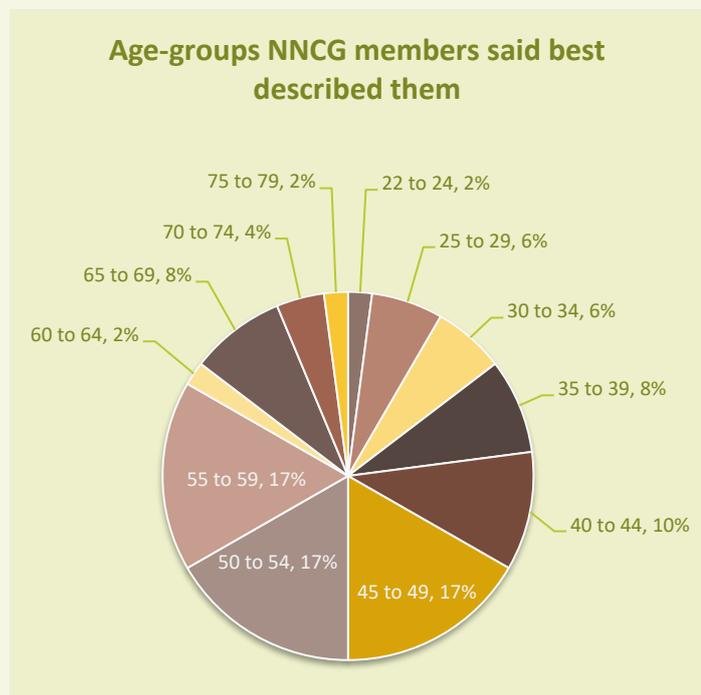
Who are NNCG's members?—Profile¹⁰

Age-group: NNCG Members' ages range from 22 to 79. Half are under 50 years old and half are aged 50 or more.

The three largest age groups, which together make up half of all members (51%), are 45-49, 50-54 and 55-59, with 17% each and spanning a range of 15 years.

10% are in their early 40s (40-44), and they are followed by those in their late 30s (35-39) and late 60s (65-69) with 8% each.

Gender: The majority of NNCG members are female—just under three quarters (73%) versus 27% male.¹¹



Caring Responsibilities: Almost 4 in 10 of the members have caring responsibilities for children, and elderly person or someone with a disability. This was experienced proportionately by both male and female members.

Members with caring responsibilities have indicated how this relates to the market in a practical sense. For 10 of the 17 respondents to this question the market provides flexibility to work around

¹⁰ 53 of the 64 members completed the in-depth member survey. It is their responses that are reflected in the numerical data presented here. 5 of the 53 who completed the survey declined to submit the personal demographic information of age, gender, and employment status, so that information relates to 48 members

¹¹ The options 'other' and 'rather not say' were also provided.

their caring roles (59%), and 6 see the markets as a welcome break from their caring roles (35%). For 8 of them their caring role sometimes stops them from attending the markets (47%), and 5 say their caring role makes it difficult for them to have a regular job (29%).



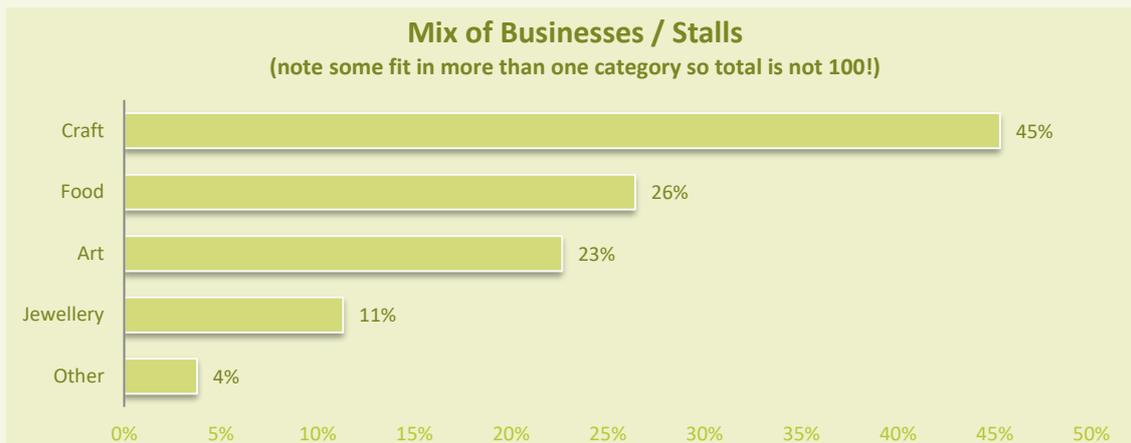
Employment status: Artisans are often employed or self-employed outside of their business as well as within it. Some are retired from mainstream employment while others see themselves as unemployed and may or may not be looking for other employment opportunities. Over a third of our members describe themselves as self-employed full-time (35%), and just under a quarter as self-employed part-time (23%). 23% describe themselves as employed full-time and less than a fifth as employed part-time (17%). 17% say they are retired and the remaining 4% say they are unemployed.



What do NNCG member businesses look like?—Profile

Types of Artisan business

The Naturally North Coast and Glens market has all that you would expect from a varied artisan market—from homemade candles and cushion covers, paintings, glassware, skin care, wood turning and silver jewellery, to goat meat, smoked salmon and various delicious baked goods from gourmet soda breads to friands, and other sweet treats. The members describe their businesses as Crafts (45%), Food (26%), Jewellery (11%) and Art (23%) with some fitting into more than one category, and another 4% describing their product as 'Other'.

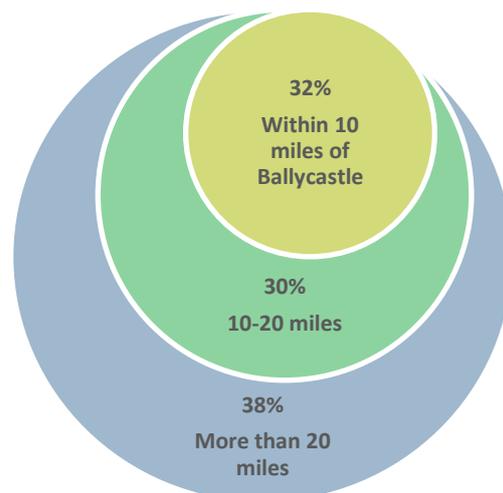


Location of members' businesses

Two thirds (66%) of members are located within the local Council Borough of Causeway Coast and Glens, while most of the others (17%) come from the neighbouring Mid and East Antrim Council area, and the remainder are from across Northern Ireland.

The locality criteria for membership is generally that the business must be within a 40 mile radius of Ballycastle, but there are some exceptions, such as if the business is offering something not available within that radius.

Approximately a third (32%) of members' businesses are located either in, or within 10 miles of, Ballycastle. Under a third are between 10 and 20 miles of Ballycastle (30%), and the remainder are outside of that (38%).



Sales outlets

All of the members who responded to the survey reported at least one sales outlet other than the NNCG markets.

Approximately two thirds trade at markets run by others (66%), sell directly to the public from their own premises in the form of door sales, private orders or commissions (64%), or sell through a physical retail outlet such as a shop, visitors center or gallery (62%). Just over half (53%) sell online, either through their own website or another online sales platform/seller. Half of the artisan food businesses (13% of members) also sell directly to the food or hospitality trade.

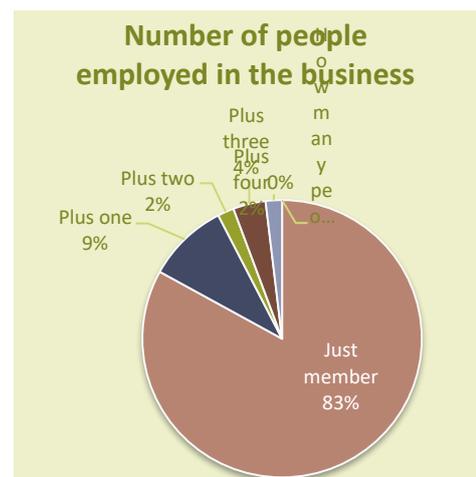


Employment in the members' artisan businesses

Most members' businesses (83%) just involve themselves working alone. However 17% employ others—9% employ one other person, 2% employ two other people, 4% employ three and 2% employ four other people.

On average, members reported that in a normal year they (and others in their business where applicable) do a total of 27.6 hours of paid work and 32.8 hours of unpaid work per week for their business.

In 2019, members attended on average 13 NNCG markets, and the hours of work related to NNCG averaged out at 40 hours, per member, per market.



How long members have traded with NCG

Just as the market has gradually grown over the past seven years, the number of members trading each year has steadily increased. Approximately equal numbers of new members have joined and remained each year (7-8), so that the proportion of members that have been trading with NCG for 7 years, since the first year (15%) is almost the same as the number who have only been trading with the market for just one year (13%).

A quarter (26%) of members' businesses had been operating before NCG began.

Half of the members businesses have been operating for more than 5 years (49%), while the other half (51%) have been operating for 5 years or less.

Market attendance

On average each member reported normally attending approximately 22 markets per year out of a possible 40ish. In 2019 however the weather severely impacted the number of markets that could be held, with only 34 out of a possible 43 being held, and the average number attended by each member was 13. This would have had a negative impact on their income for 2019.

Motivation for trading with NCG

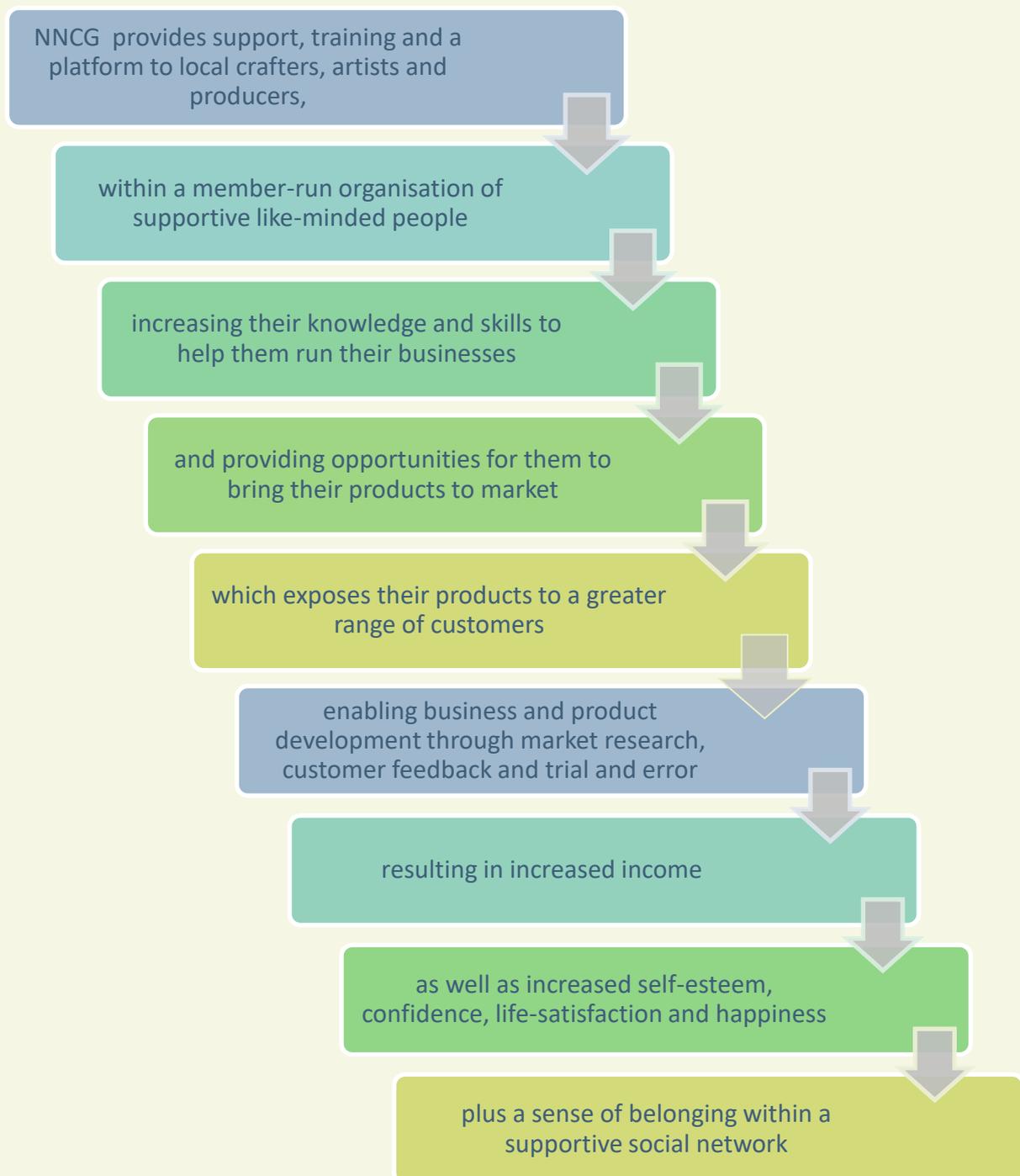
More than half of the members (53%) say their motivation for trading with NCG is equally financial and social. Just over a third (34%) are mainly motivated by financial reasons, and 13% are motivated mainly by social reasons.



NNCG's Simple Theory of Change for Members

Naturally North Coast and Glens aims to make a difference in the lives of its members by supporting them to be able to successfully bring their products to market. In order to do this they offer training sessions, workshops and courses in a range of relevant business-related skills, as well as ongoing advice and support, and signposting to other relevant information and services.

This results in increased business knowledge and skills amongst members, which, together with opportunities to trade, bring increased experience and confidence. This increased confidence was important to members, along with the sense of camaraderie and mutual support they experienced with fellow artisan crafters and producers.



Business and Financial Impacts on Members

Members talked in focus groups about how NNCG helped them to develop and grow their businesses, and how important the NNCG markets are to them financially.

The markets allow the artisans direct access to customers—an opportunity to trade, get commissions, and turn their hobby into a business. They are a direct outlet for their crafts, art, photography, jewellery, food produce, etc.

"NNCG plays a big part of my business. It provides a platform from where I can showcase my products. It provides professionalism on a high scale and everything made easy."

(NNCG Member)

The face-to-face engagement and relationship-building with customers was reported to be invaluable in helping with product development. It provided the opportunity for experimentation, trial and error, and to learn from feedback. Feedback and good ideas came from customers, other traders, and NNCG's training and workshops.

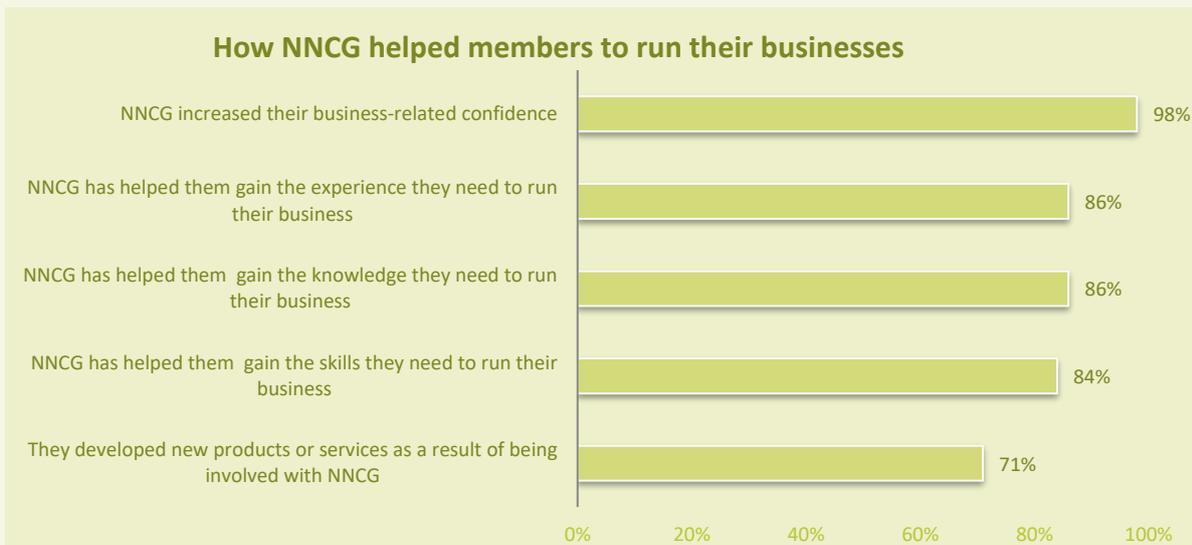
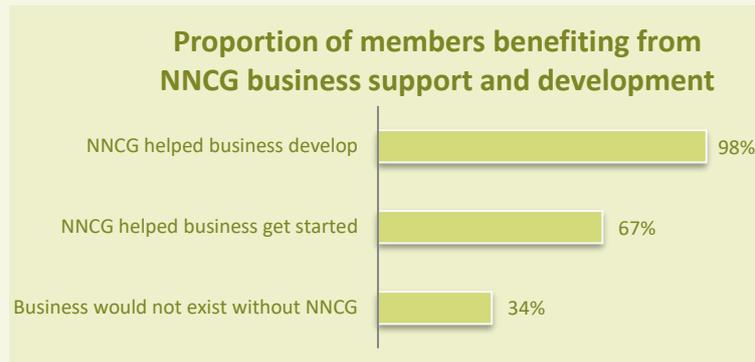
Members talked about the importance of the markets in providing exposure for their products, for direct marketing and market-research opportunities. The markets have helped them develop their customer base, and their marketing skills.

Most important impact on me? "Business development - market feedback - new customers - new business relationships"

(NNCG Member)

Business support and development

Almost all members (98%) said that NNCG had helped their business to develop. Two thirds (67%) said that NNCG had helped their business to get started, and a third (34%) said their business would not exist without NNCG.



Almost all members (98%) reported that being involved with NNCG had increased their business-related confidence. 86% said that it had helped them gain the knowledge and experience they needed to run their business, and 84% said it had helped them gain the skills they needed.

Social value of increased business knowledge and skills

In monetary terms, the 'social value' of the business skills, knowledge and experience gained through being involved with NNCG, and benefiting from training, workshops, support etc. can be calculated using a proxy, 'General Training For Job' (from the nationally recognised Social Value Bank¹²), which is valued at £1663 per person.

| | | | |
|--|-------|--|----------------|
| Value of increased business knowledge, and skills per person | £1663 | Number of NNCG members benefiting (86% of 64) | 55 |
| Proportion attributable to NNCG (estimate) | 39% | Total value of increased business knowledge, and skills to NNCG members, attributable to being involved with NNCG | £35,671 |

¹² <https://www.hact.org.uk/social-value-bank> (£1515 - value for adult in UK outside of London - inflation adjusted from 2016 to £1663 in 2019)

This was experienced by 86% of respondents, which equates to 55 members (when extrapolated out to all members). This would total £91,465, but as only 39% of this is estimated to be attributable to NNCG, while 61% might have happened anyway, the total value attributed to NNCG is £35,671.¹³

New product development - 7 out of 10 members (71%) said they had developed new products or services as a result of being involved with NNCG.

Two thirds (67%) of those who developed new products or services said feedback from NNCG customers had contributed to their new developments. 39% said ideas from other NNCG traders had contributed, and 22% said they got ideas from workshops or training run by NNCG.

On average, the annual value of those new products or services to each member was £1903.¹⁴



Value of new product or service development to each of those members, per year
£1903

Increased business turnover for members

NNCG has a significant financial impact on its member's businesses. Almost all (97%) say it has increased the financial viability of their business, and 92% say it has increased their turnover.



NNCG market impact on members' business turnover



On average, the members attribute half (51%) of their income to being involved with NNCG.

For some of them, the markets account for much more.

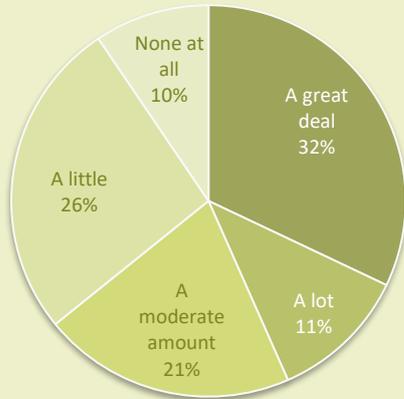
Most important impact on me? "Financial income - approx 70% of income is from market and part of other income is due to introductions at market"

(NNCG Member)

¹³ No attribution question was asked in relation to the proportion of these increased skills that are a direct result of involvement with NNCG, so the weighted average of the responses which ranged from 'strongly agree' to 'somewhat agree', was used as a proxy to estimate what proportion could be attributed to NNCG - the stronger the weighting towards 'strongly agree' the greater the proportion attributed to NNCG.

¹⁴ This is assumed to be included in total annual turnover.

How much NNCG members depend on their market business to make a living



- 43% of members say they depend on their market business 'a great deal' (32%) or 'a lot' (11%) to make a living.
- A fifth (21%) say they depend on it 'a moderate amount'.
- However, a quarter (26%) say that they depend on it 'a little'.
- Only a tenth (10%) say they don't depend on it at all to make a living.

Value of Increased Turnover for NNCG Members - According to our survey, the average turnover per stall was £412 per market.

For NNCG members, the average turnover from NNCG markets in 2019 was £5,473.¹⁵ This is less than in previous years, because so many markets had to be cancelled in 2019 due to adverse weather conditions.¹⁶

The total turnover generated for NNCG members from Ballycastle markets in 2019 was £195,087, and from all markets across the region was £350,281.

| NNCG MEMBER TURNOVER | |
|--|--|
| Average turnover per stall £412 | Average (2019) turnover per NNCG member £5,473 |
| Total 2019 turnover generated for NNCG members from Ballycastle markets £195,087 | Total 2019 turnover generated for NNCG members from all markets £350,281 |

¹⁵ Based on 64 members @ 62.5% of stalls, over 35 markets.

¹⁶ It is also less than would be expected from the average number of markets attended by members (22) as this was based on the number usually attended in a year—and 2019 turned out to have fewer than previous years due to adverse weather conditions.

Casual Trader Turnover and Overall Trader Turnover

Casual trader turnover - Apart from NNCG's 64 member traders, there are 200 casual traders who sometimes trade at NNCG markets and occupy approximately 37.5% of stalls.

Assuming their turnover was similar to members, they would have had, on average, a turnover of £1,051 each in 2019, totalling £117,052 from Ballycastle markets and £210,169 from all markets across the region¹⁷.

Overall trader turnover - Overall then, there would have been a trader turnover of £16,060 generated on average at each NNCG market, £312,139 of traders turnover generated from all Ballycastle markets, and £560,450 generated from all NNCG markets across the region.

Future research with casual traders will provide more accurate data.

| CASUAL TRADER TURNOVER | OVERALL TRADER TURNOVER |
|--|---|
| <p>Average (2019) turnover per casual trader</p> <p>£1,051</p> | <p>Total turnover generated per market in 2019 (all traders), based on 39 stalls per market</p> <p>£16,060</p> |
| <p>Total 2019 turnover generated for casual traders from Ballycastle markets</p> <p>£117,052</p> | <p>Total 2019 turnover generated for all traders from Ballycastle markets (based on 758 stalls)</p> <p>£312,139</p> |
| <p>Total 2019 turnover generated for casual traders from all markets</p> <p>£210,169</p> | <p>Total 2019 turnover generated for all traders from all markets (based on 1361 stalls)</p> <p>£560,450</p> |

¹⁷ This is just an estimated average across all casual traders. As with members, the number of markets an individual casual trader will trade at with NNCG varies significantly across the group. In any given year there might be registered casual traders who do not trade at any of NNCG's markets, and others who trade multiple times.

Personal Impacts on Members

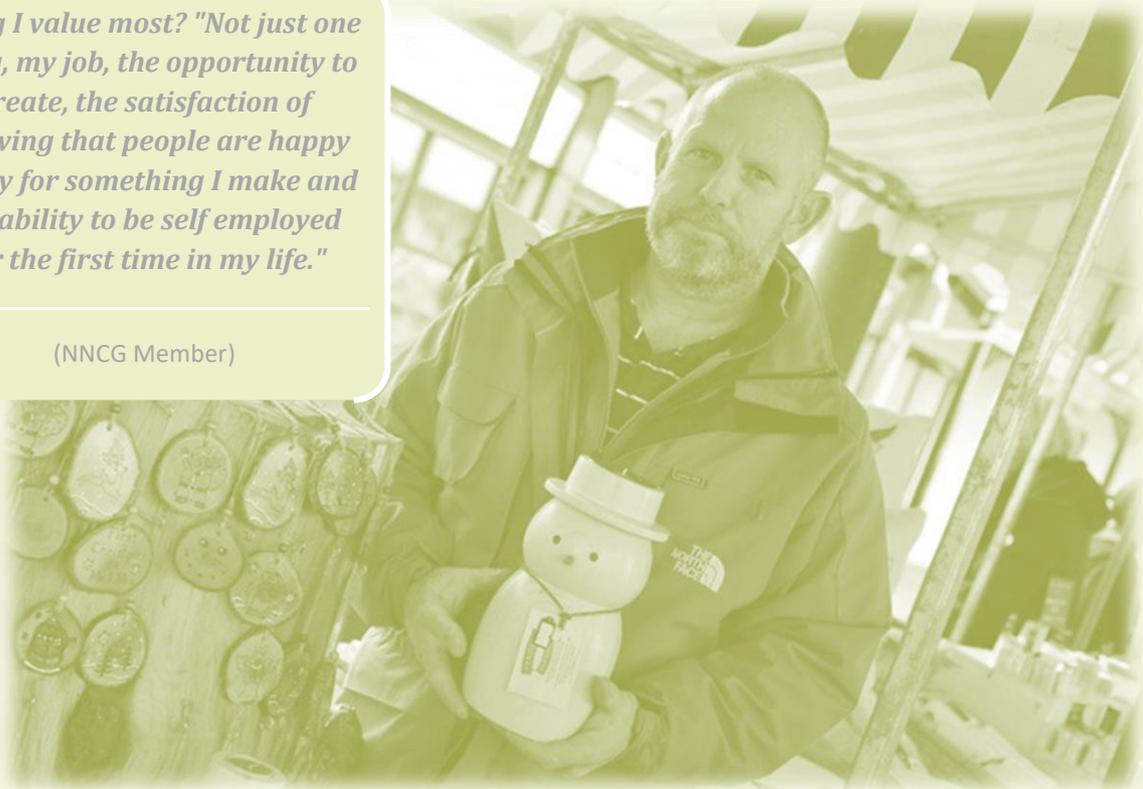
Members described positive personal differences for themselves due to being involved with NNCG. Some of these were business-related as mentioned previously—such as increased skills, knowledge and experience helping them to run their business, and increased business-related confidence.

However, increases in confidence were not just in relation to handling the business side of things—members talked in focus groups about how much they had developed in confidence overall. In the survey, 88% said had become more self-confident generally.

In focus groups they talked about getting a sense of well-being and a sense of reward from being involved with the organisation. The survey showed 84% had an increased sense of satisfaction with life and increased levels of happiness, while 80% had an improved sense of well-being and increased self-esteem.

Thing I value most? "Not just one thing, my job, the opportunity to create, the satisfaction of knowing that people are happy to pay for something I make and the ability to be self employed for the first time in my life."

(NNCG Member)



Gerard Gray, Taise Turning, NNCG Member

These changes for some people are as a result of their craft being endorsed, appreciated and purchased by customers. They are receiving validation for their work and feel it is worthwhile. For some it is because their income has improved and they are finding self-employment in a region where it is difficult to find employment.¹⁸

84% say they are in a stronger financial position because of being involved with NNCG, and 62% have improved mental health.

¹⁸ The jobs density in the Causeway Coast and Glens Borough is 0.57 jobs for every working age person (aged 16-64) living in the area—the second lowest out of 11 Council areas across Northern Ireland.

Proportion of members saying that NNCG has made differences for them personally

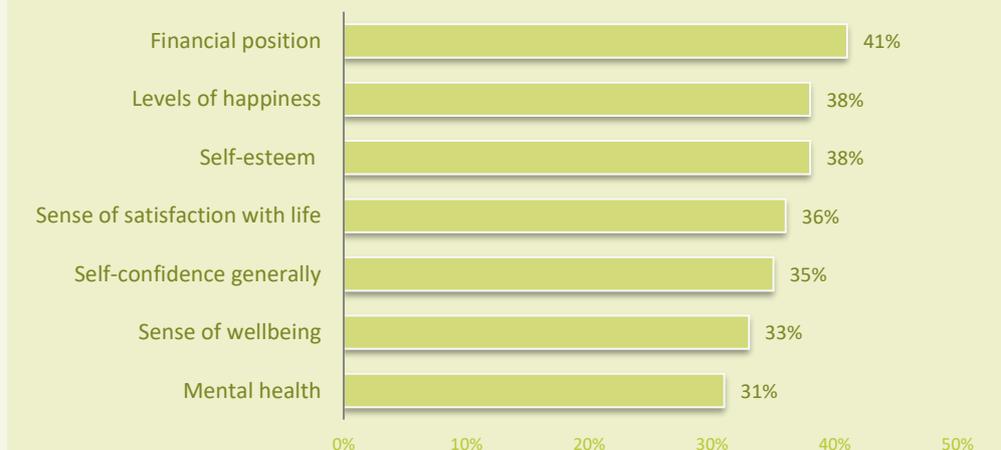


Our results are in line with previous national research into the relationship between creative occupations and subjective wellbeing—which shows that time spent in traditional craft-based occupations, such as those that NNCG members work in, results in a greater sense of life-satisfaction, happiness and worthwhileness than other occupations.¹⁹ However, that research also found that people working in these occupations also tend to report higher levels of anxiety than others, possibly associated with job instability, long hours and poor pay.

The very positive personal outcomes reported by the NNCG members in our survey could be related to the platform and support offered by NNCG which enables people to work in these creative roles and earn an income.

Our survey asked the artisans how much (what proportion) of the personal outcomes were directly related to being involved with NNCG.

Proportion of positive personal outcomes directly attributable to being involved with NNCG



¹⁹ Daniel Fujiwara Paul Dolan Ricky Lawton 2015, Creative Occupations and Subjective Wellbeing **Nesta Working Paper No. 15/09** (https://media.nesta.org.uk/documents/creative_employment_and_subjective_wellbeing_1509_1.pdf)

Members attributed 31-41% of their positive personal outcomes directly to being involved with Naturally North Coast and Glens—great confirmation for the organisation that its approach is achieving its aims and is of considerable value to members.

"The market has a very positive effect on me, both mentally and physically and has turned a hobby into a part time income."

(NNCG Member)

Social value of NNCG's personal impacts for members

In calculating the social value of these personal impacts in monetary terms it is important not to double count. We have chosen not to add a value for improved financial position as this is already to some extent included in the financial figures associated with increased business turnover. And any of the other personal impacts could be related to improved mental health. Therefore we have chosen to apply monetary values to two impacts which encapsulate the others:

- Increased self confidence generally also relates to increased self-esteem.
- Increased sense of life satisfaction also relates to levels of happiness and sense of wellbeing.

Value of Increased self-confidence generally

The 'social value' of increased confidence generally has been calculated using the proxy 'High Confidence (Adults)' (from the Social Value Bank and Global Value Exchange²⁰), valued at £14,344 per person.

88% of members (equating to 56 members out of 64) experienced increased confidence—a total value of £803,274 using the proxy—but on average they attributed 35% of that directly to being involved with NNCG, resulting in the total value to NNCG members (attributable to NNCG) being £282,993.

| | |
|--|--|
| Value of increased self-confidence generally per person £14,344 | Number of NNCG members benefiting (88% of 64) 56 |
| Proportion attributable to NNCG 35% | Total value of increased self-confidence generally to NNCG members, attributable to being involved with NNCG £282,993 |

²⁰ <http://www.globalvaluexchange.org/valuations/search?q=high%20confidence> This is the valuation for 'High Confidence (Adult)' for an adult living in the UK, outside of London. The next closest valuation is 'Improvements in confidence (Youth)' which is valued at £9,283, and also included in the Social Value Bank. It seems appropriate therefore to use the adult 'High confidence' valuation of £13,065 which is included for adults in the Social Value Bank, but adjusted for inflation from 2016 to 2019 level of £14,344.

Value of Increased sense of satisfaction with life

The 'social value' of increased sense of satisfaction with life has been calculated using the proxy 'Willingness to Pay for course to improve life satisfaction' (from the Global Value Exchange), valued at £1127 per person.²¹

84% of members (equating to 54 members out of 64) experienced increased sense of satisfaction with life—a total value of £60,841 using the proxy—but on average they attributed 36% of that directly to being involved with NNCG, resulting in the total value to NNCG members (attributable to NNCG) being £21,781.

| | |
|--|---|
| Value of increased sense of satisfaction with life per person £1127 | Number of NNCG members benefiting (84% of 64) 54 |
| Proportion attributable to NNCG (estimate) 36% | Total value of sense of satisfaction with life, attributable to being involved with NNCG £21,781 |

²¹ <http://www.globalvaluexchange.org/valuations/search?q=life%20satisfaction>. The value has been inflation adjusted from £947 in 2012 to £1127 in 2019.



Social Impacts for members

NNCG members in focus groups placed a great emphasis on the relationships they had developed with other members/traders because of being involved with NNCG.

Many of them, as crafters and artisans, work alone in their studio, kitchen or workshop. Some talked about how being part of NNCG and trading at the markets had helped them to *"get out of themselves"*, and develop friendships and a social network. They described themselves as a *"close-knit community of crafters"* where *"everybody helps everybody else"*.

Those NNCG members who also trade at other markets commented on the difference between NNCG markets and others. *"This market is friendly - others are cliquey."*

I love the fellow traders. Getting up early knowing you will be hanging out with some friends and making money while you do is a good feeling.... nothing like work at all :) thanks for that NNCG"

(NNCG Member)

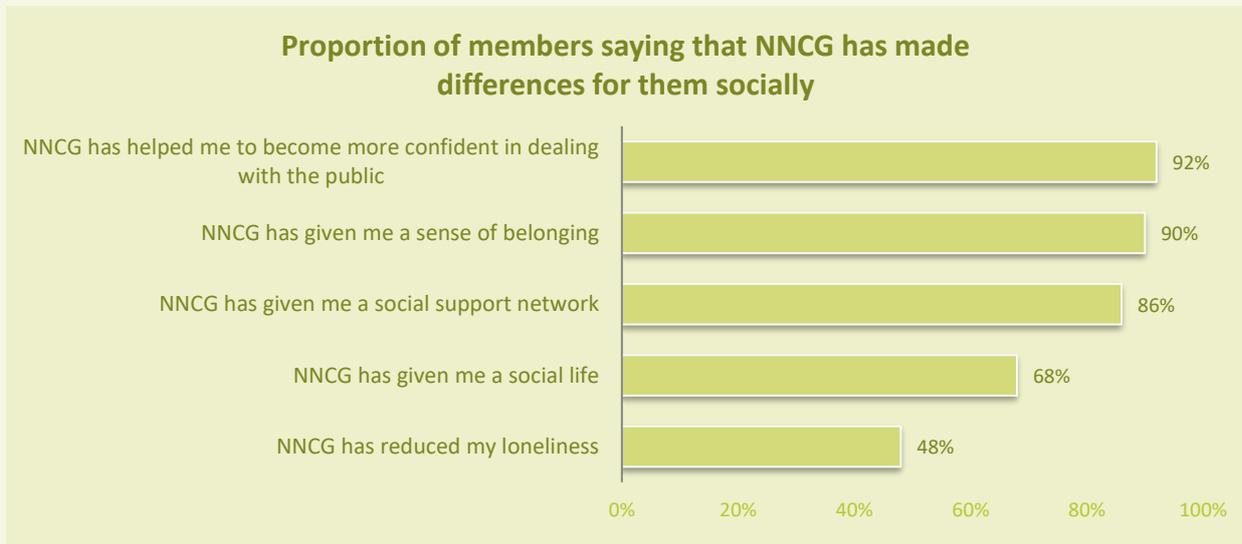


Laurie Curran, The Soap Shack, Kay Rogers, Tony's Griddle Goods, Mary Forsythe, Tully Farm, NNCG Members

They talked about getting *"genuine help and support"* from each other and *"sharing knowledge"*. They talked about *"teamwork"*, *"trust"* and *"mutual respect"*. They are customers of each other, buying each others' products, trading with each other and referring customers to each other.

The survey found that 92% of NNCG members have become more confident in dealing with the public as a result of being involved with NNCG. This has been the result of increased experience and support from fellow traders.

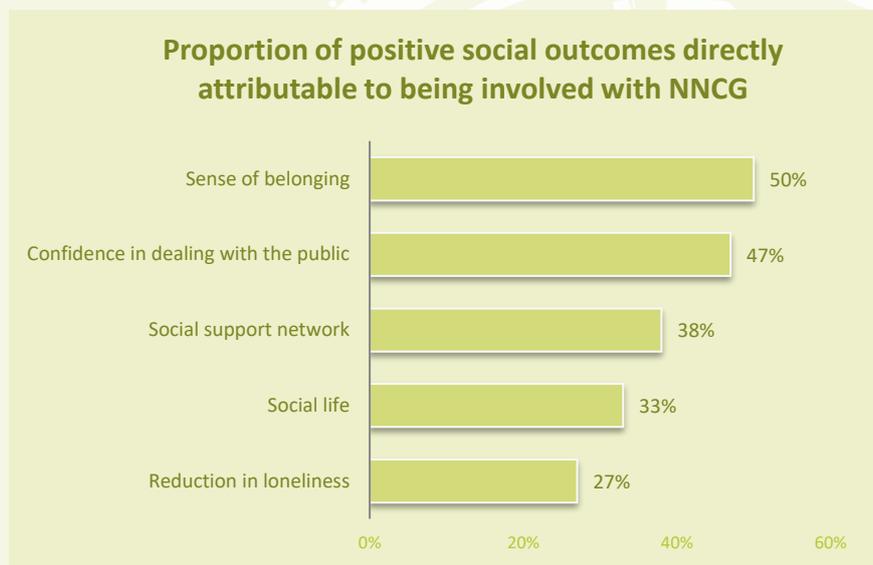
9 out of 10 NNCG members have an increased sense of belonging (90%) and reflects the discussion in the focus groups of the value they place on the good relationships they have developed and the sense of camaraderie they have with each other. 86% said they have a social support network because of being involved with NNCG and almost 7 out of 10 say that it has resulted in an improved social life (68%) for them. Just under half (48%) have reported reduced loneliness as a result.



Our survey asked the artisans how much (what proportion) of the social outcomes were directly related to being involved with NNCG.

Members attributed 27-50% of their positive social outcomes directly to being involved with Naturally North Coast and Glens

For example, what the results show is that on average, the 90% of members who felt NNCG had given them a sense of belonging attributed half (50%) of their sense of belonging directly to being involved with NNCG.



Social value of NNCG's social impacts for members

In calculating the social value of these social impacts in monetary terms, it is important, as stated in relation to the personal impacts, not to double count. We have chosen not to add a value for 'increased confidence in dealing with the general public' as this confidence is arguably included in the personal outcome of 'increased self-confidence generally' valued above.

Therefore we have chosen to apply monetary values to two impacts which together would also encompass the other two social impacts of increased social life and reduced loneliness:

- Increased sense of belonging
- Increased social support network

Value of Increased sense of belonging

The 'social value' of increased sense of belonging has been calculated using the proxy 'Member of a Social Group' (from the Social Value Bank and Global Value Exchange²²), valued at £2,031 per person.

90% of members (equating to 58 members out of 64) experienced increased sense of belonging—a total value of £117,805 using the proxy— but on average they attributed 50% of that directly to being involved with NNCG, resulting in the total value to NNCG members (attributable to NNCG) being £58,608.

| | |
|--|--|
| Value of increased sense of belonging per person | Number of NNCG members benefiting (90% of 64) |
| £2,031 | 58 |
| Proportion attributable to NNCG (estimate) | Total value of increased sense of belonging to NNCG members, attributable to being involved with NNCG |
| 50% | £58,608 |

Value of Increased social support network

The 'social value' of increased social support network has been calculated using the proxy 'Able to obtain advice locally' (from the Social Value Bank and Global Value Exchange²³), valued at £2,171 per person.

86% of members (equating to 55 members out of 64) experienced increased sense of belonging—a total value of £119,381 using the proxy— but on average they attributed 39% of that directly to being involved with NNCG, resulting in the total value to NNCG members (attributable to NNCG) being £44,971.

| | |
|--|---|
| Value of increased social support network per person | Number of NNCG members benefiting (86% of 64) |
| £2,171 | 55 |
| Proportion attributable to NNCG (estimate) | Total value of increased sense of social support network to NNCG members, attributable to being involved with NNCG |
| 39% | £44,971 |

²² <https://www.hact.org.uk/social-value-bank> This valuation is applicable as the sense of belonging is to the social group of market members, and to that creative community. The Value Bank valuation from 2016 (£1850) has been adjusted for inflation to the 2019 level £2031.

²³ <https://www.hact.org.uk/social-value-bank> Although the Social Value Bank valuation relates to having someone in their neighbourhood that people can access for advice if they need to, we have chosen to use it with the interpretation of having someone to go to for advice, whether in the physical neighbourhood or the virtual (sphere of contact) neighbourhood. (Again this is valued for an adult living in the UK, outside of London - and the value has been adjusted for inflation from 2016 to 2019 levels £1977 to £2171)

Negatives / Negative Outcomes for Members²⁴

There was no mention of negative outcomes for members during general focus group discussions, but a few negative aspects were identified when prompted, and through the survey—mostly related to market trading in general, but with one or two related to trading with NNCG in particular:

Unpredictability and unreliability -

- On some days, some traders just don't sell as much as on other days—with the reasons why not always clear.
- Outdoor markets are at the mercy of the wind and rain, and have to be cancelled if conditions become too unsafe. The weather was certainly a problem during 2019 more than in any previous year as a significant number of the year's markets were cancelled. The cost of this to traders would have been significant. This research does not have a previous baseline for comparison purposes, but acknowledges that the income reported for members in this impact report will be less than it would have been in previous years when more markets took place.

"Such a shame about the weather this year"

(NNCG Member)

Unsociable Hours - The hours of work and trading can be unsociable—with markets being held at weekends and holidays.

Perhaps this is why the positive social outcomes of sense of belonging and the social support network feature so highly for members, as they share these experiences with each other.

Negative public perceptions - On one hand some of the members felt that some non-traders considered them to be "just a market trader"—that being a market traders was considered to hold less status than other occupations. On the other hand, some members reported hearing comments like "oh that's that wee posh market" and "isn't that the expensive market?"

The perceptions of more of those who do not attend the markets is an aspect that needs to be explored further in future research.

The downside of developing friendships with customers - While customer interaction is an enjoyable aspect of trading, some members find that they develop friendships with customers which then cause problems in managing products, samples, discounts, vouchers etc.

"With all these extra stalls at markets my sales have dropped"

(NNCG Member)

Growth of the market - A couple of members expressed concern about the growth of the market impacting on their sales, particularly when similar products were on sale at the same market.

²⁴ Any negative issues raised during the course of this impact research will be fed into NNCG's continuous improvement process.

How NNCG operates makes a difference²⁵

NNCG is very highly regarded by its trading members. Without exception they expressed the view that it is an extremely successful, well-organised, well-managed and supportive market.



"NNCG markets are the best organised artisan markets that I have been to in Ireland. Setup and Take down is always swift and stress free. The traders are welcoming, friendly and supportive which makes such a difference when you are outside all day. Any issues are resolved asap and the team are always on hand to help."

(NNCG Member)

"There is equality & transparency"

(NNCG Member)

They pointed in particular to the very clear, thoughtful, transparent criteria, rules and guidelines put in place to manage all aspects of the market, such as the membership criteria, trading criteria for the types of products that can be sold depending on who makes them and where they are made, market and stall booking arrangements, set-up times and arrangements, stall layout planning and parking arrangements.

Members expressed the view that these clear criteria, rules and guidelines set and maintained high standards for the market in terms of the quality of the goods and service provided to customers as well as the experience of being a member and trader.

"The ethos is unique"

(NNCG Member)

Members have a real sense of belonging to, and ownership of, NNCG. They are all members of the organisation, which has a Committee and Directors made up of members nominated and elected to take on those roles. They feel part of a collective working together to improve everyone's business and everyone's experience, rather than simply being a source of income for a market organiser.

The market manager however, was singled out by members as being a key factor in how well the market operates because of her effective market management and operation.

"Shauna has made this market a great success and continues to develop it with her many skills and ability to deliver on everything."

(NNCG Member)

²⁵ During the impact research a range of information was collected about how NNCG and the market operate. As this is an outcomes-focussed evaluation report the process issues are beyond its scope. They will however be fed into NNCG's continuous improvement process.



"I love the atmosphere. Everyone is really friendly and helpful."

(Customer)

Tracey O'Boyle, Tom and Ollie, NNCG Member serving a customer

| Customer Ratings of NNCG Markets | | | | |
|----------------------------------|------------------------|-------------------------|---------------------------|---------------------------|
| General Atmosphere | Tidiness & Cleanliness | Friendliness of Traders | Quality of Goods on offer | Variety of Goods on offer |
| ★★★★★ | ★★★★★ | ★★★★★ | ★★★★★ | ★★★★★ |

Customers

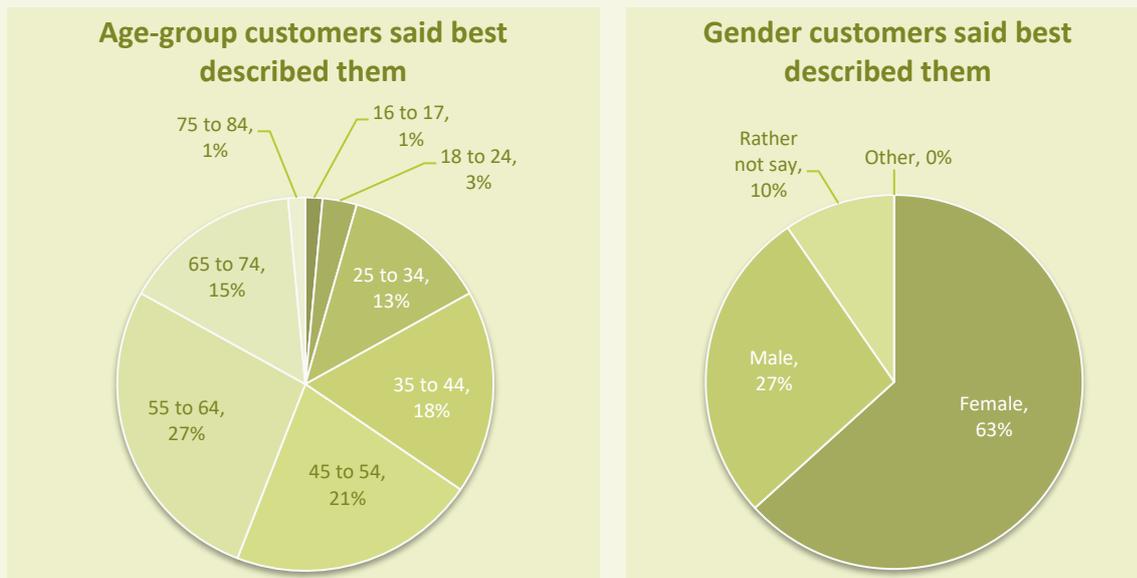
Without customers there would be no market, and no Naturally North Coast and Glens organisation. Customers are very important stakeholders, with whom NNCG has a mutually beneficial relationship. Customers have a direct positive economic and social impact on NNCG traders and the local economy, and NNCG has a direct positive social and personal impact on them!

In order to find out what difference NNCG makes to customers we conducted an in-depth survey, over two markets in Ballycastle (the main focus of our in-depth study), with 136 respondents:

- The survey asked questions about customers' experiences of the market, why they come to the market, where they come from, what they like about it, and what difference it makes to them—as well as asking about how much money they spend at stalls and in other local businesses.
- The survey also asked local customers about the impact of the market on them and on how it makes them feel about place they live, and asked customers visiting the area about the impact of the market on them and how it makes them feel about the place they are visiting.

The impacts on local and visiting customers are detailed in the next two sections—but firstly, who are NNCG's customers, why do they come to the market, and what do they like about it?

Who are NNCG's customers?—Profile of customer survey participants²⁶



Age-group: Customers who completed our survey were in age-groups ranging from 16 to 84, but 95% of them were from 25 to 74. Just under a third (31%) were aged 25 to 44 while almost half (48%) were aged from 45 to 64. This provides an opposite picture to estimates provided in the survey of NNCG traders, where traders estimated that almost half (49%) were in the 25 to 44 age-groups and just over a third (35%) were aged 45 to 64. It could be that the younger age group were less likely or less able to spend time completing our survey, as a great proportion of them had children with them (71%, as opposed to 27%).²⁷

Gender: Just under two thirds (63%) of our survey respondents were female and just over a quarter male (27%). 10% chose "rather not say".²⁸ A larger ratio of female to male customers was also the observation of NNCG traders in their survey—where more than half (55%) said their customers were mostly women and 39% said their customers were approximately equal, male and female. None said their customers were mostly male but a few said they weren't sure (6%).

Children and dependents: Almost 4 in 10 of the respondents had brought children or other dependents with them to the market.²⁹

Health and disability: Approximately 1 in 10 either had a health condition, disability or impairment that affected their experience of the market, or were with someone with such a condition.³⁰



²⁶ This description of the customer survey respondents may not be fully representative of all the customers—it is likely to be biased towards those who felt more inclined, and had more time, to complete a lengthy survey.

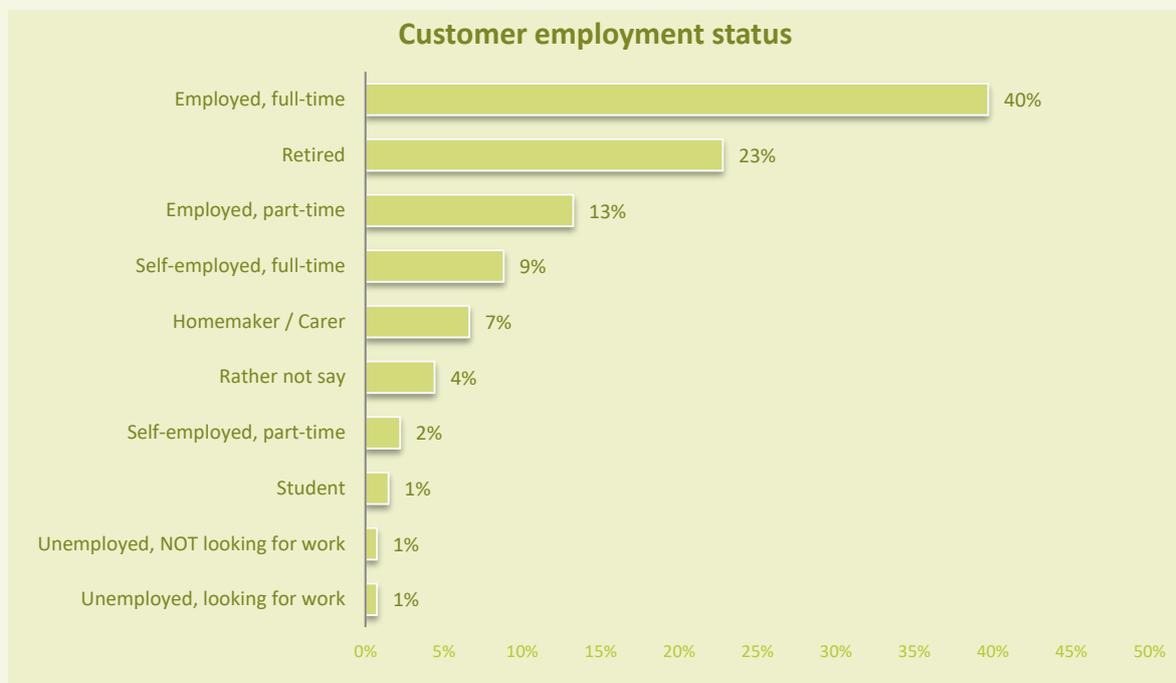
²⁷ We have undertaken a specific family-friendly survey focusing specifically on the needs of families with children.

²⁸ An additional option of 'other' was also included in the survey.

²⁹ Feedback provided by this group in the survey will inform NNCG's ongoing strategic and operational planning related to accessibility.

³⁰ Feedback provided by this group in the survey will inform NNCG's ongoing strategic and operational planning related to accessibility.

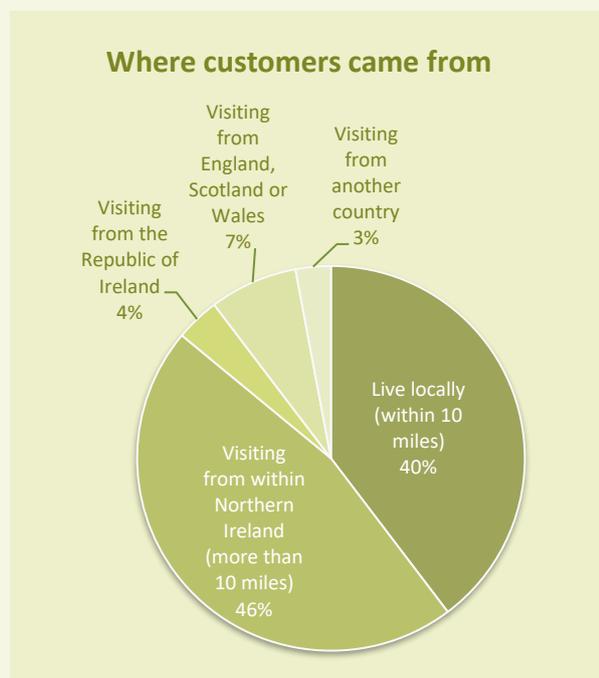
Employment: Almost half of the respondents were in full time work, either employed (40%) or self-employed (9%), and a further 14% were in part-time work, either employed (12%) or self-employed (2%). Just under a quarter of the survey respondents were retired (23%). 7% were "carers or homemakers".



Where do they come from?

Most of the survey respondents were from Northern Ireland (86%) with 40% living locally (within 10 miles).³¹

4% came from the Republic of Ireland, with the remaining 10% from UK countries (7%) or other countries (3%).



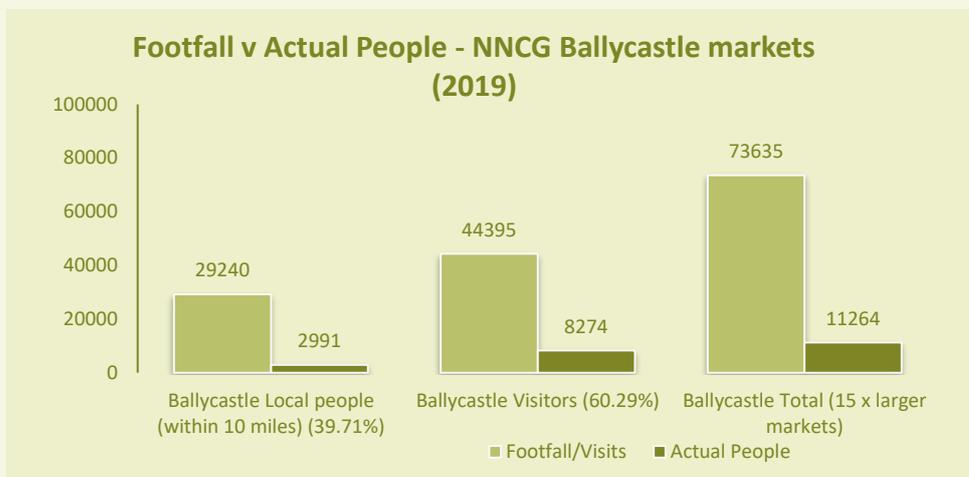
³¹ **NB. Ethnic and Religious Diversity:** No questions of ethnic or religious background were included in the survey. These questions can be divisive and make people uncomfortable in Northern Ireland, and NNCG concluded that as their desire is to foster an atmosphere of welcome for everyone, there was little to be gained from including such questions in this particular survey.

How many actual people come to the NCG markets?

Footfall for 2019 is estimated to have been 73635 for Ballycastle markets and 132213 over all NCG's markets.³² This would obviously have been higher if a number of the markets hadn't been cancelled due to weather conditions.

However, total footfall does not equal total people, as people tend to visit the markets more than once—customers who live locally attend on average 9.8 NCG markets per year, and those visiting the area attend on average 5.4 per year.³³

This translates to an estimate of 11264 individuals experiencing NCG markets in Ballycastle and a total of 20225 individuals experiencing NCGs markets across the region (including Ballycastle). The charts below show the breakdown into people who live locally (within 10 miles of the venue) and those who are visiting.

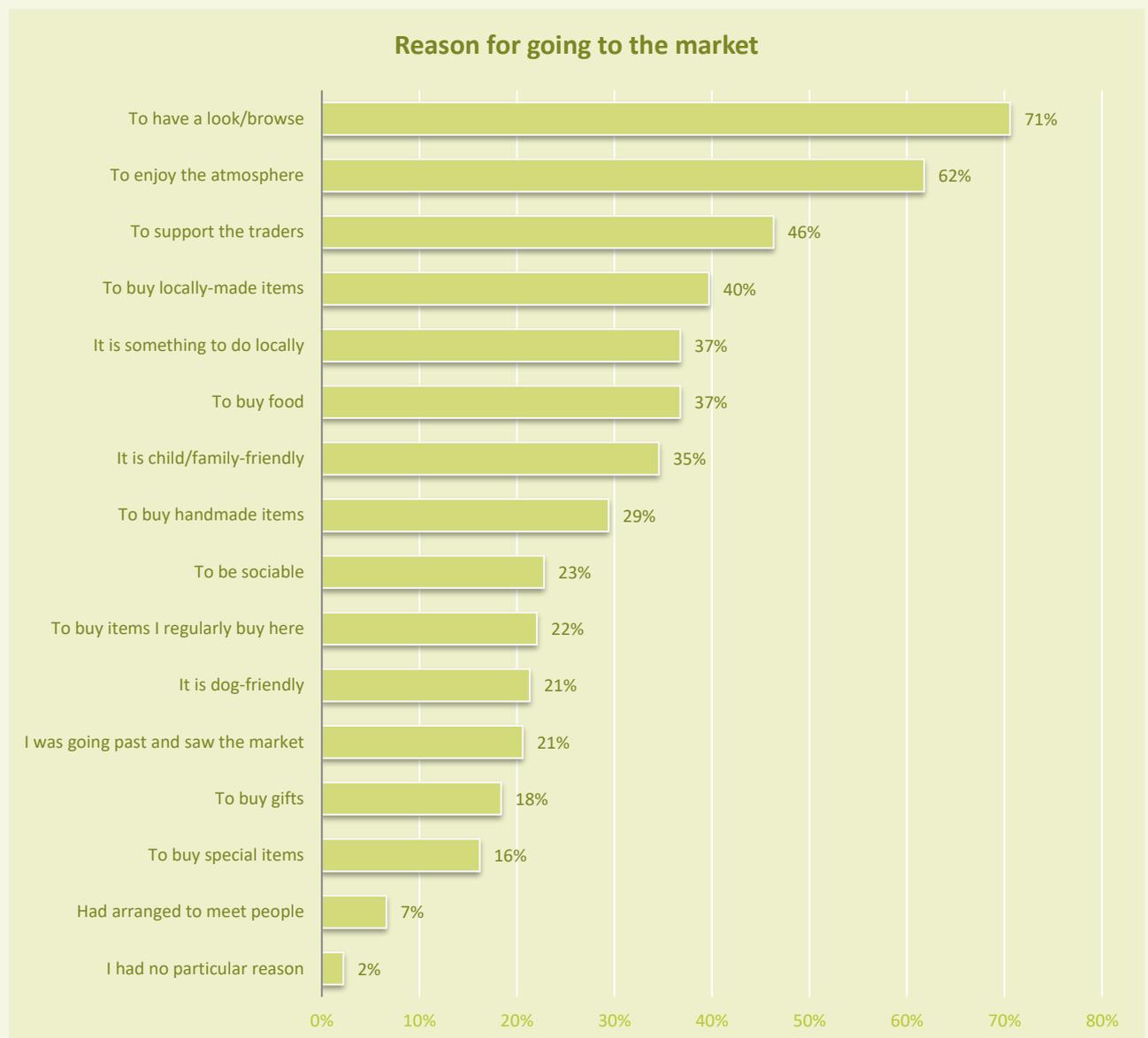


³² Footfall was measured using a clicker to count the number of people entering the market every hour for ten minutes, and the result was multiplied up. Numbers were focussed on the Ballycastle market as a case study, measured on two different market days with different numbers of stalls and different weather conditions. They were then extrapolated out to the region, adjusting for the different size of the market in different locations. The figures are therefore more approximate for the full region than for the Ballycastle market.

³³ Because there were fewer markets in 2019 the number of actual people attending markets relative to footfall is likely to be an underestimate rather than overestimate. Because of cancellations people may have each attended fewer markets than usual, so the footfall divided by a smaller number of attendances per person would result in a higher number of people, and if all markets had taken place so that footfall was higher, then the calculation would also result in a higher number of people.

Why do people come to the market?

- The main reasons for being at the market were to have a look or browse (71%) and to enjoy the atmosphere (62%).
- Almost half of the respondents (46%) were there to support the traders.
- For 37% it was something to do locally, and for 35% it was child/family friendly.
- Some people were at the market with specific shopping priorities:
 - 4 in 10 (40%) were there to buy something locally made
 - almost as many (37%) were there to buy food
 - 29% went along to buy handmade items
 - just over a fifth (22%) were there to buy items they regular buy at the market
 - and just under a fifth went to buy gifts (18%) or special items (16%).
- Almost a quarter (23%) said they went to be sociable, but only 7% had arranged to meet people.
- About a fifth (21%) said they were there because it was dog-friendly.



What do customers buy?

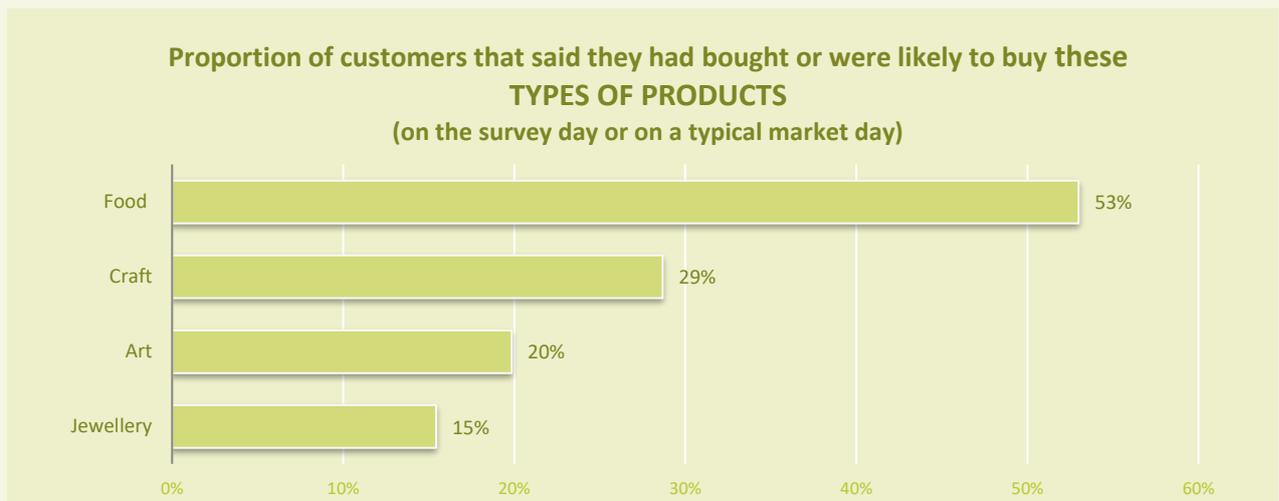
On average, purchases are made by approximately 15% of those attending the NNCG's market on a given day (footfall) making 3 purchases each—based on data from both customers and traders. (The number of purchases equate to 44% of people/footfall if they made one purchase each.)

Customers making purchases

15% of footfall

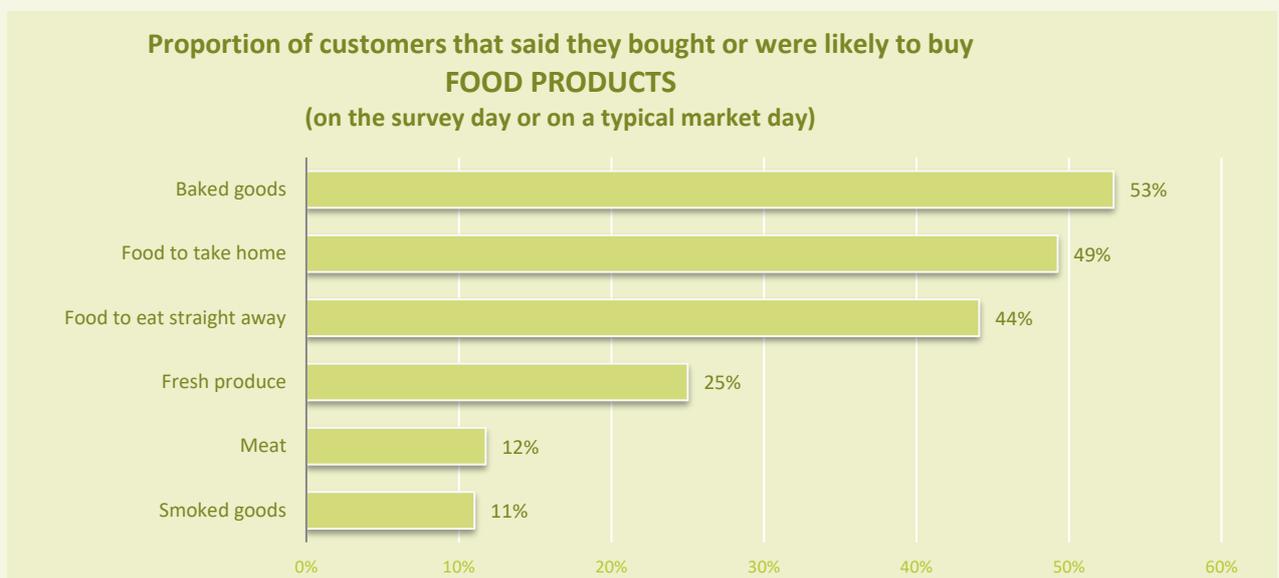
3 purchases each

We asked customers what types of products they had either bought on the day of the survey—or if they had recently arrived, what they were likely to buy that day/on a typical day at the market.



Food! - More people buy food than anything else:

- Baked goods are the most popular, being the product of choice for over half (53%) of the customers surveyed.
- Almost half of those surveyed buy food to take home (49%), and slightly less buy food to eat straightaway (44%).
- A quarter buy fresh produce (25%), and about half that number buy meat (12%) and smoked goods (11%).

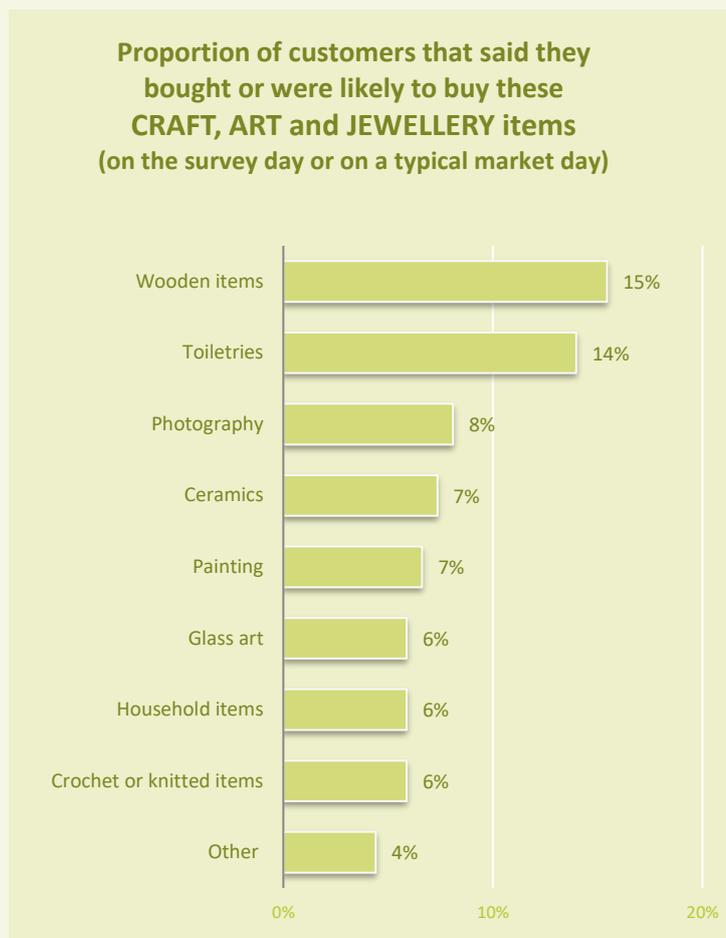


Craft - 3 in 10 customers buy craft (29%)

Art - 2 in 10 buy art (20%)

Jewellery - 15% buy jewellery

- It is difficult to categorise some hand-crafted items clearly into craft, art or jewellery as they may well fit into more than one category.
- Our survey used a range of other categories to attempt to capture the range of non-food products sold at NNCG markets³⁴:
- With the exception of wooden items (15%) and toiletries (14%), fewer than 1 in 10 customers specified that they had bought or were likely to buy—on the survey day or a typical market day—photography (8%), ceramics (7%), painting (7%), glass art, household items or crocheted/knitted items - all (6%).



Gifts - Almost a quarter of the customers said they had bought or were likely to buy a gift for someone else while at the market (24%). About half that number (13%) said they had bought or would buy a gift for themselves!



³⁴ This list is evolving.

What do our CUSTOMERS say they LIKE MOST about the market?

"The atmosphere, friendliness and variety of stalls"

"Friendly stallholders. Very different crafts on offer to other markets"

"Meeting local people. Buying local food"

"The quality of the bacon and cakes on sale and the cheese"



" Atmosphere. Everyone is so friendly."

"Setting / variety of items for sale / people selling their own stuff"

"The atmosphere and the ability to support local people"

"The friendly traders - no pressure to buy items"

This word cloud reflects the words mentioned most frequently by our surveyed customers when describing what they liked most about our NNCG market—and the selection of quotes are typical of the kinds of things people said.

The following sections outline the impact NNCG has had on local customers, the community, and customers who are visitors to the area.



NCCG Artisan Market

"Being at the market has made me feel happy!"

96%

Customers visiting the area

Impact on Customers Visiting the Area

Visiting from where? - 6 out of 10 customers surveyed lived more than 10 miles away from the market (60%). For this research that means they are considered to be *visiting* the area rather than *local* to the area.

More than a third (36%) had come to the area specifically because of the market.

Most of those visiting are from elsewhere in Northern Ireland (46% of customers surveyed) meaning that 86% of those surveyed were from Northern Ireland. 4% came from the Republic of Ireland, bringing the total from the island of Ireland to 90%. Most of the

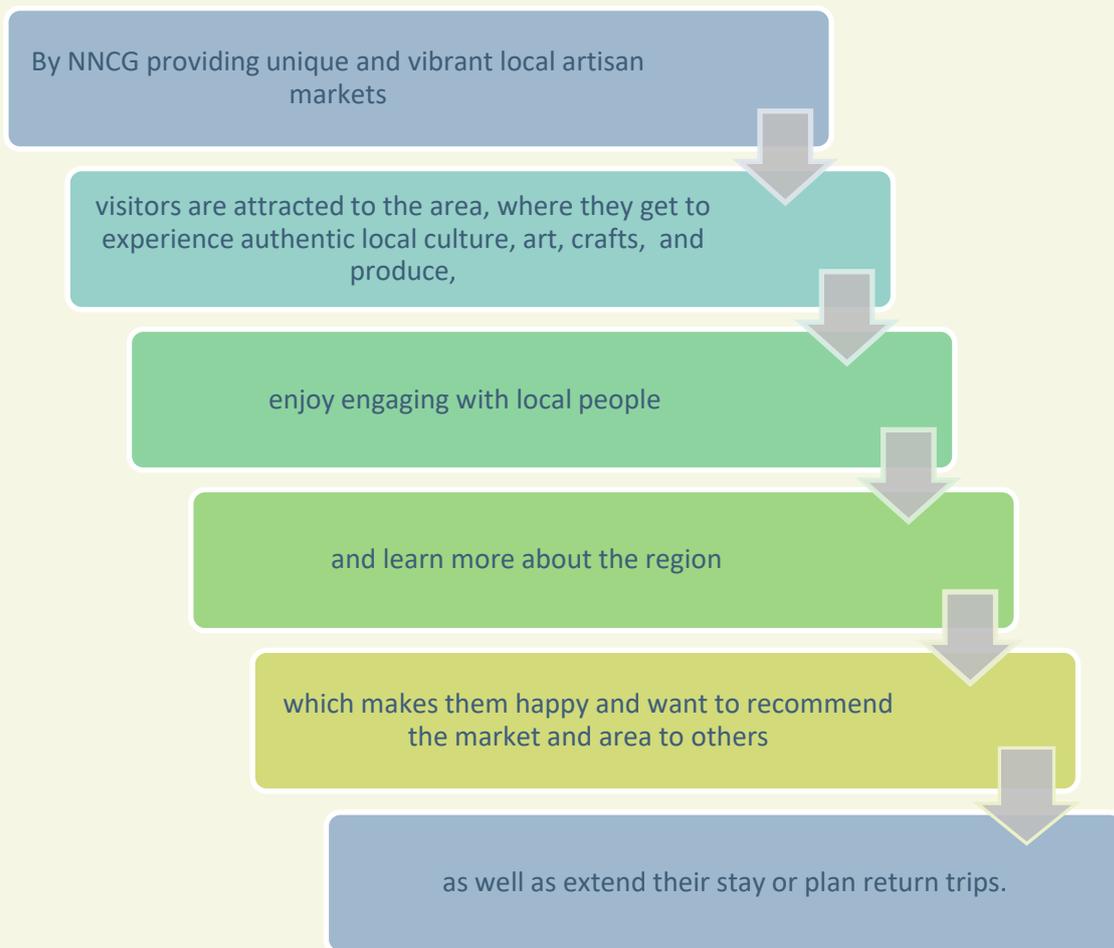
remaining 10% came from Great Britain (England, Scotland or Wales, 7%) with a few (3%) coming from further afield.

These figures demonstrate the importance of catering for, and marketing to, the day-tripper and domestic tourism market. Despite a significant focus nationally, and even regionally, on attracting international tourists, it is local people and domestic visitors that make up the vast majority of customers at the NCCG market.

This section looks at the impact the market has on those visitors.

NNCG's Simple Theory of Change for Customers Visiting the Area

By providing unique and inviting local markets, Naturally North Coast and Glens aims to attract visitors to the area and provide them with enjoyable authentic cultural experiences. This ultimately contributes to the local economy and quality of life in our communities—but for the visitors themselves the outcomes are around the quality of the experiences they have while they are here, and the impact this has on how they feel, and on how they behave in future (i.e. whether they would recommend the market/area to others, or return again for a repeat visit themselves).

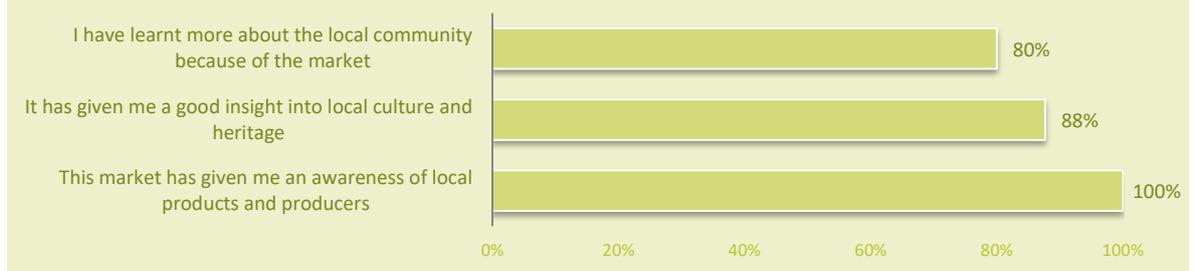


Increased participation in a genuinely local cultural experience



Almost all of the surveyed customers visiting the area *agreed or strongly agreed* that they had enjoyed chatting with the traders (96%) and that the market was a real experience with real people doing real things (95%), while almost 9 out of 10 *agreed or strongly agreed* that the market was an authentic North Coast experience (88%).

Increased knowledge about the region and its people



All of the surveyed customers visiting the area *agreed or strongly agreed* that the market had given them an awareness of local products and producers (100%) and almost 9 out of 10 *said* it had given them an insight into local culture and heritage (88%), while 8 out of 10 *agreed or strongly agreed* that they had learnt more about the local community because of the market (80%).

Influence on future behaviour



8 out of 10 surveyed customers visiting the area *agreed or strongly agreed* that they would recommend the market/area to others (80%). Just under 6 out of 10 said they would return to the area because of the market (57%, and a third (33%) had decided to stay longer because of the market. A fifth were inspired to do other things while they are here (21%).

Happiness

Being at the market has made me feel happy!

96%

Almost all the surveyed customers visiting the area *agreed* or *strongly agreed* that the market had made them feel happy (96%).

Social value of NNCG's impacts for customers visiting the area - Engaging in an artistic cultural experience

The survey results showed that NNCG's market is a local cultural experience that customers visiting the area really enjoy. It makes a lot of them happy! It is like one large exhibition of local artists' work. How do we put a value on that?

Rather than attempt to apply a value to each of the areas of impact reported—the engagement, knowledge, future behaviour and happiness—we have chosen to use one overall value for engaging, as an 'audience' member, in cultural activities.³⁵ This is valued at £53 per person per activity.³⁶

Customers visiting the area attend an average of 5.4 markets in a year which results in a total value per visitor of £286.

Although 96% of visitors enjoyed chatting with traders and said that the market made them feel happy, we have opted to apply the value to the 88% of visitors who felt that the market gave them an insight into local culture and heritage, and was an authentic North Coast cultural experience. We have also applied a 15% reduction for what might have happened anyway.³⁷

This means that the total value to 7254 visitors to the area, attending NNCG markets in Ballycastle in 2019, was over £1.76million, and the value to 13,025 visitors to the area attending all NNCG markets in the region (including Ballycastle), was over £3.16million.

| | |
|--|---|
| Value of engaging with NNCG artisan market—an artistic cultural experience, per visitor | Proportion of NNCG visitors benefiting |
| £286 | 88% |
| Total value for visitors engaging in a cultural experience, at NNCG's Ballycastle market | Total value for visitors engaging in a cultural experience, across all NNCG market venues |
| £1,763,447 | £3,166,378 |

³⁵ Fujiwara, D., Kudrna, L., and Dolan, P., 2014, Quantifying and Valuing the Wellbeing Impacts of Culture and Sport, Dept for Culture Media and Sport, (p30-31). This value has been calculated to take various factors into account, and it is the social (and wellbeing) value over and above any fee paid to participate.

³⁶ This is at the conservative end of the calculations, and has been adjusted for inflation from £47 in 2014 to £53 in 2019.

³⁷ In the absence of a known deadweight (what might have happened anyway), or other guidance regarding appropriate deadweight, 15% has been applied in line with recommendations relating to a range of other social value measures in the Social Value Bank.



NCCG Artisan Market

"Being at the market has made me feel happy! "

84%

Local customers

Impact on the Community

Naturally North Coast and Glens (NCCG) is a 'Community Interest Company' (CIC). It is run by its members, for the benefit of the community.

It aims to directly improve quality of life for people in the local community by providing positive experiences, exposure to art and culture, and opportunities for fun, relaxation and socialising, in a happy creative environment.

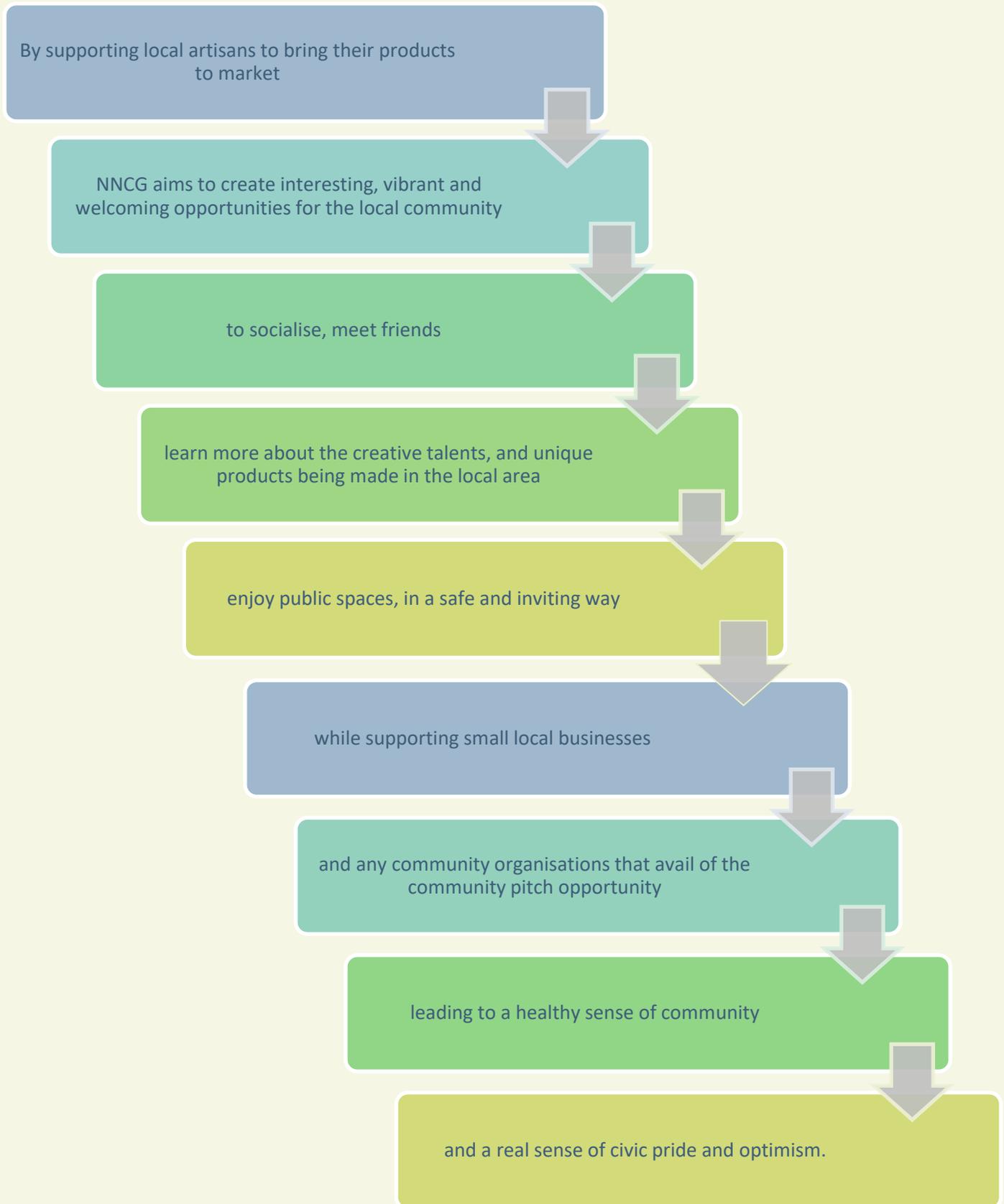
It also aims to support communities indirectly by supporting tourism and economic development in the region, and its impacts in those areas are described in other sections of this report.

There is a specific focus on Ballycastle in this section as this is where the market was first established, has been running for the longest time, and it is the community that has been impacted most by the market. However the community across the North Coast region has been impacted by the market, and that is also reflected in this section.

This section describes NCCG's impact on:

- local customers—as reported by them directly through the customer survey, and
- the local community and community sector more broadly—from data gathered in the NCCG member survey and festival organiser survey, as well as through interviews with the market manager and community representatives.

NCCG's Simple Theory of Change for the Community



What is the Community? - NNCG thinks of the community as being the people who live in the 'local area', defined specifically for the purpose of this research as within a 10 mile radius of where it runs its markets, as well as the community sector groups and organisations within the region.

What is 'Local'? - For the purpose of this research, because the region is rural and not densely populated, 'local' has been defined as within a 10 mile radius of the market.

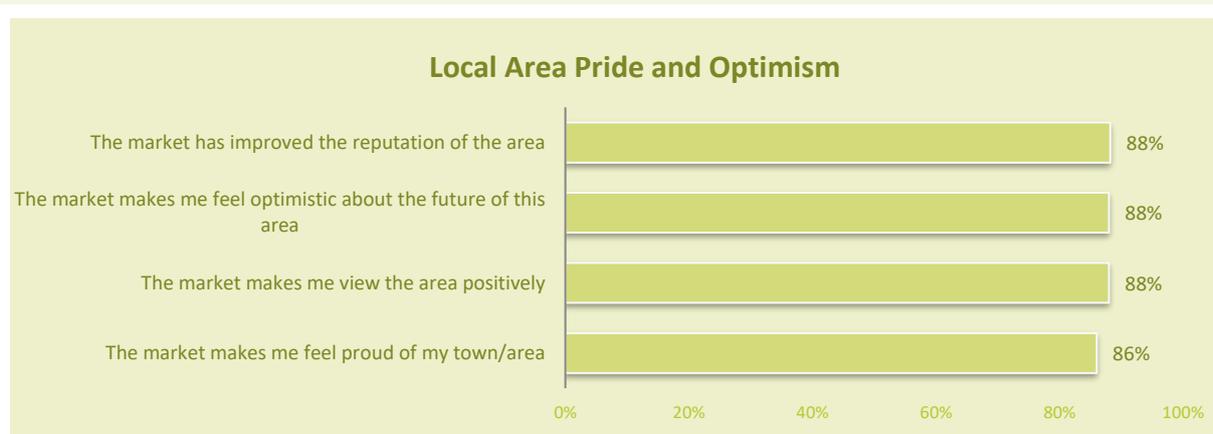
For how long had they been local? - Of the 40% of survey respondents living within 10 miles of the market:

- half (50%) had lived in the area for 21 years or more
- just under a fifth had lived locally for less than 3 years.



Increased Local Area Pride and Optimism

There is no doubt that NNCG has had an impact on the local community of Ballycastle and the North Coast region. Local people feel that the market has improved the reputation of the area and it has made them feel more positively about it as well as more optimistic for the future. They appreciate the range of talent of the artisans in the local area and are pleased to see it be appreciated by others through the popularity of the market. They have a sense of pride about the market, and the market in turn has increased the sense of pride they have in their area.



Almost 9 out of 10 local customers *agreed* or *strongly agreed* that the market had improved the reputation of the area (88%), that it had made them feel more optimistic about the future of the area (88%), and that it had made them view the area positively (88%), and that it had made them feel proud of their town/area (86%).

There's a sense that the market has contributed to Ballycastle becoming a desirable place to live, a must-visit destination for craft lovers, and well-known as a 'foodie hub' as it was a starting point and incubator for a range of successful, award-winning food businesses in the area.

- Ballycastle was just recently named as the *Best Place to Live in Northern Ireland in 2020*—where the Sunday Time Newspaper directly referred to the town's "unbeatable local produce" and "magical market". (The town previously won the coveted accolade in 2016, 2017 and has otherwise been in the top five.)
- In early 2020, the market's successes saw it:
 - feature on the *BBC Countryfile* show—January 2020—a show based on stories around Ballycastle, inspired specifically by the NNCG market
 - win the *UK's Best Community Market of the Year 2020* award from the National Association of British Market Authorities (NABMA)—January 2020—an award it had won previously in 2018.

"Ballycastle, Co Antrim — Best Places to Live in the UK 2020: With unbeatable local produce and a magical market, this friendly, foodie harbour town on the rugged Antrim coast deservedly reclaims its crown"

The Sunday Times

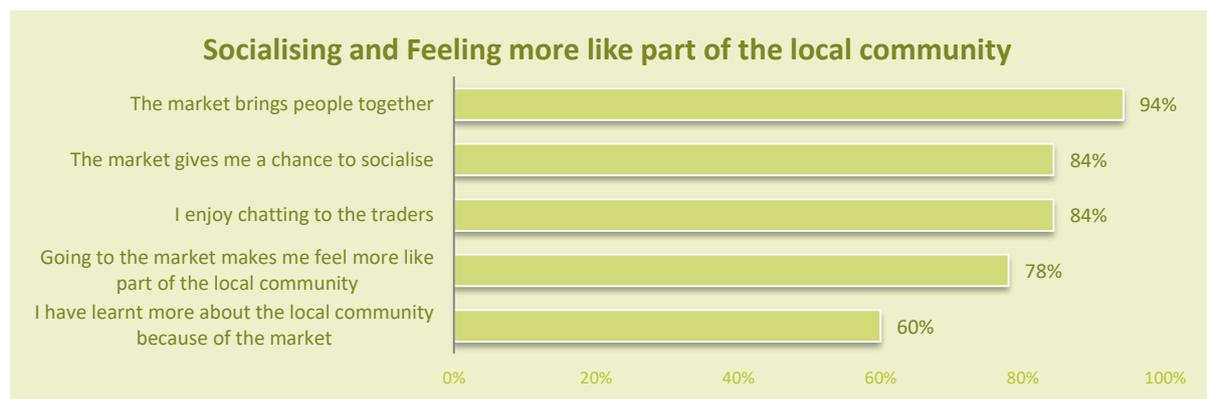
"Some still call it "Ballycastle Town Market" and think of it as their market and have a sense of ownership about it, even though it has grown and branched out."

Market Manager

Increased Socialising and Feeling More like Part of the Local Community

The market provides a venue, and a reason, for people to go out, meet others and chat while browsing at the stalls. It provides people with an opportunity to socialise—and meet each other. It is not always about shopping. As mentioned previously, people like the atmosphere of the market, and the friendliness. Importantly the market helps people learn more about the local community and to 'feel more like part of the local community'.

More than 9 out of 10 local customers *agreed or strongly agreed* that the market has brought people together (94%), and more than 8 out of 10 *agreed or strongly agreed* that the market gives them a chance to socialise (84%) and that they enjoy chatting to the traders (84%).



Almost 8 out of 10 local customers *agreed* or *strongly agreed* that the market had made them feel more like part of the local community (78%), and 6 out of 10 thought they had learnt more about the local community because of the market (60%).

Increased Happiness

Happiness

Being at the market has made me feel happy!

84%

More than 8 out of 10 local customers agreed or strongly agreed that the market had made them feel happy (84%).



A happy girl at NNCG Artisan Market

Social value of NNCG's impacts for customers living locally

Customers from the local community, benefit, just as visitors do, from attending the market as an artistic cultural experience. However, they also benefit from the role the NNCG market plays in the community, and how that impacts on them as local people. The NNCG market makes customers from the local area:

- feel optimistic about the future of the area, and
- feel more like part of the local community

It also makes them feel happy, view their local area more positively and feel proud of the local area, and other impacts as listed, but these are all accounted for within the three values being applied below.

The same value for:

- engaging, as an 'audience' member, in cultural activities

applies to NNCG customers who live locally as it does to customers visiting the area.³⁸ It is a window into the artistic works of a range of local artists and artisans. This engagement is valued at £53 per person per activity.³⁹

Value of engaging in an artistic cultural experience

Customers local to the area attend an average of 9.8 markets in a year which results in a total value per visitor of £519 (at £53 per market - see above).

As with visitors to the area, this social value is applied to 88% of local customers, with an additional 15% reduction for what might have happened anyway⁴⁰. The total value then to 2632 local customers, attending NNCG markets in Ballycastle in 2019, was £1,160,948, and the value to 4725 local customers attending all NNCG markets in the region (including Ballycastle), was just over £2 million.

| | |
|---|--|
| Value of engaging with NNCG artisan market—an artistic cultural experience, per local customer | Proportion of local NNCG customers benefiting |
| £519 | 88% |
| Total value for local customers engaging in a cultural experience, at NNCG's Ballycastle market | Total value for local customers engaging in a cultural experience, across all NNCG market venues |
| £1,160,948 | £2,084,434 |

³⁸ Fujiwara, D., Kudrna, L., and Dolan, P., 2014, Quantifying and Valuing the Wellbeing Impacts of Culture and Sport, Dept for Culture Media and Sport, (p30-31). This value has been calculated to take various factors into account, and it is the social (and wellbeing) value over and above any fee paid to participate.

³⁹ This is at the conservative end of the calculations, and has been adjusted for inflation from £47 in 2014 to £53 in 2019.

⁴⁰ In the absence of a known deadweight (what would have happened anyway), or other guidance regarding appropriate deadweight, 15% has been applied in line with recommendations relating to a range of other social value measures in the Social Value Bank.

Value of feeling optimistic about the future of the area

The 'social value' of feeling optimistic about the future of the area has been calculated using a financial proxy from the Global Value Exchange useful for valuing Hope / Aspirations / Positive Feelings for the future (Cost of Positive Psychology Short Course, module Hope, Optimism and Resilience, University of East London)⁴¹, valued at £195 per person. The amount attributable to NNCG was calculated as 60%.⁴²

The value to customers living locally in the Ballycastle area (2632 individuals) was £307,902 and across the region (4725 people) was over half a million pounds £552,825.

| | |
|--|---|
| Value of feeling optimistic about the future of the area—per local customer | Proportion of local NNCG customers benefiting |
| £195 | 88% |
| Total value, to customers living locally, of feeling optimistic about the future of the area, at NNCG's Ballycastle market | Total value, to customers living locally, of feeling optimistic about the future of the area, across all NNCG market venues |
| £307,902 | £552,825 |

Value of feeling more like part of the local community

The 'social value' of feeling more like part of the local community has been calculated using a financial proxy from the Social Value Bank (Feel Belonging To Neighbourhood⁴³) valued at £4302.70 per person.⁴⁴ The amount attributable to NNCG as opposed to other factors was estimated to be approximately 20%.⁴⁵

The value to customers living locally in the Ballycastle area (2333 individuals) was just over £2million over half a million pounds and across the region (4188 people) was almost £3.6million.

| | |
|--|---|
| Value of feeling more like part of the local community, per local customer | Proportion of local NNCG customers benefiting |
| £4,303 | 78% |
| Total value, to customers living locally, of feeling more like part of the local community, at NNCG's Ballycastle market | Total value, to customers living locally, of feeling more like part of the local community, across all NNCG market venues |
| £2,007,287 | £3,603,941 |

⁴¹ <http://www.globalvaluexchange.org/valuations/search?q=optimism>

⁴² This estimation take into account the range of other factors that might also contribute as well as the amount of time spent at NNCG markets.

⁴³ <https://www.hact.org.uk/social-value-bank>

⁴⁴ This is adjusted for inflation - up from £3919 in 2016.

⁴⁵ This estimation take into account the range of other community-based organisations and activities that might also contribute and the amount of time spent at NNCG markets.

Provision of market events in partnership with local community based festival organisers

During 2019 four of NNCG's markets were run in partnership with key community-based festival organisers. The result of this was that local organisations and communities had enjoyable public events taking place that were cost-effective, well-organised, well-managed and attractive to tourists, as well as providing a social occasion for local communities.

"NNCG is a wonderful addition and added attraction to attendees. Joint marketing and promotion also good and helps increase public awareness/attendance."

(Local Festival Organiser)

According to our survey of Festival organisers the following factors contributed to their decision to involve NNCG in their festival/event:

| Factors that contributed 'A GREAT DEAL' (Scoring 5 out of 5 on average) | Factors that contributed 'CONSIDERABLY' (Scoring 4 out of 5 on average) |
|---|---|
| It enhances visitor experience | It provides food options |
| It is high quality | It is easier/less work for us |
| It has a good reputation | It is a cheaper/more economical choice (than trying to do it ourselves) |
| It increases footfall | It is self-contained |
| It is well organised | It provides advertising/marketing/social media |
| It is local | |
| It provides an attraction | |

All of these organisers have involved NNCG's market before in their festival, and all of them said they would use them again in the future. More and more community groups are requesting that the market attend their events but unfortunately it is not always possible due to the costs and level of funding involved. However, this is something that could be considered for future funding applications.

Value to delivering markets in partnership

The social value of these markets is included along with the other social value measures in this report. However the additional monetary value, to the community-based festival organisers, of this market delivery service, is approximately £2000 per market⁴⁶, so the additional financial value of this service to the community was approximately £8000.

Markets delivered at the request of, and partnership with, local community-based organisations (2019)

4

Value of market delivery service provided to local community-based organisations (2019)

£8,000

⁴⁶ The £2000 value is based on the cost to council of running a market (as outlined in various publicly available local council documents) and NNCG's own market cost calculations.

Increased support and funds for local community groups/organisations /sports teams/charities



Kelly Neill Dance Company at NCG Artisan Market

"Kelly Neill Dance Co have three dance schools located in Ballycastle, Ballymoney and Bushmills. KNDC have performed at several events that Naturally North Coast & Glens Artisan Market have organised. They have provided this chance for the students to travel, to perform across the North coast in different locations where they meet which benefits us greatly as a youth dance school.

In effect this then helps to create a reason to perform and something to work towards in their training, therefore keeping the children enjoying coming to dance, keeping active, meeting new people, seeing new places and experience dancing at a whole new level than just inside four walls of dance studio."

(Kelly Neill Dance Co - Entertainer)

Providing a platform for local entertainers -

The NNCG markets have been a great platform for young performers to display their talents to their family, friends and the public. Local music and dance schools have appreciated having opportunities for their students to perform in friendly, relaxed atmospheres.



Traditional Musicians (Ballycastle Comhaltas) at NNCG Artisan Market

General advice and support - As well as being asked to bring the market to community events, NNCG frequently receives requests for advice and assistance from other groups on how to develop or run events, e.g. local writers festival, photography convention, arts festival. The market group has freely given advice and signposted groups to other relevant organisations and sources of funding, support and assistance.

In 2019, NNCG played a pivotal role in Causeway Coast and Glens Peace IV programme, *Building Positive Relations - Cross Border*, collaborating with other community groups from the region, to visit and engage with like-minded organisations across the island, and develop ongoing relationships and valuable, sustainable networks.

Community pitches - It provides a "community pitch" (stall/space) at each market for voluntary/not-for-profit organisations to showcase their services to the wider community, raise awareness, and fundraise, providing a unique local feel and sense of pride, as well as valuable exposure.

Community contributions made by NNCG and its members - NNCG regularly undertakes and contributes to fundraising raffles and facilitates fundraising opportunities for charities chosen by staff and members/traders. The contribution NNCG makes to the community directly is enhanced by the contribution successfully supported artisan businesses make in return.

Proportion of members who contributed to their local community in the following ways



Value to the community of increased support and funds

The basic value of the community/charity pitches to community groups in 2019 was £725—they were used at 29 markets and, according to feedback, were of great benefit to the organisations that used them.⁴⁷

The value of members' *business contributions* to local community groups, and the proportion of that that can be considered attributable to their NNCG membership—this includes contributions of products to NNCG and other charity raffles etc. as outlined in the chart above, and takes account of how much of the members' turnover is attributable to NNCG.

| Basic Value of Community Pitches 2019 | |
|--|--|
| (Taken up at 80% of markets (i.e. 29 in 2019) @ value of £25 each) | |
| £725 | |
| Total Members contributed to the Community within 40 mile radius of their business | Total attributable to NNCG market (51% - based on turnover attributable to NNCG) |
| £6,835 | £3,486 |
| Total Members contributed to the Community within 10 mile radius of Ballycastle | Total attributable to NNCG market (51% - based on turnover attributable to NNCG) |
| £3,617 | £1,845 |

⁴⁷ To date NNCG has not been keeping records of the funds raised by charities/community groups occupying the community pitches or for whom fundraising and raffles have taken place. This is something that should begin to be measured from 2020.

Negative Impacts on Community

This research has also attempted to uncover any possible negative impacts experienced as a result of NNCG's operations or markets.

Increased Traffic and Parking Congestion - The main negative impacts for the local community were identified as increased traffic and parking problems.

Coastal traffic has always tended to increase on good weather weekends and will to some extent be conflated with increased traffic that occurs on market days. Nevertheless the market does have an impact on traffic levels and on parking availability.

Parking is required for traders as well as customers, so it can be a problem, depending on the venue. NNCG manages the traffic flow of traders at the beginning and end of a market day for unloading and loading their goods, and attempts to manage where traders park as much as possible so as to maximise parking availability near the venue for customers.



Almost three quarters (74%) of local customers at the market said that the market had increased traffic, but less than half (44%) said that it had created parking problems.

Of all of the customers (living locally and visiting) who travelled to the market by car, more than a third (37%) said they had difficulty finding somewhere to park while nearly two thirds (63%) said they did not. (Interestingly, previous research has found that 39% of drivers in the UK say finding somewhere to park is a stressful experience.⁴⁸)

Negative value of increased traffic and parking problems

The negative value of increased traffic has been measured in terms of the social cost of increased Green House Gas emissions, and is set out in this report, in the section on Impact on the Environment. No additional cost has been specifically allocated to parking difficulties, but this is something that could be explored further in future research.

⁴⁸ <https://www.britishparking.co.uk/News/motorists-spend-nearly-four-days-a-year-looking-for-a-parking-space>

What did our LOCAL CUSTOMERS say was the BIGGEST DIFFERENCE the market made to them?



This wordcloud reflects the words mentioned most frequently by the local customers when describing what was the **biggest difference** the NNCG market made to them—and the quotes are a selection of what people said. (The words used most often are in the largest writing and include: local, people, produce, meet, Sunday⁴⁹, out, fresh, opportunity, products, socialise, gifts, talent, locally.)

⁴⁹ Ballycastle markets are often on a Sunday



"The market brings many locals and non locals into the towns to attend who support it and purchase the products regularly."

Local Business Owner

The Marine Hotel, Seafront, Ballycastle

Impact on Local Business and Economic Development

The NNCG market began as 'Ballycastle Town Market' and was started by the Ballycastle Chamber of Commerce back in 2012 in collaboration with a small number of local crafters, artists and producers. Its purpose was to provide a creative economic, entrepreneurial, and tourism boost to the town and area which had suffered significantly from the financial crisis and property crash of 2008.

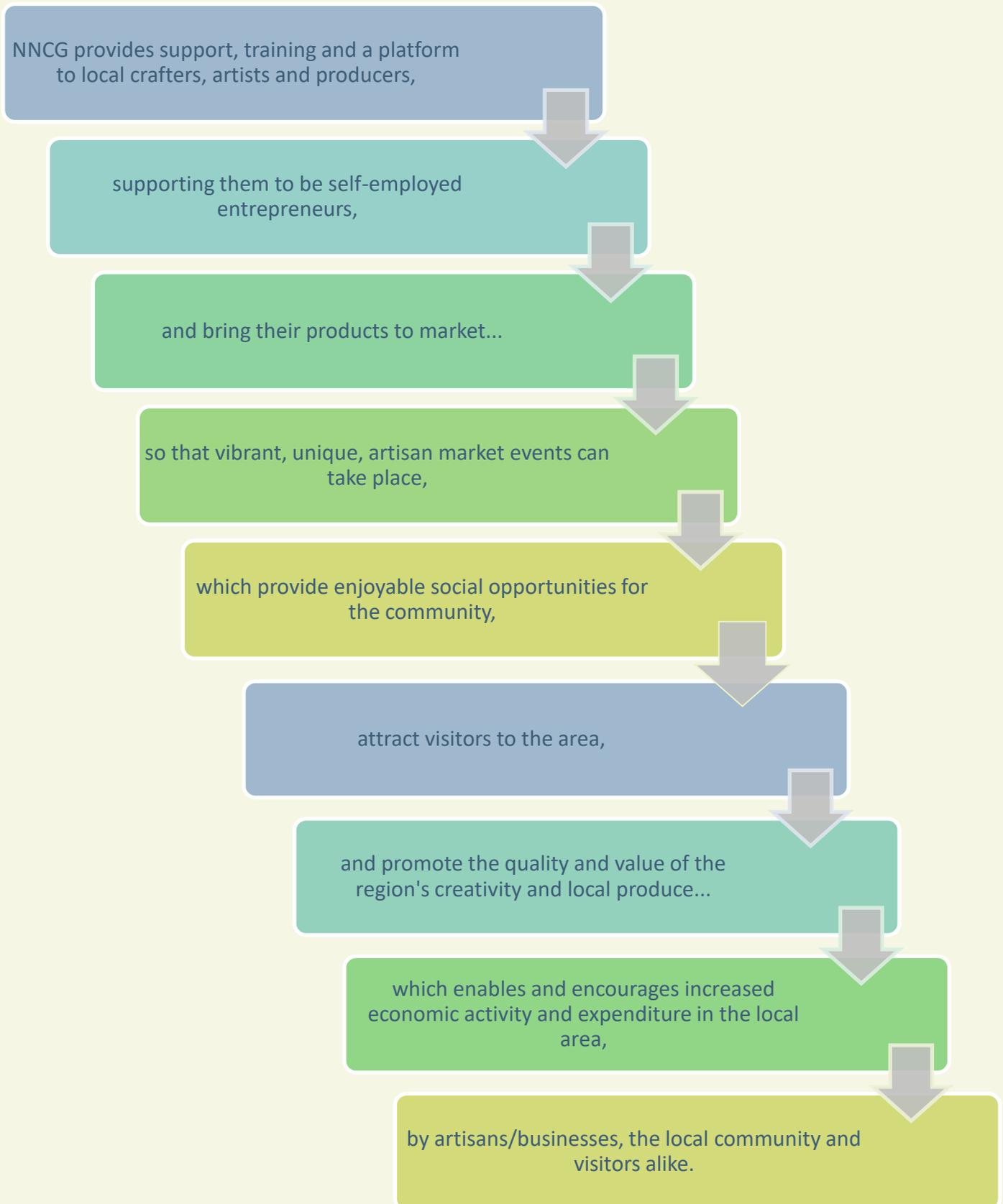
It quickly became clear that there were additional benefits to the community arising from the market—an increasing sense of pride and optimism—and a range of non-economic benefits accruing to the traders involved.

Since the market was transferred to its traders and become Naturally North Coast and Glens, it has evolved into much more than was originally envisaged, and now travels beyond Ballycastle to other venues across the North Coast, enhancing a range of events and festivals by providing an additional attraction, and bringing an artisan market to other towns in the region.

The impact of NNCG on local businesses and the economy is explored to a limited extent in this section.⁵⁰ It uses data gathered from surveys with customers, traders, local businesses and visitors. There is a focus on Ballycastle because of the genesis of the market, and there is a little extrapolation to the broader region, based on market data. This section does not include the economic benefits accruing to NNCGs members/traders, or to the local authorities—those are covered in their respective sections, and an overall analysis on the monetary value is included in the at the end of this report.

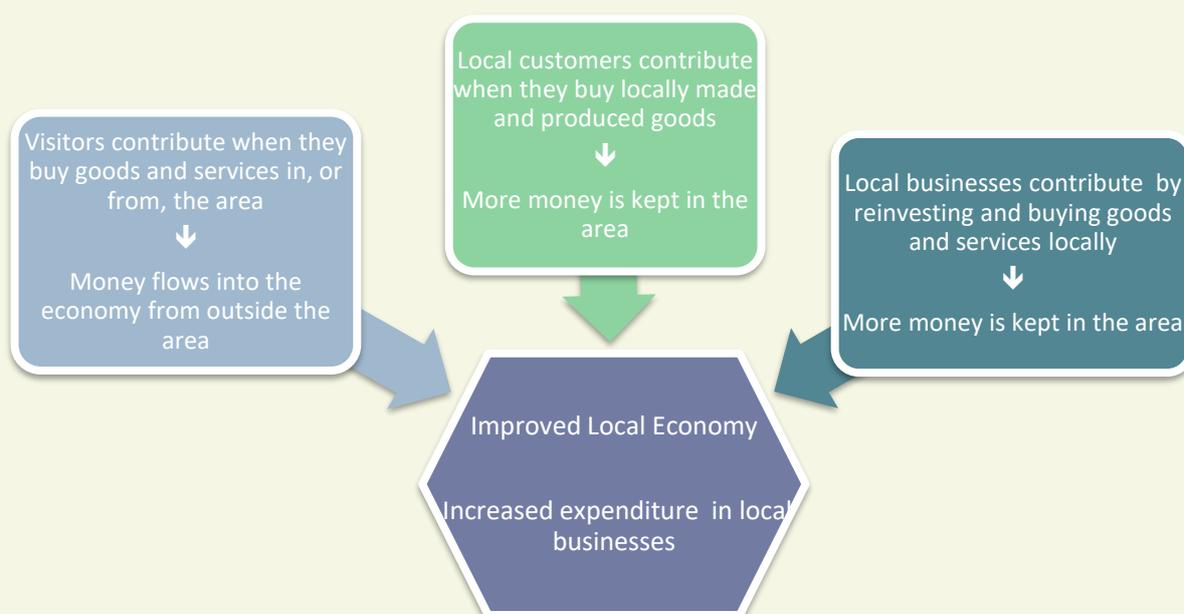
⁵⁰ (A detailed economic analysis would require further work/business cooperation/more data etc.....)

NCCG's Simple Theory of Change for the local economy



Local businesses benefit, and the local economy is given a boost, when:

- money circulating outside the local economy is brought into it due to visitors from outside of the area buying goods and services within the area, and
- more local people and businesses buy goods and services within the local area, keeping the flow of money within the local area, rather than spending it further afield.



Encouraging new business in the area

One of the key ways that NNCG aims to help develop the local economy is by supporting and encouraging the development of new businesses amongst artisan crafters, artists and producers.

Local businesses and the local community recognise the role that NNCG plays in this regard, with 95% of businesses respondents agreeing that the market had encouraged entrepreneurial activity in the area, and 92% of customers who live locally saying that the market had created opportunities for people to start in business.



Supporting artisan businesses to start and develop - Much of the impact of this encouragement and provision of business opportunities on new artisan businesses is set out in the NNCG Members section this report, and includes not only economic benefits but social and personal benefits.

In addition, NNCG ran a programme in 2018-19 called "Make it to Market", funded by the Ulster Bank's Skills and Opportunities Fund, providing training, mentoring and market support to emerging artisans. The social value of the programme to each participant was £2406.42, calculated using a recognised mental wellbeing and life satisfaction measure.⁵¹

Establishing a new social enterprise - In addition to supporting other businesses during 2019, NNCG established a new social enterprise—a pop-up farm shop called *Seasons of the Glens*—with support from The Rank Foundation's "Profit for Good" programme. *Seasons of the Glens* brings local produce to local communities and provides a platform for local growers, farmers, makers and producers to sell their produce to the public.

The purpose of the shop, which pops up at markets, is to enable small scale growers, and growers of seasonal produce, to have an affordable market outlet for their goods. The shop itself provides employment, and enables economic activity and participation amongst those who may not otherwise have the opportunity.



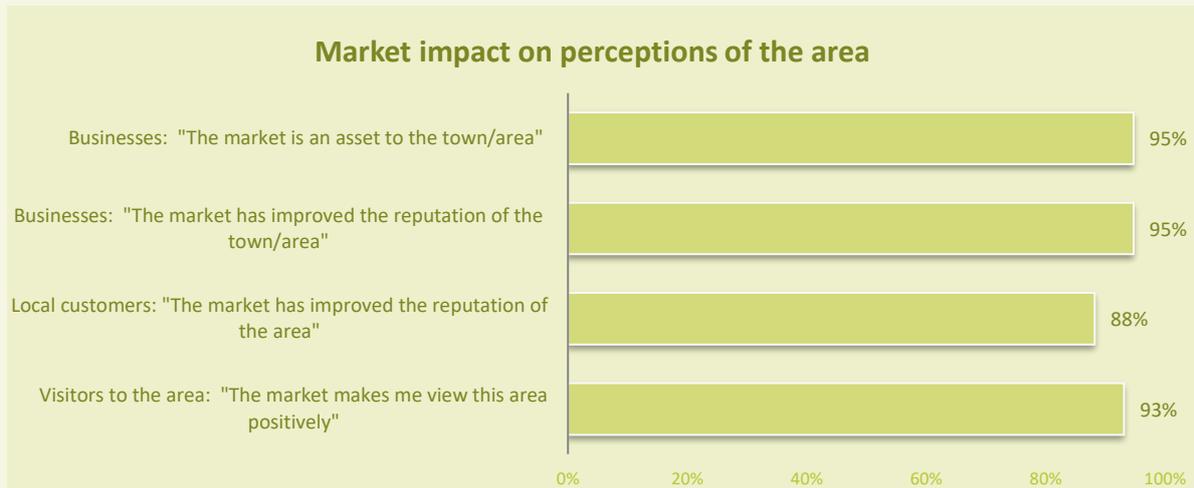
Linda McConnell, Seasons of the Glens, NNCG Member

⁵¹ Reference: Mental Health and Life Satisfaction: The Relationship between the Warwick Edinburgh Mental Wellbeing Scale and Life Satisfaction, Authors: HACT and Daniel Fujiwara (www.hact.org.uk / www.simetrica.co.uk) Source: www.hact.org.uk, License: Creative Commons Attribution-onCommercial-NoDerivatives license (http://creativecommons.org/licenses/by-nc-nd/4.0/deed.en_GB)

Improving perceptions and attracting visitors

NNCG's 'Theory of Change' suggests that having vibrant creative artisan markets taking place in the area makes it a desirable place to be for both the local community and visitors - and that this will in turn benefit the local economy and local businesses.

Our surveys showed that everyone is in agreement that the NNCG market has had a positive impact on the area's reputation.



Naturally North Coast and Glens has certainly increased the profile of the area through the awards it has won and the national media it has attracted, as referred to in other parts of this report.

Almost all of the business respondents (95%) agreed that the market is an asset to the town/area, and that it has improved the reputation of the area—also agreed by 88% of local customers.

"The Market (especially in the summer) benefits Ballycastle by enhancing in a positive manner the feel and impression of the town."

(Local Business)



All of the businesses that responded to the survey (19) said that the market makes the town/area more attractive to visitors, and 96% of the local customers surveyed said that the market had brought more people into the area.

Importantly, 93% of visitors reported that the market makes them view the area positively. Word of mouth recommendations are invaluable to business—and 80% of visitors said they would recommend the market/area to others.

The value of increased positive perception of the area is that it will become a visitor attraction and help develop tourism and boost the economy.

More than a third of the visitors (36%) came to the area specifically because of the market, and a third (33%) said they had decided to stay longer in the area because of the market.

"[The Market] Encouraged the visit to Ballycastle, and love that I can bring my grandchild here. Great for the family."

(Visitor)

The Value of Overnight Visitors

The value of one night spent in the Causeway Coast and Glens area is £53.75 per visitor, per night, based on NISRA tourism statistics.⁵²

One section of those who came to the area specifically because of the market were staying overnight.

They stayed an average of 4 nights and represent 10% of the market customers visiting the area.

The value of the overnight stays of those visiting the Ballycastle market was £177,881, and the whole region was £319,388.

| Customers visiting the area (2019) Specifically because of the market and were staying overnight | |
|---|--|
| Visitors to the NNCG Ballycastle market staying overnight 827 visitors (10%) | Visitors to all NNCG markets staying overnight 1486 visitors (10%) |
| On average they stayed 4 nights | Value per night per person £53.75 |
| Value from overnight stays related to NNCG Ballycastle market (£53.75 x 3309 nights) £177,881 | Value from overnight stays related to all NNCG markets (£53.75 x 5942 nights) £319,388 |

⁵² Northern Ireland Statistics and Research Agency, Overnight Tourism Statistics 2018, Causeway Coast and Glens 2018 Local Government District, https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/Infographic-Causeway-Coast-Glens-2018_0.pdf

Similarly a section of those who decided to stay longer in the area had decided to stay a night (or an extra night) in the area.

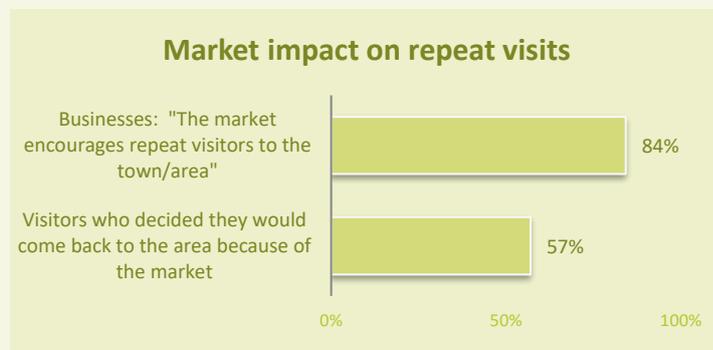
They represented 5% of the customers visiting the area.

The value to the region of the extra overnight stays created because of the market were £22,235 related to the Ballycastle NNCG market and £39,923 related to all the NNCG markets.

| Customers visiting the area who had decided to spend a night (or an extra night) because of the market | |
|--|--|
| Visitors to the NNCG Ballycastle market staying one extra night 414 visitors (5%) | Visitors to all NNCG markets staying one extra night 743 visitors (5%) |
| Value to Ballycastle area £22,235 | Value to region £39,923 |

During 2019, NNCG's dedication and success in promoting the local region was recognised with the local *Causeway Coast and Glens Person of the Year Award 2019 for championing Tourism and Hospitality*.

Our surveys confirm this success, as 84% of businesses said the market encourages repeat visitors to the town/area, and 57% of visitors themselves said they had decided they would come back to the area because of the market.



"I have really enjoyed this market and will certainly be back next year."

(Visitor)

| Number of Visitors to the Area* influenced by NNCG Market (2019) <small>(*These are mostly domestic visitors and the area is defined as a 10 mile radius of the NNCG Market venue)</small> | Number of Visitors (2019) | |
|---|---------------------------|-------------------|
| | Ballycastle Area | Across the region |
| Visitors that said they would recommend the market/area to others | 6646 | 11933 |
| Visitors that decided to come back to the area because of the market | 4747 | 8524 |
| Visitors that decided to stay longer because of the market (mostly a few hours—half a day) | 2713 | 4871 |
| Visitors that said the market inspired them to do other things while they were here | 1763 | 3166 |

These numbers demonstrate that the economic impact of the market lasts beyond any one visit, and in fact encourages additional economic impact in the area into the future.

This survey data together with more survey and interview data presented in the local agency impact section of this report show that the NNCG market has been a visitor attraction and increased the number of visitors coming to the area.

There is also evidence that the market has resulted in an increase in the awareness and purchasing of local products (by local people as well as visitors) and an increase in turnover for some local businesses.

Increasing a 'shop local' ethos

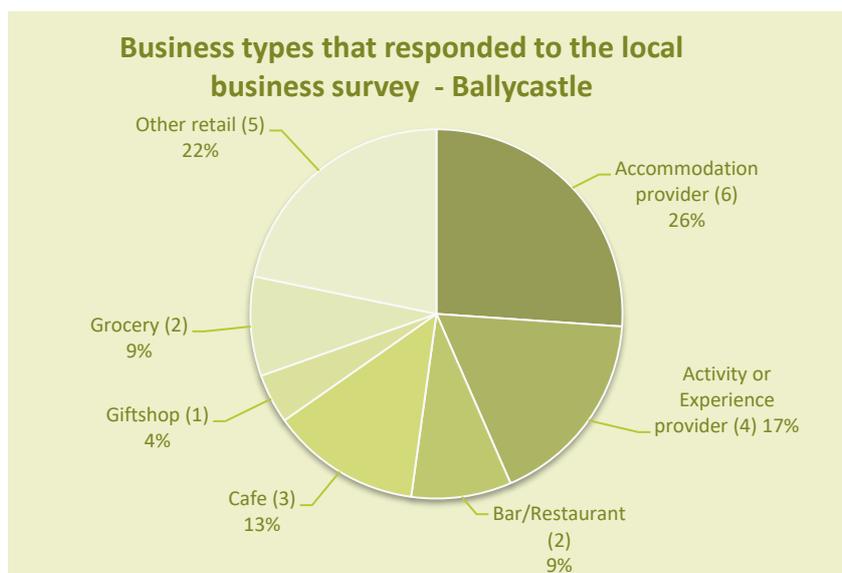
Our survey of market customers revealed that the market has not only given the vast majority of them (92%) more of an awareness of local products and producers, but has also resulted in 84% of them buying more locally-made products.



More local businesses (37%) are stocking or using local products. This includes businesses that are retailing locally made goods directly to the public, and those in hospitality sector that are using them in their business, on their menu, or as part of their decor etc.

The business data presented here comes from the 19 respondents to the local business survey representing 23 Ballycastle businesses.

Ballycastle has been singled out as a case study because the NNCG market began in Ballycastle and that community/economy has had the most time to become familiar with and feel the impact of the markets.



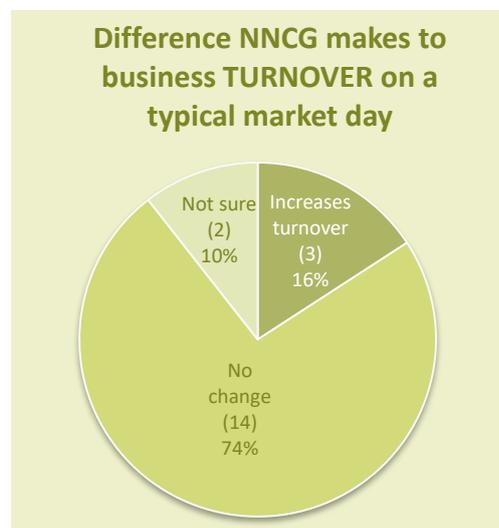
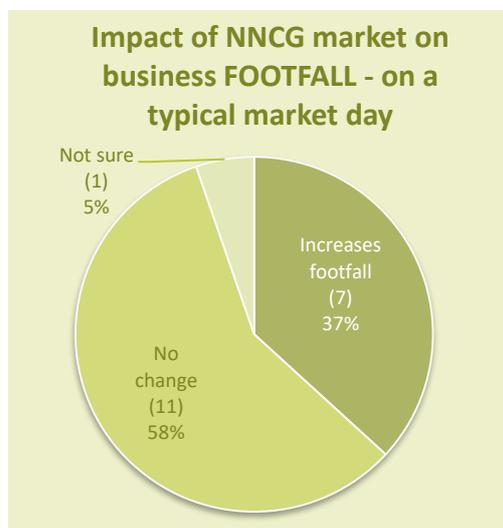
Increasing local business turnover / expenditure in the local area

Measuring NNCG's impact on local business turnover is difficult. Our surveys provide some indication of the extent of the impact from the businesses point of view as well as from self-reports of spending in local businesses by market members, and customers, that can be attributed to NNCG.

As reported above, many local businesses were very positive about the market as an asset to the area and as an attraction for visitors. However, less than half (47%) of the local business survey respondents reported that the market has a positive impact on their business.



Our survey asked businesses what difference the market made to their footfall and turnover on market days. This is not the same as estimating the overall difference the market's existence makes to their businesses over the course of the year through raising the profile of the area and attracting visitors etc—but that would be difficult to assess without more detailed information from businesses, so for this project, the difference on a market days is more tangible.



Our survey showed that on a market day 37% had increased footfall, and 16% had increased turnover. Those reporting an increase in turnover on average reported an increase of 6.33% on market days.

Ave % increase in turnover experienced by those who noticed an increase on NNCG market day

6.33%

The self-reported spending data available from the NNCG members survey and the customer survey is outlined below, and provides some more detail on the financial contribution the market makes to the local economy.

NNCG artisan traders have developed their small businesses helped by the support and sales platform provided by NNCG. On average they attribute just over half of their turnover (51%) to NNCG. These supported businesses are then in a position to contribute in the local economy by buying goods and services locally.

42% of local businesses surveyed were aware of NNCG artisans / traders using or purchasing from their business.



NNCG members' spend on raw materials and services within 40 mile radius of business (i.e. the wider region)

| | |
|---------|--|
| Total | Total attributable to NNCG market: (i.e. 51% - based on turnover attributable to NNCG) |
| £89,651 | £45,722 |

NNCG Members purchase raw materials and services locally

NNCG members bought some of their raw materials and services locally. We calculated how much this contributed to the local economy within a 10 mile radius of Ballycastle (our case study) and within the wider region (i.e. within a 40 mile radius of their business).

NNCG members' spend on raw materials and services in Ballycastle +10 mile radius

| | |
|---------|--|
| Total | Total attributable to NNCG market: (i.e. 51% - based on turnover attributable to NNCG) |
| £17,160 | £8,752 |

Only 51% of this was considered to be attributable to NNCG, aligning with 51% of business turnover on average—£45,722 to the wider region, and £8,752 to the Ballycastle area.

Market traders make purchases at local businesses (outside of the market) on market days.

On market days, 83% of NNCG Artisans / Market traders spend an average of £14.43 each on coffee, fuel, etc. in local businesses outside of the market—totaling £10,941 in Ballycastle and £19,645 across all NNCG market venues.

| | |
|---|---|
| % of traders who regularly spend in local businesses (coffee/fuel etc) on market day | Average spend per trader in local businesses (coffee/fuel etc) per market day |
| 83% | £14.43 |
| Total trader spend at local businesses on NNCG market days in Ballycastle (2019) | Total trader spend at local businesses on market days across all NNCG market venues (2019) |
| £10,941 | £19,645 |

Market customers and visitors make purchases at local businesses (outside of the market) on market days.

On market days in 2019, 91% of NNCG purchasing customers/visitors spent an average of £36.07 each in local businesses outside of the market.

£1.22 was spent in local businesses for every £1 spent at the market—totaling £381,779 in Ballycastle and £685,489 across all NNCG market venues.

However, customers said they would have spent 51.58% of this anyway (63p), so the remaining 59p (48.42%) of it can be attributed to being at the market.

That's a ratio of 0.59:1.

This works out at £184,838 in Ballycastle and £331,880 across all NNCG market venues.

| | |
|--|--|
| % of customers who spent at NNCG market, also spent at local business | Average local business spend per purchasing NNCG customer |
| 91% | £36.07 |
| £s spent in local business for every £ spent at NNCG market (Ratio of 1.22:1) | Amount attributable to NNCG market (Ratio of 0.59:1) |
| £1.22 | £0.59 |

| NNCG customer/visitor spend in local businesses outside NNCG's Ballycastle market (2019) | |
|---|--|
| Total | Amount attributable to NNCG market (48.42%) |
| £381,779 | £184,838 |

| NNCG customer/visitor spend in local businesses outside all NNCG market venues across the region (2019) | |
|--|---|
| Total | Amount attributable to NNCG markets (48.42%) |
| £685,489 | £331,880 |

Negative Impacts on Local Business and Economy

Local businesses expressed concern about two possible negative impacts as a result of NNCG's operations /markets—parking problems and trade displacement /concentration.

Parking Problems - The main negative impact mentioned by local businesses in Ballycastle was reduced parking availability. 16% saw this as a problem.

NNCG manages the traffic flow of traders, staggering their access to the market site at the beginning and end of a market day for unloading and loading their goods, and specifies, as much as possible, where traders should park

" The only issue we seem to face is parking issues for customers who struggle to find space due to the market"

(Local Business)

in order to minimise parking congestion and maximise parking availability near the venue for customers. Lack of adequate parking space is an ongoing problem for Ballycastle's seafront area throughout the tourist season, even on days without markets.

Cost of Parking Problems -

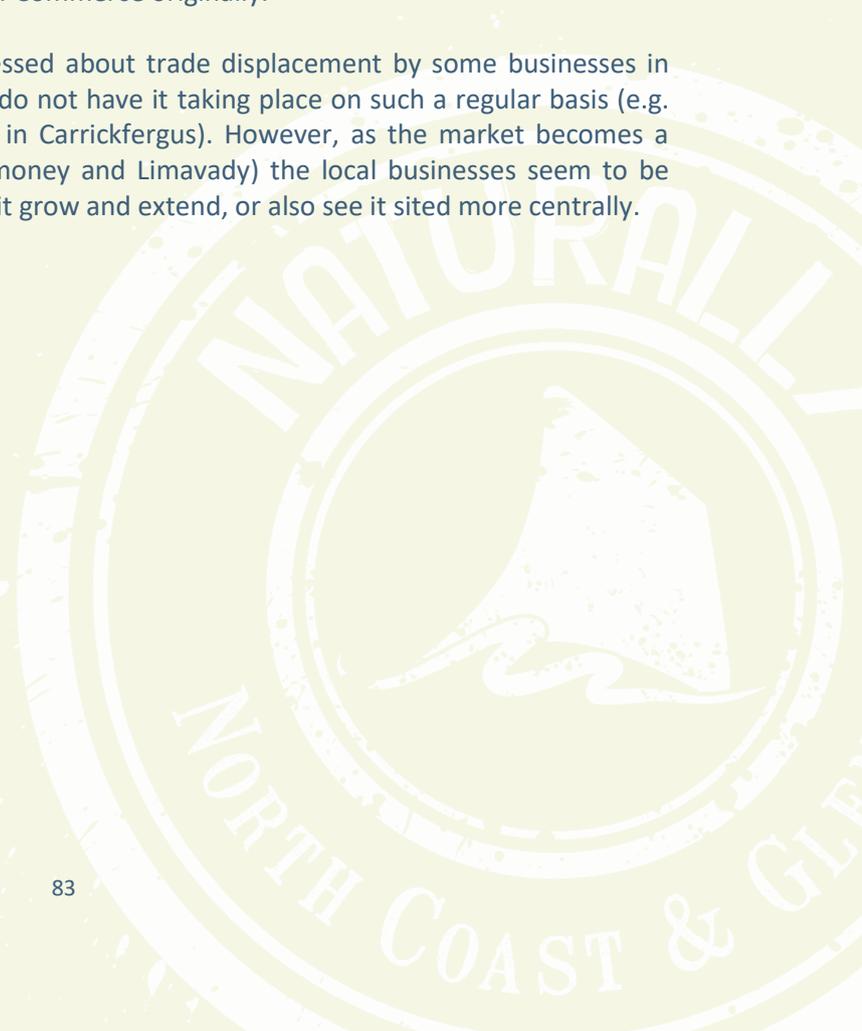
- The cost of increased traffic is included in the environmental impact section of this report and is calculated in terms of the social impact of increased Greenhouse Gas emissions.
- The cost to businesses of their customers experiencing parking problems has not been estimated—further work would be required to explore this. However, as there appears to be an overall increase in turnover for local businesses, the cost is perhaps less than the benefit.



Concern about trade displacement - 10% of the of Ballycastle businesses were concerned about potential trade displacement from the town centre to the market—which is located in the seafront area—although they also said that it wasn't a great concern as most of the markets are on a Sunday when most businesses are closed in the town centre.

Others were keen for the market to sometimes take place in a more central location within the town, as they feel it would be of more benefit to the businesses nearby. Generally however businesses support the market taking place because it attracts visitors to the town - which is why it was started by the Ballycastle the Chamber of Commerce originally.

Beyond Ballycastle, concern has been expressed about trade displacement by some businesses in communities that are new to the market or do not have it taking place on such a regular basis (e.g. Bushmills and more recently, further afield in Carrickfergus). However, as the market becomes a more regular feature in an area (e.g. Ballymoney and Limavady) the local businesses seem to be becoming more supportive, and want to see it grow and extend, or also see it sited more centrally.





"Collaboration at all levels has made a difference—it is mutually beneficial and good for sustainability"

(Local Authority Employee)

Impact on Local Authorities

One of the key stakeholders, that NNCG makes a difference to, is local authorities.

Local authorities/Councils in Northern Ireland have responsibilities related to regional level town planning, event management, business development, community development, tourism/visitor information services, as well as the administration and the enforcement of street-trading, environmental health and waste management legislation. All of these are relevant to the work that NNCG does.

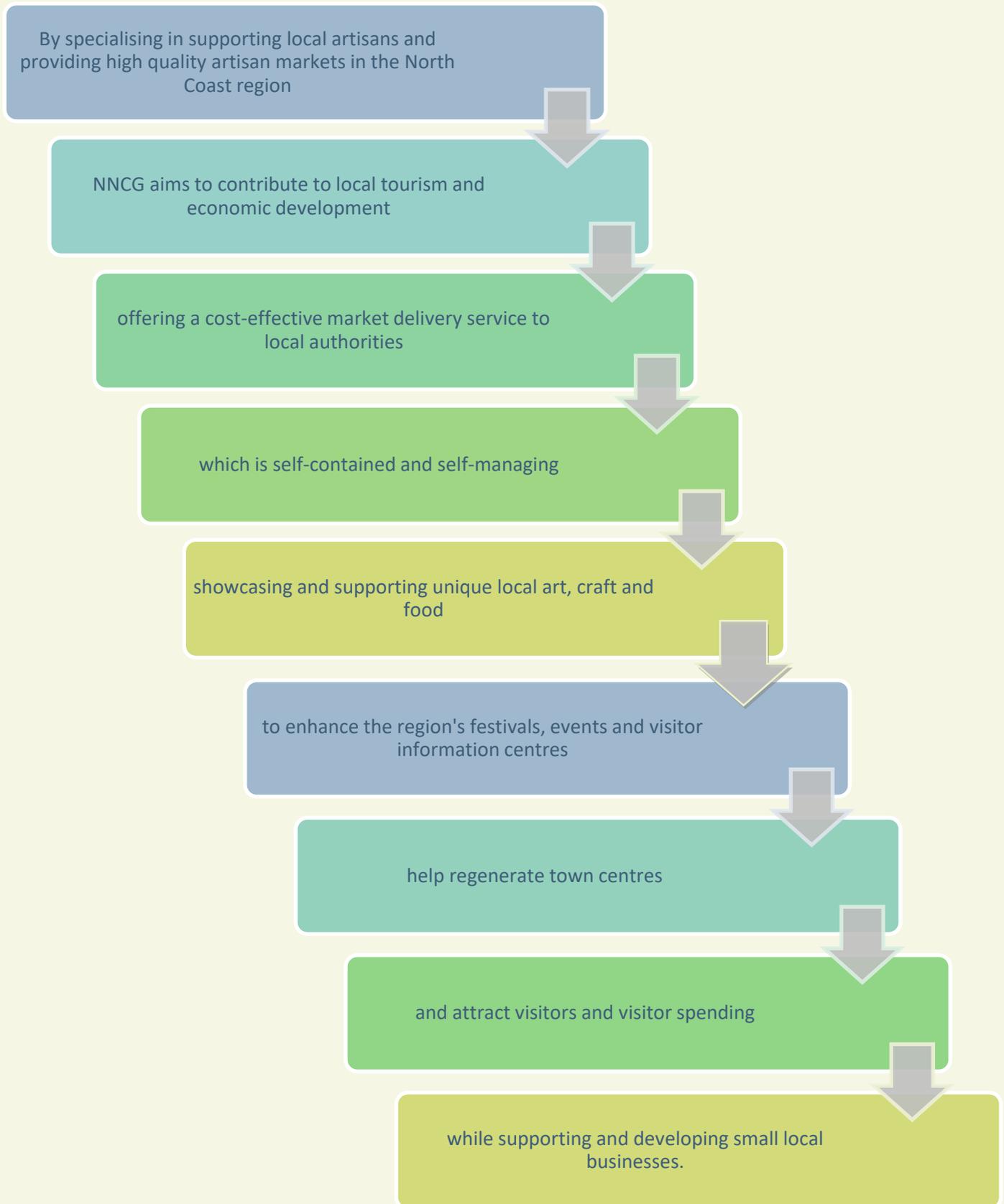
At a basic level, the operation of outdoor markets and events requires a great deal of interaction between NNCG and local authorities in order to ensure that all legislation is adhered to, permissions and licenses are sought and fees are paid.

At a higher level, NNCG and council departments collaborate in order to meet wider goals around enhancing the region's tourism potential, economic development and community development, working to everyone's benefit.

In order to find out more about the impact that NNCG has had on local authorities, we captured the views of 13 local authority employees/council staff by undertaking:

- a series of four impact focus groups/meetings with local authority employees/council staff with a range of responsibilities, and
- a Visitor Information Centre (VIC) staff survey to explore the impact of NNCG on local VICs.

NCCG's Simple Theory of Change for Local Authorities



Market delivery

"NNCG is a fantastic quality market - exceptionally good"

(Local Authority Employee)

One of the biggest differences NNCG has made to local authorities—mostly the Causeway Coast and Glens Borough Council (CCAGBC), but also increasingly the Mid and East Antrim Borough Council (MEABC)—is market delivery.

During 2019 NNCG ran 21 markets at the request of councils. These included both standalone markets, and markets as added attractions at council-organised events and festivals.

The results for local authorities were enjoyable public events taking place in their borough that were cost-effective, well-organised, well-managed, and attractive to tourists, as well as providing a social occasion for local communities:

"Local people like to have their 'own market' - it gives a sense of pride and they like to support it"

(Local Authority Employee)

- **Standalone markets** - Roe Valley Speciality Market is a locally branded market run by NNCG for the CCAG borough council. It met a need within the local community that could not be met by council itself within its existing capacity.

"It is a well-managed, off-the-shelf market solution"

(Local Authority Employee)

- **Added attraction at festivals and events** - NNCG runs markets at various council festivals and events around the region, including signature events like Airwaves, Rathlin Sound Maritime Festival, the Ould Lamma Fair, and the Salmon and Whiskey Festival. Local authorities have the funds and control of infrastructure and legalities but lack the practical management capacity, so engage NNCG to partner with them.
- **Food provision and collaboration** - The NNCG market includes good quality 'gourmet' or 'artisan' hot food producers as well as those who sell food to take home. For this reason it is an added bonus to have at events. It can meet the need to provide food, without event organisers having to find, engage or manage vendors.

"It takes the weight off"

(Local Authority Employee)

NNCG and CCAGBC had previously collaborated during the 2016 Year of Food and Drink to facilitate the showcasing of local food, and enable producers to undertake cooking demonstrations at markets and events. It was noted during focus groups that the legacy of that collaboration continues.

- **Promotions and marketing** - The focus groups pointed out that engaging NNCG to put on markets at festivals and events works really well for marketing the events as NNCG provides 'double exposure'—NNCG advertises the events it attends, as do the artisans who will be trading...all of which provides additional PR for the event. They noted that NNCG's social media and web presence is 'great'.

- **Relationship management** - It was noted that NNCG has frequently been in the position of relationship manager between local communities and the local authorities in the organisation of festivals and events in which it is involved. This particularly includes the Bushmills Salmon and Whiskey festival and the Rathlin Sound Maritime festival.

- **Efficiency / Cost-effectiveness** - All of the focus groups stressed how well organised and well run the NNCG markets are, and most of them specifically identified the skills of the current manager as being key to NNCG's success.

"The 'difference' it makes is in the management of the infrastructure and logistics...it's the management skillset and knowledge"

(Local Authority Employee)

Local authority/council staff have developed trust in NNCG's ability to make sure that all Health and Safety rules and other legislative requirements are adhered to, so that as a result there is little impact on Council's

administration or enforcement services. This means that involving NNCG is a safe, efficient and cost effective option.

They noted that their previous experience, without NNCG, had involved much more work by local authority employees/council staff in tendering and engaging more with providers.



NNCG Artisan Market

The cost of delivering a market has been conservatively estimated to be at least £2000 per market⁵³ (based on previous CCAG figures), so the financial value of NNCG's service to local authorities in 2019 has been approximated as £42,000. Accounting for funding of £1,280 to

⁵³ £2000 is a conservative estimate of financial value based on CCAG's publicly available 2012 figures on its in-house cost of running markets: https://www.whatdotheyknow.com/request/financial_cost_of_causeway_speci?fbclid=IwAR01OI_X14AL-O0dO3JtWrluNRyr2X_pftW6rvnXAWAU_dbAlMsRqaaNjDw#incoming-288306

NNCG from local authorities, the value of the market delivery service to them would then be £40,720. However, as also described in previous sections, the social value of these markets is much higher.

| Markets delivered on request to local authorities or as part of a council-organised event/festival (2019) | Value of standalone and event/festival-based market delivery service provided to local authorities (2019) |
|---|---|
| 21 | £40,720 |

- Potential negative impact** - The potential for market saturation, or dilution of the positive benefits, was mentioned as a concern or caution if NNCG was to operate more often, or in more areas across the region. It was noted that with other towns, shopping centres and areas also wanting to have a market, or to have one more often, there was the 'potential for overkill'. However, this was simply a note of caution and not (yet) an outcome.

Business development

Local authority employees felt that by association with NNCG—engaging it to run markets, independently or as part of festivals—local authorities were promoting local entrepreneurship, mobile food providers and artisan producers, because it uses local skills and products.

"It is inspirational - can inspire others to think about doing it themselves"

(Local Authority Employee)

- Business testing ground** - One of the benefits mentioned by focus groups was the platform offered by NNCG for entrepreneurs and businesses wanting to market-test ideas for new businesses or new products. They cited local businesses that had begun and developed through trading at the market: e.g. Ursa Minor Bakehouse, North Coast Smokehouse, Infuse Tea.

- Start-up support and training** - The training and support offered by NNCG to new traders starting out was highlighted, along with the collaborative approach to the CCAG borough council's Journey to Market programme and NNCG's Make it to Market programme, as helping to bring new traders and a better quality of market business to the borough, including to the council-run Causeway Speciality Market in Coleraine.

"It is nice to work with the group...it is not competing - we have good working relationships/work collaboratively"

(Local Authority Employee)

- Relationship management** - Focus groups talked about NNCG's relationship management skills not only in relation to event and festival management, but to other areas as well. For example NNCG liaised between the local authority, recycling officer, and the NNCG's market businesses to help administer the new 'bag levy' legislation, where traders would have to either charge customers for any bags they provided, not offer a bag at all, or offer a free alternative.

Local Visitor Information Centres

In addition to our series of impact focus groups/meetings with local authority employees, the impact of NNCG on the local Visitor Information Centres (VICs) was also explored in a VIC staff survey.

The biggest difference:

Availability of good quality local crafts

The biggest difference the NNCG market group has made is the introduction of local crafters' products to VICs where they are available to be purchased by visitors and local people all year round.

Our survey including a question to find how much interest staff felt their visitors had in local products, makers and markets. The following are staff estimates, so simply provide an indication, but interesting nonetheless.

"It's great to offer and showcase local produce and I'm proud to tell visitors about local artisans not just here but across the Causeway area"

(Local Authority Employee)

"Visitors are very interested in the local crafts and artisan produce in the Market and in turn often comment on the variety of these items we sell in the Visitor Information Centre"

(Local Authority Employee)



Local VIC staff, like other non-government visitor centre staff (e.g. from the Giant's Causeway) go along to the NNCG markets to source new suppliers and new products for their shops. They sometimes work with local producers to create items more suitable for the tourist retail market.

The role that the NNCG organisation plays is in supporting local artisans to bring their products to market professionally, enabling them to make a small business of their craft and exposing them to new customers and stockists.

This creates a healthy supply of local craft products for outlets such as the VICs—staff even questioned whether there would be any suitable crafters in the region without the NNCG market support.

"Would we even have any crafters without the market?"

(Local Authority Employee)

The VICs give priority to crafters from the local Causeway Coast and Glens borough and charge them a lower commission rate than those from outside the borough, stating that their priority is supporting local economic development through local small business and entrepreneurs.

The VICs have a total of 77 crafters listed on their books, most of whom are from the local area and trade at NNCG markets. In 2018/19 financial year, the turnover from sale or return craft items sold in Visitor Information Centres was £20,145. If only three quarters of the crafters (58) were supported by NNCG (a conservative estimate) then the associated turnover would be £15,109.

"The market provides a centralised location where visitors and artisans/makers can engage"

(Local Authority Employee)

Number of NNCG-supported crafters estimated to be selling products through VICs

58

Turnover (estimate) from NNCG-supported crafters' products sold through VICs (2018-19)

£15,109

A visitor attraction

NNCG markets are actively promoted by the VIC staff. They can be standalone events or an added attraction as part of a bigger festival. According to the VIC survey:

- Visitors love the atmosphere and spend more time and money in the borough as a result.
- The markets provides opportunities for authentic engagement with the local artisans, culture and community.

" The Markets bring a lot of locals and visitors and usually when the Markets are on we would be busy"

(Local Authority Employee)

Increased promotion

The VICs, and the local borough in general, benefits from NNCG providing additional promotion and marketing for bigger festivals and events that it is part of, through both its own social media and through that of the traders.

Increased VIC footfall

Three quarters of VIC staff surveyed said that the number of visitors to their VIC increased on market days, with an estimate of 25% more than on a normal day.

"Visitors would come into the Centre before they go to the Market or on their return."

(Local Authority Employee)



Ulster Wildlife at NNCG Artisan Market

"The market has raised my awareness of environmental issues."

56%
Customers

Impact on the Environment

This research has provided an interesting starting point for considering NNCG's environmental impact and the role that members and visitors play in it.

To what extent is the organisation's environmental impact dependent on the environmental sustainability of its traders' and visitors' practices, and their carbon footprints as they relate to the market? These are aspects which would need to be explored further.

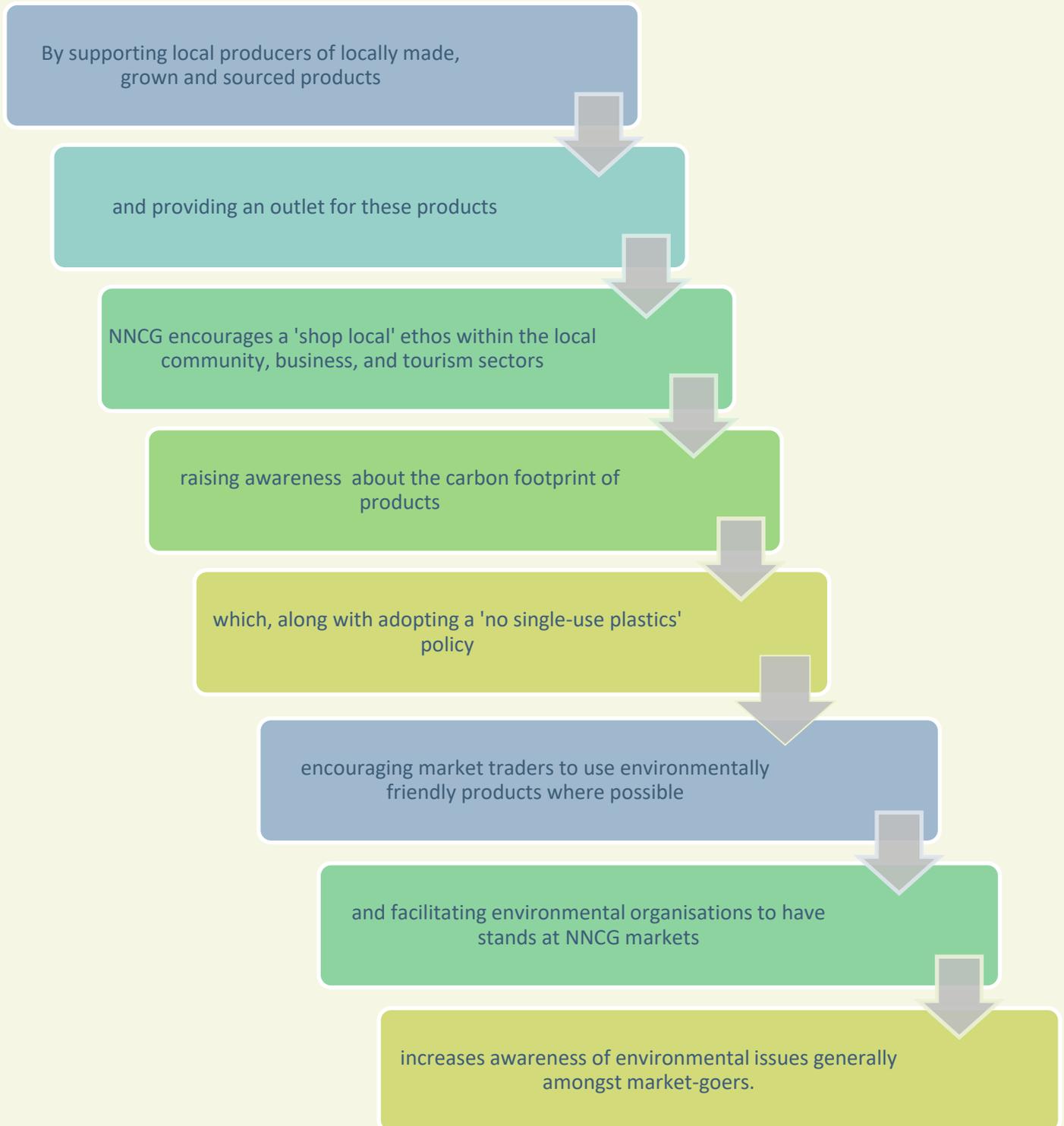
In the first instance this impact research has surveyed NNCG members about the environmental nature of their products and packaging, as well as their waste disposal. The data itself is a useful beginning - but the

process of asking also introduces the idea that this is something to be focused on for the future as all businesses need to be more conscious of their environmental impact.

This research also estimates the extent and cost of Green House Gas emissions associated with transporting visitors and traders to the market, as well as the carbon footprint of the organisation itself.

NNCG is in the early stages of measuring its environmental impact, and while the organisation has environmental policies in place, such as a 'no single-use plastic' policy, it is an evolving area, and policies will be continue to be updated and revised, along with measurement practices.

NCCG's Simple Theory of Change for the Environment



Increased awareness of environmental issues

NNCG is aware of the climate crisis and the need for everyone to become more conscious of their role in either exacerbating or helping to alleviate the crisis.

NNCG has worked with environmental organisations to facilitate their presence at some of NNCG's markets, where they can inform and educate the community about a range of environmental issues.

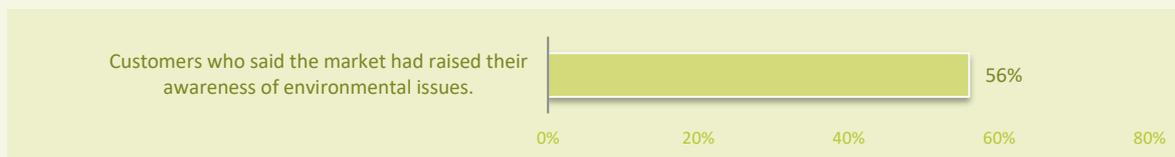
This has been beneficial for the organisations and for the community.

This kind of overt environmental education, together with the more subtle messages conveyed by

the lack of single use plastic, and by artisans using more environmentally materials where possible, has contributed towards 56% of customers saying that the market has raised their awareness of environmental issues.

" Thank you for all the support you have given us this year it has been an amazing year for us! We have seen membership grow by a fantastic 6% this year (to put that into perspective, the average across the Wildlife Trusts is only 1.4%) - which all means more money for our local nature conservation work! This growth would not be possible without the support we get from yourselves allowing us to come along to the markets."

(Ulster Wildlife Trust)

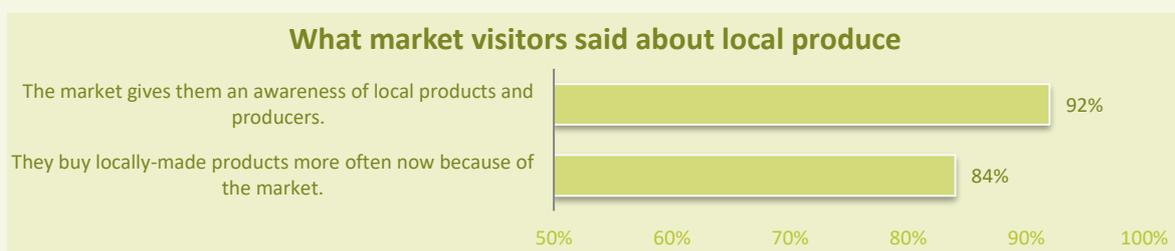


Increased awareness and purchasing of local products

NNCG is strongly focused on locally-grown, locally-sourced, and locally-made products, in order to reduce the region's carbon-footprint, reduce food-miles (with associated air pollution) and encourage a shop-local ethos, to support both the environment and the local economy.

The criteria for membership and trading with the NNCG market prioritise the local nature of the goods, and this is what customers have come to expect from NNCG markets. For example producers and makers are encouraged as far as possible to source their raw materials or ingredients locally.

In a recent survey 92% of market visitors said that the NNCG market gives them an awareness of local products and producers, and 84% of them said they buy locally-made products more often now because of the market.



Products, packaging, and waste disposal

NNCG is committed to ethical trading standards and environmental sustainability. No single-use plastic packaging is allowed at markets, and the organisation actively promotes and encourages the use of environmentally-friendly materials.

This is not straightforward however, as the terminology and waste disposal infrastructure for environmentally-friendly and sustainable packaging is still evolving and causes confusion.

For example, the terms *biodegradable* and *compostable* applied to packaging might mean quite different things to the manufacturer and the end consumer—and the infrastructure required to dispose of them appropriately (e.g. waste collection and separation systems, or industrial composting plants) is not necessarily available in all geographical areas⁵⁴.

Despite NNCG's requirement for all take-away food traders at markets to serve their products in recyclable or compostable containers, the waste disposal systems are not always in place for customers to then dispose of these

Suggested improvements:
"More bins and recycle points."

(Customer)

items appropriately.



In order for the organisation's policy to be fully effective there needs to be appropriate, cost-effective, waste-collection points, and industrial systems in place (e.g. industrial composting infrastructure) in the region.

The members' survey included questions about the sustainable nature of their products and packaging, as well as how they disposed of any waste they produced.⁵⁵ The questions used four sustainability/environmentally-friendly categories—recyclable, reusable, biodegradable and compostable—to provide a high level indication of the different types of materials being used.

⁵⁴ WRAP and The UK Plastics Pact, Understanding plastic packaging and the words we use to describe it, <https://wrap.org.uk/sites/files/wrap/Understanding%20plastic%20packaging%20FINAL.pdf>

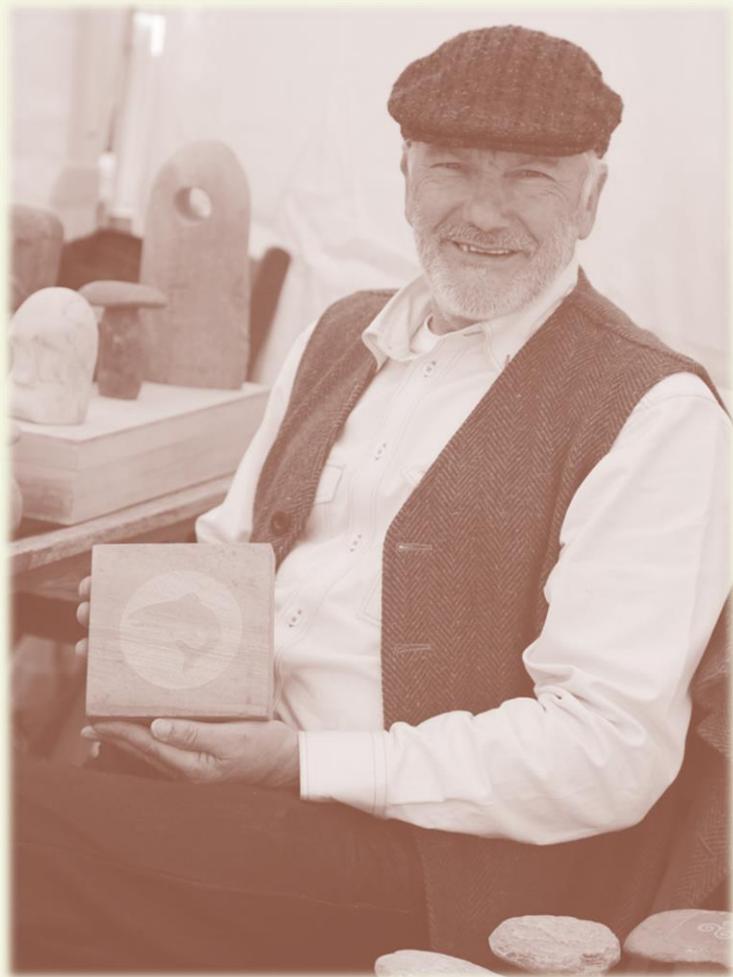
⁵⁵ The questions around sustainability of products, packaging, and waste disposal were only answered by about two thirds of the surveyed members—the graphs in this section display the results as proportions of all members surveyed. There are two probable reasons for this. Firstly, the questions were complex and possibly confusing and perhaps need to be simplified and clarified for future surveys, and secondly, the answers require knowledge and information that members might not know or ever have previously thought about.

Assessing the true sustainability of products and packaging would require more information about the whole life-cycle of the individual materials used.

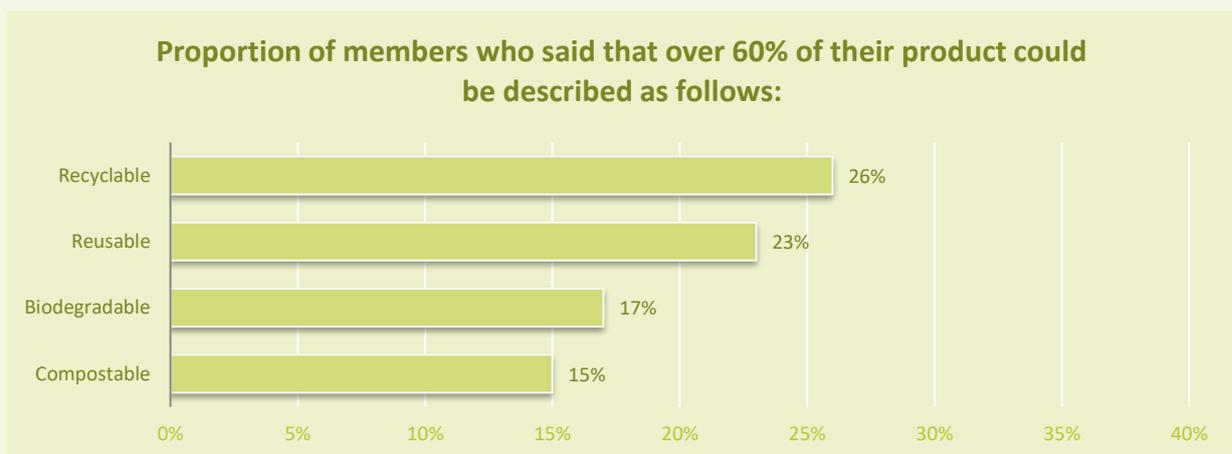
Product materials - Less than half of those surveyed said that some proportion of their product could be described as recyclable or reusable (45%), compostable (40%) or biodegradable (38%).

There are members who make their products out of wood, stone, glass, and natural fibres, for whom most of their product is sustainable or environmentally friendly, and which needs little packaging, as well as food producers for whom packaging can be more problematic, even if the contents are compostable.

The proportion that could claim that over 60-100% of their product fell into these categories is shown in the chart below—about a quarter said that over 60% of their product was recyclable (26%) or reusable (23%) and less than a fifth claimed that over 60% of their product was biodegradable (17%) or compostable (15%).



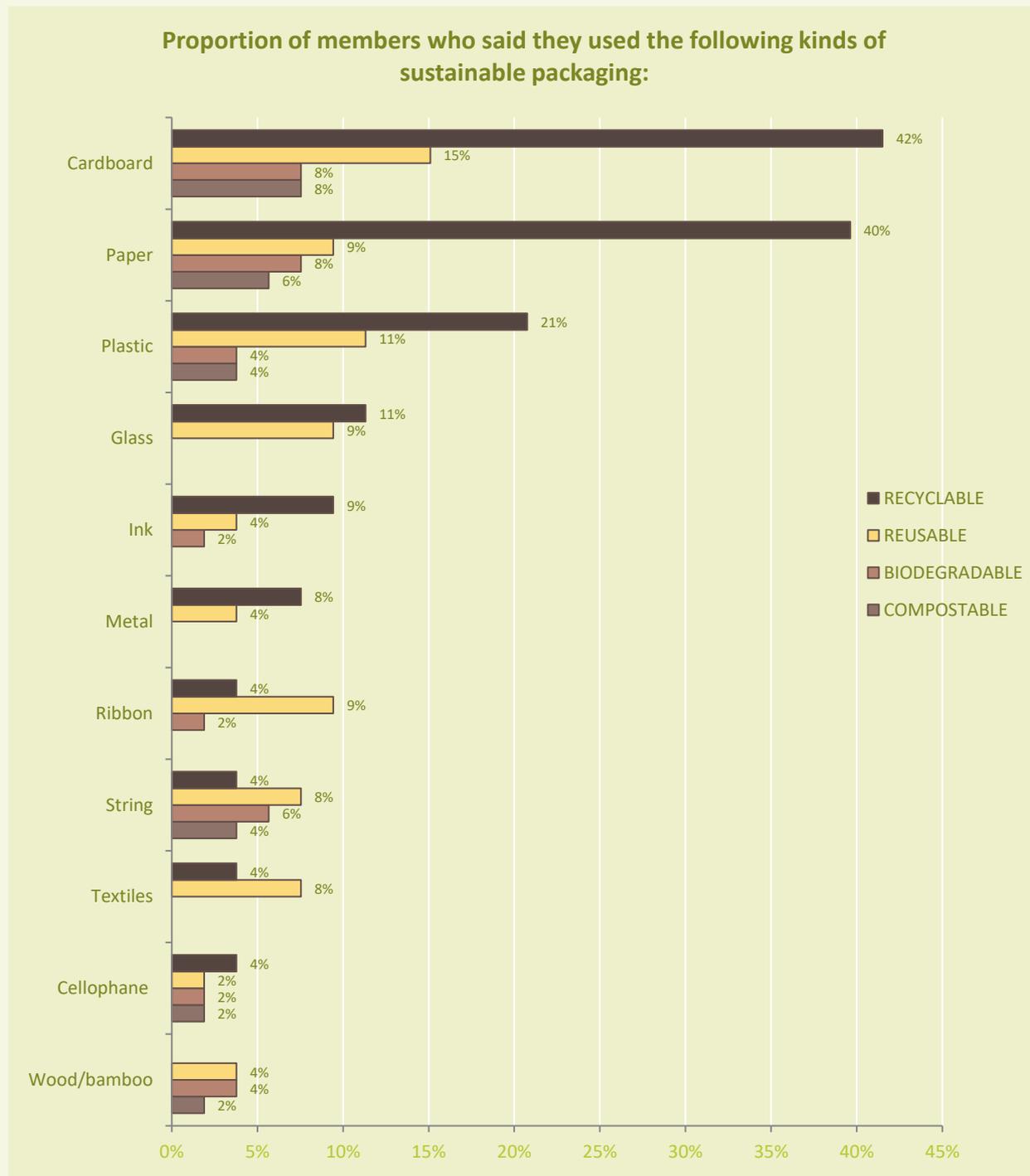
Norman Heggarty, Blue Dog Crafting, NNCG Member



Packaging materials - The chart below shows the proportion of members that used packaging materials which had any 'sustainable' features (i.e. that were recyclable, reusable, biodegradable or compostable).

It will be interesting to see how this picture changes over time as consumers demand more sustainable and environmentally-friendly products and packaging.

- The most commonly used materials were:
- recyclable cardboard (42%)
 - recyclable paper (40%)
 - recyclable plastic (21%)
 - reusable cardboard (15%)
 - reusable plastic (11%)
 - reusable glass (11%)



Waste disposal - About half (49%) of those surveyed said that some proportion of their waste was recycled, 45% said some of their waste went to landfill, and 40% said some was composted.

Less than a third (30%) said that over 60% of their waste was recycled, 6% said that over 60% of their product was composted, and went to landfill, and a few (4%) weren't sure where 60-100% of their waste went.



More focused research is needed with members on use of sustainable materials and waste disposal⁵⁶.

Carbon footprint - Greenhouse Gas (GHG) (including Carbon Dioxide (CO2)) Emissions

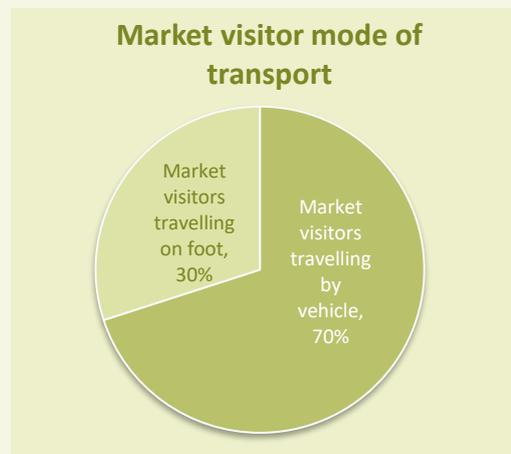
One of the ways an organisation can assess its environmental impact is to calculate its Carbon Footprint—its GHG & CO2 emissions.

A fully accurate measurement of NNCG's carbon footprint or environmental impact would, to some extent, require information about the carbon footprint of the members/trading businesses it supports—as arguably they would not all be operating to the same extent if NNCG did not exist (as stated by members in this impact research).⁵⁷

However, what can be gauged at this stage are the GHG & CO2 emissions from the transporting of people and goods to and from markets.

The customers' survey showed that more than two thirds (70%) of visitors to the market travelled by vehicle (cars or campervans), while 30% travelled on foot.⁵⁸

Overall this resulted in 26,083 return vehicle journeys by market visitors in 2019—at an average length of 19.3 miles each—a total of 1,005,703 miles.



However, the proportion of visitors who drove to the area specifically because of the market was 36%—so we can say that NNCG accounts for 36% of these miles, or approximately 367,082 miles.

Add to this the total miles traveled by traders bringing their products to markets—54,600—and the grand total is 421,682.

⁵⁶ The questions used in the environmental part of this survey were overly-complicated—simpler questions in future research could provide clearer data.

⁵⁷ This information has not been asked of members yet, but it is something the organisation will be working towards with its members in 2020-2021.

⁵⁸ This particular survey question illustrates the need to undertake the survey at a wider range of markets. The result here is perhaps very reflective of the nature of the Ballycastle market - the lack of public transport, and the number of people living within walking distance. However, it was somewhat surprising that there wasn't one cyclist amongst the survey respondents.

Cost of GHG & CO2 Emissions

We can calculate the total emissions, and their social/environmental impact in economic terms, using the average tailpipe emissions of an average car per mile⁵⁹, multiplied by the number of miles driven, and the estimated social/environmental cost, per tonne of emissions⁶⁰.

| GHG & CO2 Emissions per mile | Social/environmental cost of GHG & CO2 emissions per tonne |
|------------------------------|--|
| 404g (0.000404 tonnes) | £66 |

The total social and environmental cost of emissions from market customers (£5,451) and traders (£816), travelling by car to the Ballycastle markets, is £6,267.

| GHG & CO2 Emissions and Costs - NNCG Ballycastle Markets (2019) | | | |
|---|------------------------------|---------------------|--|
| | Number of miles attributable | GHG & CO2 emissions | Social/environmental cost of emissions |
| Market Visitors | 204,444 miles | 82.60 tonnes | £5,451 |
| Market Traders | 30,600 miles | 12.36 tonnes | £816 |
| Total | 235,044 miles | 94.96 tonnes | £6,267 |

The total social and environmental cost of emissions from market customers (£9,788) and traders (£1,456), travelling by car to all of the 2019 NNCG markets in the region (including Ballycastle), is £11,243.

| GHG & CO2 Emissions and Costs - All NNCG Market Venues (2019) | | | |
|---|------------------------------|----------------------|--|
| | Number of miles attributable | GHG & CO2 emissions | Social/environmental cost of emissions |
| Market Visitors | 367,082 miles | 148.30 tonnes | £9,788 |
| Market Traders | 54,600 miles | 22.06 tonnes | £1,456 |
| Total | 421,682 miles | 170.36 tonnes | £11,243⁶¹ |

⁵⁹ Greenhouse Gas Emissions from a Typical Passenger Vehicle (PDF) (5 pp, 507 K, EPA-420-F-18-008 March 2018, About PDF) <https://www.epa.gov/greenvehicles/greenhouse-gas-emissions-typical-passenger-vehicle>

⁶⁰ Cahill, N. and O'Connell, L., 2018, *Cost-Benefit Analysis, Environment and Climate Change*, National Economic and Social Council (NESC) Secretariat Papers, Paper No. 15, November 2018, (f.n.21, p.42)

http://files.nesc.ie/nesc_secretariat_papers/No_15_CBA_Env_and_ClimateChange.pdf

⁶¹ Totals may appear incorrect due to rounding.

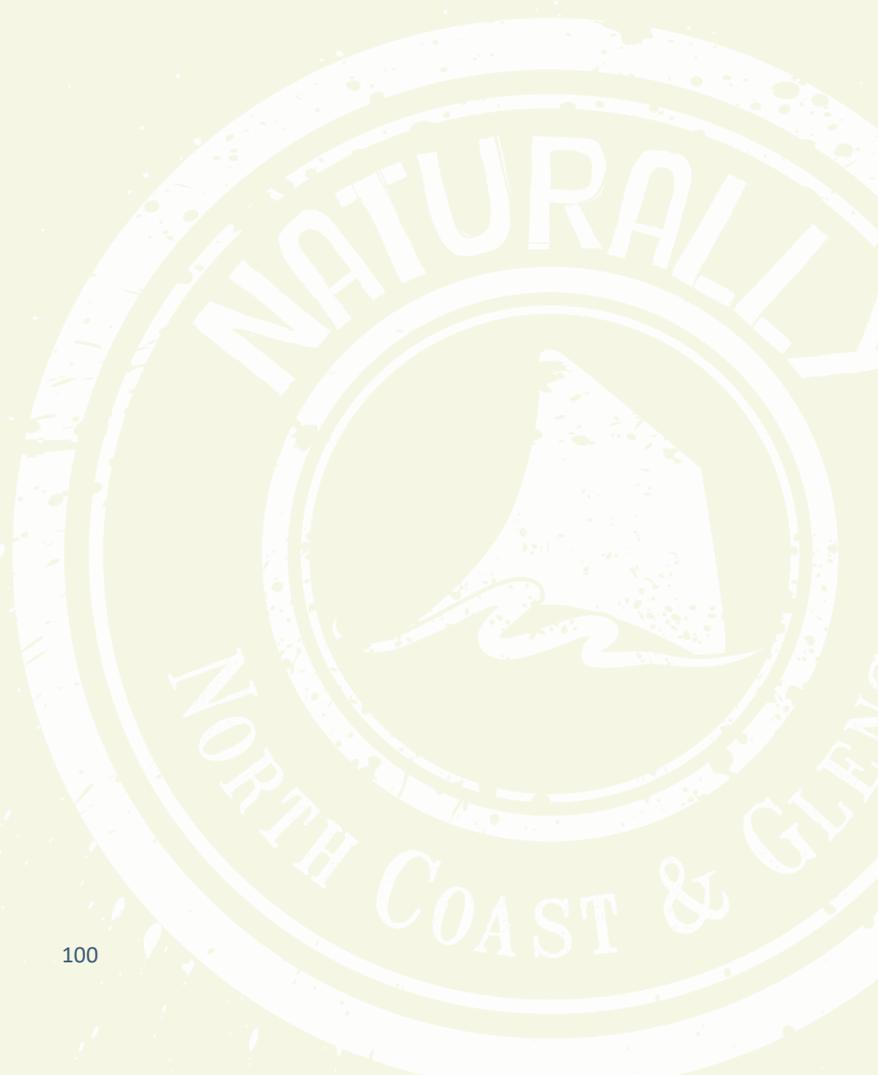
NNCG has also calculated its own very basic 2019 organisational carbon footprint (from power and fuel) to be 2910kgCo2 or 2.91tonnes of Greenhouse Gas (including Carbon Dioxide) emissions, with a social and environmental cost of £192.

| NNCG's Organisational Carbon Footprint | |
|--|---|
| GHG & CO2 emissions | Social/environmental cost of emissions |
| 2.91 tonnes | £192 |

The organisation is looking at Carbon offsetting options as well as how to reduce its own emissions.

Reducing the negative environmental impact of transport to and from markets is to some extent out of the hands of NNCG. However, it can lobby and add weight to the call for much needed improvements to the public and green transport networks in Northern Ireland, in terms of infrastructure, routing and timetabling, as well as reductions in the greenhouse gas and CO2 emissions of private vehicles.

It can support and educate its members and customers too to make environmentally-friendly choices to reduce their emissions, or to consider carbon offsetting options if reducing emissions proves too difficult.



"Well organised and put together. An asset to Ballycastle and surrounding areas."

(Customer)



NNCG Artisan Market

Conclusions

This impact research has shown that the Naturally North Coast and Glens (NNCG) Community Interest Company is truly operating in the interest of the community—and not just in the interest of its artisan traders.

Although the impact on individual artisan traders is understandably greater than the impact on individual community members, the value created by NNCG for the community as a whole, is significant. NNCG improves how people feel about the place they live and makes them feel more optimistic about the future. It increases their sense of being part of a community.

Community members say it improves the reputation of the area, with the enjoyable atmosphere and positive cultural experience it provides, along with its unique, high quality, local art, craft, jewellery and produce. This attracts visitors, supports tourism, and results in increased economic activity in the area, which benefits local businesses.

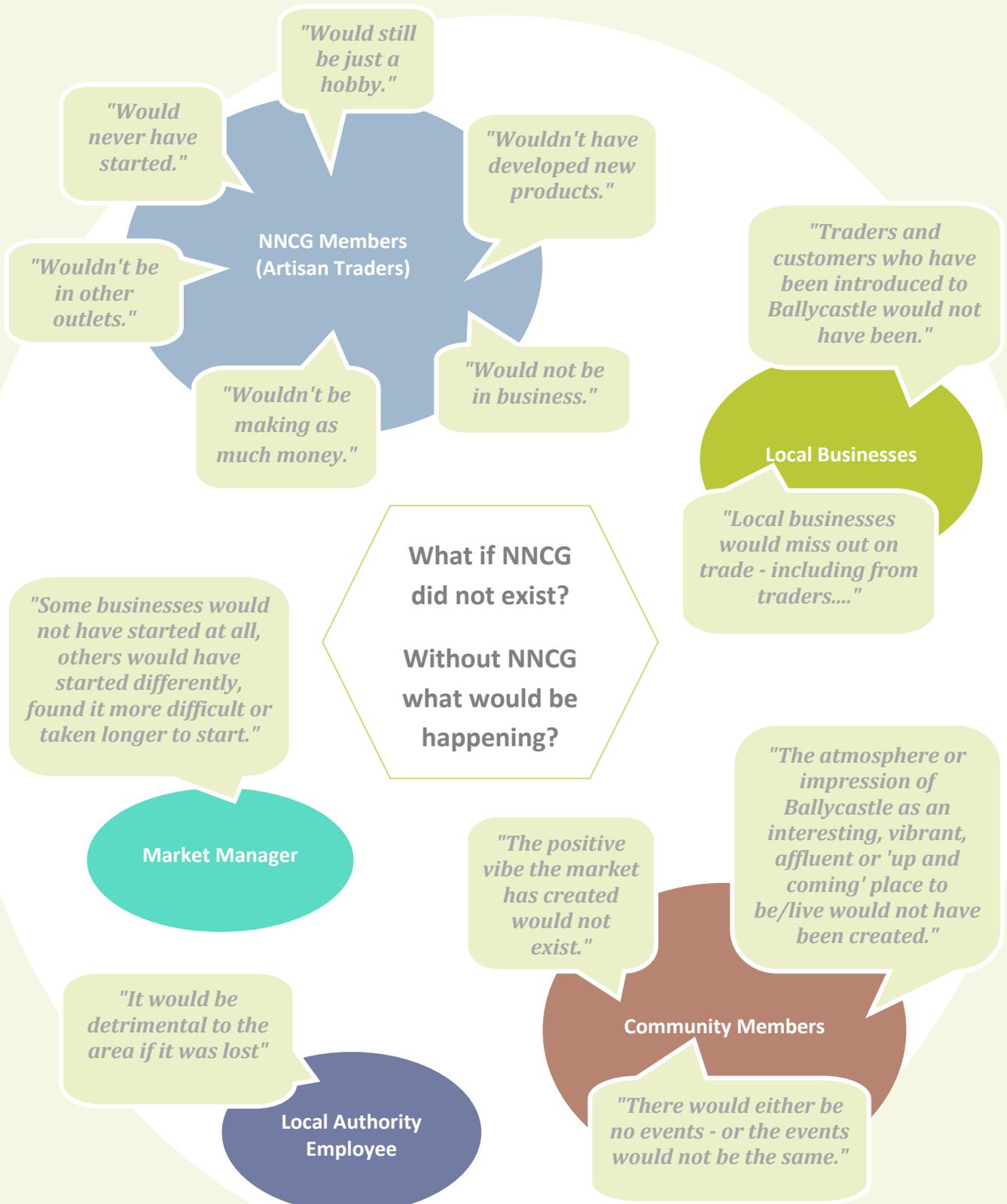
The challenge for NNCG into the future is how to sustain and improve on these great positive outcomes while also maximising its environmental sustainability—helping and encouraging its members and customers to move towards carbon neutrality.

NNCG's overall impact for all stakeholder groups, and for individuals within those groups, is outlined below in monetary terms. Monetary value though is only one representation of how valuable the impact of the organisation is.

The quotes scattered throughout this report speak for themselves in terms of illustrating what NNCG and the market really mean to people, and included below is a sample of what people think would be happening without NNCG/the market, or if it did not exist.

Imagining Life without the NNCG Market

Life would be different for stakeholders if the NNCG market had never operated or stopped operating. Here is what some of them said:



Overall Value of Impact—in Monetary Terms

The total net value created by NNCG for the Ballycastle area in 2019 was just over £6million—£6,013,561.

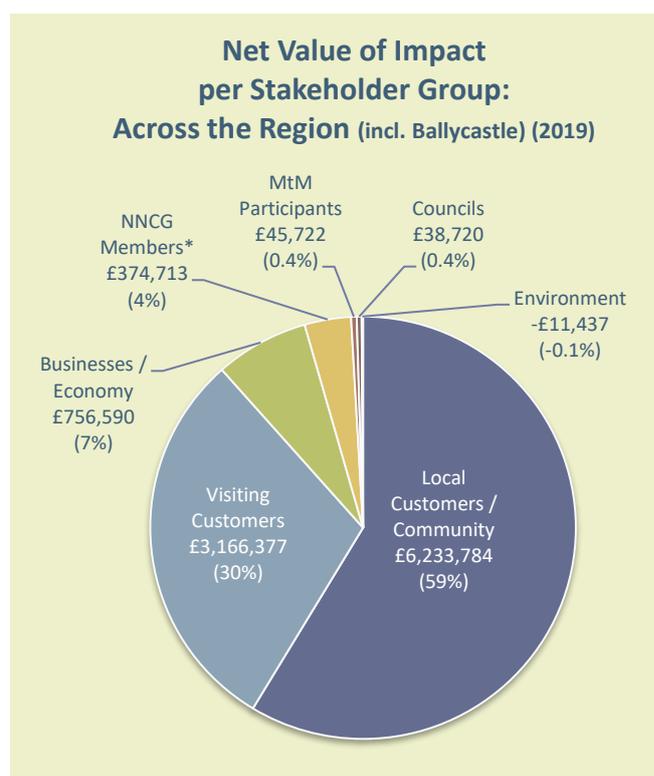
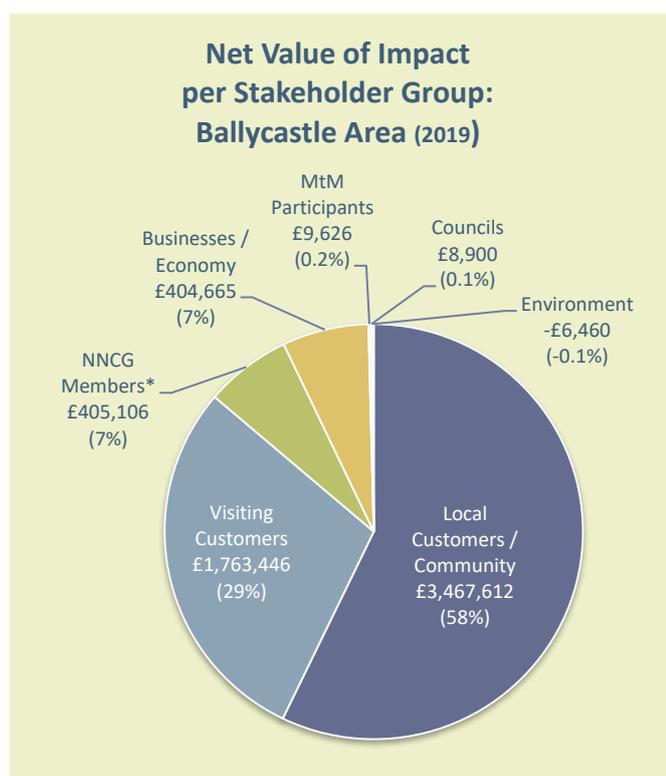
This represents a social return on investment of £19 for every £1 invested.

The total net value created for the wider Region in 2019 was just over £10.5million—£10,521,594.

This represents a social return on investment of £18 for every £1 invested.

| NNCG's Overall 2019 Valuation and Social Return on Investment (SROI) | | |
|--|-------------------|--------------------|
| | BALLYCASTLE AREA | ACROSS THE REGION |
| Net Value Created | £6,013,561 | £10,521,594 |
| Inputs / Investment Value (Time, Money, etc) | £317,643 | £583,378 |
| Social Return on Investment (SROI) Ratio | 19:1 | 18:1 |

The two charts below show the net value of NNCG's social, economic, and environmental impact in monetary terms in 2019 for each stakeholder group in this analysis.⁶²



*Note that the overall monetary value of the impact for Members is lower for markets across the region than for the Ballycastle markets. This is because the time and money (input) invested by members was higher in the regional calculation as they attended more markets, whereas the social and personal outcomes had fixed values for the year (i.e. they did not have a 'per market' value).

This impact value for members is above and beyond the income they earned (living wage) for the time invested/worked to make and sell their goods. That income is included as an input, as it is the value of the time they contributed. For more on inputs see Appendix - Methodology.

⁶² NB. The net values in each chart only take account of inputs/investments from each relevant stakeholder group, whereas the overall net values used to calculate the SROI also take account of inputs/investments from external funders (e.g. Ulsterbank and Rank Foundation).

How the Net Value and Social Return on Investment (SROI) Ratio are calculated

The net value of NNCG's impact is equal to the gross value created in terms of outcomes, minus any proportions that need to be discounted (because for example some amount of the outcome might have happened anyway or someone else might also have contributed to it—as referenced throughout the report) and minus the input or investment that different stakeholders contributed towards achieving the outcomes.

$$\text{Net Value} = \text{Gross value} - \text{Discounted proportions (Deadweight etc)} - \text{Input (Investment)}$$

The Social Return on Investment is the amount of value created relative to the investment required.

$$\text{Social Return on Investment} = \text{Net Value} / \text{Net Investment}$$

(Further detail on the inputs/investments contributing towards NNCG outcomes in 2019, and the discounting used, as well as other information about this research, SROI, or how the calculations were done, please see the detail in the Appendix - Methodology.)

Value to Stakeholder Groups

- The *groups* that benefited most from NNCG's activities in 2019 were the **Community (and specifically Customers living locally)** with 58-59% of the total value created and **Visiting Customers** (those customers living outside the local area) who benefited from 29-30% of the total value.
- The reason for the high value created for these groups is due to the high numbers of individuals in each group benefiting from what the market brings to the local area, and from their attendance at the market—there were 5369 NNCG customers who lived locally and 14855 customers visiting the area during 2019 (across the region).
- **Local businesses and economy** benefited from 7% of the total value. This includes a direct economic benefit of £756,590 to businesses across the region, outside of the market, with £404,665 of that benefiting the Ballycastle area (i.e. within a 10 mile radius of the town).
- **NNCG's members** benefited from 4-7% of the value, depending on whether the focus is on the Ballycastle area (7%), or across the Region (4%). This net value of NNCG's impact on members is the value in addition to the income they earn from the market (based on living wage). As

| Net Value of NNCG's Impact per Stakeholder Group (2019) | | |
|---|------------------|--------------------------------------|
| Stakeholder Group | Ballycastle Area | Across the Region (incl Ballycastle) |
| Community (Including 2991 & 5369 Local Customers) | £3,467,612 | £6,233,784 |
| 8274 & 14855 Visiting Customers | £1,763,446 | £3,166,377 |
| Businesses / Economy | £404,665 | £756,590 |
| 64 NNCG Members (above and beyond income) | £405,106 | £374,713 |
| <i>64 NNCG Members Living Wage Income (also Value of time Invested)</i> | <i>£153,125</i> | <i>£273,438</i> |
| Make it to Market Programme/19 Participants | £9,626 | £45,722 |
| Local Authorities CCAGBC and MEABC* | £ 8,900 | £38,720 |
| Environment | -£6,460 | -£11,437 |

* Causeway Coast and Glens Borough Council (CCAGBC) and Mid and East Antrim Borough Council (MEABC).

members attend extra markets their investment value increases relative to the fixed social and personal outcome values, which is why the net impact value is lower in the regional calculation.

- The value of NNCG's impact on the **Local Authority stakeholder group** appears relatively small when compared to the value created by NNCG for the local community, visitors to the area and local businesses/economy. However, it could be argued that the value created for these groups are all of benefit to Local Authorities, given their roles in relation to tourism, community and economic development.
- This research identified an unintended negative impact for the **environment**—the greenhouse gas emissions, including carbon dioxide, from people and goods being transported to the market. This has been calculated as a social cost to the environment of -£6,460 related to the Ballycastle markets and -£11,437 across the whole region.

Value to Individuals within Stakeholder Groups

NNCG's impact profile looks very different when it is broken down to an individual level.

NNCG Members and aspiring traders benefit most, followed by the local and visiting customers, followed by businesses.

The following values apply across the region:

- As individuals NNCGs 64 members benefit most from NNCG's activities with a total value of £10,155.
 - The average living wage income earned from 2019's NNCG markets per member was £4,273. (This, as explained previously, is considered to be an 'input' / 'investment' in the net value calculations)
 - In addition to income earned from the market, NNCG creates £5,882 of *net* value for each member.



- Make it to market participants on average benefited from £2,406 of value.
- The value to each of NNCG's 5369 Local Customers is £1,161, while to each of the 14855 Visiting Customers the value is £213—a difference due to the additional benefits NNCG brings to the community.

- In order to express the local businesses/economy value in terms of value to individual businesses, the total value has been divided across the number of registered businesses in the Causeway Coast and Glens Borough during 2019, which was 6015. The value to each would be £126 on average. This is really only an indicator however, as the number of businesses actually benefiting is likely to be much smaller.

Following on from this research are some recommendations for NNCG to consider for possible improvements based on the findings, and some recommendations for future impact measurement.

Recommendations

Possible Improvements

The most pressing issue identified in this impact evaluation as requiring improvement, or attention, is the unintended negative environmental impact resulting from the transport of people and goods to NNCG's markets.

While NNCG does not have any explicitly stated aims in relation to desirable environmental outcomes, its 'shop local' ethos, focus on locally produced, grown or sourced products and raw materials, and its policy on "no single-use plastics", all express a desire for positive environmental outcomes. This study was not able to provide, within its scope, any potentially balancing positive impact value resulting from these aspects of NNCG's operation—that would require additional complex analysis.

As NNCG is not directly responsible for transporting goods and people to their markets this is a difficult issue to influence significantly. However there are steps NNCG could take to improve the impact it has on the environment and on the measurement of the organisation's environmental impact—largely involving helping and encouraging its members, customers, and wider society:

- Encourage members to calculate the carbon footprints of their businesses (using online resources), beginning with very basic calculations and gradually becoming more detailed.
- Encourage members to consider their raw material and packaging choices for environmental sustainability.
- Request/encourage/support climate friendly improvements to Northern Ireland's public transport infrastructure, timetabling and routing, as well as for greener private transport options.
- Work towards zero 'waste' and request/encourage/support improved and appropriate recycling and composting infrastructure.
- Support and educate members and customers to make environmentally-friendly choices to reduce their emissions, and consider carbon offsetting options.
- Consider how to reduce NNCG's own emissions and consider its carbon offsetting options.

Future Impact Measurement

A number of questions arose during this research which could be explored more fully in future studies:

- Is any trade displaced from other local or regional businesses that sell similar items? Customers could be asked if they would have bought similar items from other local shops instead of the market, or bought them online instead, or not bought anything similar?

- To a large extent, the impact analysis for 2019 was focussed on the impact of NNCG in the Ballycastle region, and the extrapolated results will therefore reflect that. As the market becomes more embedded in other communities it would be useful for future impact research to include:
 - Frequent dedicated footfall counting at all sites and event types
 - Surveys at each site (town/village) and event type
 - More Business and community feedback from each site (town/village)
 - Include a survey for casual traders.
- Parking problems and traffic congestion were mentioned by the community and local businesses as possible negative impacts of the NNCG market. Further observations and analysis on market days and similar non-market days (e.g. summer weekends) would be useful to determine whether, and to what extent, the market contributes to these problems.
- A number of "Springboard businesses" (started at the market and used it to expand or springboard into new premises, larger businesses etc.) were identified during the research. Placing a valuation on the market's contribution to this was not part of the project but would be useful in further analysis.
- There is scope too for additional, more detailed analysis to attempt to value some of NNCG's activities/policies and ethos on the environment, as outlined above.
- Further work could also refine NNCG's impact measurement approach, updating data requirements for collection, calculation and reporting.

Final Words

By far, the most delightful impact NNCG has had on people is that it has made them feel happy!⁶³

| NNCG made 18,835 people Happy across the region! | |
|---|--|
| 14,245 (96%) Customers visiting the area | "Being at this market has made me feel happy!" |
| 4,527 (84%) Customers living locally | "Being at this market has made me feel happy!" |
| 54 (84%) NNCG Members (Artisan Traders) | "NNCG has increased my levels of happiness" |

While this is not the primary purpose of the Naturally North Coast and Glens CIC it is an extremely positive impact—one worth being happy about!

⁶³ This study did not use a separate financial proxy for happiness, as the concept of happiness was incorporated into other valuations.

Appendix - Methodology

This Appendix supplements, rather than duplicates, the methodological information already provided in the main report—therefore the two ought to be read in conjunction with each other.



Melanie Brown, Project Manager Strategy and Impact (middle), with Iona Starrs, Research Assistant (left), and a survey participant (right), at a Ballycastle NNCG market, 2019

Main methodological approach

Social Return on Investment (SROI)⁶⁴, as introduced in the main body of the report, is the main approach used in this research to understand and measure the value of the social, personal⁶⁵, economic and environmental outcomes created by an activity or an organisation. It is based on the following seven principles:

| | | |
|----------|--------------------------------------|---|
| 1 | Involve stakeholders | Understand the way in which the organisation creates change through a dialogue with stakeholders |
| 2 | Understand what changes | Acknowledge and articulate all the values, objectives and stakeholders of the organisation before agreeing which aspects of the organisation are to be included in the scope; and determine what must be included in the account in order that stakeholders can make reasonable decisions |
| 3 | Value the things that matter | Use financial proxies for indicators in order to include the values of those excluded from markets in same terms as used in markets |
| 4 | Only include what is material | Articulate clearly how activities create change and evaluate this through the evidence gathered |
| 5 | Do not over-claim | Make comparisons of performance and impact using appropriate benchmarks, targets and external standards. |
| 6 | Be transparent | Demonstrate the basis on which the findings may be considered accurate and honest; and showing that they will be reported to and discussed with stakeholders |
| 7 | Verify the result | Ensure appropriate independent verification of the account |

⁶⁴ The SROI Network 2012, The Guide to Social Return on Investment - <http://www.socialvalueuk.org/resources/sroi-guide/> or <http://www.socialvaluelab.org.uk/wp-content/uploads/2016/09/SROI-a-guide-to-social-return-on-investment.pdf>

⁶⁵ Personal outcomes would normally be captured under 'social' but it is this author's view that they are better acknowledged separately.

Data Collection used both quantitative and qualitative methods and a large body of information was gathered—the more outcomes-focussed was used in this analysis and some, more process-focussed, was provided directly to NNCG to use in their continuous improvement process.

| Interviews | Focus Groups | Surveys | Observation |
|---|---|--|---|
| 1 x Market Manager interview | 1 x Focus Group | 53 x in-depth surveys with member traders | Footfall counting x 2 differently sized markets in two different weather conditions |
| 1 x Community Group interview | Meeting with NNCG Committee | 136 x in-depth surveys with customers | |
| 2 x Local business interviews | | 19 x 'before' and 19 x 'after' surveys with "Make It To Market" participants | |
| 4 x interviews with 'new' traders | 2 x Focus groups with member traders | 4 x surveys with festival/event organisers | |
| 3 x interviews with 'experienced' traders | 4 x Focus groups with local authority departments | 5 x surveys with visitor information staff | |
| 3 x interviews with 'springboard' traders | | 25 x surveys with local businesses | |

Data triangulation was used to test the accuracy of the research findings—i.e. comparing data on the same subject by using more than one data source: in this case a range of different stakeholders, artisan traders, market-goers in some instances (e.g. footfall) independent observation. This, together with reasonable lack of response variance in relation to the crucial impact questions, compensated for a less than optimal customer sample size.

NB. This research has now provided a more accurate picture of the customer population size, which will help inform future survey plans. As a result of this project's findings, future survey contents can also be reduced and refined.

| | Sample | Population | Confidence level | Error Rate |
|------------------------|--------|--|------------------|------------|
| Member Survey | 53 | 64 3777 (Average market) | 90% | 5% |
| Customer Survey | 136 | 11264 (All Ballycastle markets) 20225 (All markets) | 90% | 7% |
| - Local customers | 54 | 2991 (Ballycastle) 5369 (All) | 90% | 11% |
| - Visitors | 82 | 8274 (Ballycastle) 14855 (All) | 90% | 9% |

Outcomes Valuation 'Discounting' in order to Establish 'Impact'

A number of methods are used to ensure the value of outcomes created by the organisation or activity being analysed is as accurate as possible, thereby establishing its actual impact. The methods reduce overclaiming and ensure credibility, by estimating and discounting how much of the outcome would have happened anyway, what proportion of an outcome could actually be attributed to some other source, how much is displaced by it, or how much the value decreases over time.

| | |
|----------------------|---|
| Deadweight: | An assessment of how much of each of the outcomes would have happened anyway, without NNCG |
| Displacement: | An assessment of how much of each of the outcomes displaced other activities or outcomes that would otherwise have occurred. |
| Attribution: | An assessment of how much of each of the outcomes was generated by the contributions of other organisations or people e.g. referral sources, family members etc. |
| Drop-off: | In future years, beyond the period in question, the amount of each outcome that can be directly attributed to the project will be greatly reduced as it becomes more influenced by other factors. |

Discounting can be applied using any one of deadweight, displacement, attribution and/or drop off, or a combination of these. In this analysis drop off is not applied as the focus is on the value created for one year only - 2019. Deadweight which is 'What would have happened without the activity' has in this analysis included, where relevant, any displacement or attribution to others - resulting in only one overall discounting amount for each value. In some cases attribution alone has been used where the proportion of change seems due only to contributions from others/other factors. In other cases the outcome has a direct financial value (e.g. turnover) and these have generally not been discounted. Drop off is not used in this analysis as the focus is on the data and impact relating solely to one year, and no claims of impact are being made beyond a one year period.

| Outcomes Valuation Discounting | | | | | | | | |
|--|---|---|--|---|---------------------------------|--|---|--|
| Stakeholders | Outcomes | Indicator | Monetary valuation | Deadweight ⁶⁶ % | Displacement ⁶⁷ % | Attribution ⁶⁸ % | Drop off % ⁶⁹ | Rationale |
| Those who have a relationship with NNCG | Changes experienced by stakeholders | How the change is measured | How the change is valued (in either actual, or proxy, financial terms) | How much would have happened without the activity | How much activity was displaced | How much change was due to someone else's contribution | How much the outcome drops off in future years? | Notes to explain amounts discounted |
| NNCG Members/ Artisan Traders ⁷⁰ | Increased turnover / increased financial viability | Reported turnover per stall - Self reported in Trader Survey 2019 (triangulated with customer reports from Customer Survey 2019) | Financial value reported | 0% | 0% | 0% | 0% | No discount is applied as the financial figures are fully attributed to NNCG's activity (minus trader inputs in terms of time, raw materials etc) |
| | Increased business knowledge, skills and experience | Self report - Agreement in the Trader Survey 2019 (likert scale) that NNCG has helped them gain the knowledge, skills and experience they need to run their business (3 questions). | £1663 per qualifying member 2019 (Proxy value used: 'General Training For Job' from the Social Value Bank) | 61% | 0% | 0% | 0% | Our survey asked the artisans what proportion of the personal outcomes were directly related to being involved with NNCG - the remainder is what would have happened without NNCG. |

⁶⁶ Deadweight estimates in this analysis have taken into account displacement and attribution to others. There is only one overall discount figure applied to each monetary value.

⁶⁷ Displacement is not used in this analysis as the estimates around Deadweight (what would have happened without the activity) includes anything that would have been displaced.

⁶⁸ Attribution estimates in this analysis relate to the proportion that is estimated to have been due to (attributable to) other factors.

⁶⁹ Drop off is not used in this analysis as the focus is on the data and impact relating solely to one year - no claims of impact are being made beyond a one year period.

⁷⁰ This research included the impact on artisan traders who were NNCG members in 2019 - further research will include casual traders at NNCG markets who are not NNCG members.

| Stakeholders | Outcomes | Indicator | Monetary valuation | Deadweight ⁶⁶ % | Displacement ⁶⁷ % | Attribution ⁶⁸ % | Drop off % ⁶⁹ | Rationale |
|---|--|--|--|---|---------------------------------|--|---|--|
| Those who have a relationship with NNCG | Changes experienced by stakeholders | How the change is measured | How the change is valued (in either actual, or proxy, financial terms) | How much would have happened without the activity | How much activity was displaced | How much change was due to someone else's contribution | How much the outcome drops off in future years? | Notes to explain amounts discounted |
| | Increased self-confidence (business confidence, confidence dealing with the public, general confidence and self-esteem) | Self report - Agreement in the Trader Survey 2019 (likert scale) that NNCG has increased their business confidence, helped them to be more confident generally, helped them to become more confident in dealing with the public and increased their self esteem (4 questions). | £14,344.18 per qualifying member 2019 (Proxy value used: 'High Confidence' from the Social Value Bank) | 65% | 0% | 0% | 0% | Our survey asked the artisans what proportion of the personal outcomes were directly related to being involved with NNCG - the remainder is what would have happened without NNCG. |
| | Increased sense of satisfaction with life (including wellbeing, happiness and mental health) | Self report - Agreement in the Trader Survey 2019 (likert scale) that NNCG has increased their sense of satisfaction with life, happiness and improved their mental health and sense of wellbeing (4 questions). | £1126.69 per qualifying member 2019 (Proxy value used: 'Willingness to Pay for course to improve life satisfaction' (from the Global Value Exchange) | 64% | 0% | 0% | 0% | Our survey asked the artisans what proportion of the personal outcomes were directly related to being involved with NNCG - the remainder is what would have happened without NNCG. |
| | Increased sense of belonging (given a social life and reduced loneliness) | Self report - Agreement in the Trader Survey 2019 (likert scale) that NNCG has given them a sense of belonging, given them a social life and reduced their loneliness (3 questions). | £2031.13 per qualifying member 2019 (Proxy value used: 'member of social group' from the Social Value Bank) | 50% | 0% | 0% | 0% | Our survey asked the artisans what proportion of the personal outcomes were directly related to being involved with NNCG - the remainder is what would have happened without NNCG. |
| | Increased social support network | Self report - Agreement in the Trader Survey 2019 (likert scale) that NNCG has given them a social support network. | £2170.57 per qualifying member 2019 (Proxy value used: 'able to obtain advice locally' from the Social Value Bank) | 62% | 0% | 0% | 0% | Our survey asked the artisans what proportion of the personal outcomes were directly related to being involved with NNCG - the remainder is what would have happened without NNCG. |

| Stakeholders | Outcomes | Indicator | Monetary valuation | Deadweight ⁶⁶ % | Displacement ⁶⁷ % | Attribution ⁶⁸ % | Drop off % ⁶⁹ | Rationale |
|--|---|--|---|---|---------------------------------|--|---|--|
| Those who have a relationship with NNCG | Changes experienced by stakeholders | How the change is measured | How the change is valued (in either actual, or proxy, financial terms) | How much would have happened without the activity | How much activity was displaced | How much change was due to someone else's contribution | How much the outcome drops off in future years? | Notes to explain amounts discounted |
| Visitors to the Area - at markets | <p>Visitors engage with an enjoyable and educational artistic and cultural experience, gaining a unique insight into local culture and heritage</p> <ul style="list-style-type: none"> Increased participation in a genuinely 'local' cultural experience Increased knowledge about the region and its people Increased happiness! Influence on future behaviour (e.g. decisions to recommend the market/area to others, and to return to market/area etc.) | <p>Number of visitors (2019) having the experience - calculated from footfall counts, and average number of markets visitors attend calculated from Customer Survey 2019 responses.</p> <p>Self report - Agreement in the Customer Survey 2019 (likert scale) that:</p> <ul style="list-style-type: none"> they had enjoyed chatting with the traders and that the market was a real experience with real people doing real things, and that the market was an authentic North Coast experience the market had given them an awareness of local products and producers and an insight into local culture and heritage, and that they had learnt more about the local community because of the market being at the market had made them feel happy they would recommend the market/area to others and would return to the area because of the market, had decided to stay longer because of the market and were inspired to do other things while they are here | <p>£286 per qualifying visiting customer 2019 (Proxy value used: 'Engaging (as an audience member) in a cultural activity' - (£47 adj for inflation £53 per activity = £286 for ave 5.4 events attended by visitors)⁷¹</p> | 15% | 0% | 0% | 0% | In the absence of a known deadweight (what might have happened anyway), or other guidance regarding appropriate deadweight, 15% has been applied in line with recommendations relating to a range of other social value measures in the Social Value Bank. |

⁷¹ This Wellbeing Valuation is the social value people get from attending a cultural or artistic activity (over and above any entrance fee they might pay) - Dept for Culture Media and Sport, Quantifying and Valuing the Wellbeing Impacts of Culture and Sport - Fujiwara, Kudrna, Dolan 2014

| Stakeholders | Outcomes | Indicator | Monetary valuation | Deadweight ⁷² % | Displacement ⁷³ % | Attribution ⁷⁴ % | Drop off % ⁷⁵ | Rationale |
|---|--|--|---|---|---------------------------------|--|---|--|
| Those who have a relationship with NNCG | Changes experienced by stakeholders | How the change is measured | How the change is valued (in either actual, or proxy, financial terms) | How much would have happened without the activity | How much activity was displaced | How much change was due to someone else's contribution | How much the outcome drops off in future years? | |
| Local Community | Local people engage with an artistic and cultural experience | Number of local customers (2019) having the experience - calculated from footfall counts, and average number of markets local customers attend calculated from Customer Survey 2019 responses. | £519 per qualifying local customer 2019 (Proxy value used: 'Engaging (as an audience member) in a cultural activity' - (£47 adj for inflation £53 per activity = £519 for ave 9.8 events attended by local customers) ⁷⁶ | 15% | 0% | 0% | 0% | In the absence of a known deadweight (what might have happened anyway), or other guidance regarding appropriate deadweight, 15% has been applied in line with recommendations relating to a range of other social value measures in the Social Value Bank. |
| | Local area pride and optimism | Self report - Agreement in the Customer Survey 2019 (likert scale) that the market makes them feel optimistic about the future of the area, improved the reputation of the area, made them view the area positively and made them feel proud of their town/area (4 questions). | £195 per qualifying local customer 2019 (Proxy value used: 'Cost of Positive Psychology Short Course, module Hope, Optimism and Resilience, University of East London' - from the Global Value Exchange 'useful for valuing Hope / Aspirations / Positive Feelings for the future'. | 0% | 0% | 40% | 0% | This estimation take into account the amount of time spent at NNCG markets and the range of other factors that might also contribute to this outcome |
| | Increased socialising and local people feeling more like part of the local community | Self report - Agreement in the Customer Survey 2019 (likert scale) that being at the market makes them feel more like part of the local community and makes them feel happy, that the market has brought people together and gives them a chance to socialise, and that they enjoy chatting to the | £4302.70 per qualifying local customer 2019 (Proxy value used: 'Feel Belonging To Neighbourhood' from the Social Value Bank | 0% | 0% | 80% | 0% | This estimation take into account the amount of time spent at NNCG markets and the range of other community-based organisations and activities that might also contribute |

⁷² Deadweight estimates in this analysis have taken into account displacement and attribution to others. There is only one overall discount figure applied to each monetary value.

⁷³ Displacement is not used in this analysis as the estimates around Deadweight (what would have happened without the activity) includes anything that would have been displaced.

⁷⁴ Attribution estimates in this analysis relate to the proportion that is estimated to have been due to (attributable to) other factors.

⁷⁵ Drop off is not used in this analysis as the focus is on the data and impact relating solely to one year - 2019.

⁷⁶ Ibid.

| Stakeholders | Outcomes | Indicator | Monetary valuation | Deadweight ⁶⁶ % | Displacement ⁶⁷ % | Attribution ⁶⁸ % | Drop off % ⁶⁹ | Rationale |
|---|--|---|---|---|---------------------------------|--|---|--|
| Those who have a relationship with NNCG | Changes experienced by stakeholders | How the change is measured | How the change is valued (in either actual, or proxy, financial terms) | How much would have happened without the activity | How much activity was displaced | How much change was due to someone else's contribution | How much the outcome drops off in future years? | Notes to explain amounts discounted |
| | | traders and had learnt more about the local community because of the market. | | | | | | to this outcome |
| | Increased income in local community | Actual NNCG Wages from NNCG records | Actual financial value reported | 0% | 0% | 0% | 0% | No discount is applied as the value relates to actual financial figures that would not have been generated without NNCG |
| | Enjoyable public events taking place, in partnership with local community/festival organisers, that were cost-effective, well-organised, well-advertised and well-managed - attractive to visitors as well as providing a social occasion for local communities. | Number of markets run (4) in partnership with other community/festival organisers | £2000 per market (average cost of running a market, as calculated/outlined in various market/local authority documents) | 0% | 0% | 0% | 0% | No discount is applied as this is a direct value of NNCG organising their market which has not displaced another market service, and wouldn't happen without them. |
| | Increased funds and support for community groups/sports teams/charities etc | Members' contribution to community groups/charity raffles, team sponsorship etc in the region - as reported in Trader Survey 2019 | Actual financial value reported | 49% | 0% | 0% | 0% | This deadweight is calculated as 51% of the business turnover is directly attributed to NNCG - and the judgement is that therefore 51% of the business contribution (leaving deadweight of 49%) can also be attributed - as it would not otherwise be available. |
| | | Actual costs of providing the pitches - from NNCG records | Actual financial value reported | 0% | 0% | 0% | 0% | No discount is applied as the value relates to actual financial figures that would not have been generated without NNCG. |

| Stakeholders | Outcomes | Indicator | Monetary valuation | Deadweight ⁶⁶ % | Displacement ⁶⁷ % | Attribution ⁶⁸ % | Drop off % ⁶⁹ | Rationale |
|--|--|---|---|---|---------------------------------|--|---|--|
| Those who have a relationship with NNCG | Changes experienced by stakeholders | How the change is measured | How the change is valued (in either actual, or proxy, financial terms) | How much would have happened without the activity | How much activity was displaced | How much change was due to someone else's contribution | How much the outcome drops off in future years? | Notes to explain amounts discounted |
| Make it to Market Programme Participants (Ulster Bank - Funded) | Increased wellbeing and life satisfaction for participants (social impact of the programme) through improved business confidence and economic prospects. | A 'Before and After' Survey was conducted, on skills, confidence, and wellbeing, using the Warwick Edinburgh Mental Wellbeing Scale (WEMWBS) was used. Ref: Mental Health and Life Satisfaction: The Relationship between the Warwick Edinburgh Mental Wellbeing Scale and Life Satisfaction, Authors: HACT and Daniel Fujiwara (www.hact.org.uk/ / www.simetrica.co.uk) Source: www.hact.org.uk , License: Creative Commons Attribution-onCommercial-NoDerivatives license (http://creativecommons.org/licenses/by-nc-nd/4.0/deed.en_GB) | £2406.42 (per participant, 2019) calculated using the Mental Health Social Value Calculator based on outcomes of the Warwick Edinburgh Mental Wellbeing Scale (WEMWBS). | 0% | 0% | 0% | 0% | This value calculation has already had discounting applied to it. |
| Local businesses/ economy | Increased turnover for local (non-market) businesses / economy, | Spend of market customers buying in local businesses when visiting the market: | Actual financial value reported | 52% | 0% | 0% | 0% | This has been discounted according to the proportion customers said they would have spent anyway |
| | | Spend of market traders buying items (coffee, fuel, etc) at local businesses when at the market: Trader Survey 2019 self-reported spending in local businesses on market days | Actual financial value reported | 0% | 0% | 0% | 0% | No discount is applied as the value relates to financial figures that would not have been generated without NNCG - as arguably traders would not have been travelling or needing to buy coffee etc if they were not at the market. |

| Stakeholders | Outcomes | Indicator | Monetary valuation | Deadweight ⁶⁶ % | Displacement ⁶⁷ % | Attribution ⁶⁸ % | Drop off % ⁶⁹ | Rationale |
|---|-------------------------------------|--|--|---|---------------------------------|--|---|---|
| Those who have a relationship with NNCG | Changes experienced by stakeholders | How the change is measured | How the change is valued (in either actual, or proxy, financial terms) | How much would have happened without the activity | How much activity was displaced | How much change was due to someone else's contribution | How much the outcome drops off in future years? | Notes to explain amounts discounted |
| | | <p>Spend of market traders buying raw materials and services from local businesses as a result of having NNCG support and markets to trade at:</p> <p>Members' local spend on raw materials and services - as reported in Trader Survey 2019</p> | Actual financial value reported | 49% | 0% | 0% | 0% | This deadweight is calculated as 51% of the business turnover is directly attributed to NNCG - and the judgement is that therefore 51% of the business raw materials and services spend (leaving deadweight of 49%) is attributable to NNCG |
| | | <p>Spend of visitors attracted to the area by the market:</p> <p>Self reported from customer survey - proportion visiting the area specifically because of the market and also staying overnight =1486 people.</p> | £215 spend per visitor - (ave 4 nights each @ £53.75 per night - calculated from Northern Ireland Statistics and Research Agency, Overnight Tourism Statistics 2018, Causeway Coast and Glens 2018 Local Government District ⁷⁷) | 0% | 0% | 0% | 0% | This value has not been discounted as customers have self-reported the outcome to be specifically attributable to the NNCG market attraction |
| | | <p>Spend of visitors encouraged to stay in the area longer because of the market:</p> <p>Self reported from customer survey - proportion deciding to stay a night or extra night specifically because of the market = 743 people.</p> | £53.75 per visitor - (calculated from Northern Ireland Statistics and Research Agency, Overnight Tourism Statistics 2018, Causeway Coast and Glens 2018 Local Government District ⁷⁸) | 0% | 0% | 0% | 0% | This value has not been discounted as customers have self-reported the outcome to be directly attributable to the NNCG market experience |

⁷⁷ https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/Infographic-Causeway-Coast-Glens-2018_0.pdf

⁷⁸ *ibid.*

| Stakeholders | Outcomes | Indicator | Monetary valuation | Deadweight ⁶⁶ % | Displacement ⁶⁷ % | Attribution ⁶⁸ % | Drop off % ⁶⁹ | Rationale |
|---|---|---|---|---|---------------------------------|--|---|---|
| Those who have a relationship with NNCG | Changes experienced by stakeholders | How the change is measured | How the change is valued (in either actual, or proxy, financial terms) | How much would have happened without the activity | How much activity was displaced | How much change was due to someone else's contribution | How much the outcome drops off in future years? | Notes to explain amounts discounted |
| Local Authorities | Local authorities had enjoyable public events taking place in their borough that were cost-effective, well-organised, well-advertised and well-managed - attractive to visitors as well as providing a social occasion for local communities. | Number of markets run (21) either at councils' request or as part of council-organised event/festival | £2000 per market (average cost of running a market, as calculated/outlined in various market/local authority documents) | 0% | 0% | 0% | 0% | No discount is applied as the value relates to actual financial figures that would not have been generated without NNCG |
| | Visitor Information Centres (VICs) - had increased footfall on market days - had increased turnover due to crafters supported by NNCG selling through VIC shops | (Turnover related to NNCG crafters - but counted in visitor spending) | Estimated financial value attributable | 0% | 0% | 0% | 0% | |

| Stakeholders | Outcomes | Indicator | Monetary valuation | Deadweight ⁶⁶ % | Displacement ⁶⁷ % | Attribution ⁶⁸ % | Drop off % ⁶⁹ | Rationale |
|---|---|--|--|---|---------------------------------|--|---|--|
| Those who have a relationship with NNCG | Changes experienced by stakeholders | How the change is measured | How the change is valued (in either actual, or proxy, financial terms) | How much would have happened without the activity | How much activity was displaced | How much change was due to someone else's contribution | How much the outcome drops off in future years? | Notes to explain amounts discounted |
| Environment | Negative outcome - - Contributing to GHG CO2 emissions | Amount of CO2 emitted by customers travelling specifically to attend the market (calculated using miles travelled) | 75 Euros (£66) per tonne - Social Cost of CO2 Emissions ⁷⁹ | 64% | 0% | 0% | 0% | Discount is applied to the value of customers travelling to the NNCG markets as 64% would have travelled anyway - while 36% were travelling specifically because of the market. The value of traders however have no discount applied as they were all travelling specifically because of the market. |
| | | Amount of CO2 emitted by traders travelling specifically to attend the market (calculated using miles travelled) | 75 Euros (£66) per tonne - Social Cost of CO2 Emissions | 0% | 0% | 0% | 0% | |
| | | Amount of CO2 emitted by NNCG's overall operations (fuel, power, etc), calculated using an online Carbon Footprint Calculator | Total calculated by online Carbon Footprint Calculator | 0% | 0% | 0% | 0% | |
| | Positive outcomes - - Increased customer awareness of environmental issues - Increased customer awareness and purchasing of locally-made products | Number of people reporting increased awareness and behaviour change Self report - Agreement in the Customer Survey (likert scale) that the NNCG market: - has raised their awareness of environmental issues, and - gives them an awareness of local products/producers, and results in them buying locally-made products more often now. | Attaching a monetary value to these outcomes, in terms of their value to the environment, is beyond the scope of this project. Further work would be required. | - | - | - | - | - |

⁷⁹ Cahill, N. and O'Connell, L., 2018, *Cost-Benefit Analysis, Environment and Climate Change*, National Economic and Social Council (NESC) Secretariat Papers, Paper No. 15, November 2018, (f.n.21, p.42) http://files.nesc.ie/nesc_secretariat_papers/No_15_CBA_Env_and_ClimateChange.pdf

Input/Investment is what the stakeholders contribute in terms of time, money, or other resources towards the activity/organisation achieving outcomes. In this case the NNCG members are the stakeholder group contributing the most towards achieving the outcomes. For each market they spend on average about 40 hours making their products, preparing for and selling at the market. The value of this time is considered to be an input, part of members' investment in NNCG, towards achieving the desired outcomes. For the purposes of this project it has been valued at living wage level, and then, together with raw material and other costs, deducted from the gross value (after other discounting) of the impact created by NNCG for members.

The table below shows the value of inputs from different stakeholder groups.

| Input/Investment into NNCG (2019) | | | |
|---|-------------------------|---------------------|--|
| Stakeholder/Input Source⁸⁰ | Ballycastle Area | Wider Region | Detail |
| Community | £ 43,201 | £77,627 | Time |
| Members | £234,006 | £419,593 | Time (Wages), Raw materials, Fees, Insurance, etc. |
| Local authorities | £1,100 | £3,280 | Direct funds and Staff time |
| Other inputs: | | | |
| The Rank Foundation funding (pro rata) | £16,800 | £30,000 | Time to Shine and Profit for Good Programmes |
| NNCG non-salary spending ⁸¹ (pro rata) | £18,273 | £32,628 | Operating costs |
| Ulster Bank Funding (pro rata) | £4,263 | £20,250 | Make it to Market Programme |
| Total Input | £317,643 | £583,378 | |

When the input is applied to the total gross value (after other discounting) the overall valuation and net SROI is calculated as shown→

| NNCG's Overall Impact Valuation (2019) | | |
|---|-------------------------|--------------------------|
| | Ballycastle Area | Across the Region |
| Value Created after discounting | £6,331,204 | £11,104,972 |
| Minus Inputs (Time, Money, etc) | -£317,643 | -£583,378 |
| Net Value Created | £6,013,561 | £10,521,594 |
| Return on Investment | 19:1 | 18:1 |

Sensitivity Analysis is used to examine how sensitive the final results are to the estimations and assumptions used in the analysis. The analysis makes extrapolated assumptions based on the results gathered from interviews, focus groups, surveys, and footfall data collected. The sensitivity analysis explores the effect, on the SROI ratio, of changing some of the assumptions. Discount rates were tested to clarify the impact of changing deadweight/attribution/displacement. Outcome values were tested to determine the impact of changes.

⁸⁰ No inputs/investments were included in the calculations from businesses, the environment or visiting customers as they did not contribute any direct calculable inputs to NNCG. Visiting customers spent time and money, but their returns for that time and money are in the form of the goods they purchased and the experience they had. The social value that accrues to them as a result of that experience is above and beyond any fee or time they spend.

⁸¹ NNCG Salary spending is included as part of the value for Community.

Sensitivity Analysis

| Stakeholder Group | Outcome | Sensitivity |
|-----------------------------|---|---|
| Community | Feeling more like part of the local community—experienced by 4188 people. Proxy value used was "Belonging To Neighbourhood" from the Social Value Bank (£4302.70 adjusted for inflation - up from £3919 in 2016). | It is estimated that approximately 80% of this outcome is attributable to other factors, people or organisations in the community. Because of the large numbers involved, adjusting this attribution assumption down to 50% changes the outcome value from £3 603,941 to £9,009,853 and changes the overall ratio from 19:1 to 28:1. |
| Customers visiting the area | Engaging in an artistic cultural experience. Proxy value used was a Wellbeing Valuation of £47 per activity adjusted for inflation to £53 = £286 for 5.4 events on average. (Dept for Culture Media and Sport, Quantifying and Valuing the Wellbeing Impacts of Culture and Sport - Fujiwara, Kudrna, Dolan 2014) | The number of visitors to the area was calculated at 14,855. Despite the fact that this outcome value could theoretically be applied to all attendees, it was decided to apply it only to the 88% who agreed that the market gave them "a good insight into local culture and heritage" (13,025) erring on the side of caution and not wanting to overclaim. Had it been applied to ALL attendees the outcome value would have changed from £3,166,378 to £3,611,250 and the overall ratio from 19:1 to 20:1. |

The results show the main areas of sensitivity relate to outcomes for the customer groups - those from the local community and those visiting the area. The sensitivity is really due to the very large numbers of people in these groups, and the fact that these groups account for a 87-89% of the total value. Because of this the assumptions used are extremely cautious and as such are more likely to have resulted in an underclaim than an overclaim.

