



Tralee Town Centre

Health Check Report 2017



An Chomhairle Oidhreachta
The Heritage Council



An Roinn Ealaíon, Oidhreachta,
Gnóthaí Réigiúnacha, Tuithe agus Gaeltachta
Department of Arts, Heritage,
Regional, Rural and Gaeltacht Affairs



An Roinn Tithíochta, Pleanála,
Pobail agus Rialtais Áitiúil
Department of Housing, Planning,
Community and Local Government





Congratulations to all our project partners involved in preparing the Tralee Town Centre Health Check (TCHC), as part of the Heritage Council, RGDATA and Partners' 'Pilot' TCHC Training Programme 2016/2017. The collaboration has been first-class and it is envisaged that other historic towns in Ireland with unique heritage assets will be empowered by the Tralee TCHC's creative approach to urban planning, heritage management and sustainable Place-making.

Alison Harvey - Heritage Council



The Town Centre Health Check is important to all businesses operating in Tralee as it gives us a great indication of where we are and outlines the areas we need to work on. A healthy Town Centre is important for everyone who lives here, works here and those who visit Tralee. This is the first step in a process of improving Tralee and Tralee Chamber Alliance are fully committed to the project.

*Kieran Rutledge - CEO
Tralee Chamber Alliance*



As Mayor of Tralee, I am proud to be associated with the publication of the results of the Tralee Town Centre Health Check. This document provides us with a valuable framework for taking stock of Tralee's very many assets. I have no doubt we will all work together to maximise the benefits for everyone, particularly in areas such as quality of life, tourism, recreation, commercial activity, and job creation. I look forward to the next steps which I believe will bring significant benefits for the people of Tralee and its wider hinterland.

Mayor of Tralee - Councillor Norma Foley



The Institute of Technology Tralee was delighted to take part in the Tralee Town Centre Health Check Pilot and welcome this publication of the Tralee Town Centre Health Check Report 2017. The IT Tralee believes that a thriving and vibrant atmosphere in Tralee, coupled with first class student accommodation, retail, recreational, social and educational facilities are essential if the town and indeed the Institute, is to continue to expand and grow. We look forward to continued collaboration with Kerry County Council, the Tralee Chamber Alliance and all stakeholders to maximise the opportunities for the town ensuring it continues to grow and prosper, building on successes of more recent times.

*Brid McElligott - Vice President - Research,
Development and External Engagement
Institute of Technology, Tralee*

Introduction

Tralee is a bustling market town with all the assets and facilities of a county capital, including a vibrant and rich heritage. The historic town is the main shopping, administrative and service centre in the south-west and has a growing economic and tourism base. Tralee offers unique cultural, leisure, sporting, entertainment, educational and recreational facilities as well as first-class natural amenities. Tralee is located on Ireland's Wild Atlantic Way and is the Gateway to the Dingle Peninsula and venue for the world-renowned International Rose of Tralee Festival.

In September 2016, Tralee was selected to participate in the Heritage Council, RGDATA and Partners' **National Pilot Town Centre Health Check (TCHC) Training Programme (2016/2018)**. The Department of Arts, Heritage, Regional, Rural and Gaeltacht Affairs (DoAHRRGA) and the Department of Housing, Planning, Community and Local Government (DoHPCLG) are also key partners. The key aim of the Pilot TCHC Training Programme is to:

"Establish a co-ordinated National Town Centre Health Check (TCHC) Training Programme and TCHC Baseline (2016) involving and engaging the private, public and civic sectors in a representative selection of Irish towns in order to raise awareness, understanding and appreciation of the critical role that historic town centres play and the impact they have on overall socio-economic, environmental and cultural growth and development....."¹

The key findings from Tralee's first-ever Town Centre Health Check and baseline will inform plans and strategies in relation to the following:

- **Arts, Heritage and Culture**
- **Commerce/eCommerce and Enterprise**
- **Cultural Tourism, e.g. music, food, etc.**
- **Public Realm, e.g. historic streetscapes, parks and public spaces**
- **Living in the Town Centre**
- **Strategic Planning and Place-making**



Tralee TCHC Project Team:

Front row, L-R: Alison Harvey (Heritage Council), Dr Noreen O'Mahony (Kerry County Council), Lisa Fanning (Kerry County Council), Martha Farrell (IT Tralee)
Back row, L-R: TJ Mahony (Kerry County Council), Kevin Burns (Kerry County Council), Sandra Leahy (Kerry County Museum), Kieran Rutledge (Tralee Chamber Alliance)

Representatives of Kerry County Council, Tralee Chamber Alliance and IT Tralee with ongoing support provided by the Heritage Council's National 'Pilot' TCHC Co-ordinator formed the Tralee TCHC steering group and engaged in a collaborative process to achieve the goals set out by the National Pilot Town Centre Health Check briefing documents. The TCHC research focused on a number of key areas:

- **Shoppers' behaviour and attitudes**
- **Business owners' perceptions of the town centre**
- **Footfall in the historic town centre**
- **Land use in the historic town centre**
- **Availability of parking spaces**

¹ Source: Agreed Project Charter for Pilot TCHC Training Programme, 2016. For further information on the Pilot TCHC Training Programme, please contact Alison Harvey, Heritage Council.

Survey Methodology

The TCHC research was undertaken in October and November 2016. Following the recommended **15-Step Methodology** as set out in the **Pilot TCHC Training Programme**, IT Tralee students, from the **BA in Information Systems Management** and the **B Bus in Marketing** programmes, collected survey data from shoppers and retailers. They also conducted a footfall survey and a land use survey.

Survey questionnaires were based on previous TCHC research in Ireland and Scotland. The students used non-probability quota sampling to personally administer 300 questionnaires to shoppers in Tralee Town Centre. Quotas were based on age, gender and social class as per CSO data.

One hundred, randomly-selected, business owners were invited to participate in a personally administered survey and a total of 69 businesses responded.

A land use survey was also undertaken by students to examine the use of ground floor retail space. This core retail area included The Mall, Castle Street, Ashe Street, Denny Street, Rock Street, Russell Street, Bridge Street, Abbey Court, The Square and precincts. The survey was conducted from 5th-12th October 2016 and units were classified according to their use using the Goad Classification of Land Use. It also examined the number of vacant units in the survey area. The land use survey findings were also validated by Kerry County Council.

Pedestrian counts were undertaken in five count points within the town centre, at three different intervals on 28th and 29th October, 2016.

A survey of car parking spaces was undertaken by Kerry County Council as part of the Tralee Transportation Strategy (2013), which also fed into the Tralee TCHC results.

Shoppers' Opinions of Tralee Town Centre...

The study indicates that respondents are most likely to associate Tralee Town Centre with Shopping.

Indeed, 59% of respondents were in the town centre to shop on the day they were surveyed. Over three-quarters of respondents shop in Tralee at least once per week and Tralee is the main shopping town for both clothing and food shopping for over 90% of respondents. However, these shoppers are more likely to shop in Tralee out of habit/convenience than for the range of shops on offer.

What do you think about Tralee town, what are your first thoughts?



Why do you shop in Tralee?

Out of habit/convenience **60%**

For the selection of shops **8%**

The main store types visited by respondents included supermarkets, clothing stores and restaurants. The average spend was €34.85.

Top 5 Business Types Visited:

- Supermarket**30%**
- Clothes Shop**23%**
- Restaurant**21%**
- Bank**10%**
- Chemist**10%**

Average Spend: €34.85
Minimum Spend: €1
Maximum Spend: €328

90% +

Picked Tralee as No 1 town
for Clothing and for
Food Shopping



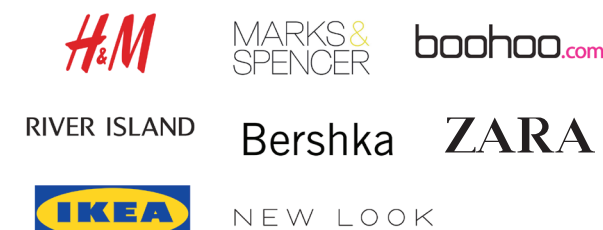
Almost 4 in 10 respondents **shop online** at least once per month with **68%** stating that clothing and accessories are the type of goods mainly bought online. **Respondents' top online stores:**



Younger respondents shop online more frequently and have a higher online spend. Shopping online at least once per month:

18-25	64%
26-34	43%
35-49	39%
50-66	20%
67+	0%

When asked 'What type of shop is missing in Tralee?' respondents suggested popular high street and online retailers. Some of these brand names reflect the growing trend of online shopping as some suggested brands (e.g. boohoo.com) exist exclusively online:



Shoppers feel the biggest improvements the town centre could benefit from are related to: parking, the public realm and the number of shops.




Parking	23%
Public Realm	19%
Other	19%
Number of Shops.....	15%
Appearance of Town Centre.....	10%
More Events	9%
Safety.....	5%

Just over two-thirds of respondents prefer to park in a surface car park vs multi-storey.



Top 5 event types suggested:

Many respondents suggested events as a means of improving the town centre and music events were the most frequently-suggested events.

 Music.....	43%
 Food Events/Markets	18%
 Cultural/Art/Theatre	8%
 Sports.....	7%
 Children/Family Events	5%

The survey also invited respondents to rate 20 key aspects of the town centre. The most positive rating was achieved by the town's cafés and restaurants and the standard of service in shops.

	Good	Neutral	Poor
Café/Restaurant choice	77%	16%	7%
Café/Restaurant quality	77%	17%	6%
Standard of Service in Shops	73%	20%	7%
Parks/Green Spaces	69%	19%	12%
Ease of getting around	71%	19%	10%
Value for money	66%	21%	13%
Feeling of safety during the day	60%	26%	14%
Variety of Goods available	63%	24%	13%
Quality of Shops	60%	24%	16%
Variety of Shops	59%	24%	17%
Attractiveness of Town Centre	54%	25%	21%
Pavement Cleanliness	50%	27%	23%
Pavement Quality	45%	27%	28%
General feeling of vibrancy	48%	22%	30%
Traffic Flow	44%	25%	31%
Seating/Areas to congregate	39%	25%	36%
Other Attractions	34%	26%	40%
Parking	34%	28%	38%
Feeling of safety at night	35%	21%	44%
Range of Events	27%	27%	46%

Respondents also expressed a demand for extended shopping hours in the town centre with almost one-third of them expressing a preference for late opening on Fridays.



Preferred Extended Shopping Hours

Fridays 6pm - 9pm.....	31%
Sundays 2pm - 6pm	21%
Thursdays 6pm - 9pm	14%
Other.....	34%

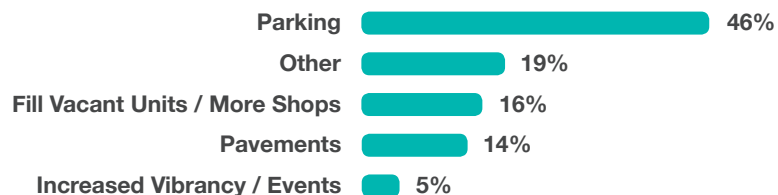
Business Owners' / Managers' Opinions of Tralee Town Centre

Shopping, parking problems and a lack of atmosphere were most likely to be associated with Tralee Town Centre by the business owners/managers who completed questionnaires.

The study shows that 78% of the business respondents feel that shopping is the main thing that attracts customers to the town centre and over 60% of them think that shopping is the main strength of Tralee Town Centre.

When asked for their ideas to improve the Town Centre, business owners suggested: **Improving Parking and Pavements, Filling Vacant Units/Increasing the Number of Shops and Improving the Atmosphere.**

What **improvements** would you like to make to Tralee town centre?



Business Owners' Online Presence



Website 79%

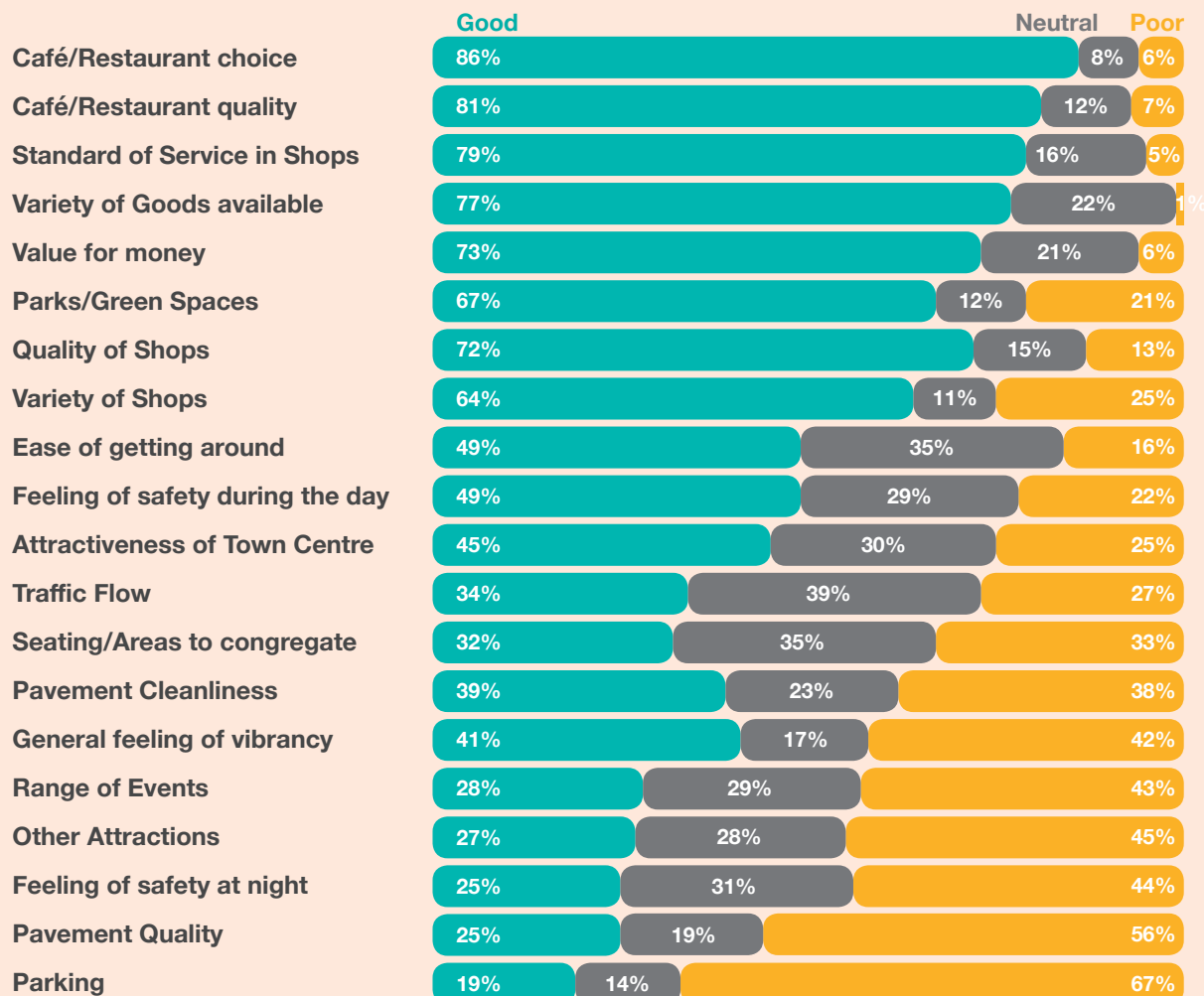


Facebook 77%

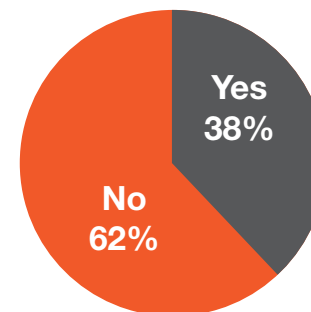


Instagram 20%

Business owners/managers also rated 20 aspects of the town centre. The findings were similar to those of the shoppers as the most positive rating was achieved by the town's cafés and restaurants and the standard of service in shops.

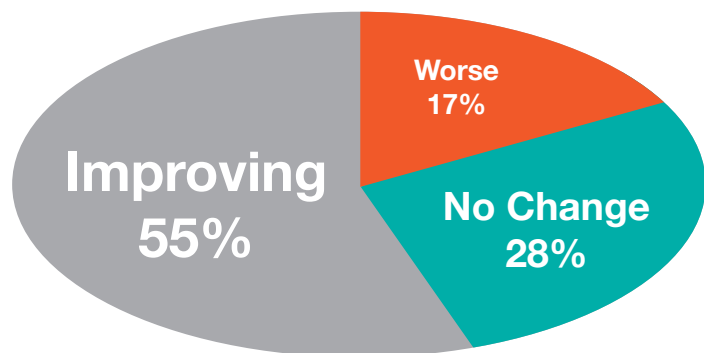


Do you sell online?



While over three-quarters of business respondents say they have a Facebook page for their business and almost 80% have a website, only 38% say they sell online and only 20% have a presence on the important social media platform Instagram.

Trading expectations for the next two years



55%

...expect trading to improve over the next 2 years

61%

...would help organise events

64%

...would contribute to a marketing fund to attract people to Tralee

Over 50% of business respondents would like to see **music-related events** and 32% suggested having **food events/markets** in the town centre to entice people to spend more time there.

Survey of Parking Spaces



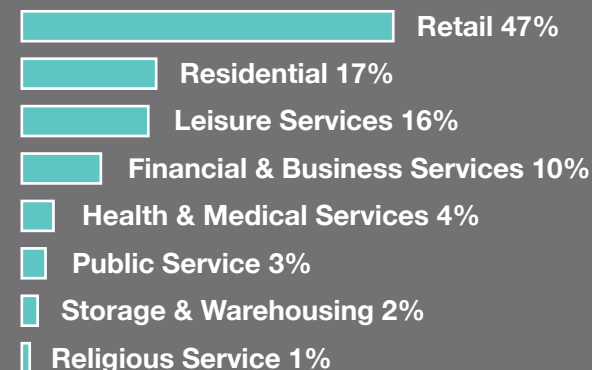
According to the Tralee Transportation Strategy (2013), there are **2,050** spaces in **off-street car parks**, **1,000** spaces **on-street**; and significant volumes of non-designated on-street spaces.

Even without the non-designated spaces, there is currently sufficient parking stock (3,050 spaces) to meet demand in the present (2,137 spaces) and in the future (estimated: 2,591 spaces by 2026). (Tralee Transportation Strategy, 2013).

Survey of Land Use

The Tralee TCHC Land Use survey revealed an occupancy rate of 81% in the town centre and categorized 47% of the units surveyed as 'Retail'. Other significant categories included: Leisure Services and Residential.

This land use survey data has been validated and entered into the Local Authority GIS (Geographic Information System). Please see page 8 for the Tralee Land Use Map.



Tralee Town Centre Health Check

Tralee Land Use Map

Study Area



GOAD Sub-class

- Comparison
- Convenience
- Retail Service
- Other Retail
- Leisure Services
- Financial and Business Services
- Health and Medical Services
- Public Service
- Religious Service
- Residential
- Open Space
- Storage and Warehousing
- Vacant Unit

Car Park



Surface

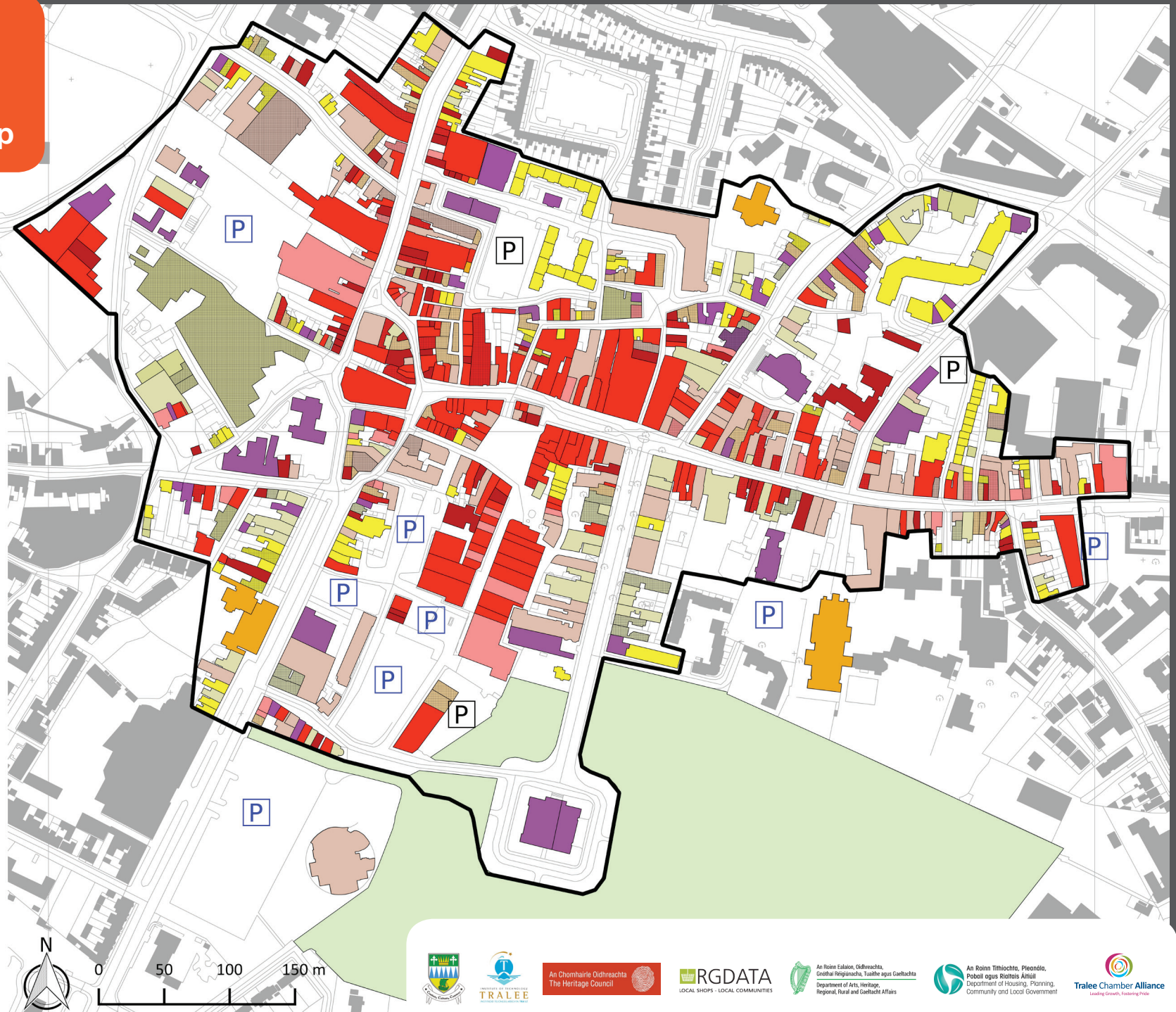


Multi-Storey

Map © Ordnance Survey Ireland (OSI)

Buildings based on OSI Data

Drawn by: Darren Burke



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The Heritage Council

RGDATA
LOCAL SHOPS - LOCAL COMMUNITIES

An Roinn Ealaíon, Oidhreachta,
Grúthair Réilíníochta, Tuaithe agus Gaeltachta
Department of Arts, Heritage,
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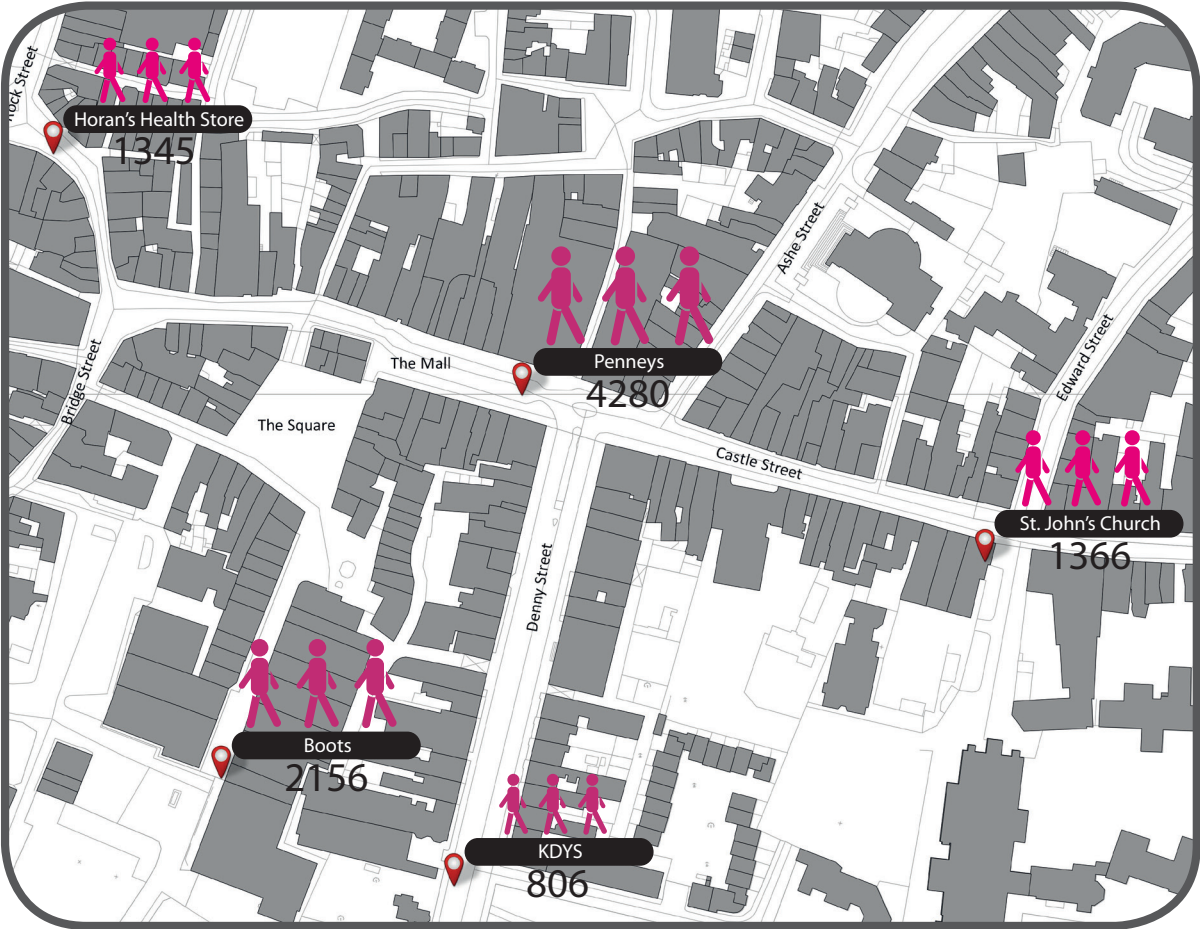
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Survey of Footfall in Tralee



Day	Times	KDYS	Penneys	Horan's Health Store	Boots	St. John's Church	Totals	Overall Totals
Fri	1.15-1.30	284	835	287	357	325	2088	
	3.15-3.30	88	526	184	259	193	1250	
	5.10-5.30	52	516	190	269	206	1233	
								4571
Sat	1.15-1.30	123	723	247	408	173	1674	
	3.15-3.30	171	953	280	540	280	2224	
	5.15-5.30	88	727	157	323	189	1484	
								5382
Totals		806	4280	1345	2156	1366		9953



Pedestrian counts were undertaken at five count points within the town centre, at three different intervals on 28th and 29th October, 2016. The cold but dry weather conditions were favourable for the duration of the survey.

The pedestrian count findings showed the highest footfall count was recorded at Penneys on a Saturday afternoon (953 people). The Mall area was the busiest count point in general over the course of the footfall survey. The Abbey Court area (Boots) recorded 540 people on Saturday 29th October.

This data will act as a base line for pedestrian counts planned in the future.



Key Considerations and Opportunities for Tralee

With large-scale national and European investment in projects such as Tralee Active Travel Project (€2.2m) and Tralee TC West Master Plan and The Island of Geese (€3.2m co-funded by ERDF), along with initiatives like Purple Flag, the Heritage Council - RGDATA Pilot Town Centre Health Check study, the Tralee Public Realm Plan, 2017, Tralee has an abundance of potential to thrive with a collaborative approach to revitalising its town centre. There are also significant opportunities for economic growth and development under the planned European Year of Cultural Heritage 2018 and the hosting of the Irish Planning Institute's National Planning Conference for the first time in Tralee in April 2018.

The National Planning Framework (NPF) 2040 also supports the revitalisation of the historic county town. The Heritage Council - RGDATA National Pilot TCHC training programme has been a catalyst for bringing key stakeholders together to ensure a vibrant future for the historic town centre of Tralee and to enhance the quality of life for citizens and visitors alike. In order to create a vibrant town centre - a comprehensive retail, cultural and community hub - a collaborative effort is required to initiate and implement a Town Centre Renewal Action Plan.

The **Framework for Town Centre Renewal** (Department of Jobs, Enterprise and Innovation, 2017) sets out a practical step-by-step plan which will be applied by the Tralee Town Centre stakeholders to enhance the town. This action plan, underpinned by the National Planning Framework, will develop a sense of place, heritage, identity; it will enhance the town centre experience, encompassing quality design; and create a sense of vibrancy (including a night-time economy and a schedule of town centre activities and events).



A Framework for Town Centre Renewal, Department of Jobs, Enterprise and Innovation Retail Consultation Forum, 2017.



If you would like to get involved in the renewal of the town centre of Tralee, please contact:

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Kieran Rutledge (Tralee Chamber Alliance)
t: 066 7121472 | e: kieran@tralee.ie | www.facebook.com/tralee.ie/







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