



Collaborative Town Centre Health Check Training Programme



Dundalk Town Centre Consumer Surveys

March 2019



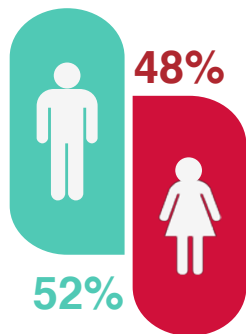
Ireland's Collaborative Town Centre Health Check Training Programme

- / This research was conducted on behalf of the Heritage Council and Partners as part of the Collaborative Town Centre Health Check Training Programme. Undertaking Consumer Surveys in town centres is Step 5 in the overall 15-Step CTCHC 'process'.
- / Fieldwork was conducted 12th October – 23rd November 2018.
- / The sample size was n = 408.
- / The project team is provided at Appendix A (TBC)

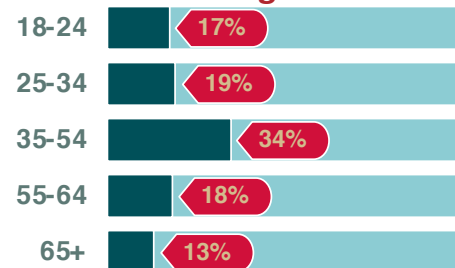
Fieldwork Locations



Gender



Age



Social Class

ABC1's: 48%



C2DE's: 52%



Summary of Key Findings - I

Reasons for Visiting Dundalk Town Centre

1. Shopping is the main reason why users use Dundalk town centre on a regular basis, with 75% claiming to use the town for shopping generally. Visits to cafés and restaurants represent the next most common activity (36%). For a fifth of users of the town centre, attending work is their main reason, while most users of Dundalk (75%) use the town centre at least once a week.
2. When asked what they like about the town, users of Dundalk town centre cite friendliness, a general feeling that the town is good/great or convenience as the main thing they like about the town. In terms of dislikes, a lack of (modern) shops is an issue for approximately 1 in 5.
3. Beyond Dundalk the next most popular destinations for users of the town centre are Dublin, Newry and Drogheda. Approximately 1 in 4 visit either of these towns/cities at least once a month.

Satisfaction with Dundalk Town Centre

1. In terms of traffic and ease of access around Dundalk, 80% rate the town as being easy to get around with two thirds of users of the town centre rating the town as being good or excellent at managing traffic flow. Parking scores are less strong, but rated favourably by 57%.
2. Users of Dundalk generally find their town to be attractive with just over 3 in 4 finding the town generally attractive. A similar proportion rate the quality and cleanliness of pavements to be good.
3. The people of Dundalk are really quite happy with the cafés and restaurants of the town, with almost 90% of users of the town centre viewing these favourably on both range of options available and quality.
4. Dundalk's tourism credentials are also held in high regard. 3 in 4 rate us as having a general feeling of vibrancy around the town centre, with a wide range of events.
5. Feeling of Safety/Security is generally better during the day around Dundalk, with a significantly smaller proportion of users of the town centre feeling safe at night (61%) than during the day (75%).

Summary of Key Findings - II

Shopping in Dundalk Town Centre

1. Generally users of Dundalk town centre are happy with the various retail outlets in the town, with the majority rating the town favourably on quality of shops, service standards, range of goods and value for money.
2. Convenience is the most common reason why people shop in Dundalk town centre (58%), followed closely by force of habit (56%). Quality and range of shops available in the town are also rated as important to shoppers.
3. Trips to supermarkets are the most popular destinations when shoppers are visiting the town centre (36%), followed by café/takeaways (30%) and clothes shops (22%).
4. For extending opening hours, shoppers prefer variety over a designated day for shops to stay open later with 41% favouring an extra hour every weekday over long extended hours over Thurs-Sunday.
5. Less than half of visitors (46%) to Dundalk town centre also shop online. Of those who do shop online, most get goods delivered directly to their home or place of work. Range of stores online, cheaper prices and convenience are the main drivers of why people are going online to buy their goods.
6. Clothing and clothing accessory purchases (59%) make up most of the purchases people make when shopping online. This is followed by technology/devices at 24%.

Public Events and Festivals

1. The Saint Patrick's Day celebrations are the most popular festival occurring during the year for Dundalk, with 60% of those who use the town centre partaking in the celebrations. This is followed by the Christmas market (31%) and the Brigid of Faughart festival (23%).
2. More Christmas events (44%) are the most popular potential festivals that users of the town centre would like to see in the future. Music events are also a popular option with around 39%.

Access and Parking

1. Just over half of those using Dundalk town centre arrive by car. Of those that drive, 84% paid for parking. Surface car parks are the most popular choice for people to park with 62% favouring car parks over parking their car on street.
2. Cycling and taxis are the least popular method for people who are visiting the town centre in Dundalk, with only 5% opting to cycle and 2% arriving in a taxi. Conversely, 1 in 4 users of the town centre arrive on foot.

Summary of Key Findings - III

Brexit

1. Generally there is a feeling of concern among people using Dundalk town centre about Brexit. Since the announcement of Brexit, a third of users of the town have noticed a decrease in activity around the town.
2. Those who live within 3 km of the town centre, work there or those who visit the centre for social reasons are most likely to have noticed a fall in activity.
3. Furthermore, two thirds of users of Dundalk believe that Brexit will have a negative impact on the town centre. This is consistent across all demographics.

1

Users of
Dundalk Town
Centre

2

Satisfaction
with Dundalk
Town Centre

3

Dundalk Town
Centre
Shopping

4

Online
Shopping

5

Public Events
and Festivals

6

Access &
Parking

7

Brexit



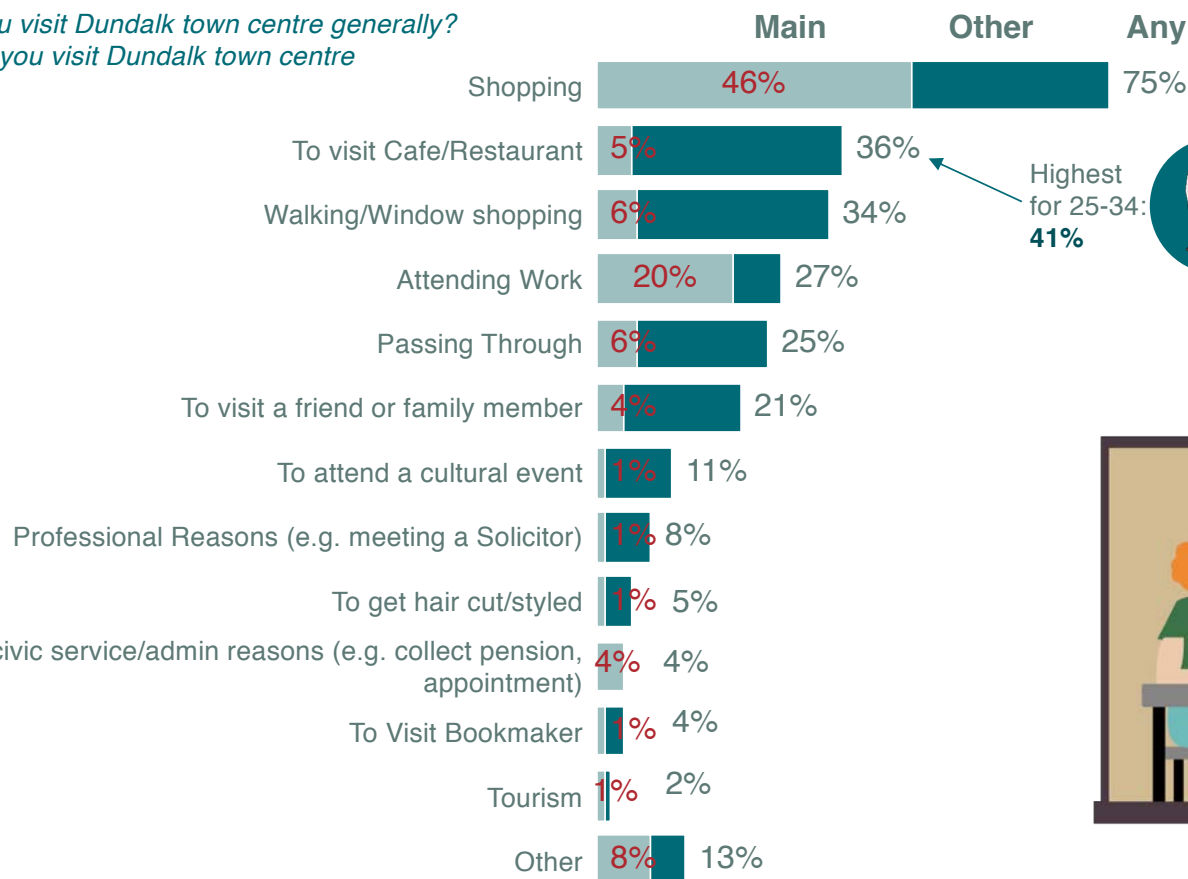
1. Users of Dundalk Town Centre

Reasons For Using Dundalk Town Centre?

(Base: All Users of Dundalk Town Centre; n=408)

Q.1a What is the **main** reason you visit Dundalk town centre generally?

Q.1b And what **other** reasons do you visit Dundalk town centre generally?

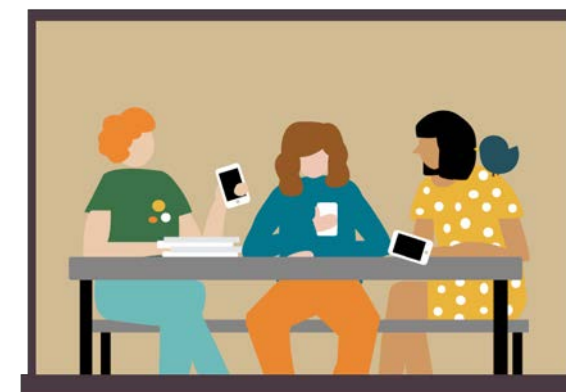


Highest for 25-34: 41%



Highest for 65+: 86%

Lowest for 18-24: 68%



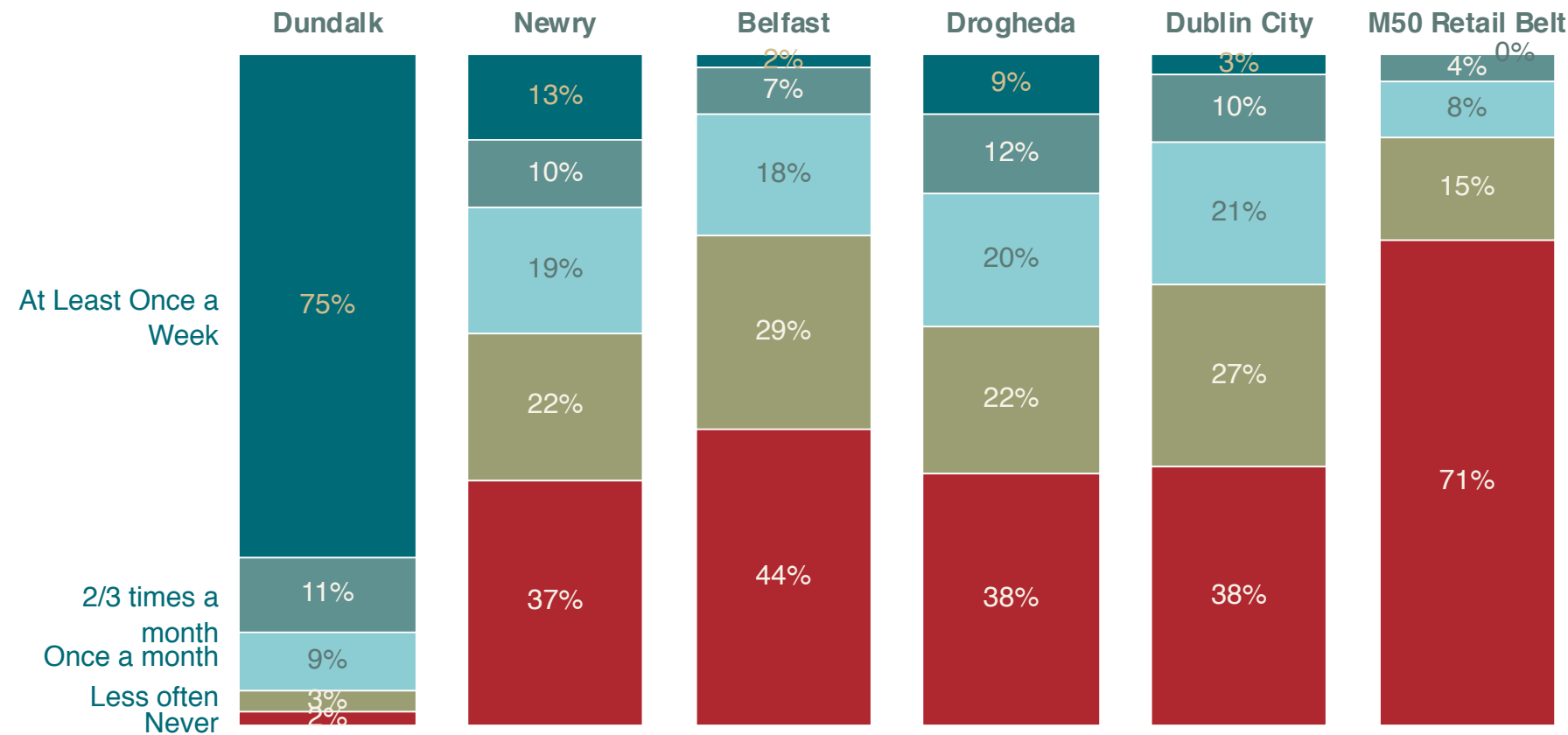
Shopping is the primary reason people use Dundalk Town Centre, having more than twice the importance of the next most common reason, which is to visit a café/restaurant. In terms of the main reasons why people use the town centre, 1 in 5 town users say their primary reason is to attend work.

RED C

(Q.1a/b)

Frequency of Visiting Dundalk & Competing Towns

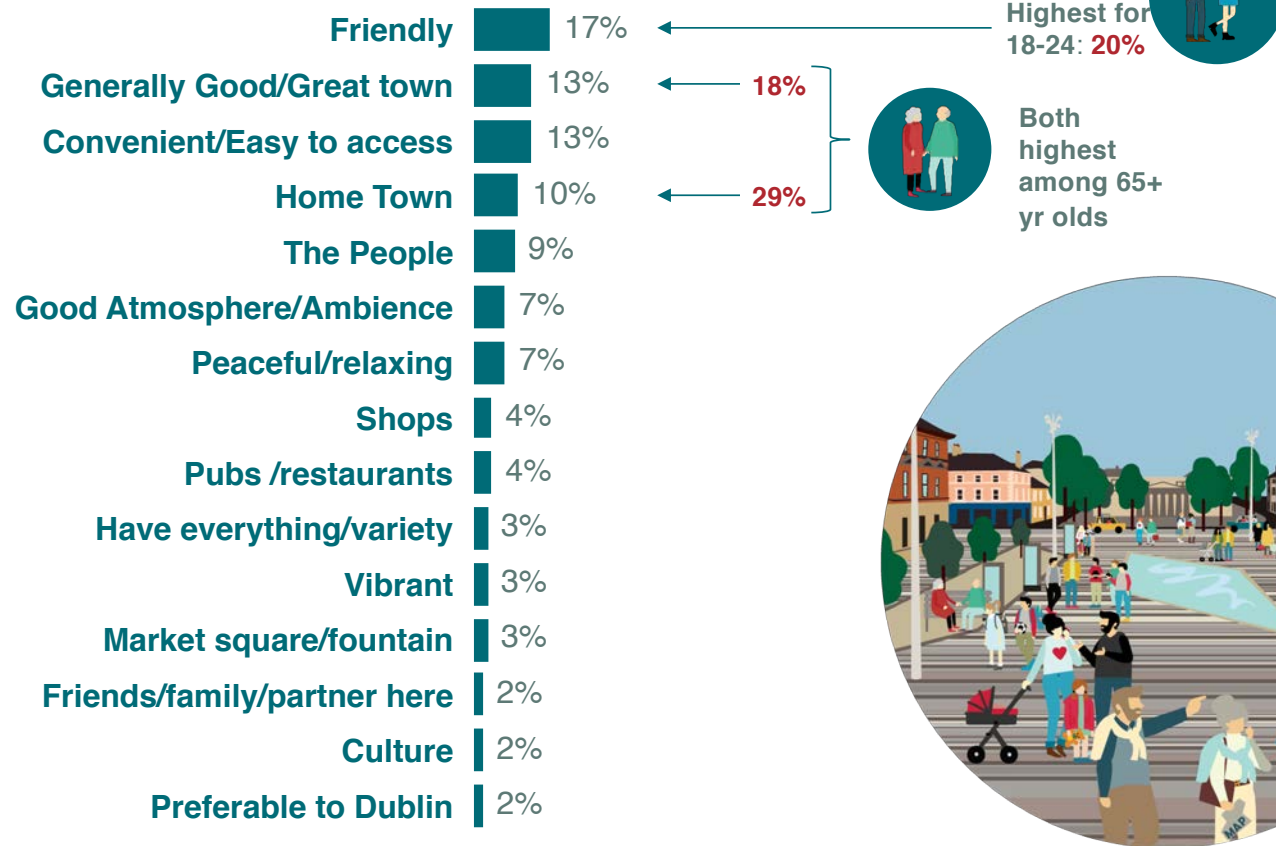
(Base: All Users of Dundalk Town Centre; n=408)



The vast majority of town centre users say they use Dundalk Town Centre at least once a week. Newry and Drogheda are Dundalk’s biggest competitors in terms of attracting weekly users.

What do People like about Dundalk Town Centre?

(Base: All Users of Dundalk Town Centre; n=408)



Friendliness, a general feeling that it's a great town and accessibility are the main things that people like about Dundalk Town Centre.

What do People like about Dundalk Town Centre?

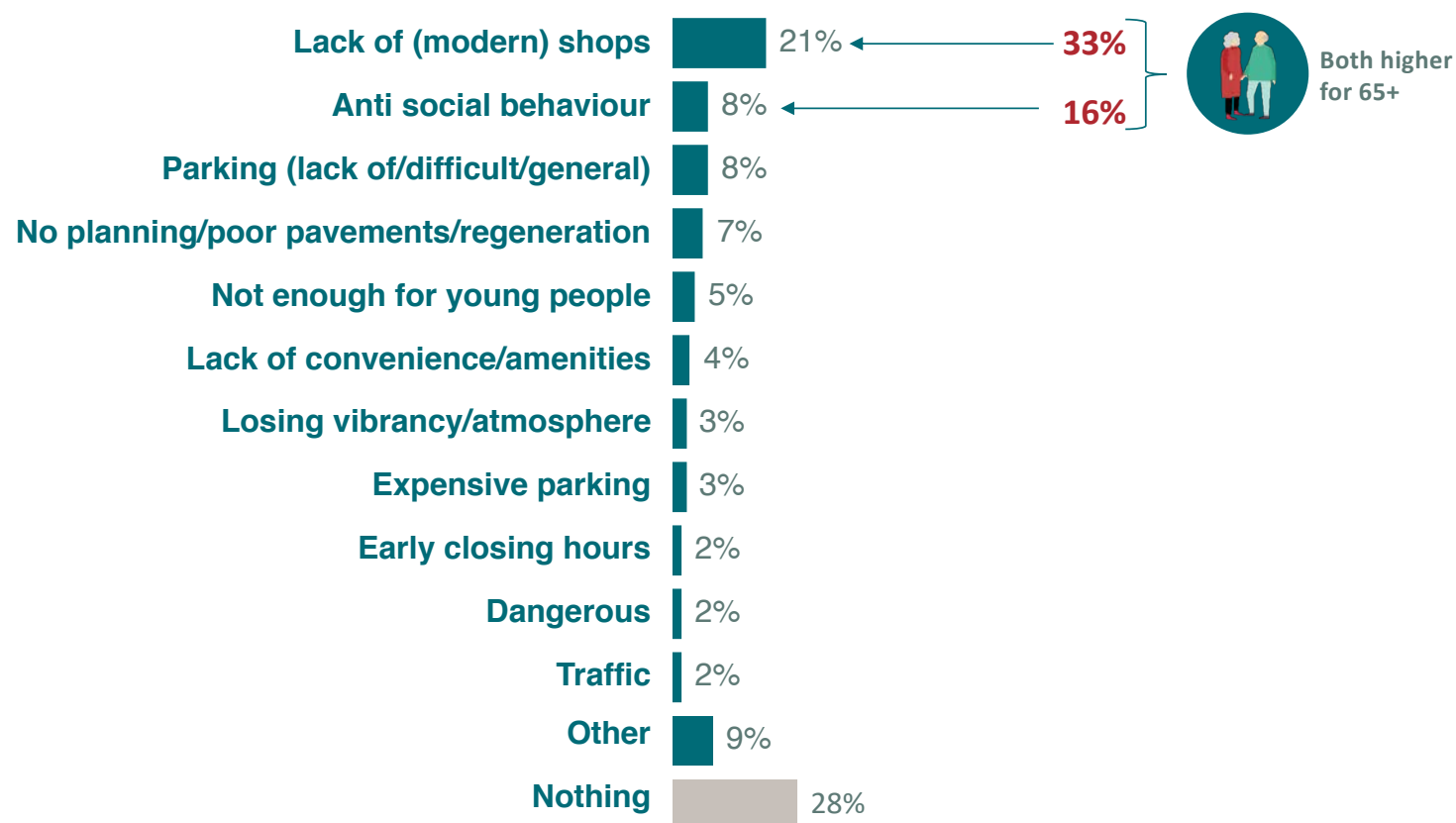
(Base: All Users of Dundalk Town Centre; n=408)



(Q.12)

What, if Anything, Do People dislike about Dundalk Town Centre?

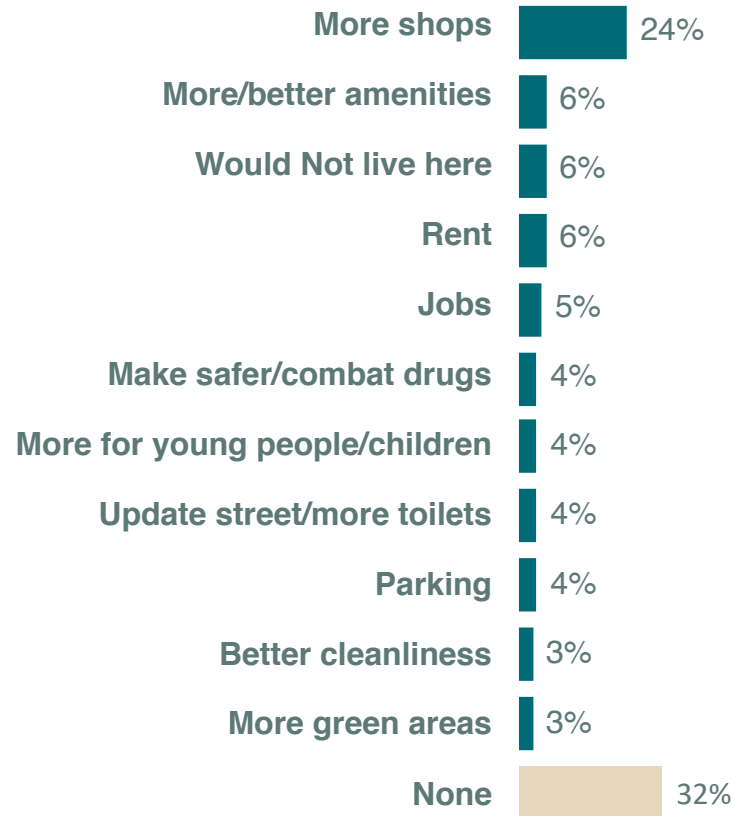
(Base: All Users of Dundalk Town Centre; n=408)



Just over 1 in 4 say there is nothing they dislike about Dundalk Town Centre. For those that do mention something, the number one thing that comes out is the lack of (modern) shops, cited as an issue by 21% of town centre users.

What Improvements or Incentives, if any, would make People Move To Dundalk Town Centre

(All currently not living in Dundalk Town Centre, n=376)



Having more shops is the most common improvement that people would want to see in Dundalk town centre before they would consider moving there.

What do People Dislike about Dundalk Town Centre?

(Base: All Users of Dundalk Town Centre; n=408)





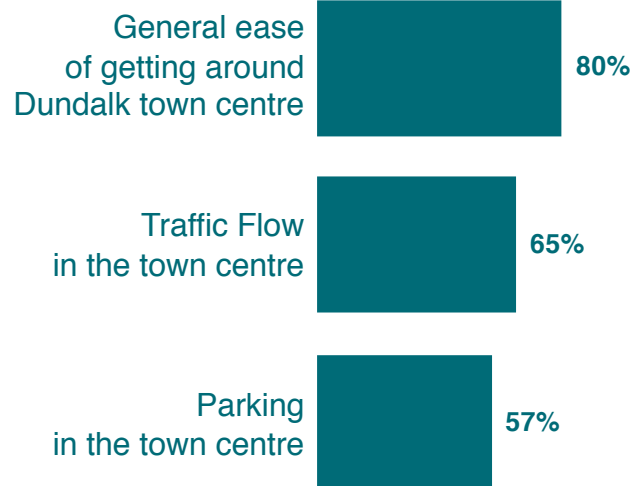
2. Satisfaction with Dundalk Town Centre

Satisfaction with Various Aspects of Dundalk Town Centre - I

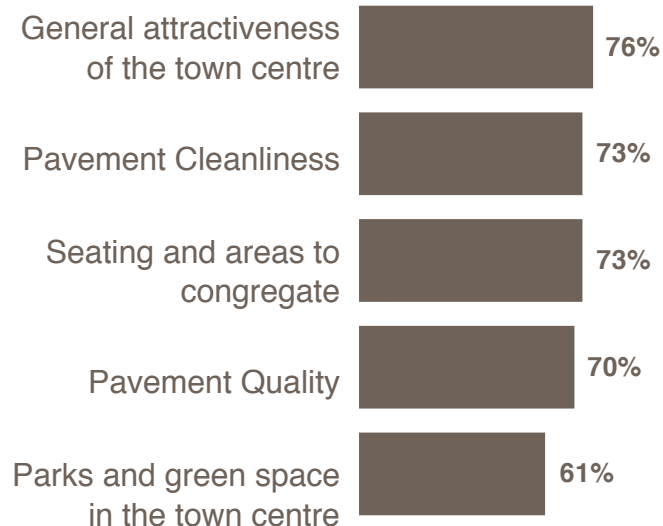
(Base: All Users of Dundalk Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Dundalk Town Centre. For each I want you to tell me how you would rate Dundalk Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very poor.

Traffic & Ease of Access



Attractiveness



Café/Restaurant



Showing % That score 4 (Good) and 5 (Very Good)

RED C

(Q.17)

Satisfaction with Various Aspects of Dundalk Town Centre - II

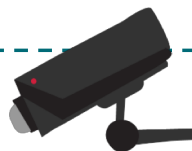
(Base: All Users of Dundalk Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Dundalk Town Centre. For each I want you to tell me how you would rate Dundalk Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very poor.

Tourism



Security/ Safety



Showing % That score 4 (Good) and 5 (Very Good)

Shopping



Dundalk Town Centre Ratings – Traffic & Ease of Access

(Base: All Users of Dundalk Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Dundalk Town Centre. For each I want you to tell me how you would rate Dundalk Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very poor.

Traffic & Ease of Access



Highest for
under 35's:
86%

General ease of getting around
Dundalk town centre

80%

Traffic Flow in the town centre

65%

Parking in the town centre

57%

Is handy to
get around

Meeting
friends,
convenient
location

Is not too bad for traffic
compared to Drogheda



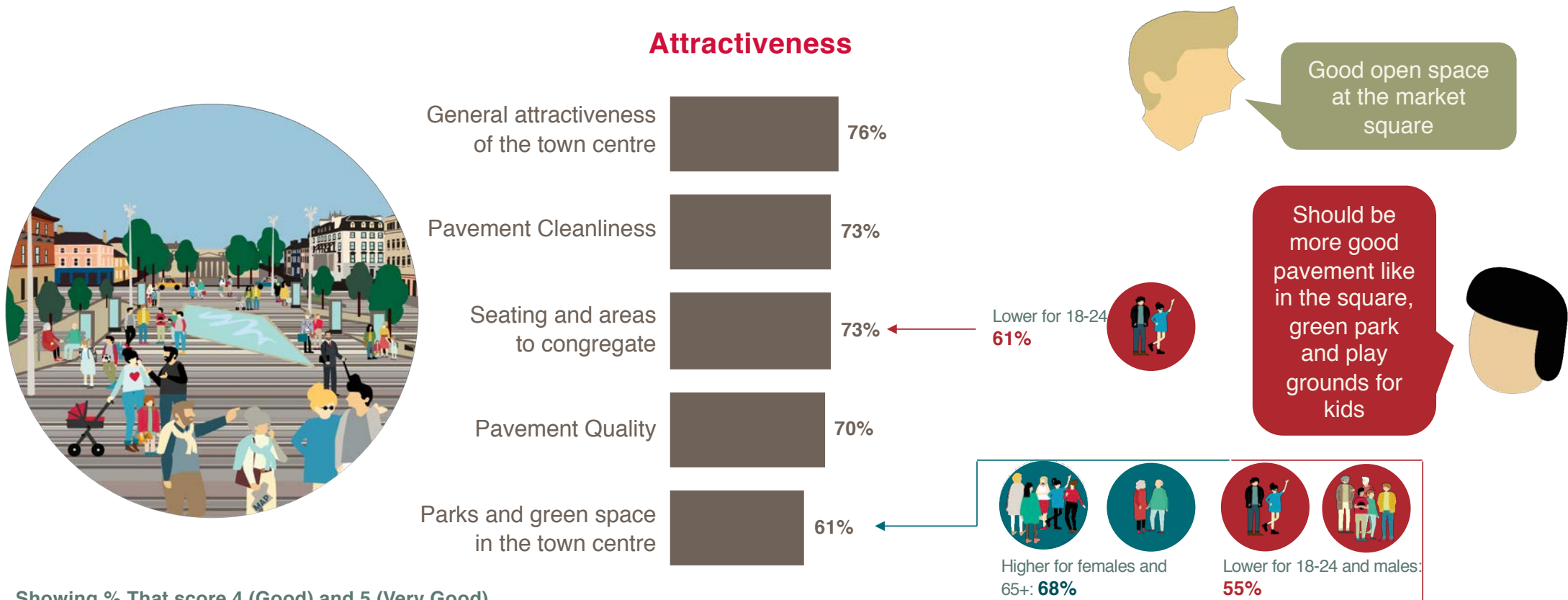
Showing % That score 4 (Good) and 5 (Very Good)

In terms of ease of access to the town, the vast majority of town users rate the ease of getting around the town centre as good or very good, with two thirds also rating the traffic flow positively. A majority also rate parking in the town centre as good or very good, but interesting to note that town users are less happy with this than they are for other aspects of town accessibility.

Dundalk Town Centre Satisfaction - Attractiveness

(Base: All Users of Dundalk Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Dundalk Town Centre. For each I want you to tell me how you would rate Dundalk Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very poor.



Showing % That score 4 (Good) and 5 (Very Good)

The general attractiveness of the town centre is not seen as a significant issue in Dundalk, with the majority of town users rating this as either good or very good. Key learning in terms of town attractiveness however is that while a majority still rate the parks and green space positively, it scores lower than other aspects of attractiveness.

Dundalk Town Centre Satisfaction - Café/Restaurant

(Base: All Users of Dundalk Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Dundalk Town Centre. For each I want you to tell me how you would rate Dundalk Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very poor.

Café/Restaurant

Café/restaurant choice
in the town centre

89%

Café/ restaurant quality
in the town centre

87%

Great variety of
coffee shops

Great choice of restaurants
and friendly atmosphere



Showing % That score 4 (Good) and 5 (Very Good)

The quality and choice of cafés/restaurants in the town centre is also rated extremely highly, very positive to see in the context of this being the second most common reason that people user Dundalk town centre.

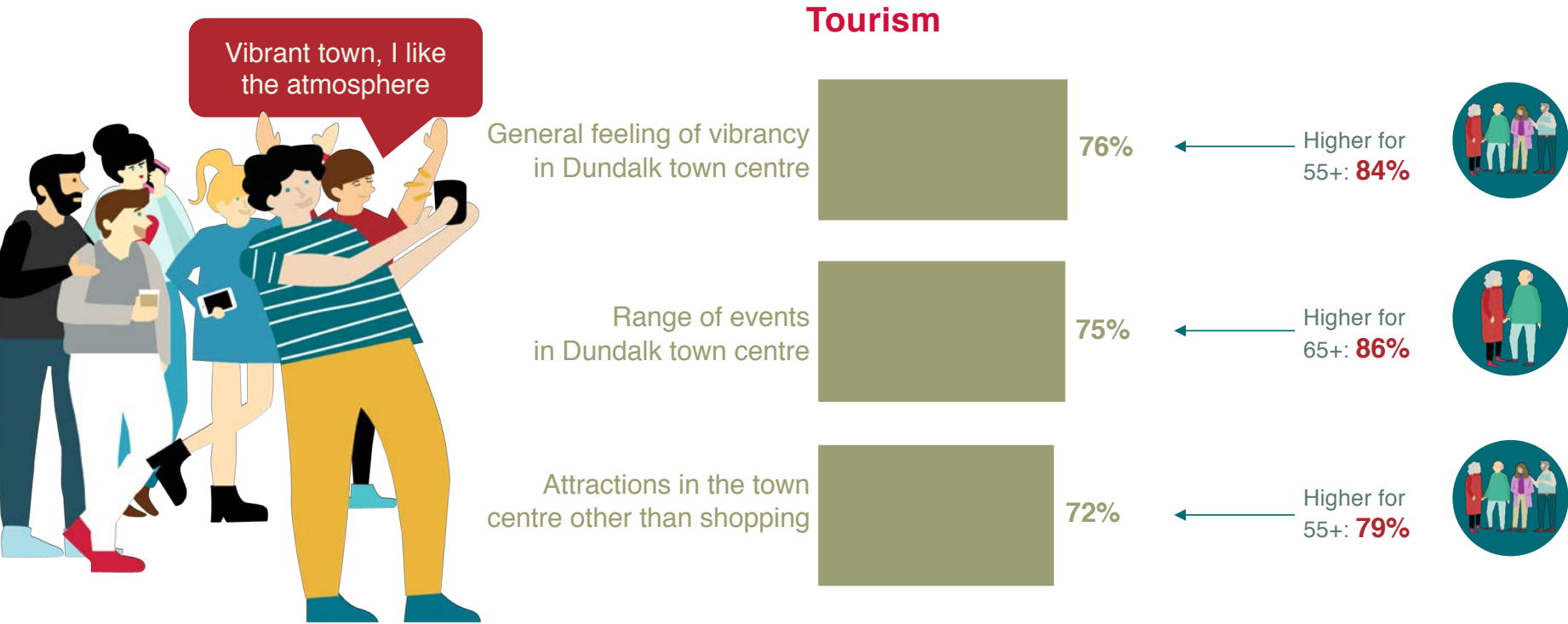
RED C

(Q.17)

Dundalk Town Centre Satisfaction - Tourism

(Base: All Users of Dundalk Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Dundalk Town Centre. For each I want you to tell me how you would rate Dundalk Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very poor.



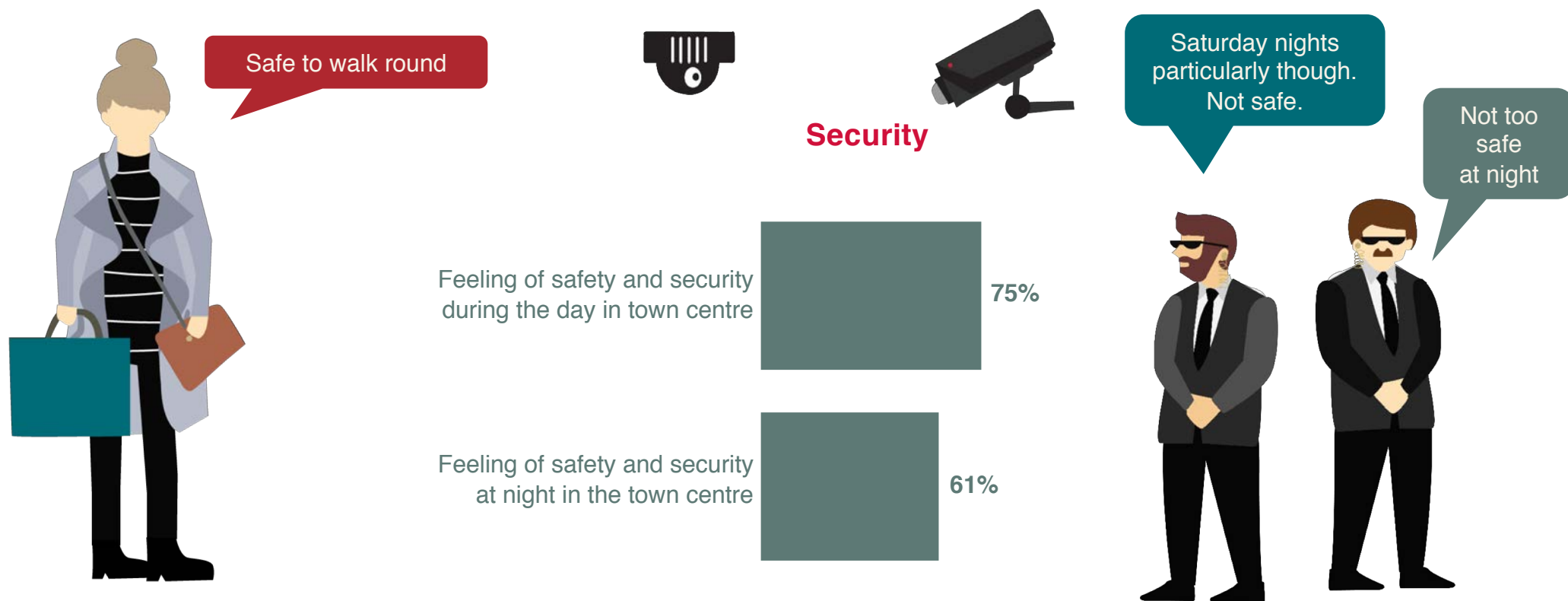
Showing % That score 4 (Good) and 5 (Very Good)

From a tourism perspective, circa 3 in 4 positively rate the general feeling of vibrancy, the range of events and the attractions in Dundalk Town Centre other than the shops.

Dundalk Town Centre Satisfaction – Security/ Safety

(Base: All Users of Dundalk Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Dundalk Town Centre. For each I want you to tell me how you would rate Dundalk Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very poor.



Showing % That score 4 (Good) and 5 (Very Good)

While a majority do feel safe in Dundalk Town Centre at both day time and night time, there is a significant discrepancy in feeling safe between the two.

Dundalk Town Centre Satisfaction - Shopping

(Base: All Users of Dundalk Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Dundalk Town Centre. For each I want you to tell me how you would rate Dundalk Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very poor.



Showing % That score 4 (Good) and 5 (Very Good)

While the lack of (modern) shops does come out as a dislike about Dundalk Town Centre for 1 in 5, in terms of the existing stores, the quality, standard, variety of goods and value for money are all rated very positively. Furthermore, it is interesting to note that 75% do actually rate the variety of shops in the town centre as good or very good.



3. Dundalk Shopping

Reasons Why People Shop in Dundalk Town Centre

(Base: All who shop in Dundalk Town Centre; n=307)

Q.2a Thinking specifically about the shopping environment what is the **main** reason you shop in Dundalk town centre?

Q.2b And what **other** reason do you shop in Dundalk town centre?



Higher for
55+:
68%



The impact of the perceived ease of accessibility to Dundalk Town Centre is clear, with a majority of town users who shop citing handiness/convenience as the main reason why they shop in the town centre. Habit is the next most common reason, with a significant gap then to the next most common reasons of quality and selection of shops.

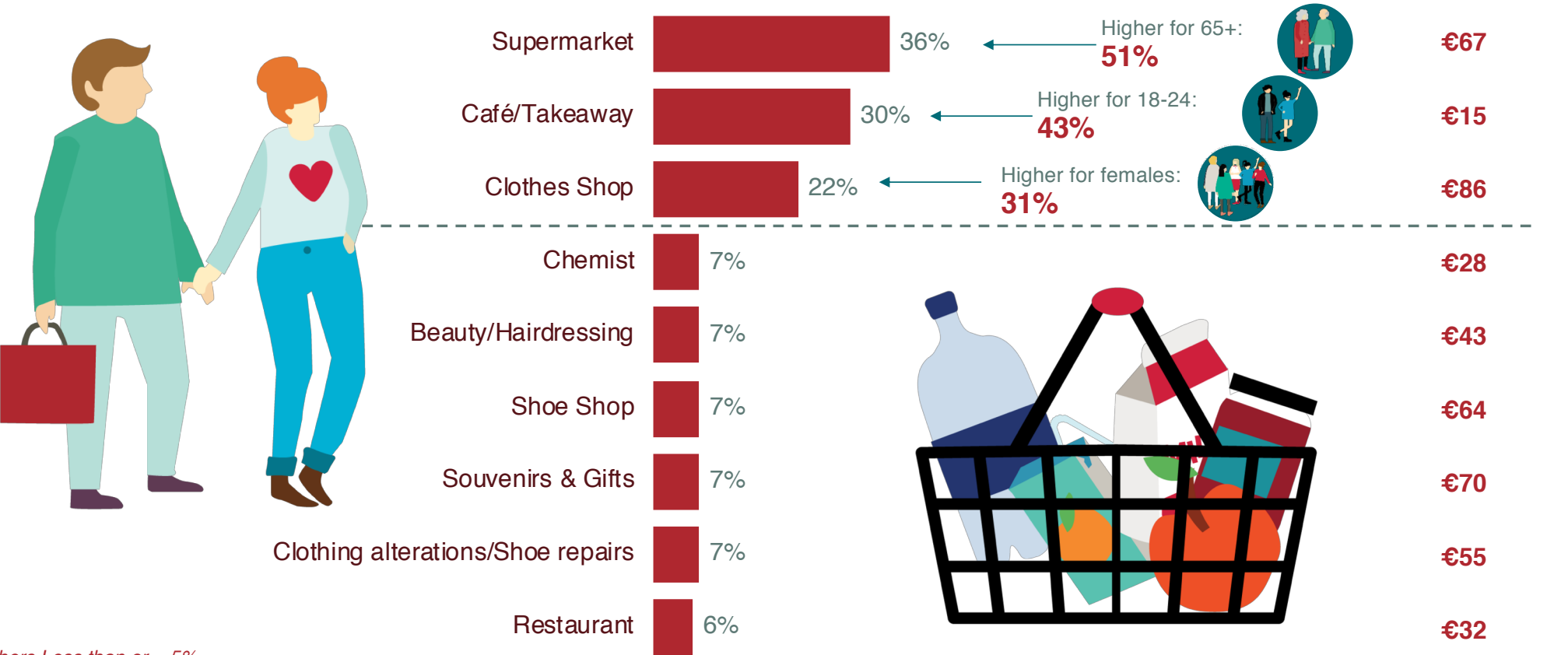
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(Q.2a/b)

Business/Shops Visited Today

(Base: All who shop in Dundalk Town Centre; n=276)

Q.3b And which types of business/shops did you visit today?



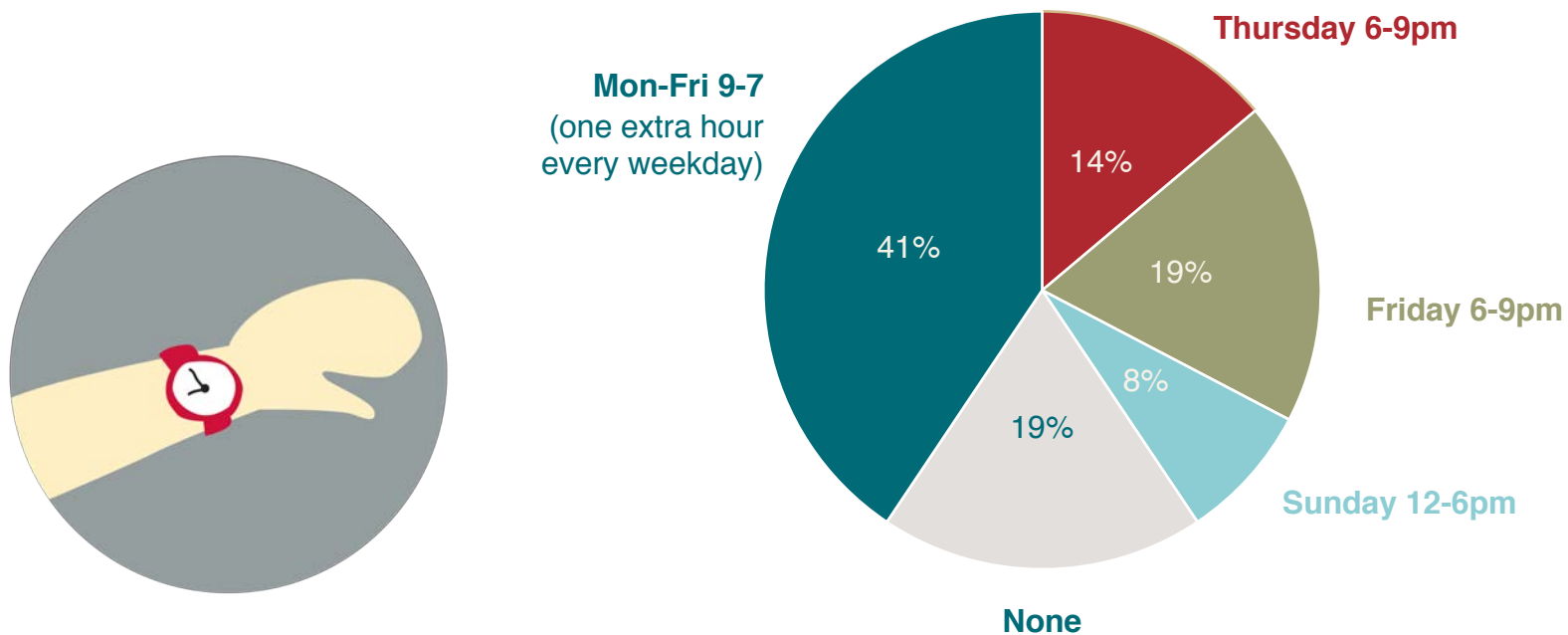
Others Less than or = 5%

Supermarkets, cafés and clothes shops are the most common outlets that people visit when shopping in Dundalk Town Centre. Clothes shops also enjoy the highest level of average spend, with users of these outlets spending an average of €86.

Alternative Opening Hours?

(Base: All Who Shop In Dundalk; n=400)

Q.4b Which of the following 'extended opening hours' options would you avail of most often if they were available in Dundalk?



When presented with various options for extended shopping hours, an additional hour every weekday was the single most popular option, with 41% of town centre users saying they would avail of this if it was available in Dundalk.

RED C

(Q.4b)

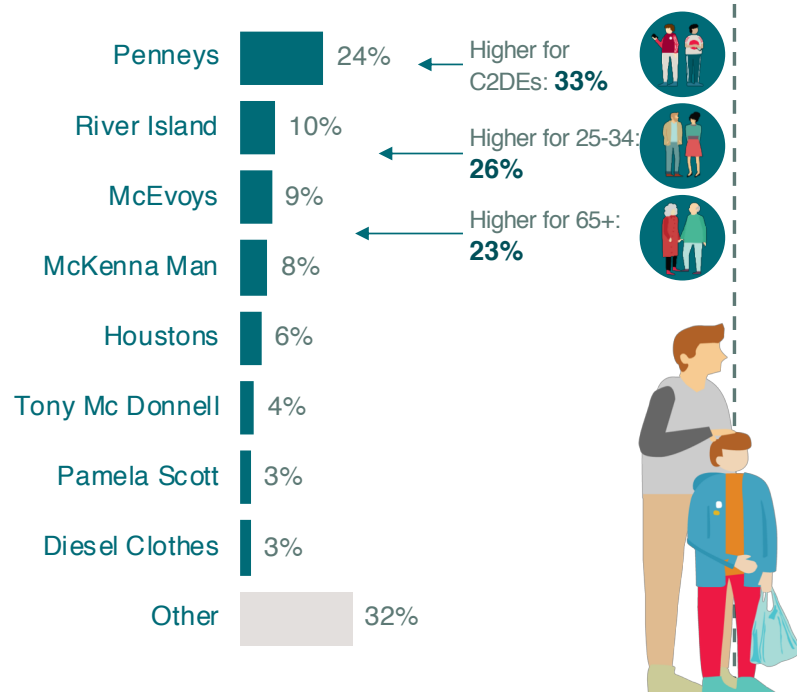
Shops Most Shopped At

(Base: All Who Shop In Dundalk; n=307)

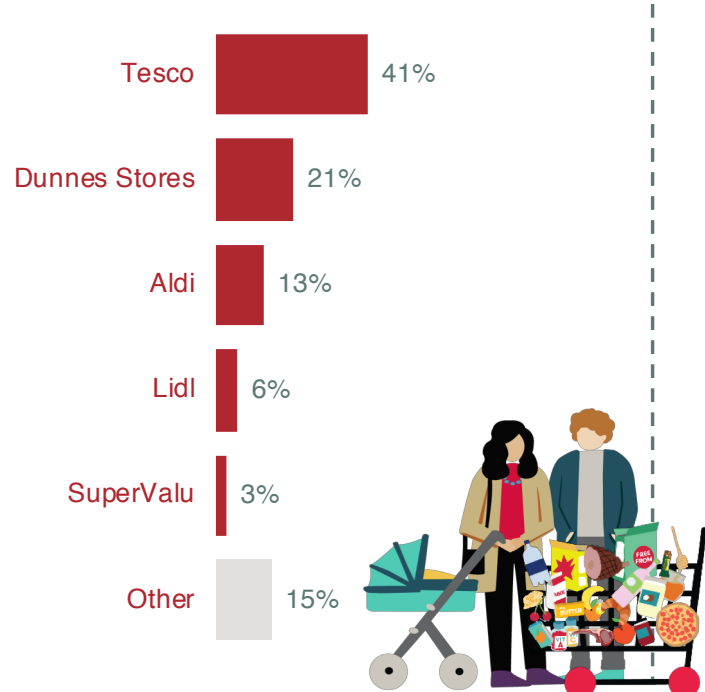
Q.10 When shopping in Dundalk Town Centre, please name the Store in which you do most of your shopping for the following goods?



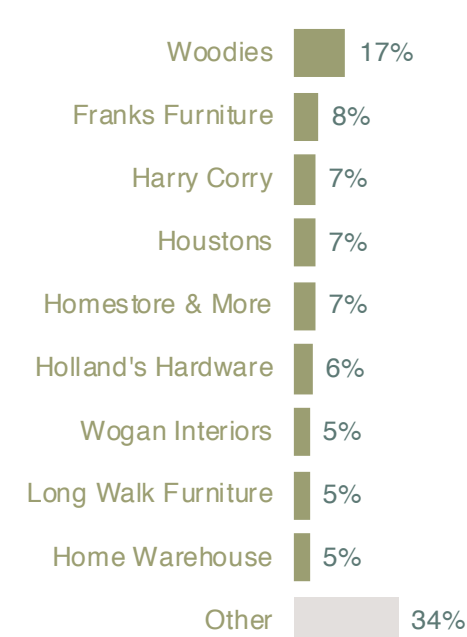
Clothes



Food Stuff



Furniture/Durables



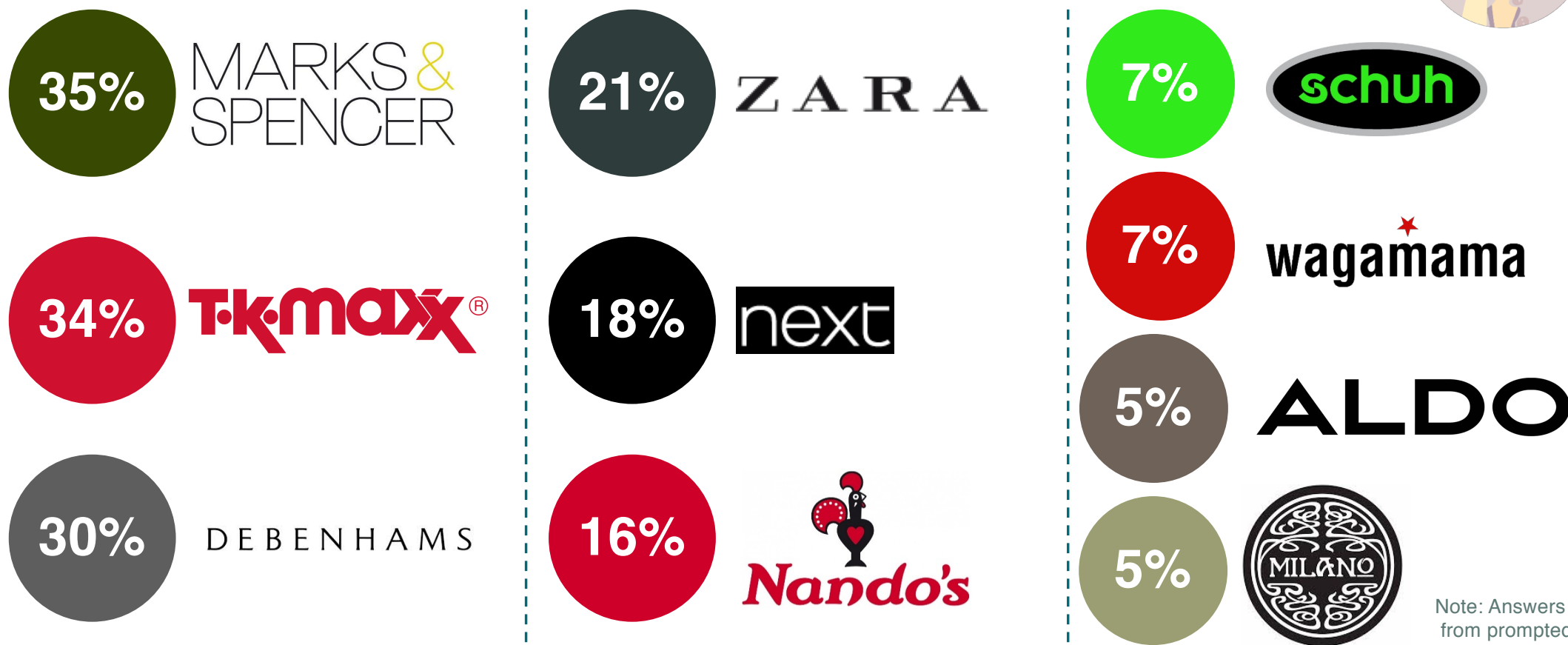
Penneys is by far the most often used clothes shop. Tesco dominates food shopping in the town, with 41% of town users saying this is the store they use most often. Meanwhile, Woodies is the market leader in Furniture/Durables.

RED C

(Q.10a/
b/c)

What Stores and Services Are Missing From Dundalk?

(Base: All Users of Dundalk Town Centre; n=408)

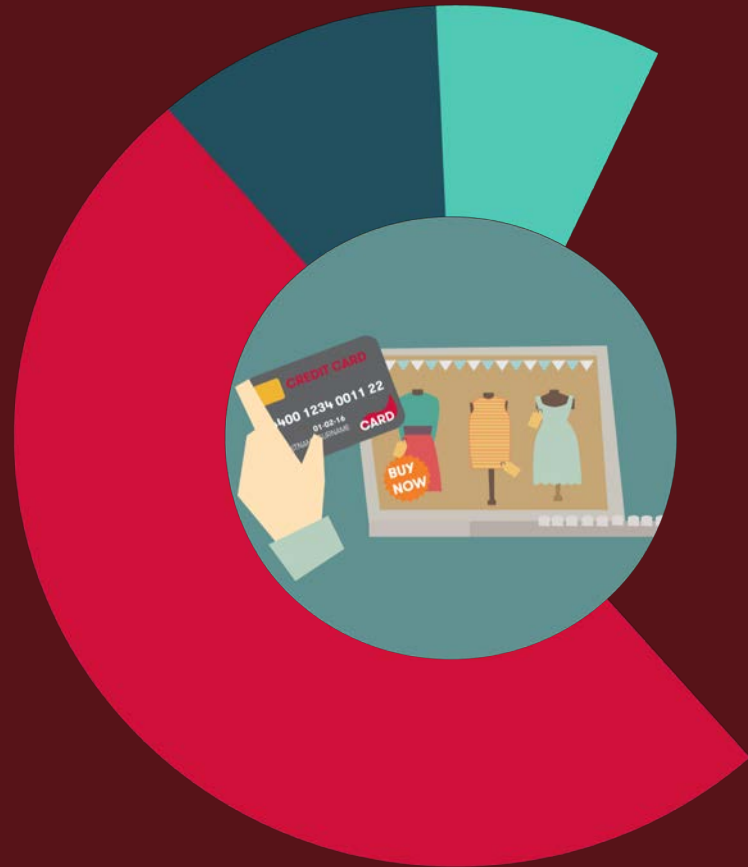


Note: Answers are from prompted list

1 in 3 town centre users would like to see a Marks & Spencer in Dundalk with TK Maxx and Debenhams the next most desired stores for current town users.

RED C

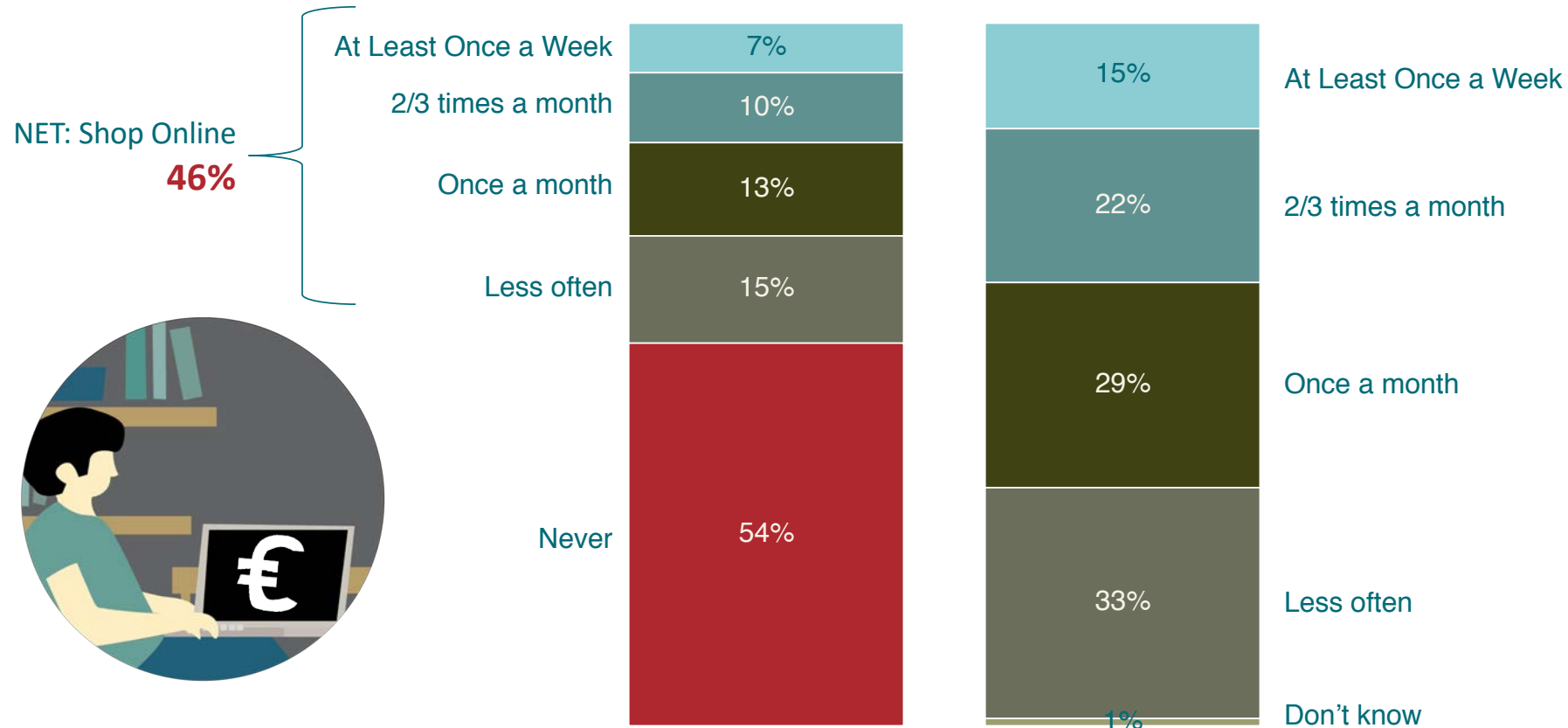
(Q.11)



4. Online Shopping

Shopping Online

Q.5 And how often, if at all, do you shop online?

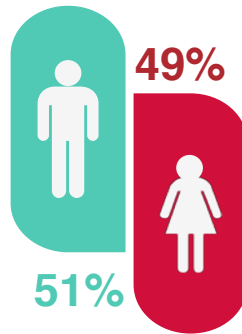


Just under half of Dundalk Town Centre users say they shop online. Positive to see however, that among those that do, it is only just over a third who are doing it more often than once a month.

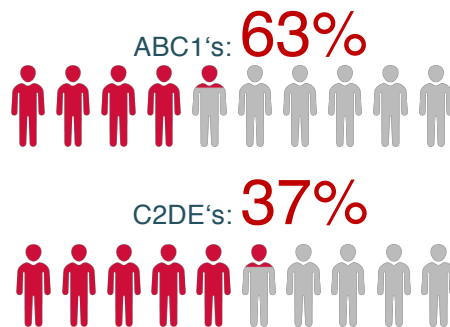
Analysis Of Online Shoppers in Dundalk

(Base: All Adults aged 18+ who shop online, n=187)

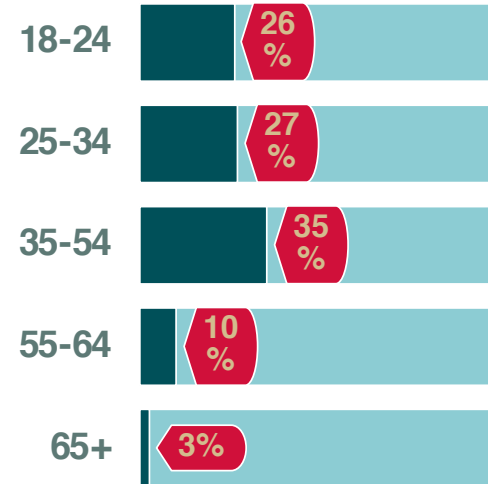
Gender



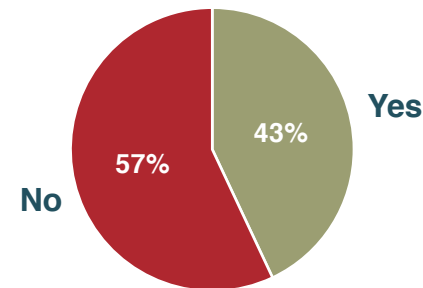
Social Class



Age



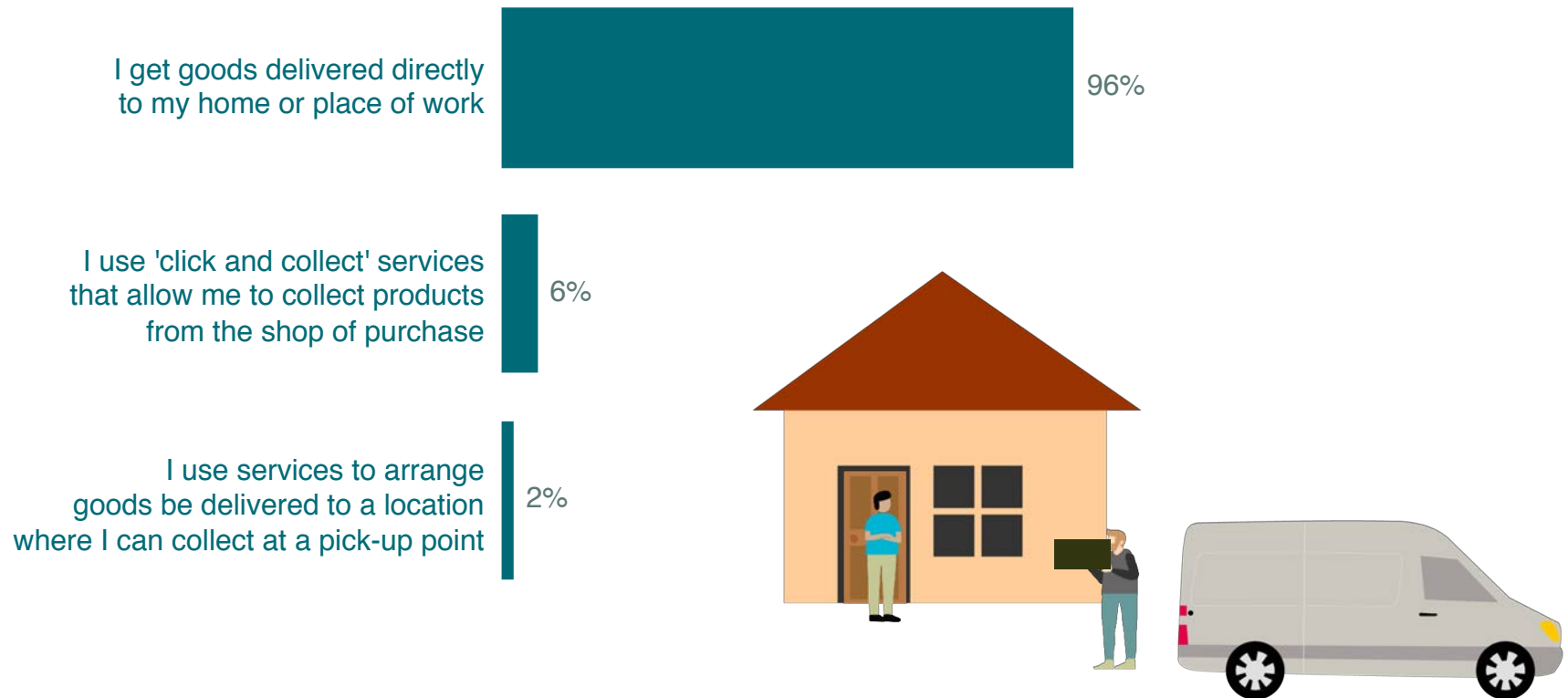
Dependent Children?



Online Delivery Options

(Base: All Who Shop Online; n=186)

Q.6 Which of the following do you do when you purchasing goods online?

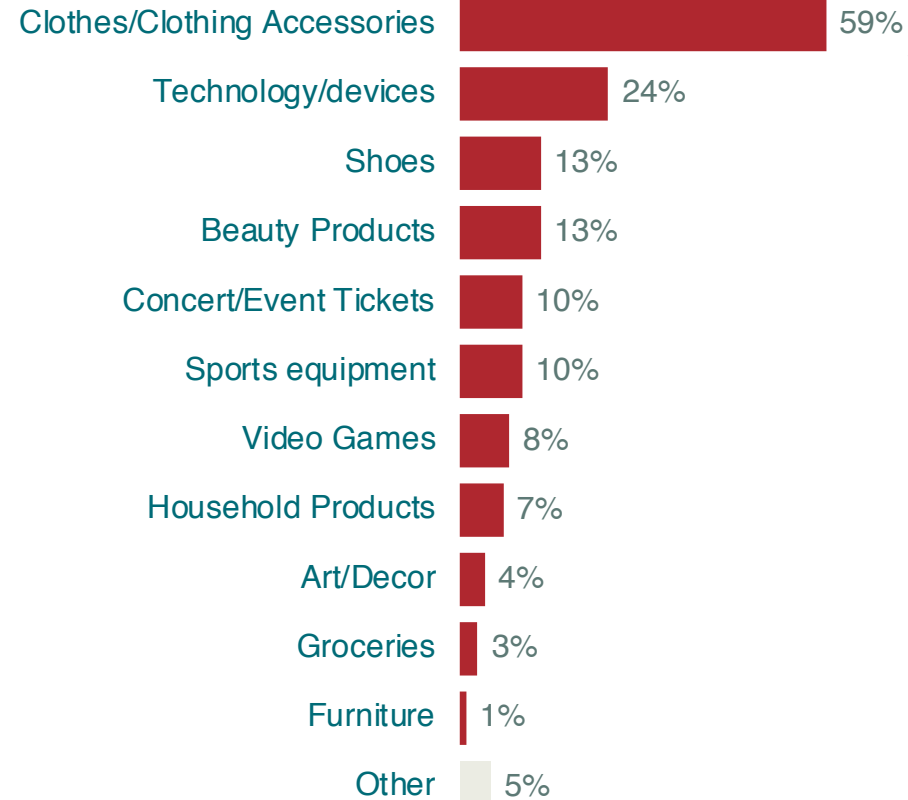


Almost all online shoppers opt for home or work delivery, with just 6% using “click and collect” and just 2% using collection point services.

Main Items Bought Online

(Base: All Who Shop Online; n=186)

Q.6b What types of goods do you mainly buy online?



And for 18-24:
69%



Reflecting online shopping trends generally, Dundalk Town Centre users who shop online are primarily buying clothes/clothing accessories, accounting for 59% of their online purchases. Technology/devices are the next most common item bought online.

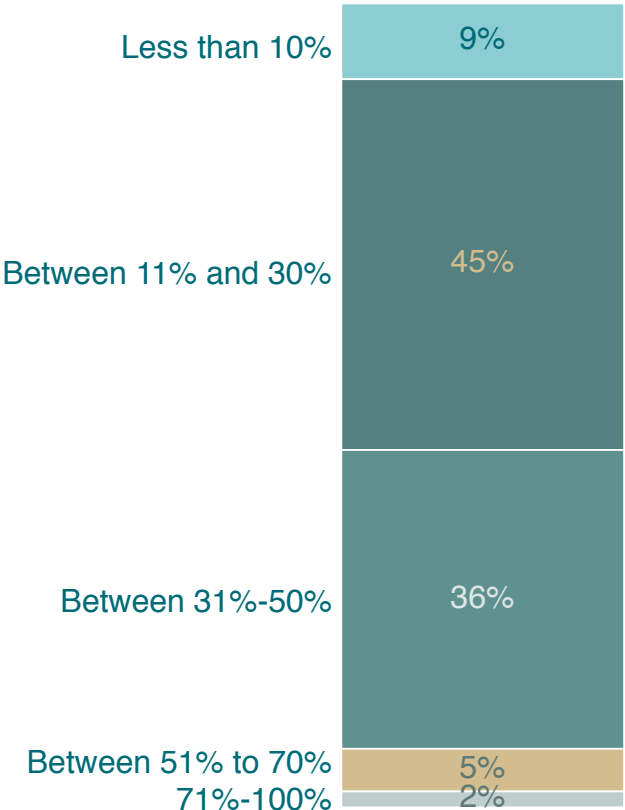
RED C

(Q.6b)

Proportion of Clothes and Accessories Bought online

(Base: All Who Bought Clothes Online; n=110)

Q.7a Roughly what percentage of your clothing and accessories do you buy online?

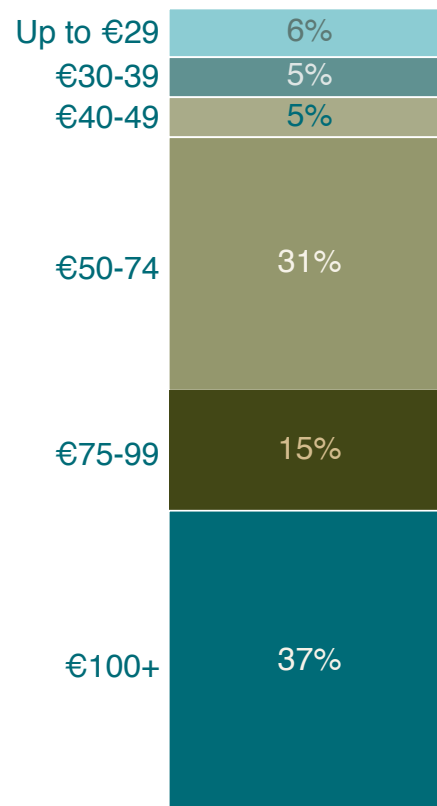


Positive to see for Dundalk’s clothing and accessory retailers, even among those town users who are buying clothes online, the vast majority say they buy less than 50% of their clothing and accessories via this medium.

Online Spend On Last Clothes Purchase

(Base: All Who Bought Clothes Online; n=110)

Q.7 And thinking back to that last time you made a clothes/clothing Accessories purchase online, how much did you spend? Please round up your estimate to the nearest euro.



Average Spend
€93.31

While not significantly so, it is notable that the average spend on clothing and accessories online is slightly ahead of the average spend (€86) in bricks and mortar stores in the town centre.

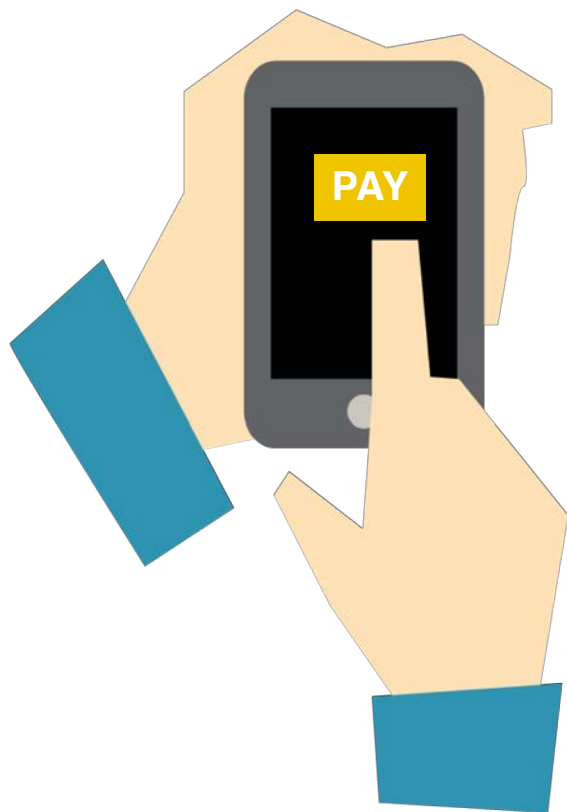
RED C

(Q.7b)

Benefits of Shopping Online

(Base: All Who Shop Online; n=186)

Q.8 What do you feel are the benefits of shopping online?

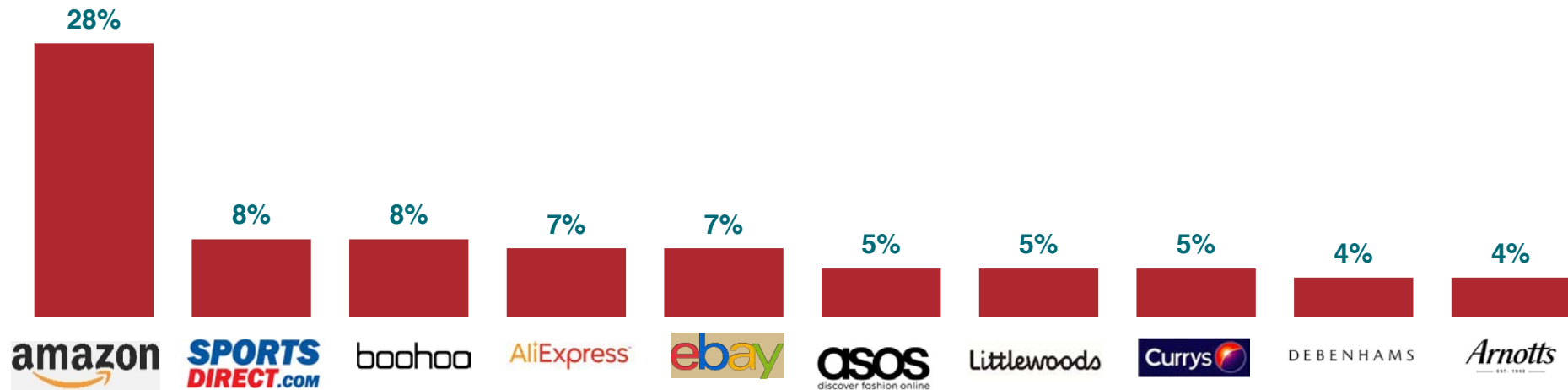


The selection/range of stores online is seen as the biggest benefit of online shopping while two in five are motivated by Price and a similar number of people by convenience.

Favourite Online Store/Website

(Base: All Who Shop Online; n=186)

Q.9 What is your favourite online store/website to shop?



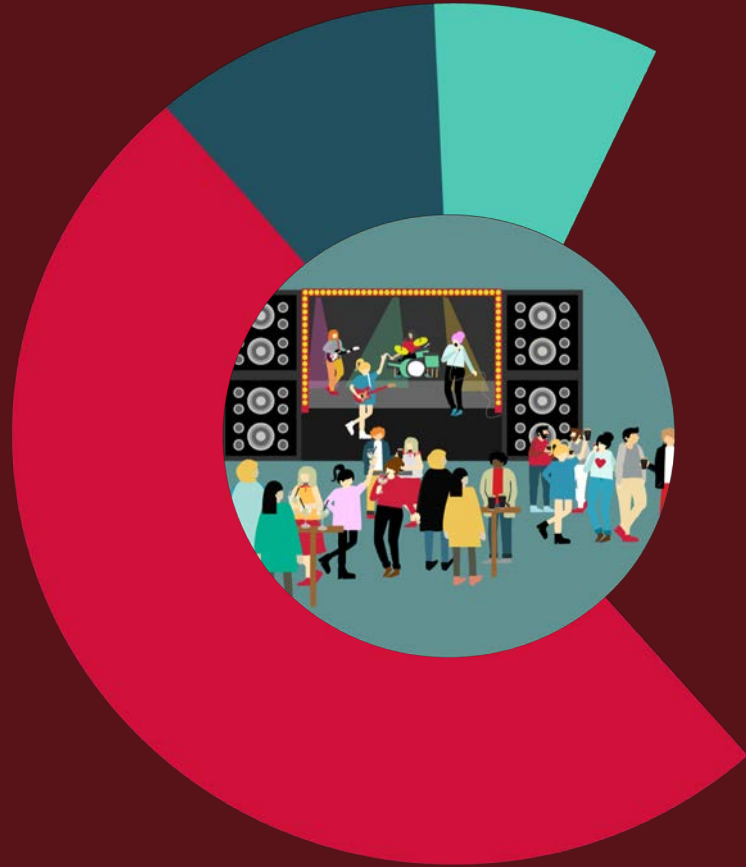
Others Less than or = to 3%

Amazon is the favourite online store/website for 28% of Dundalk town users who shop online, with a significant lead over all other stores asked about.

RED C

(Q.9)

37



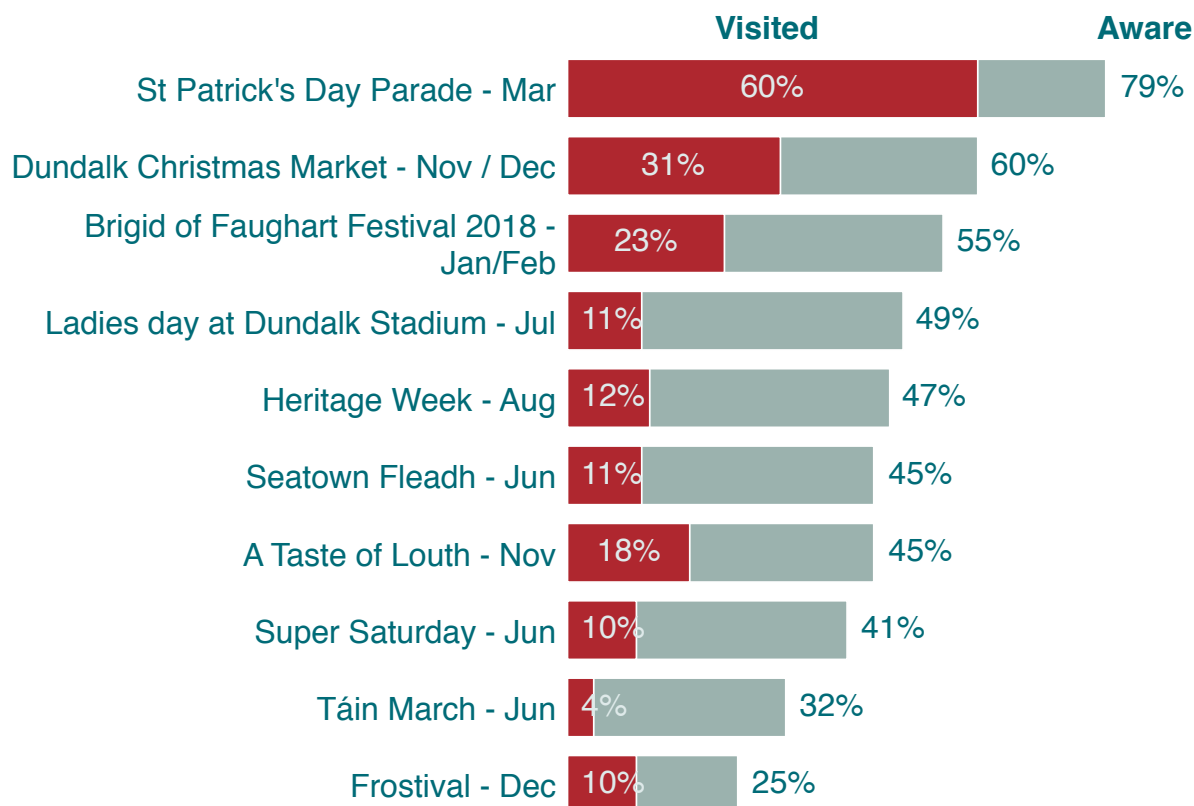
5. Public Events and Festivals

Dundalk Public Events

(Base: All Users of Dundalk Town Centre; n=408)

Q.14 Which of the following public events are you aware of in Dundalk Town Centre?

Q.15 And which of these public events have you visited within the last year?



People who visit an event on average have been to **TWO EVENTS** in the last year.



Of the events asked about, the St Patricks Day Parade is by far the biggest, with just under 80% of Dundalk Town Centre users saying they know about the parade and 60% saying they have went to it within the past year.

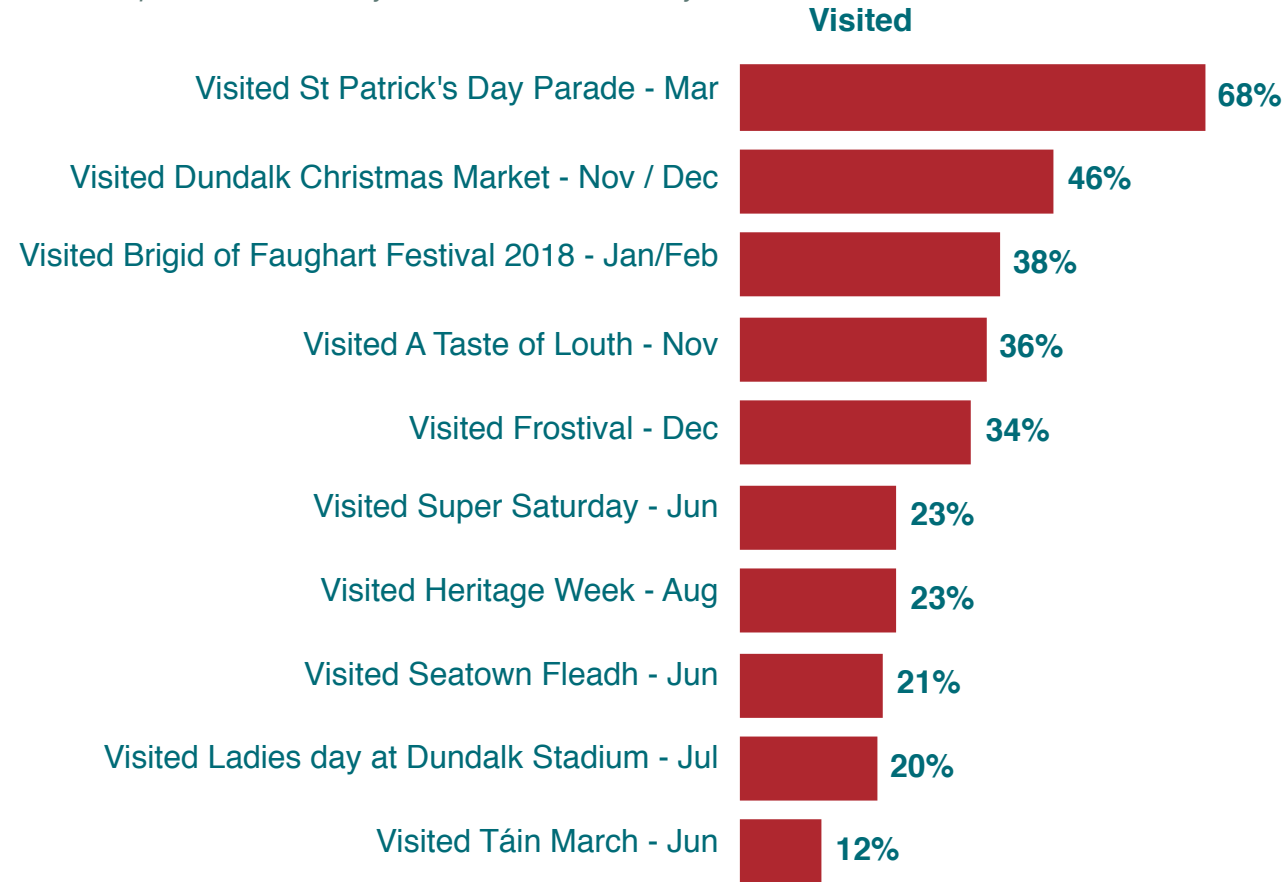
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(Q.14/
15)

Dundalk Public Events

(Base: All Aware of Each Event)

Q.15 And which of these public events have you visited within the last year?



Among those aware, the St Patricks Day Parade also has the highest conversion from awareness into visitors, with 68% of those aware of the event saying they went to it within the past year.

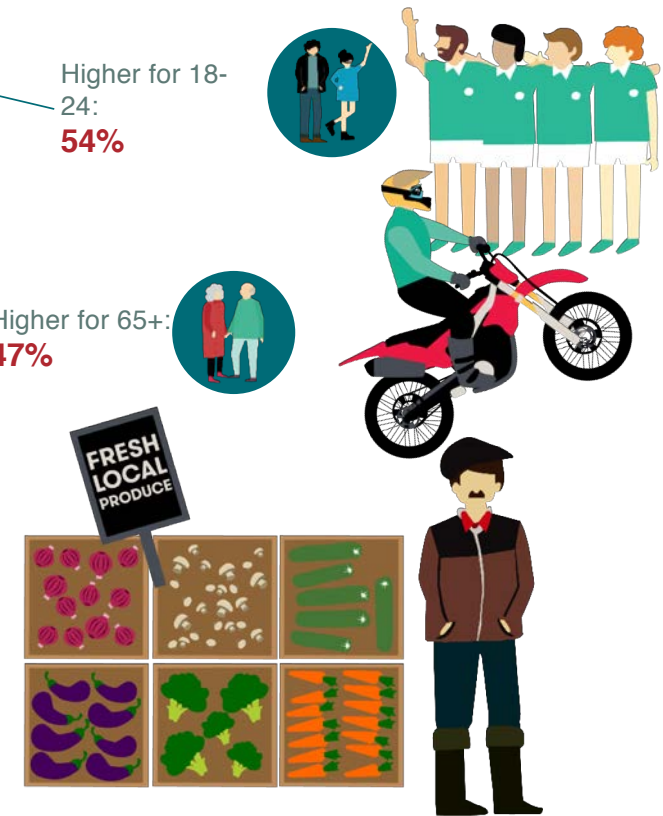
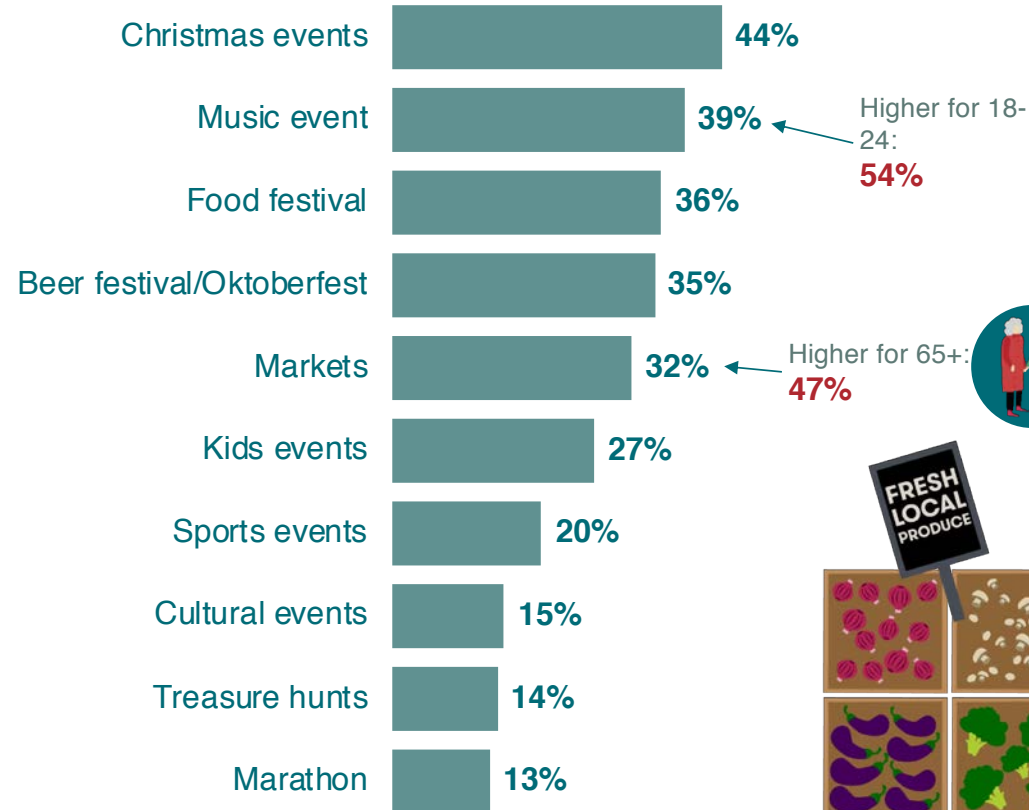
RED C

(Q.14/15)

Future Events In Dundalk

(Base: All Users of Dundalk Town Centre; n=408)

Q.16 Which of the following types of event, if any, would you like to see take place in the town centre to entice you to visit and spend more time in the town centre of Dundalk?



For driving increased visits and spend to the town centre, Christmas events are the most likely to entice current town users to spend more time in Dundalk, followed by music events.

RED C

(Q.16)

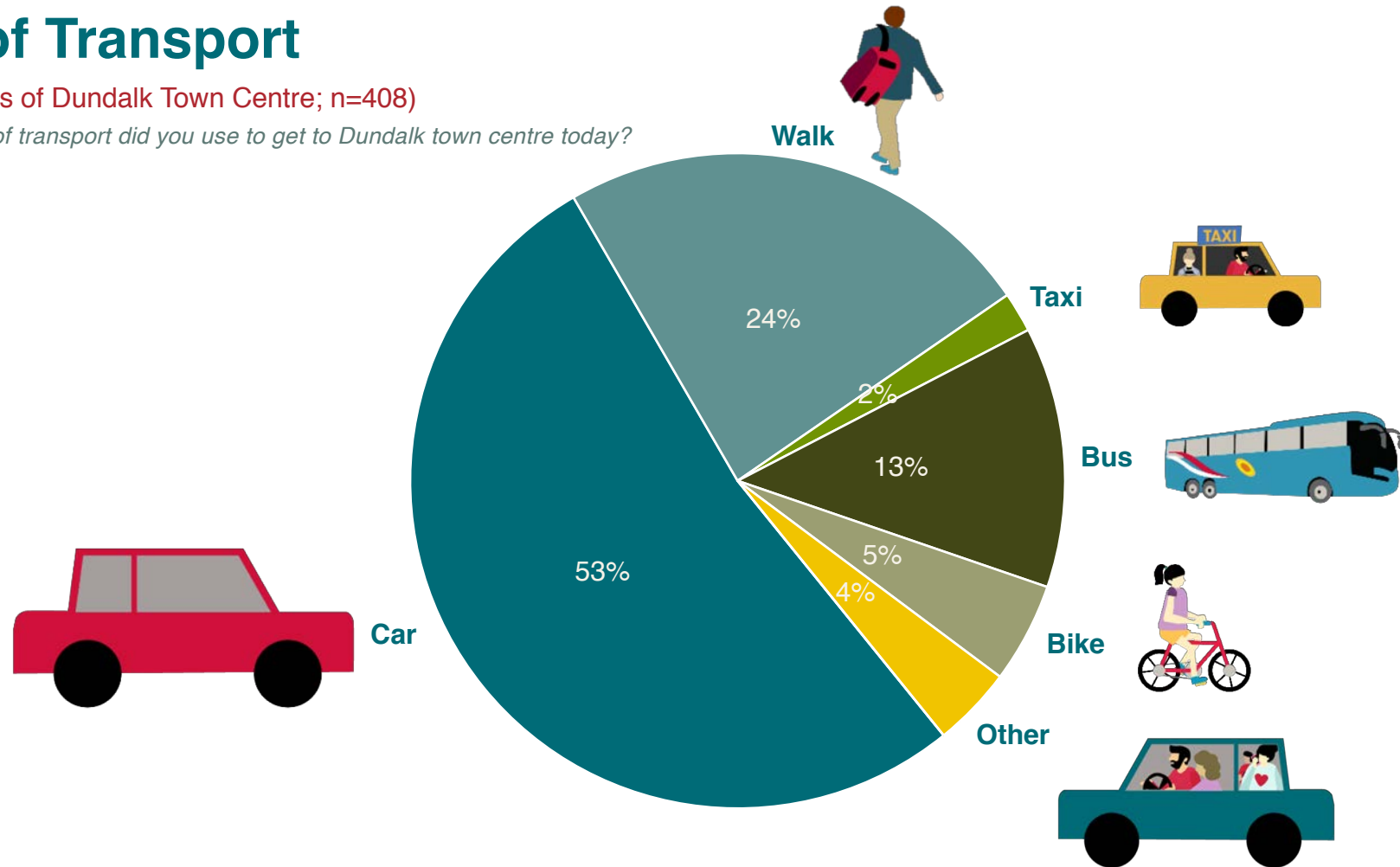


6.Transport & Parking

Mode of Transport

(Base: All Users of Dundalk Town Centre; n=408)

Q.18 What form of transport did you use to get to Dundalk town centre today?

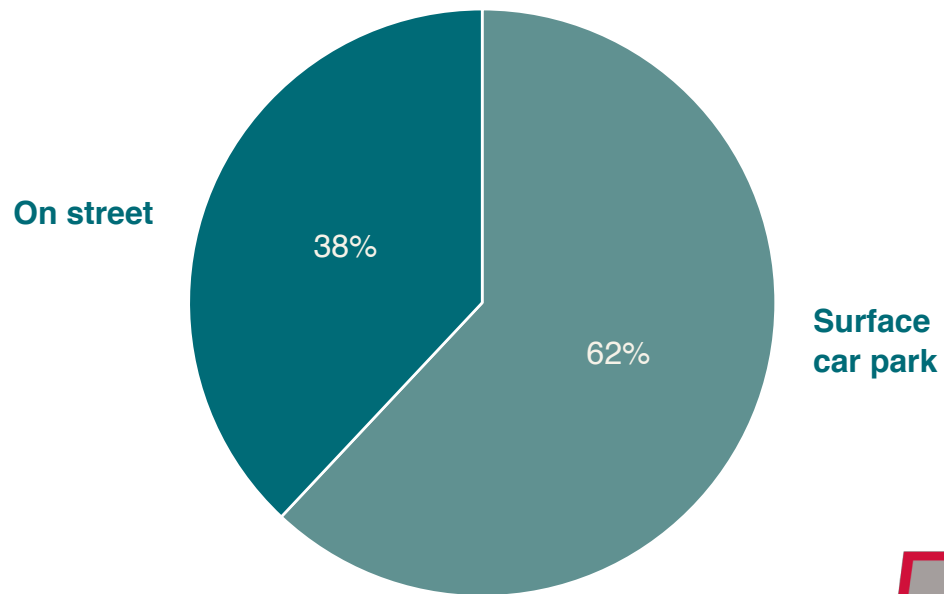


Car is the main mode of transport used by Dundalk Town Centre users, used by over half of people, with approx. 25% arriving on foot and just 13% by bus.

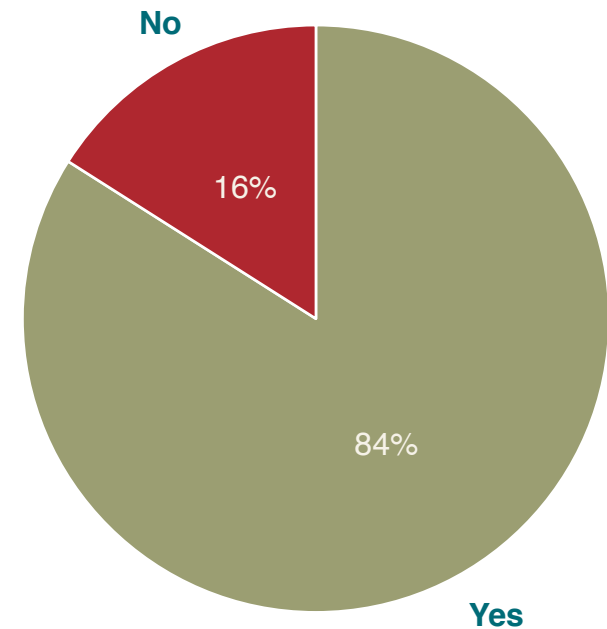
Parking Preference

(Base: All Who Drove In A Car; n=216)

Q.19 When in Dundalk Town Centre, would your preference be to park in...



Q.20 Did you pay for parking today?



Surface car parks are preferred by the majority of town users who came in by car with 84% saying they paid for parking in the town centre.

RED C

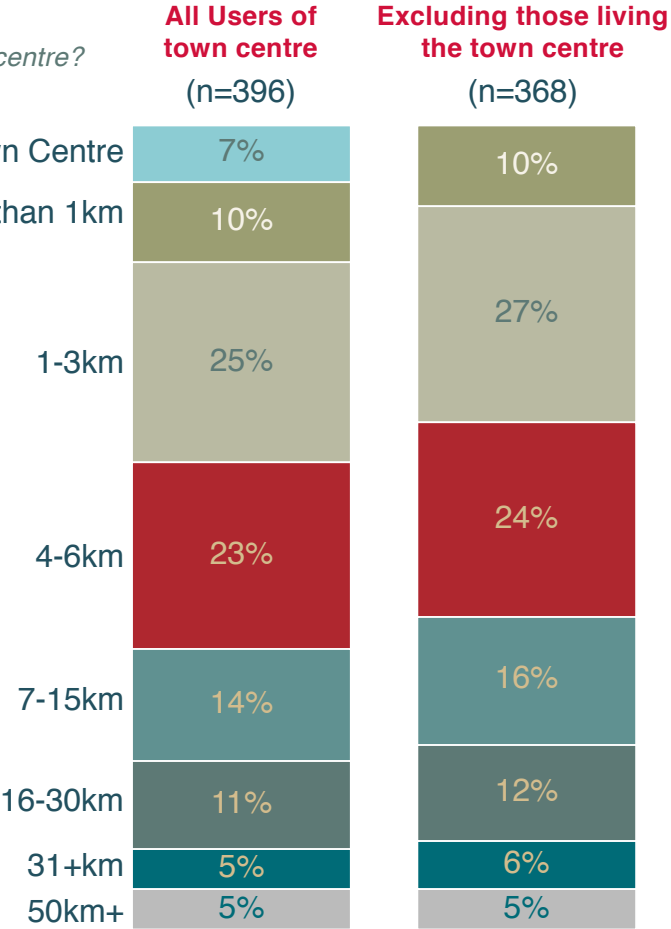
(Q.19/
20)

44

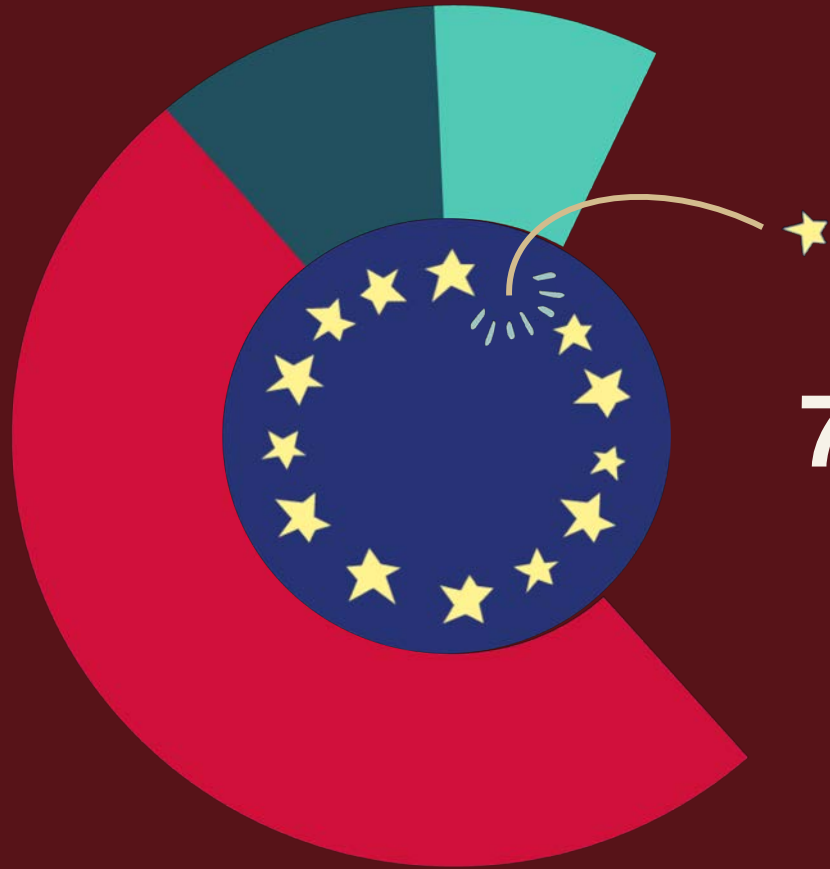
Dundalk Catchment

(Base: All Users of Dundalk Town Centre; n=396)

Q.22 How far do you actually live from the Dundalk town centre?



42% of town users say they live within 3km of the town centre, with a further 23% saying they live between 4 – 6km from the town.

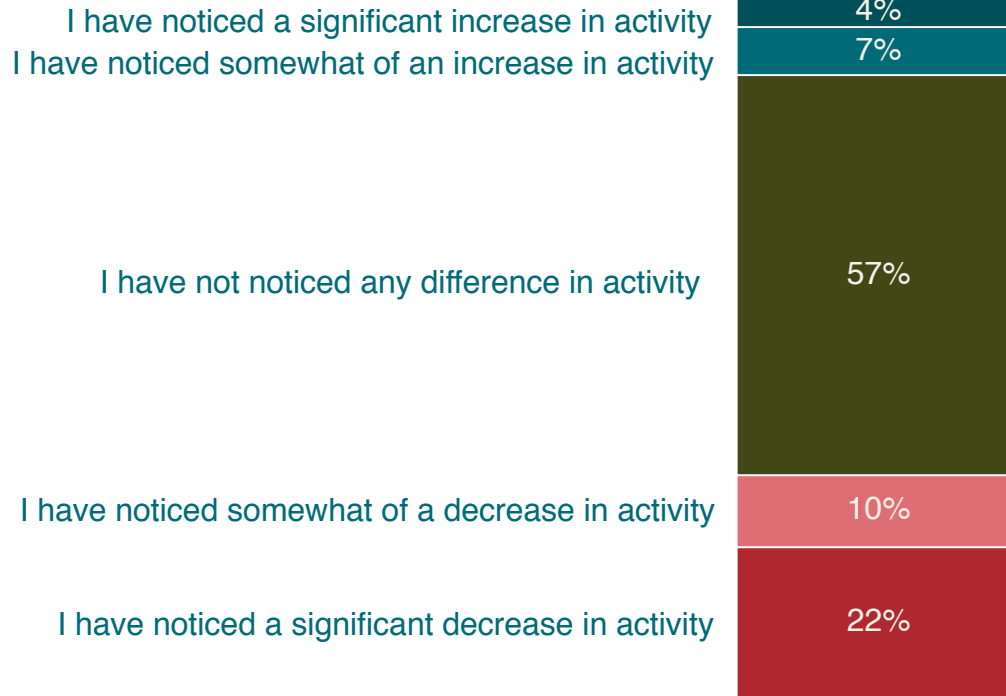


7. Brexit?

Change in Activity in Town Centre Since Announcement of Brexit

(Base: All Users of Dundalk Town Centre - 408)

Q.24 Since the announcement of Brexit, which of the following best describes the extent to which you have noticed any change in activity in Dundalk town centre?



NET: Increase 11%

NET: Decrease 32%

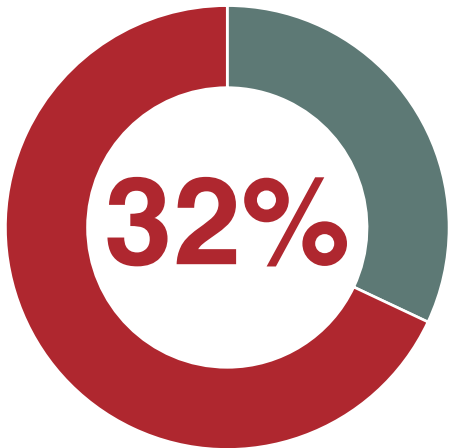


Just under a third of those who currently use Dundalk town centre have noticed a decline in activity around the town since the announcement of Brexit.

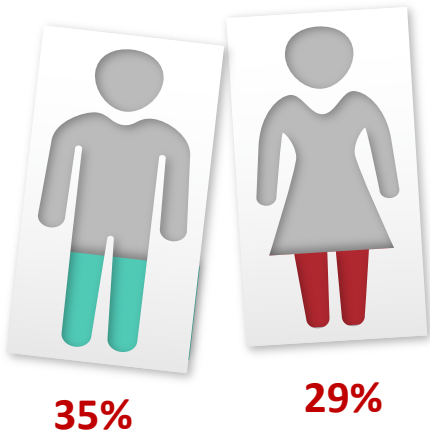
Who has noticed a decrease in activity since the announcement of Brexit?

(Base: All Users of Dundalk Town Centre - 408)

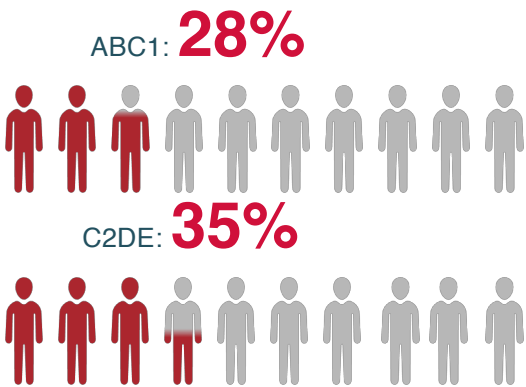
Q.24 Since the announcement of Brexit, which of the following best describes the extent to which you have noticed any change in activity in Dundalk town centre?



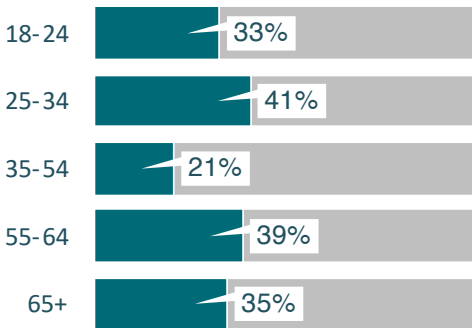
Gender



Social Class



Age



Those attending Dundalk Town Centre for Work

41%



Those attending Dundalk Town Centre on Social Visits

40%



Those living within 3km of the town centre

43%

(Base: All Users of Dundalk Town Centre - 408)

(Base: All Users of Dundalk Town Centre - 408)



Meanwhile, just under two thirds of users of Dundalk town centre believe that Brexit will have a negative impact on the town if it goes ahead, with just 1 in 8 believing it will have a positive impact on the town.



Appendix

Project Team



Ali Harvey
The Heritage Council

- / Founding Co-ordinator of the CTCHC Training Programme in Ireland
- / Qualified Spatial Planner and Project Manager with a background in economics and urban development
- / Twenty-three years' experience of project managing planning and regeneration programmes and projects in Ireland (both private and public sectors);
- / Author of the Community-led Village Design Statements Toolkit, 2012;
- / Founding Co-ordinator of the Irish Walled Towns Network (IWTN) in 2005.



Martin McElligott
Dundalk BIDS

- / Dundalk native and Town Centre retailer for 20+ years
- / Town Centre Commercial Manager with Dundalk Business Improvement District Scheme, Martin works with all stakeholders in Dundalk to help generate a positive image and collectively helping to generate a positive business future.
- / Project & Event Manager Martin has been responsible for creating many different Dundalk events e.g , Frostival "Carnival of Light", Dundalk on Ice, Super Saturday
- / Over 20 years experience working as a Commercial & Fashion Photographer, he has worked with many national and international companies.



Bryan Cox
RED C Research & Marketing Director

- / Bryan has 15 years experience in market research.
- / Bryan has a honours degree in Marketing from Dublin City University
- / Bryan has worked in RED C for the past 13 years and has vast experience in a qualitative and quantitative capacity
- / Bryan is the Research project Director on consumer surveys for the ongoing Heritage Council Collaborative Town Centre Health Check Research Project.



Mark Curley
RED C Research & Marketing Associate Director

- / 5 years' experience in market research; specialising in quantitative methodologies.
- / Mark has a MSc. in Marketing from Smurfit Business School and also has an MA from Trinity College in Business and Economics.
- / Mark has extensive experience in the management of projects across a wide variety of industries including Governmental research, FMCG, Telecoms, Health insurance, Transport and Utilities.
- / As a core member of the RED C Polling team, Mark has overseen a significant number of F2F projects across Ireland.



John Rogers
RED C Research & Marketing Research Project Manager

- / Joined RED C in early 2016 after completing a Honours Degree in Psychology and Masters in Cognitive Science from UCD.
- / John is a Quantitative specialist and is currently working with several Irish and international clients across a number of sectors including Retail, Telecoms, Insurance, Supermarkets and Tourism.
- / Experience across several industries including political polling, tourism, telecoms and retail.

THANK YOU

