



Listowel Town Centre Health Check Report 2018

Ireland's Tidiest Town



Listowel Tidy Towns
WORKING WITH THE COMMUNITY FOR A LITTER FREE TOWN
Overall Winner of Ireland's Tidiest Town 2018



INSTITUTE OF TECHNOLOGY
TRALEE
INSTITIÚID TEICNEOLAÍOCHTA TRA LÍ





The Town Centre Health Check is a very important piece of research and as a benchmark based on feedback from customers, retailers and visitors; it gives us a great indication of where we are and outlines the areas we need to work on. What is most pleasing about the research is the tremendous sense of pride coming through from everyone in the town. If we can harness this pride and back it up with a set of actions based on the feedback, then we will give people who visit our town the best possible experience and more reasons to spend in the town and stay with us.

I want to sincerely thank IT Tralee who, in collaboration with ourselves in the Listowel Business & Community Alliance, undertook to carry out the study free gratis. I also want to thank the BA in Business Information Management students who carried out the survey over a number of weeks and also the retailers and customers in the town who willingly took part and supported the survey. Finally I want to sincerely thank Kerry County Council who have very kindly agreed to fund the production of the report. This is another step in the process of improving our town and Listowel Business & Community Alliance are fully committed to this very important initiative.

Stephen Stack
Chair of Listowel Business and Community Alliance



As Mayor of Listowel, I am proud to be associated with the publication of the results of the Listowel Town Centre Health Check. This document provides us with some very positive feedback on Listowel, taking stock of the town's numerous assets. I am confident that we will all work together to maximise the benefits and opportunities for everyone. I look forward to the next step which will be the publication of a Listowel Town 3-Year Strategic Economic Plan (incorporating Retail, Tourism & Marketing Strategies), which in collaboration with all key stakeholders, has the goal of making Listowel a great place to work, live, do business, visit and shop.

Councillor Aoife Thornton
Mayor of Listowel



Kerry County Council wish to congratulate the Institute of Technology Tralee and Listowel Business and Community Alliance on the work undertaken on the Listowel Town Centre Health Check. We were very pleased to be involved in this worthwhile initiative. A huge body of important information has been collated which will inform a number of initiatives in the town into the future, helping to provide a better quality of life for our citizens. Maximising the financial return for our businesses in the retail, tourism and enterprise sectors is vital to ensure continued investment and opportunities for Listowel. We look forward to continued collaboration with the Institute of Technology Tralee and Listowel Business and Community Alliance to help ensure significant benefits and growth in Listowel.

Joan McCarthy
Manager, Listowel Municipal District
Kerry County Council



The Institute of Technology Tralee was delighted to take part in the Listowel Town Centre Health Check project 2018 on behalf of the Listowel Business and Community Alliance. Listowel presents a range of opportunities for further development as one of Kerry's leading market towns. The town's strong heritage coupled with its success in tourism development, community enterprise and commercial offering provides a unique visitor and shopping experience. Listowel also offers a thriving and engaging community spirit represented by over 70 voluntary organisations that are active in the town. The students of the BA in Business Information Management programme at the IT Tralee were afforded an excellent opportunity to work with the relevant stakeholders in Listowel to bring this project to fruition. The Institute looks forward to working with the Listowel Business and Community Alliance in delivering on a number of the recommendations in this report.

Brid McElligott
Vice President Research & Dev and External Affairs
Institute of Technology Tralee

Introduction

Listowel is a vibrant market town, situated on the banks of the beautiful River Feale, serving the agricultural hinterland of North Kerry. The 2016 census recorded a population of 4,820 for the town. The town has a rich literary and cultural heritage with five vibrant streets and a Georgian Town Square where many historical buildings, including the 15th Century Listowel Castle, stand proud.

Listowel offers unique cultural, leisure, sporting, entertainment, educational and recreational facilities. The beautiful Childers Town Park & Woodlands consisting of over 35 acres is enjoyed by locals and visitors and in 2018 was awarded the prestigious Green Flag accreditation, a first for Co. Kerry. St. John's Theatre offers over 200 arts events and 400 arts education workshops per year and is a wonderful venue for the many local drama groups in the town. The Community Centre offers a first-class gym and sporting facilities, whilst the Kerry Writers' Museum and Lartigue Monorail Museum offer unique experiences for any visitor. The Listowel Tidy Towns group has achieved phenomenal success, particularly since 2008, being named Ireland's Tidiest Small Town for 2015 and 2016 and achieving the accolade of Ireland's Tidiest Town for 2018.



Members of Listowel Business & Community Alliance

IT Tralee, in conjunction with Listowel Business and Community Alliance and Kerry County Council, conducted a Town Centre Health Check (TCHC) for Listowel in late 2017. IT Tralee students, from the BA in Business Information Management programme, collected survey data from town users (i.e. shoppers and visitors) and business owners regarding their perceptions of Listowel town. They also conducted a footfall survey and a land use survey.

A number of key findings will inform strategies for both the private and public sectors. In particular, it is evident that the following issues require a collaborative approach from all stakeholders in future plans:

- The promotion of Tourism and the Heritage Town offering to a wider market, at home and abroad
- A programme of first-class events in the town
- A strong brand and online presence for the town
- An improved online presence among businesses
- Traffic Management and Parking

The survey findings were largely positive and showed that respondents from all sectors are immensely proud of Listowel and expressed a great willingness to work together to improve the town. This is a great asset in itself and must be nurtured and built upon.

The Listowel TCHC research focused on a number of key areas:

- Town Users' behaviour and attitudes
- Business Owners' perceptions of the town
- Availability of Parking Spaces in the town
- Land use in the town
- Footfall in the town

Survey Methodology

The Listowel TCHC research was undertaken in October and November 2017. Survey questionnaires were based on previous TCHC research in Ireland and Scotland. The students used non-probability quota sampling to personally administer 204 questionnaires to town users in the town of Listowel. 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 70 business owners responded.

Pedestrian counts were undertaken at four count points within the town, at three different intervals on 27th and 28th October, 2017.

A land use survey was also undertaken by students to examine the use of ground floor space within the town centre boundary. Units were classified according to their use using the Goad Land Use Classification system. It also examined the number of vacant units in the survey area. The land use survey findings were also validated by Kerry County Council.

A survey of car parking spaces was undertaken by Kerry County Council and Listowel Business and Community Alliance.

Town Users' Opinions of Listowel Town...

86% of town users rate the overall experience of Listowel town as either 'good' or 'very good'.

When you think of Listowel, what are your first thoughts?



The study indicates that town users feel Listowel is an attractive, friendly town with good shopping and a rich heritage.

The survey also invited town user respondents to rate 20 aspects of the town. The response was largely positive. The **most positive rating** was achieved by the town's **cafes and restaurants**, the **feeling of safety**, the **parks and green spaces**, the **attractiveness of the town** and the **standard of service in shops**.

| | Good % | Neutral % | Poor % |
|---|--------|-----------|--------|
| Café/restaurant quality | 89 | 8 | 3 |
| Feeling of safety and security during the day | 87 | 8 | 5 |
| Café/restaurant choice | 88 | 8 | 4 |
| Parks and green space | 85 | 11 | 4 |
| Standard of service in shops | 85 | 12 | 3 |
| General attractiveness of the town | 87 | 8 | 5 |
| Feeling of safety and security at night | 73 | 21 | 6 |
| Pavement cleanliness | 78 | 12 | 10 |
| Quality of shops | 77 | 16 | 7 |
| General feeling of vibrancy | 72 | 21 | 7 |
| General ease of getting around | 73 | 16 | 11 |
| Variety of goods available | 65 | 26 | 9 |
| Pavement quality | 69 | 20 | 11 |
| Attractions in the town other than shopping | 61 | 27 | 12 |
| Range of events | 62 | 25 | 13 |
| Variety/range of shops | 64 | 23 | 13 |
| Value for money of shops | 64 | 25 | 11 |
| Seating and areas to congregate | 64 | 19 | 17 |
| Parking | 52 | 23 | 25 |
| Traffic flow | 32 | 26 | 42 |

Up to 90% of respondents say they shop in Listowel at least once per week and Listowel is the main shopping town for food shopping for 81% of respondents. Tralee is the main shopping town for clothing and accessories for 58% of respondents. The town users surveyed are more likely to shop in Listowel out of habit/ convenience (52%) than for the range of shops on offer (8%) and the main reasons why they like to shop in Listowel town include: the People/ Good Customer Service (28%), Convenience (18%), and the Boutiques/Shops (12%); 7% of respondents say they shop in Listowel to support the local businesses and community.

The town users were asked to suggest their top activities/ attractions for tourists in Listowel.

The top five suggestions included:

The Castle



The River Walk



The Lartigue Monorail



St John's Theatre



The Seanchai Centre



The survey shows that 15% of respondents shop online at least once per week with 71% stating that clothing and accessories are the type of goods mainly bought online.

Respondents' top online shops:

Littlewoods

ZARA



amazon.com

RIVER ISLAND

boohoo.com



SPORTS DIRECT.COM



Millennials (those born between 1982 and 2004) shop online more frequently. Shopping Online at least once per week:

| | |
|-------------|-----|
| 18-24 | 18% |
| 25-34 | 36% |
| 35-49 | 20% |
| 50-64 | 6% |
| 65+ | 0% |

When asked 'What type of shop is missing in Listowel?' respondents suggested popular multiples (e.g. Dunnes Stores, Tesco) and high street retailers (e.g. Penneys, DV8).



Town users feel the biggest improvements the town could benefit from are related to: **traffic management, parking and the number of shops.**



| | |
|-----------------------------------|-----|
| Improved Traffic Management | 29% |
| Improved Parking | 27% |
| More shops | 24% |
| Other | 20% |

Top Five Event Types Suggested

Town users were also asked to suggest the types of events they feel could improve the town centre. Music events were the most frequently-suggested events.



| | |
|-----------------------------|-----|
| Music-related | 40% |
| Children's Activities | 8% |
| Horse Racing | 6% |
| More festivals | 6% |
| Heritage festival | 4% |

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



Preferred Extended Shopping Hours:

| | |
|-----------------------------|-----|
| Fridays 6-9pm | 32% |
| Mondays after lunch | 22% |
| Thursdays 6-9pm | 13% |
| Sundays 2-6pm | 12% |
| None of these options | 21% |

Business Owners'/ Managers' Opinions of Listowel Town Centre...

The business owners/ managers who participated in this study have a very positive impression of their town and feel that Listowel is a **beautiful, friendly and well-kept town; rich in heritage** with **good shopping** and some excellent **cultural festivals and events**.



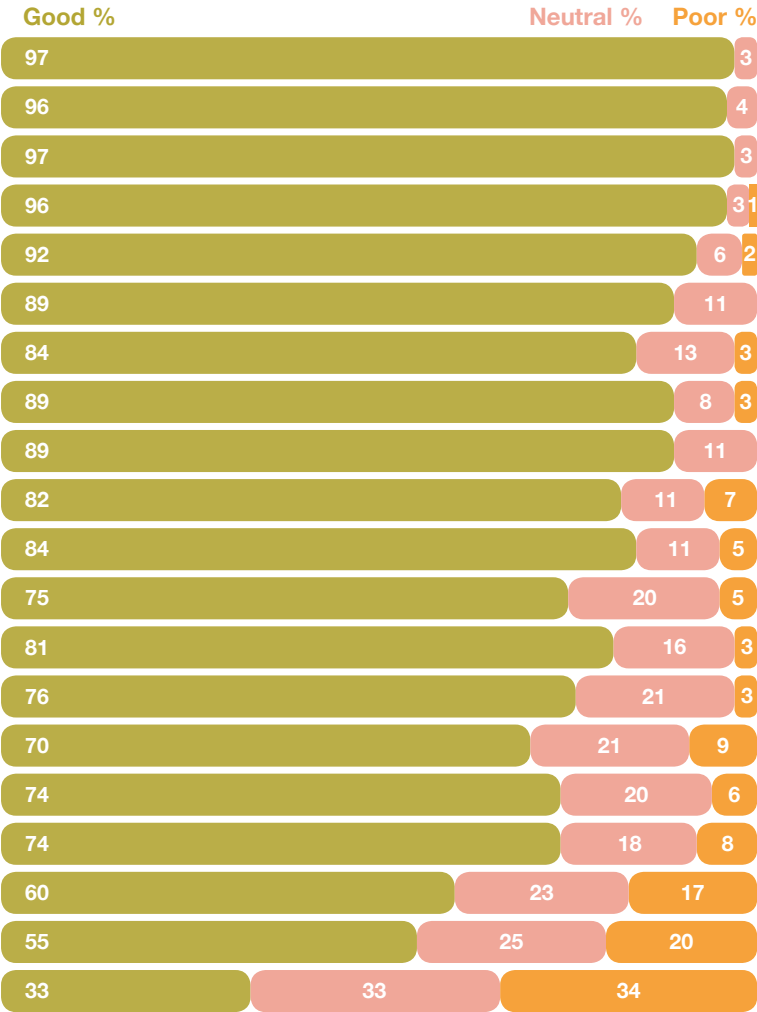
When you think of Listowel, what are your first thoughts?



Heritage is a very important aspect of life in Listowel so it is no surprise that 96% of business owners/ managers surveyed say they are aware that Listowel is designated as a Heritage Town of Ireland and half of respondents feel this could be promoted to a greater extent.

Business owners/ managers also rated 20 aspects of the town. The response was very positive and the findings were similar to the ratings of the town users. The **most positive rating** was achieved by the town's **parks and green spaces**, the **attractiveness of the town**, the **feeling of safety**, the **café/restaurant quality and choice**, and the **standard of service in shops**.

- Parks and green space
- General attractiveness
- Feeling of safety and security during the day
- Café/restaurant quality
- Café/restaurant choice
- Standard of service in shops
- General feeling of vibrancy
- Quality of shops
- Feeling of safety and security at night
- Pavement cleanliness
- Variety/range of shops
- Range of events
- Variety of goods available in shops
- General ease of getting around the town
- Attractions in the town other than shopping
- Value for money of shops
- Pavement quality
- Seating and areas to congregate
- Parking
- Traffic flow



91%

of the business owners/ managers who responded rate the overall experience of Listowel town as either 'good' or 'very good'.

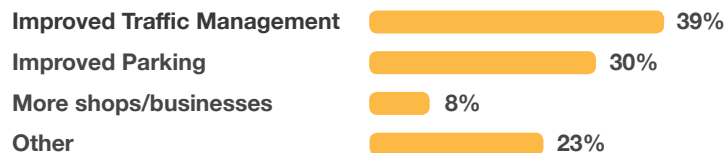
When asked to suggest their top activities/ attractions for tourists in Listowel, the business owners' top five suggestions included:

- The Lartigue Monorail
- The Castle Tour
- The River Walk
- Restaurants
- Bars

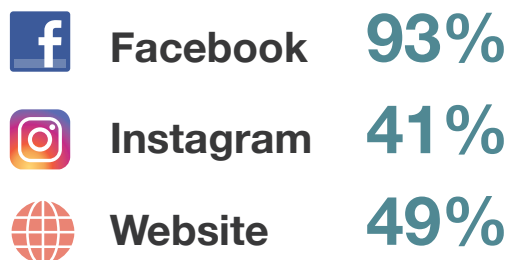


The study shows that 38% of the business respondents feel that **the people / the strong community spirit** is the the **main strength** of Listowel town.

Business owners/ managers feel that the biggest improvements the town could benefit from are related to: **traffic management, parking** and increasing the **number of shops and businesses**.



While over 90% of business respondents say they have a Facebook page for their business, less than half of businesses say they have a website (only one third of these are e-commerce websites).



68%

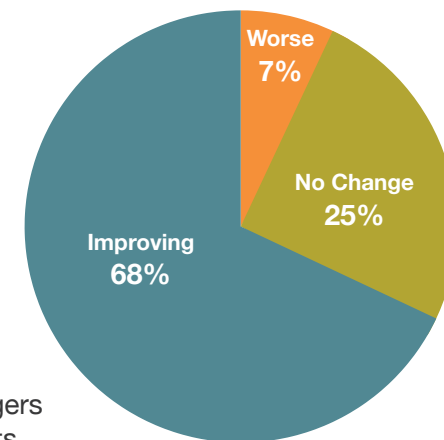
...expect trading to improve over the next 2 years

81%

...would help to organise events
- over half of business owners/ managers surveyed feel that music-related events would attract more people to the town

78%

...would contribute to a cooperative marketing strategy fund to attract people to Listowel



79% were aware of the Listowel Business and Community Alliance at the time the survey was conducted.

Survey of Parking Spaces



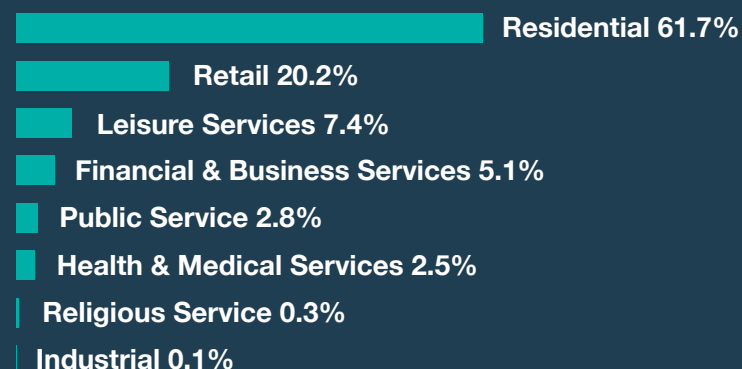
According to Kerry County Council figures, there are currently **432 free off-street car parking spaces** and **524 pay parking on-street spaces** within close proximity of the centre of Listowel town. On-street parking is charged at €1.00 per hour with a maximum stay of 2 hours, between the hours of 9.30am to 6.00pm Monday to Saturday. Listowel town, unlike Tralee and Killarney, is unique in offering free off-street parking in several car parks. Resident parking permits are also available to residents residing on the streets where pay parking applies at a cost of €60 per annum; however no business permit scheme exists.



Survey of Land Use

The Land Use survey revealed an overall occupancy rate of 91% within the town centre boundary. The Goad (Sub Class) Classification categorised 62% of the units surveyed as 'Residential'. Other significant categories included: Retail, Leisure Services and Financial and Business Services.

The land use survey data was validated by Kerry County Council and entered into the local authority GIS (Geographic Information System). Please see page 9 for the Listowel Land Use Map.



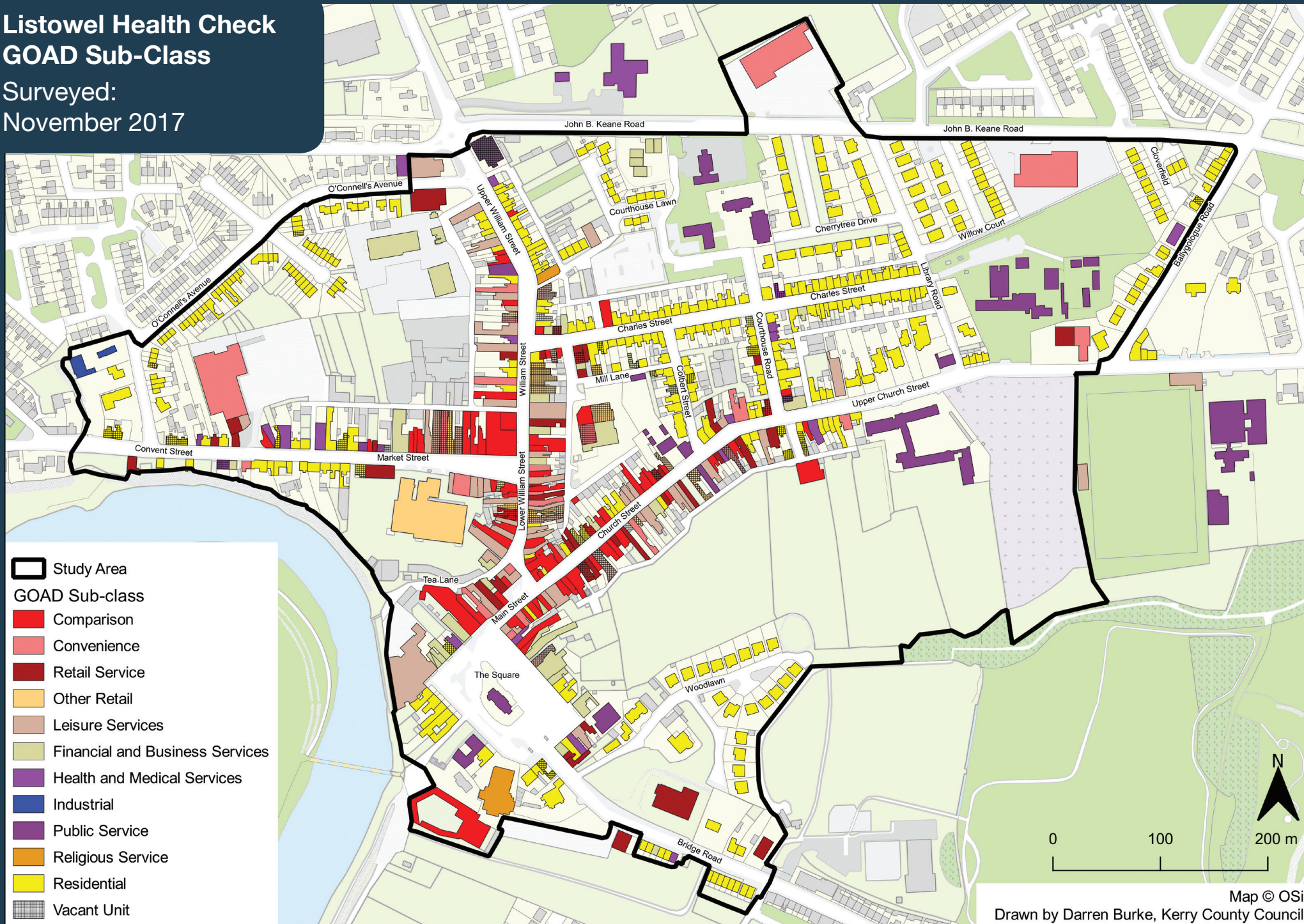
The Study Area is generally based on lands zoned Town Centre and Town Centre Residential in the Listowel Town Development Plan 2009-2015 as extended. The Retail and Service uses are concentrated on The Square, Church Street, William Street and Market Street, with residential uses becoming more frequent towards the edge of the town centre/study area.

Vacancy is spread across the town centre with Main Street the only street to have an occupancy rate of 100%. The Square would also show a lower level of vacancy than other town centre areas/streets.

The retail sector, concentrated on Market Street, Lower William Street and Church Street has a dominant position in terms of land use in Listowel town centre compared to the services sector. The service sector is spread across the town with a higher number of services in The Square compared to other uses.

Listowel Health Check GOAD Sub-Class

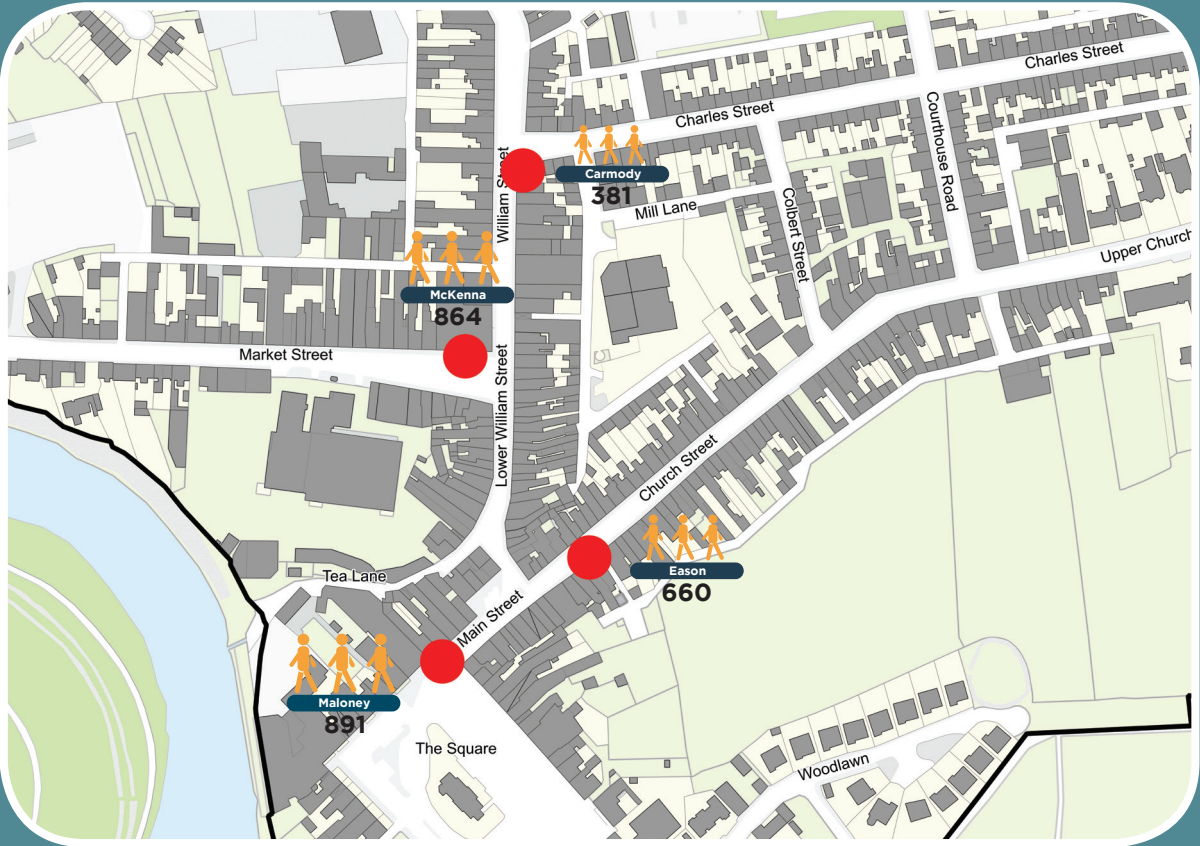
Surveyed:
November 2017



Survey of Footfall in Listowel



| Date | Time | Carmody | Eason | Moloney | McKenna | Total | Overall Totals |
|--------|-----------|---------|-------|---------|---------|-------|----------------|
| Fri | 1.15-1.30 | 55 | 145 | 230 | 158 | 588 | |
| | 3.15-3.30 | 76 | 41 | 160 | 140 | 417 | |
| | 5.15-5.30 | 56 | 41 | 122 | 93 | 312 | |
| | | | | | | | 1317 |
| Sat | 1.15-1.30 | 56 | 156 | 136 | 150 | 498 | |
| | 3.15-3.30 | 88 | 166 | 168 | 196 | 618 | |
| | 5.15-5.30 | 50 | 111 | 75 | 127 | 363 | |
| | | | | | | | 1479 |
| Totals | | 381 | 660 | 891 | 864 | | 2796 |

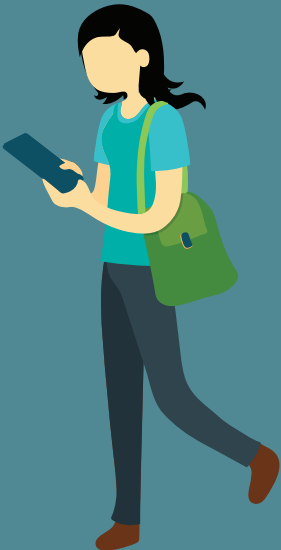


Pedestrian counts were undertaken at four count points within the town centre, at three different intervals on 27th and 28th October, 2017.

The pedestrian count findings showed that the highest footfall count was recorded at Moloney’s on a Friday morning (230 people).

Moloney’s was the busiest count point in general over the course of the footfall survey.

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



Key Considerations and Opportunities for Listowel

Listowel has faced a number of challenges over the last number of years including vacant retail premises, increased dereliction, changing trends in consumer behaviour as well as greater consumer mobility. There is no doubt that the Town Centre needs to build on its strengths from an economic, heritage, social and cultural perspective in order to ensure a brighter future for its inhabitants. In addition, National and European investment in significant projects for the town should result in additional development opportunities in the next few years. Currently Gas Networks Ireland are investing in bringing gas to Kerry Group, and Listowel Town businesses and industries are also availing of this low-cost energy supply.

In recent years, the town centre has experienced significant traffic congestion during the Summer period. Investment in the N69 Listowel Bypass project, in particular, will ensure that locals and visitors can enjoy a much improved traffic management system.

The newly-formed Listowel Business and Community Alliance has a strong strategic approach. Through its structures and focus on retail, marketing, tourism and enterprise, it has ambitious plans for the future, which are supported by a sustainable funding model. It has provided strong support for the development of the Great Southern Trail and the hugely successful Listowel Tidy Towns project. In addition, projects such as the Listowel Town Centre Health Check, Listowel Heritage & Community-Led Regeneration Strategy, the development of a three-year economic and marketing plan, the creation of a new website, and working on a strong identity for the town will ensure the continued viability and vibrancy of Listowel. Currently there is a huge sense of positivity, community spirit and cooperation evident among the community of Listowel. This community spirit has been central to recent successes in Listowel; most notably winning the Ireland's Tidiest Town accolade for 2018. It is essential that we leverage this pride of place in the development of Listowel. We invite you to become involved in this renewal project.

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 Listowel Town stakeholders to enhance the town. This action plan will develop a sense of place, heritage, identity; it will enhance the town centre experience and retail mix, and create a sense of vibrancy (including a schedule of town centre activities and events).

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



Listowel Town Centre

Health Check Report 2018

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

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