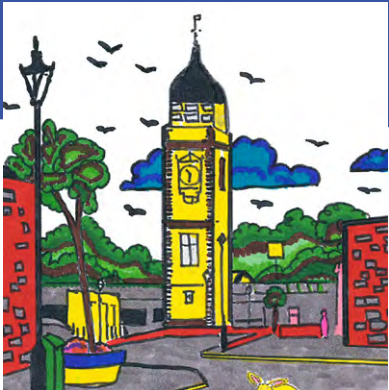


Tipperary Town

Collaborative Town Centre Health Check (CTCHC) Report

2022



Health implications
of poor air quality from
transport impacts the
liver, lungs
and spleen

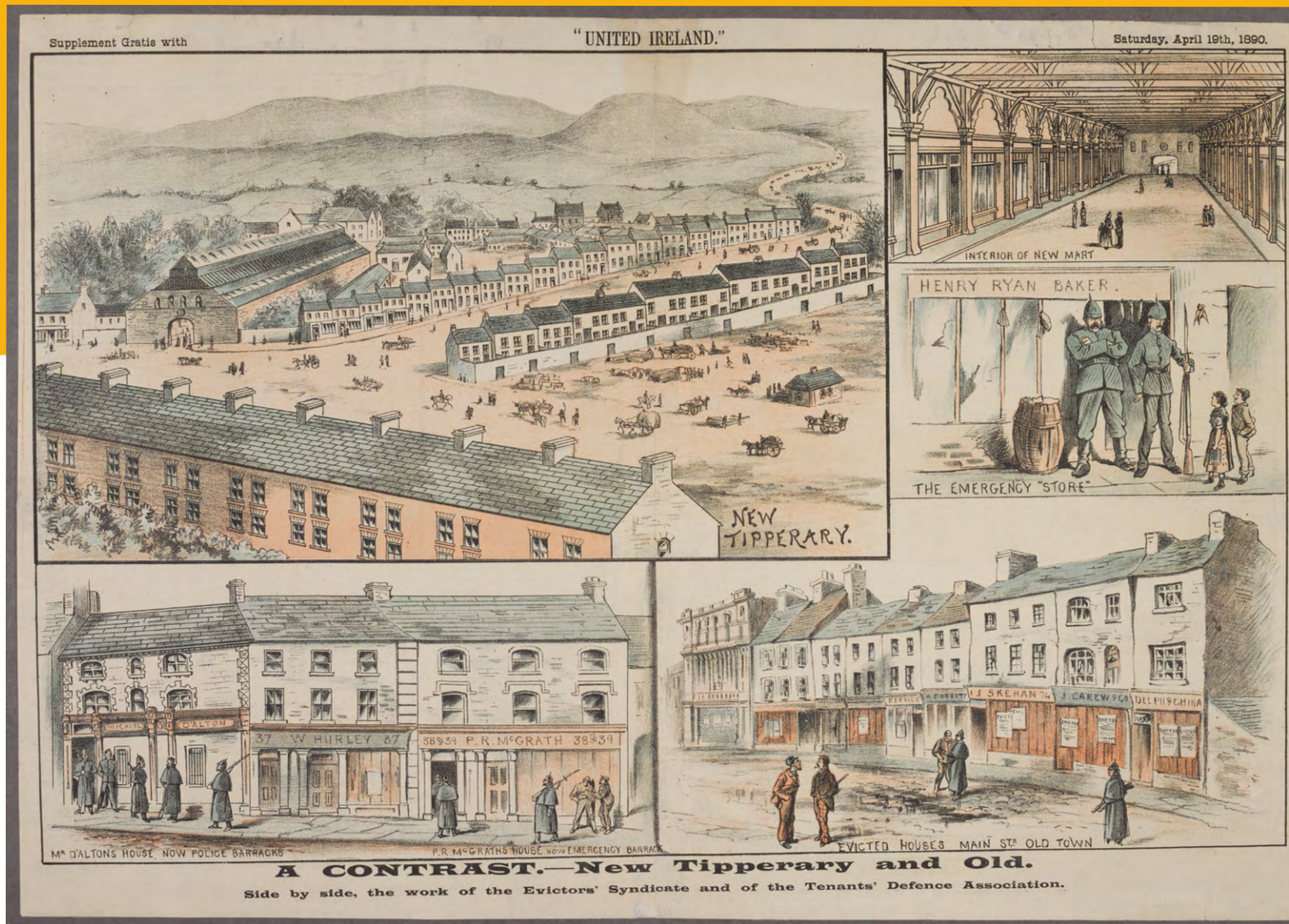


Comhairle Contae Thiobraid Árann
Tipperary County Council



An Chomhairle Oidhreachta
The Heritage Council





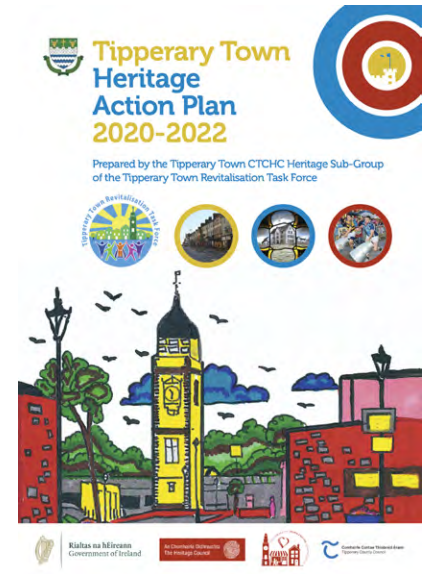
New Tipperary and Old (1890), Image Courtesy of the National Library of Ireland.



Introduction

Tipperary (*Thiobraid Arann*, 'Well of the Ara') is a historic market town situated in Ireland's Mid-West region. You'll find it in Munster's mystical and fertile Golden Vale amid signs of earlier human habitation, some of which dates back to Ireland's Bronze Age. The 'Old Town' of Tipperary, which has a rich agricultural and industrial history, gave its name to County Tipperary in the early 14th Century. Tipperary Town has a resident population of circa 5,000 people (2016 CSO) plus an enormously engaged diaspora spread across the world.

The former medieval walled town is notable for its stunning location near the Galtee Mountains, its history of conquest and revolution and for its beautiful 19th and 20th century architecture. (Tipperary Heritage Audit, 2021) The busy N24 runs directly through the historic town centre along Tipperary's historic Main Street with its 18th century buildings, contributing to the town's high commercial vacancy rate. In addition, the N24 has a severe impact on the potential for quality pedestrian walkways and cycle lanes in the historic town centre.



Despite an international profile, due to the famous song *It's a Long Way to Tipperary* along with the Tipperary International Peace Prize, the historic town has endured socio-economic and environmental decline in recent decades, which has resulted in high unemployment and significant disinvestment in Tipperary's historic core. This baseline CTCHC report is part of an in-depth collaboration and partnership between the Heritage Council's CTCHC Programme, Tipperary Town Task Force and Tipperary County Council.

Aim of the CTCHC Report?

The key findings from Tipperary Town's first-ever Collaborative Town Centre Health Check (CTCHC) and baseline data will inform investment plans and strategies in relation to:

- Arts, Heritage and Culture
- Climate Change adaptation
- Commerce/eCommerce and Enterprise
- Community Health and Well-being
- Cultural Tourism, e.g. music, food, etc.
- Education and Training
- Heritage-led Regeneration
- Living in the Town Centre, e.g. reuse of buildings and enabling development
- Public Realm e.g. historic streetscapes, parks and public spaces
- Renewable Energy/Energy Harvesting
- Strategic planning and Place-making



The CTCHC research focuses on a number of key areas:

- Landuse and vacancy in the historic town centre
- Consumers' opinions and attitudes
- Business owners' attitude towards the town centre
- Footfall in the town centre
- Movement and accessibility e.g. active travel
- Noise and air quality

Based on these meetings (and in conjunction with the establishment of the Task Force's Heritage Group) the CTCHC Programme Co-ordinator wrote the Tipperary Heritage Action Plan 2020-2022 during the first lockdown, which was launched by Minister Noonan T.D. in August 2020. The CTCHC project then got underway again in June 2021.



Representatives from Tipperary Town Chamber, Tipperary Town Task Force, Tipperary County Council, Tipperary Tidy Towns, Canon Hayes Sports Complex, Tipperary Excel and Saint Anne's Secondary School with ongoing support provided by the Heritage Council's CTCHC Programme Founder & Co-ordinator, formed the Tipperary Town CTCHC Steering Group in early 2020. The group met in person in Tipperary in January, February and March 2020 and then Covid-19 Lockdown happened!



CTCHC Survey Methodology

The Covid-19 pandemic, along with significant changing demographics, lifestyles, travel to work patterns and consumer preferences, are all impacting on the vitality and viability of Ireland's historic town centres. In addition, robust data about our historic town centres has been limited in scope – the CTCHC Programme seeks to address this data gap. This summary CTCHC report presents up-to-date research and survey results for Tipperary Town that will help inform strategic responses to these challenges – through existing and future operational programmes that support heritage-led regeneration and embrace the recently published Town Centres First (TCF) Policy. Tipperary's CTCHC surveys were undertaken from June 2021 onwards following the 15-Step CTCHC Methodology as set out by the CTCHC Programme, which is included in the Programme for Government (PfG, pg 12-13).



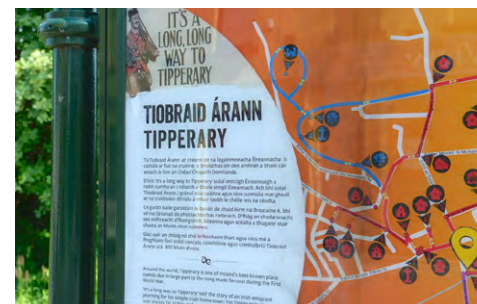
Tipperary Town's CTCHC land use survey examined the use of ground floor space in the core town centre area which includes over 400 premises. The survey was conducted in October 2021 and updates a previous CTCHC landuse survey from 2020. The data is mapped using the CTCHC Programme's GIS colour coding system, which was created at the outset of the CTCHC Programme – as such, all towns in the CTCHC Programme are surveyed/mapped using the same methodology, which enables member towns to compare & contrast their findings.



Red C, a research-based consultancy, also undertook detailed business and consumer survey fieldwork in the town centre during June 2021 (n=61 businesses) and November 2021 (n=281 consumers, online and face to face). These two surveys were designed by the CTCHC Programme with input from Tipperary Taskforce, Tipperary Chamber and Tipperary County Council.

In addition, a CTCHC footfall survey was also undertaken in the historic town centre by Tipperary Town Tidy Towns & Community Group 'Light Up the Plan' in September 2021 using the CTCHC methodology.

This added a further layer of data by cross-referencing real time footfall and traffic numbers, highlighting the conflict between Tipperary Town's public realm and heavy goods traffic in the historic



town centre, particularly from freight traffic, i.e. 5/6 axel lorries. A Noise Survey carried out by Queen's University Belfast (QUB) also confirmed poor noise quality within the historic town centre.



Consumers' Opinions of Tipperary Town Centre

Throughout this section of the report, the answer to a number of questions in the Red C survey may add to more than 100%. This is because they were multi-code questions, meaning respondents were able to select more than one answer.



Shopping is the primary reason people use Tipperary Town Centre (**37%**). In terms of main reasons why people use the town centre, **1 in 5 town users** also say their primary reason is to attend **work**.



Supermarkets attract the most consumers (**59%**), followed by pharmacies (23%), hair and beauty (12%) and cafés and takeaways.

Most use Tipperary Town Centre regularly – **66% visit daily** or **2/3 times per week**.



Limerick, Clonmel and Cashel are Tipperary largest competitors, however visits to these towns are much less frequent.

Most Used Stores in Tipperary



Foodstuff/Grocery*

44%
Aldi

19%
Dunnes

18%
SuperValu

16%
Tesco

2% Gerry's Mini Mart

1% Other



Clothes

22%
O'Deas Menswear

18%
Graces Women's Clothes

12%
Dave Macs Menswear

6%
A Class Above

2%
Julie's Children's Wear

1%
Wired to the Moon

29%
Other



Furniture/Durables

26%
O'Dwyer Hardware

22%
Tipperary Co-op

13%
Wellworths

10%
Joe Whelan's

6%
Liam Whelan's

2%
Blackburn's Hardware

1%
Elmore Electrical

15%
Other

* Lidl was closed for refurbishment at the time of the CTCHC Consumer Survey in Autumn 2021.



Where does Tipperary Town do well?

58%

Standard of service in shops in the town centre

48%

Cafe/restaurant quality in the Town Centre

55%

Feeling of safety and security during the day in Town Centre

43%

Cafe/restaurant choice in the Town Centre

What type of shop is missing from Tipperary?

56%

Clothes shops for young people

50%

More independent retailers

42%

Next

42%

Lifestyle shop

40%

Marks & Spencer

What improvements would encourage you to live in Tipperary Town Centre?

Derelict buildings done up & architectural features of buildings enhanced

Less traffic and better range of stores, outdoor events, more greenery

More commercial and evening vibrancy on our derelict main street

Less traffic, cleaner town, buildings done up and more boutiques

More jobs, less traffic, more amenities for young and old, more use of Glen of Aherlow

Jobs, walking tracks, cycling tracks, clothes shops...bakery, guards on the streets

Less traffic, renovation of old neglected buildings, work opportunities



Preferred extended opening hours



Friday 6-9pm 37%
Sunday 12-6pm 27%
None 21%
Thursday 6-9pm 15%

Top 6 Festivals/Events suggested

A significant number of respondents suggested events as a means of improving the town centre and Christmas events were the most frequently-suggested attractions.

79% Christmas events

68% Markets

59% Food festivals

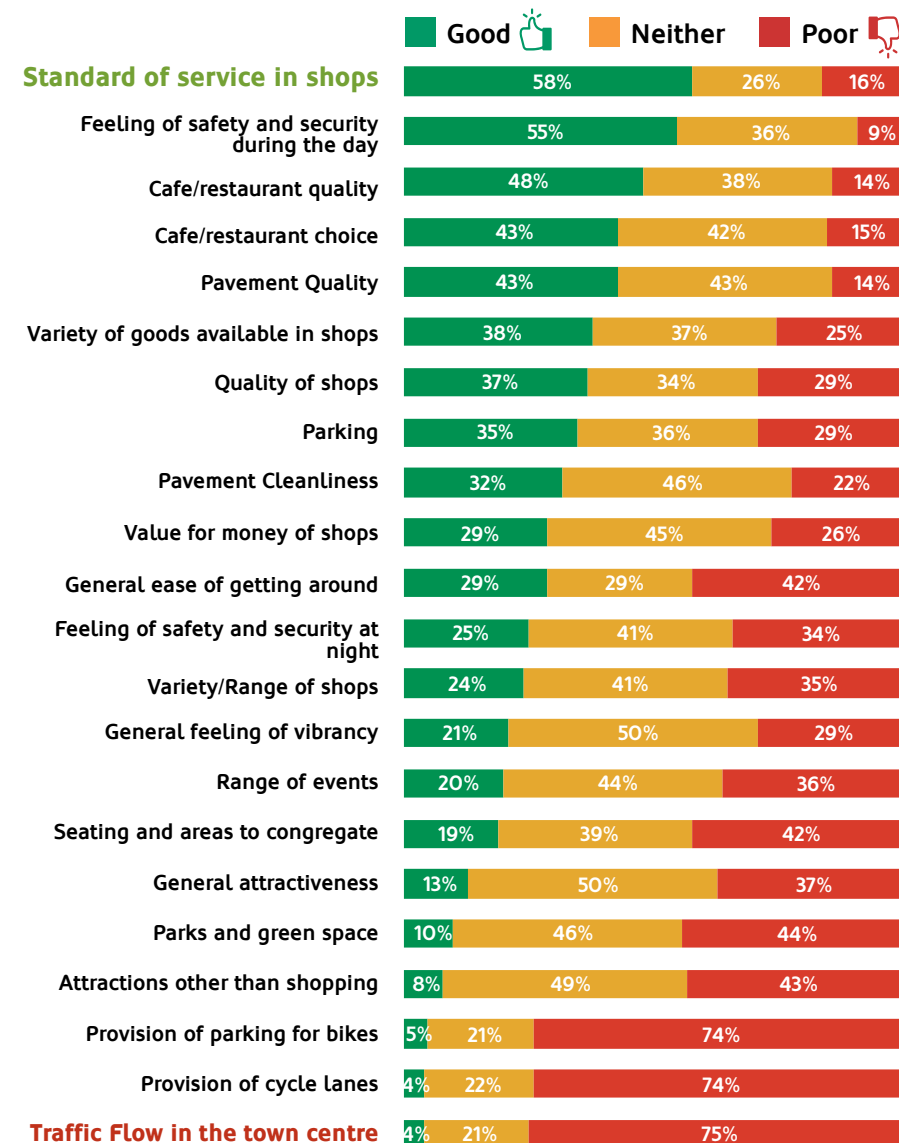
56% Music events

53% Kids' events

48% Sports events



The survey invited respondents to rate 22 key aspects of the town centre. The most positive rating was achieved by the standard of service in shops.



Transport and Active Travel in Tipperary Town Centre



73%

of respondents travel by car, 26% walk, 1% travel by bus



0% cycle
into Tipperary Town Centre!



62%

Almost two thirds of people paid for parking when they visited Tipperary Town Centre



74%

of respondents consider provision of cycle lanes to be poor/very poor in the town centre



73%

of respondents consider parking for bikes to be poor/very poor in the town centre



What encourages consumers to visit Tipperary Town Centre?



42%

Tipperary's unique and natural setting and environment make a positive contribution to your experience of the town



41%

believe the signposting and wayfinding in the town centre make it easy to navigate the historic core of the town



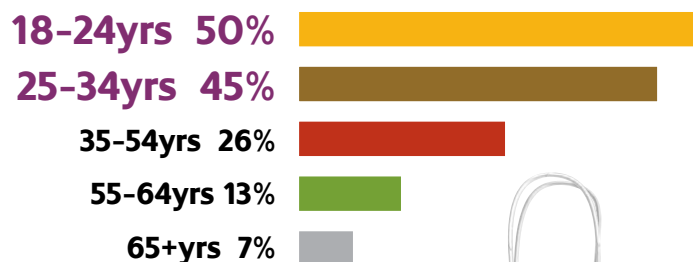
33%

believe that the historic building environment encourages you to visit and spend time in the town centre

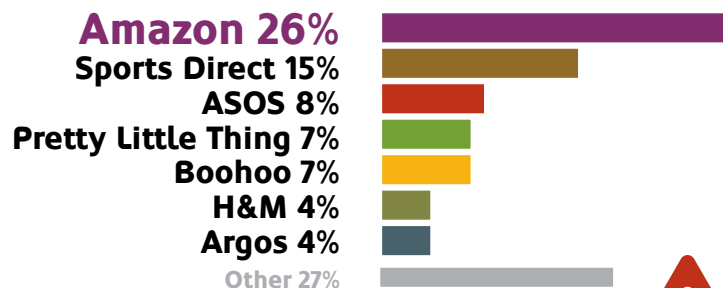
Online Shopping



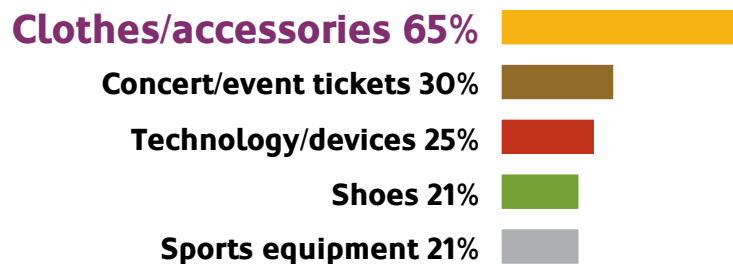
Shopping online at least once a month:



Amazon is by far the most popular online used by respondents/consumers. Sports Direct and other clothes retailers are also popular:



Main items bought online



Click and Collect Service

Almost **50%** would avail of such a consumer service and a further **26%** are not sure but could be brought around if a service was available for Tipperary Town i.e. **76%** of respondents in total.

Amount spent on last clothes purchase



The increasing trend towards online options represents a threat to many businesses in the town centre without an online presence.

Almost 80% of respondents are increasingly spending more online since Covid-19.



79% are increasingly spending more on clothes online since COVID-19



76% of online clothes purchases made by respondents in Tipperary Town are worth €50 or more

What do businesses think are the main attractions in Tipperary Town?



Shopping
34%



Attending work
8%



Tourism
8%

10% "For locals there is not much to attract them at all."

Comments from businesses in Tipperary Town

"Empty shops, not a lot of activity within that area as local businesses closed down and units are vacant"

"Business premises closed, a real need to regenerate the business in the centre of the town"

"heavy congested traffic, not a lot of business going on, lots of properties for sale. Past planning has made shopping centres on the outskirts of the town."

What does Tipperary Town do well?

87%

Standard of service in shops

79%

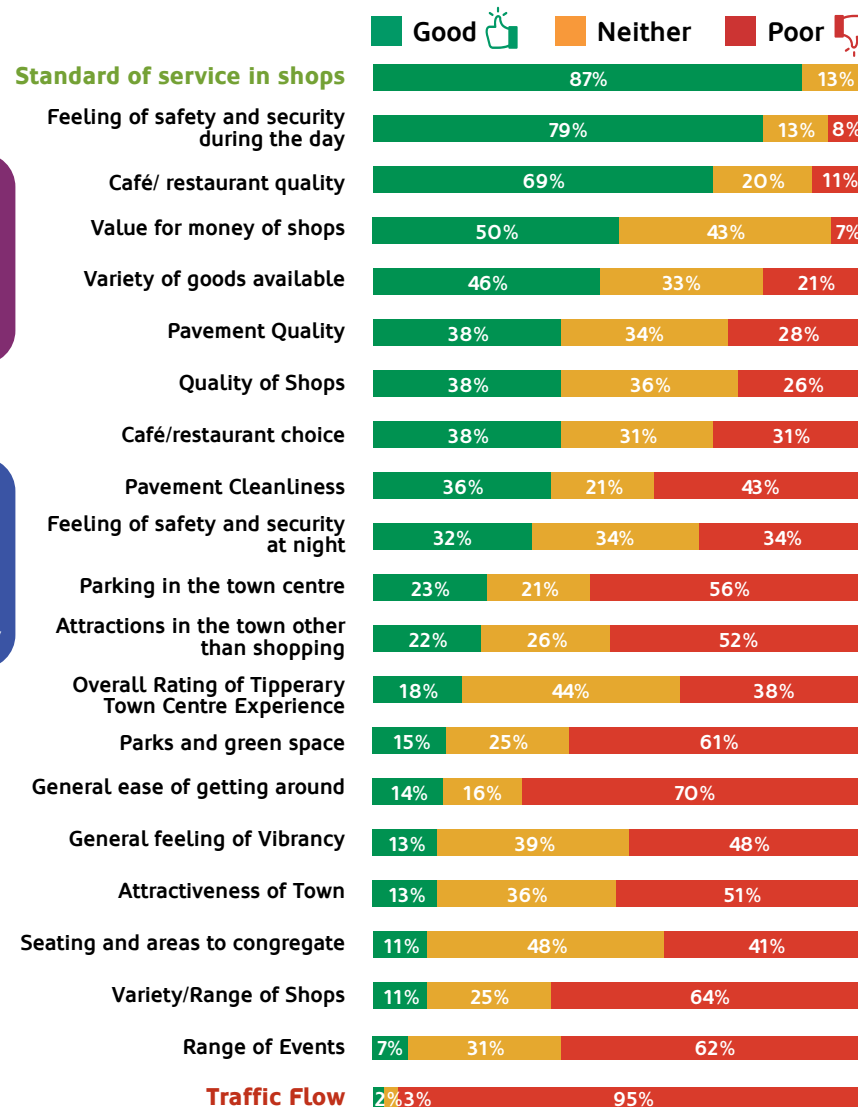
Daytime safety and security

69%

Café/restaurant quality



The survey also invited respondents to rate 21 key aspects of the town centre. The most positive rating was achieved by the standard of service in shops.



Where can we improve?



Traffic Flow
95%



What improvements would you make to Tipperary Town Centre?



Reduce traffic
54%



Increase investment
44%



Repurpose derelict buildings
43%

Top Attractions in the Town



41%
Excel
Centre



34%
Eating



25%
Glen of
Aherlow



23%
Canon Hayes
Recreation Centre

21%
Golf
nearby

21%
Walking
routes

20%
Tipperary
Hills

Main
competitors
for
Tipperary
Town?



Limerick 64%



Clonmel 20%



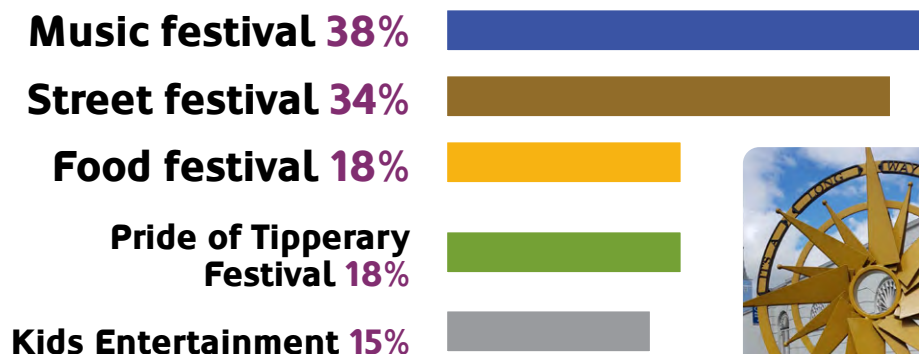
Cashel 15%



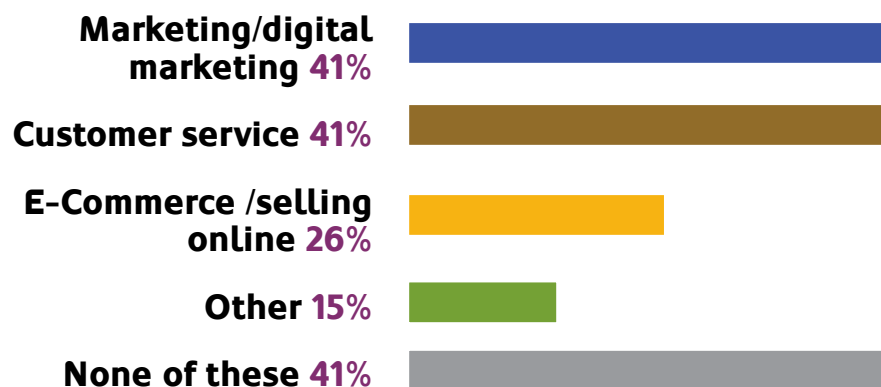
Other 1%



What events do business people want to see in Tipperary Town?



Interest in Training Opportunities?



Business Owners' Comments



"Traditional festivals with activities are needed, it has slipped in recent years"

"Open air activities like St Patrick's Day festival, events the whole town is involved in: A Long Way to Tipperary Festival!"

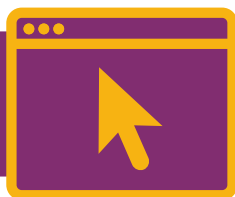


Willingness to participate in events to attract people to Tipp Town – **70% stated NO**, 30% said Yes

Are there sufficient amenities in Tipperary? **50% responded No** – more playgrounds, more activities for families and more green spaces/park areas were the three top amenities most people would like to see...

During Covid – 30% of respondents said their business turnover and profitability was down 50%+

Website presence and e-Commerce



- **36% of businesses do not have a website** for their business and 64% have a website
- 36% have had a website for 1-5 years, **44% have had a website for 6-10 years** and 20% have had a website for 11+ years.
- 36% sell online, **33% do not sell online** and 31% stated this is not applicable to their business
- Take up of Local Enterprise Grant for website design – **82% No and 18% Yes**
- **75% of businesses have a presence on Facebook**

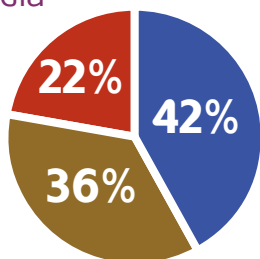


Social Media spend

91% of businesses do their own social media in house

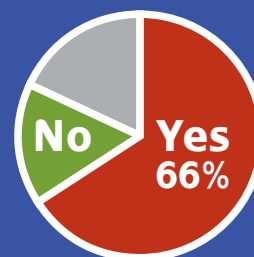
% of turnover spent on social media promotion

0% 1% 2-5%

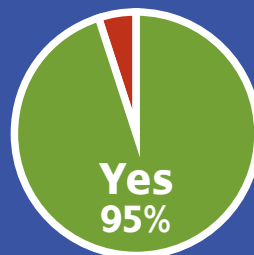


85% support the N24 diversion

Is traffic hurting business?



Do you believe the traffic situation can be improved?



Business Owners' Comments



"Lots of HGV traffic here as we are on the main route from the West to Rosslare"

"Build a ring road or a by pass around the town centre, whichever is the quickest to build - to get the pollution out of the town"

Business Premises



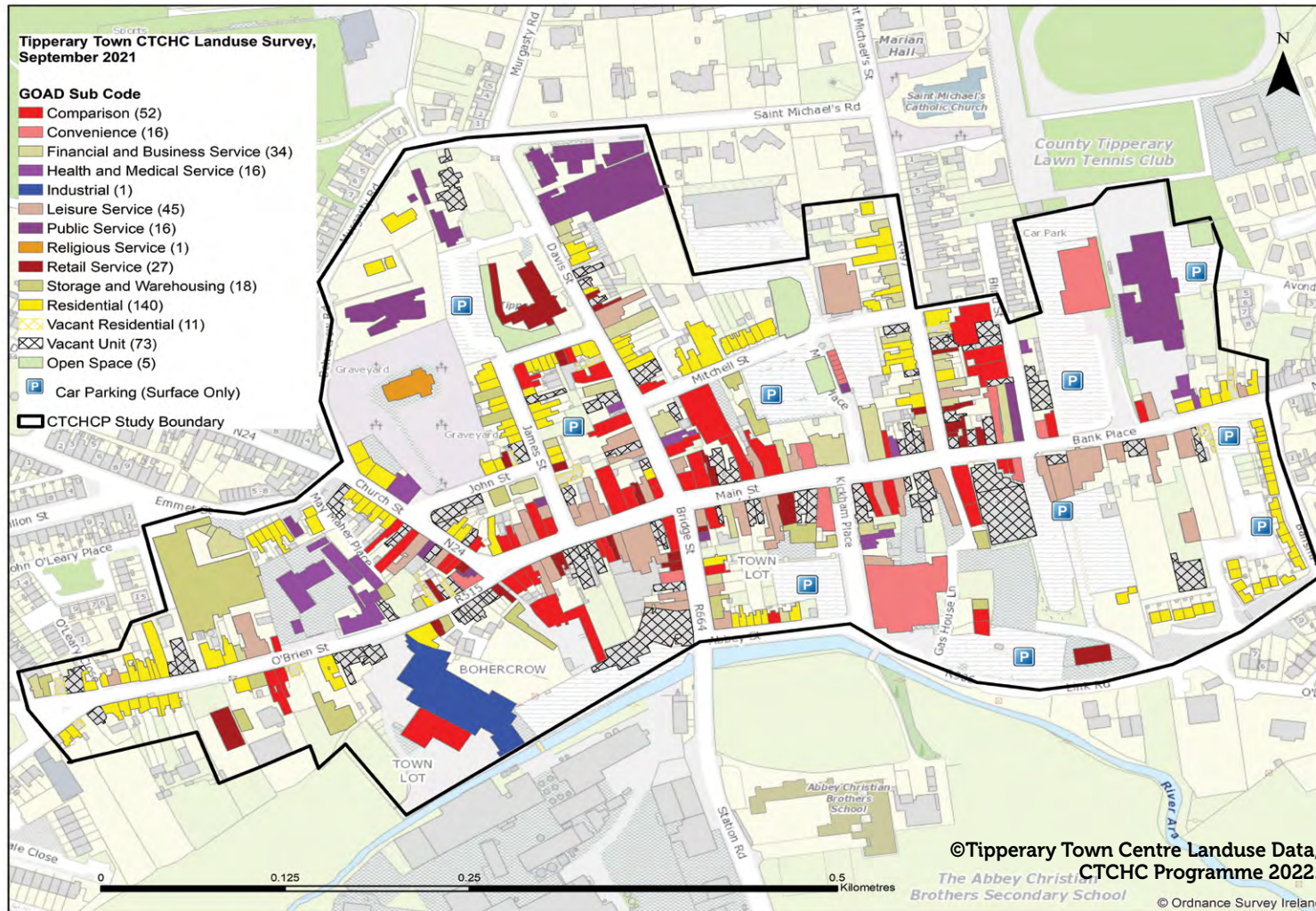
66% own their current premises and 34% rent, 97% are quite/very satisfied with their current premises

67% Support for 2 hour free parking.

97% of respondents were aware of Tipperary Town Chamber and 72% are willing to contribute to a co-operative marketing strategy for the town centre.

CTCHCP Survey of Land Use in Tipperary Town Centre

Results, October 2021. Step 2 of the CTCHC's 15-Step process.



Residential 31.1%	Retail Service 6%	Vacant Residential 2.4%
Vacant Non-Residential 16.2%	Storage and Warehousing 4%	Industrial 0.2%
Comparison 11.6%	Convenience 3.6%	Religious Service 0.2%
Leisure Service 10%	Health and Medical Service 3.6%	
Financial and Business Service 7.5%	Public Service 3.6%	

18.6%

Total Vacancy Rate

81.4%

Total Occupancy Rate

31.2%

Retail Vacancy Rate*

73 Non Residential



11 Residential

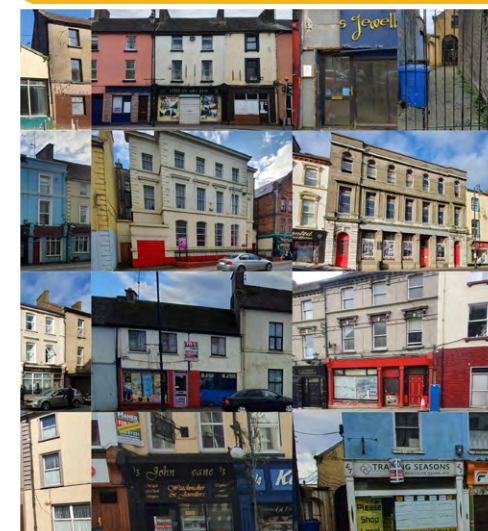
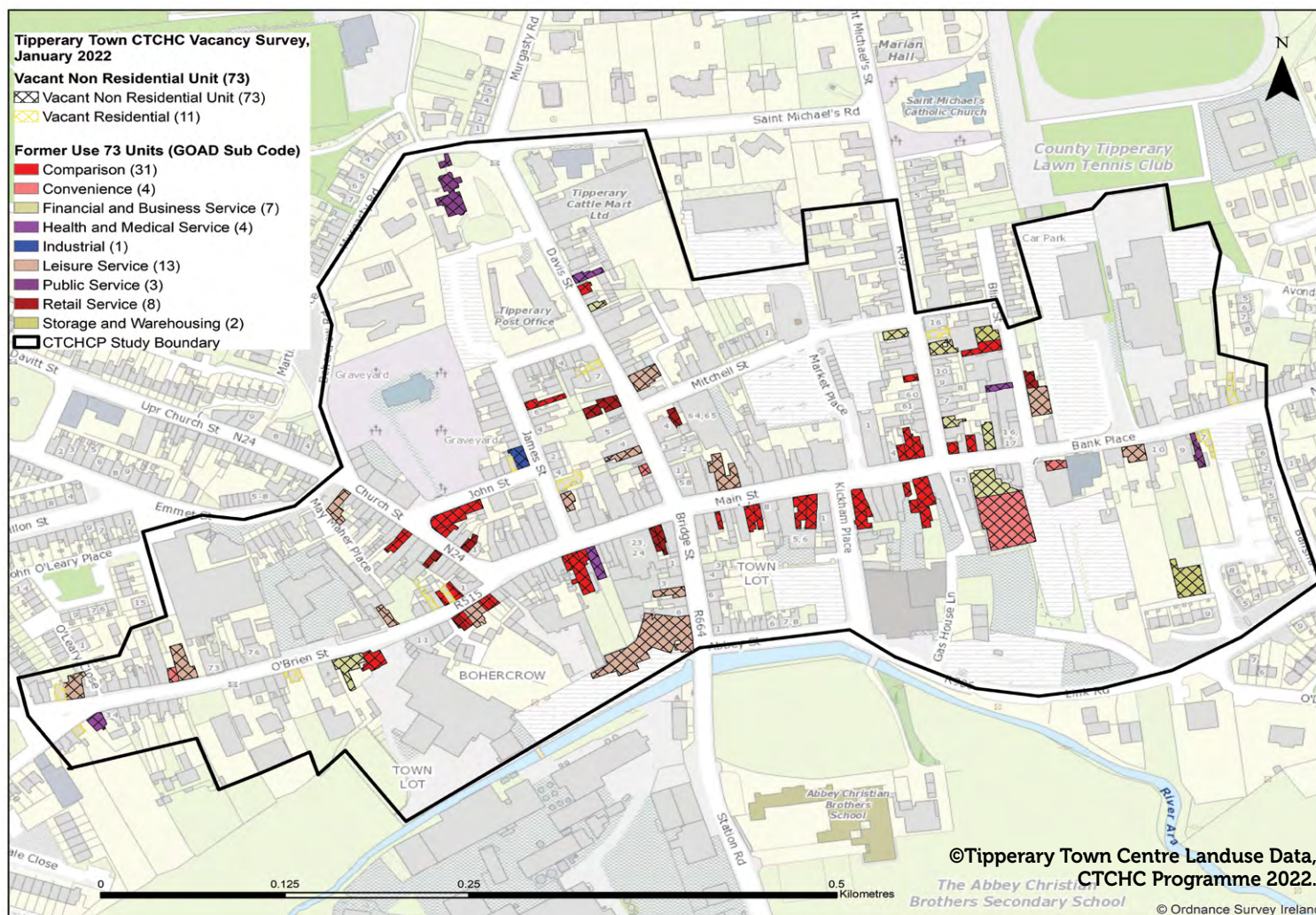


84 Empty Buildings

* Ground floor retail vacancy is calculated using three GOAD landuse categories: convenience, comparison and retail services.

CTCHCP Survey of Vacancy in Tipperary Town Centre

Results, January 2022. Step 2 of the CTCHC's 15-Step process.



43

Vacant Comparison, Convenience and Retail Service Buildings

31.2%

Retail Vacancy Rate*

* Ground floor retail vacancy is calculated using three GOAD landuse categories: convenience, comparison and retail services.

Comparison 31 units	Financial and Business Service 7 units	Public Service 3 units
Leisure Service 13 units	Convenience 4 units	Storage and Warehousing 2 units
Retail Service 8 units	Health and Medical Service 4 units	Industrial 1 unit

CTCHC Footfall Survey and Traffic Count



Footfall Count in Tipperary Town Centre, September 2021

Day	Times	Main Street Upper	Kickham Place	Main Street Lower	Bridge Street	Market Yard	Church Street	Bank Place	Davis Street	Totals	Overall Totals
		1	2	3	4	5	6	7	8		
Fri 24th Sept 2021	1.15-1.30	127	64	111	48	94	39	33	38	554	
	3.15-3.30	69	64	51	52	49	64	37	39	425	
	5.15-5.30	51	53	52	43	41	52	24	18	334	1313
Sat 25th Sept 2021	1.15-1.30	99	133	68	68	30	29	28	46	501	
	3.15-3.30	112	84	85	83	26	31	41	51	513	
	5.15-5.30	63	96	63	71	18	28	72	38	449	1463
TOTALS		521	494	430	365	258	243	235	230		2776

Tipperary Town Centre is 11% busier on Saturday than Friday



Traffic Count Main Street Tipperary Town

Date	Time	Time	Time
Fri 24th	12-1pm	2-3pm	4-5pm
N24	569	732	767
N74	290	394	433
Total	859	1126	1200
Sat 25th	12-1pm	2-3pm	4-5pm
N24	549	484	482
N74	344	297	302
Total	893	781	784

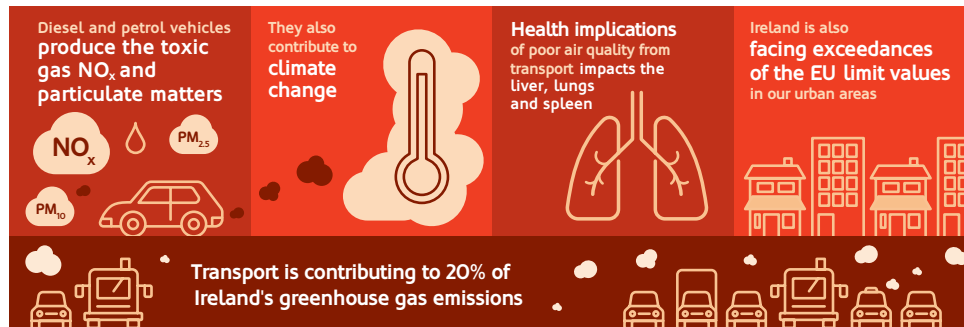
Source: Transport Infrastructure Ireland (TII)

A CTCHC footfall survey was undertaken by Tipperary Town Tidy Towns and 'Light Up the Plan' Community Group at different locations across Tipperary Town Centre on Friday 24th and Saturday 25th September 2021. Three time slots were recorded for each location as per the CTCHC methodology. The centre of Main Street along with Kickham Place are the busiest areas of the town centre. Main Street Upper has an average pedestrian movement of 347 people per hour over the two days.

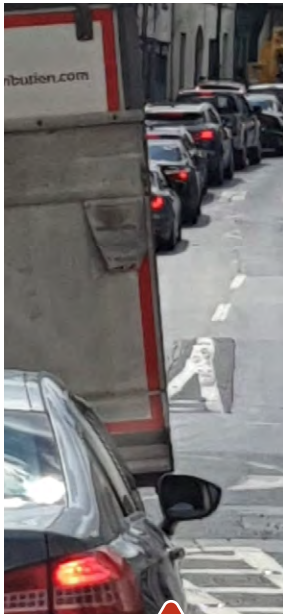
The busiest time in the town centre is Friday and Saturday lunchtimes and the quietest time is after 5pm on both days.

Air and Noise Quality in Tipperary Town Centre

Air Quality



The World Health Organisation (WHO) has described air pollution as 'the world's single biggest environmental health risk' (Source: EPA Ireland)



In 2019, local community group March4Tipp, concerned with the negative health implications caused by traffic pollution, carried out roadside monitoring within Tipperary Town centre, to assess levels of nitrogen dioxide - NO_2 – a main source of road transport-based pollution.

As a result of these concerns, Tipperary CoCo committed to examine pollution levels along the busy N24 that runs through the historic town centre. In February 2020 12 NO_2 diffusion tubes were placed throughout the town centre. However, from March 2020, Covid 19 restrictions on movement impacted on the reduction in emissions from transport and on the findings.

Tipperary CoCo are currently undertaking roadside monitoring (Dec '21 to May '22) to assess traffic pollution now that traffic levels have returned to pre pandemic levels.

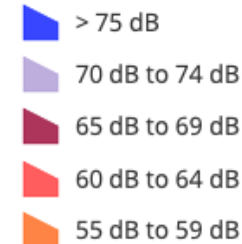


An Air and Noise quality monitoring dashboard is needed for Tipperary Town Centre in the immediate term

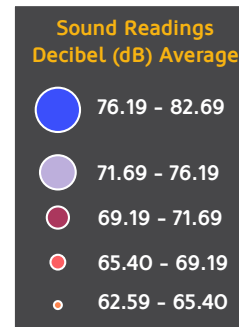
Noise Quality

Noise Map 2017 showing Main Street Tipperary.

Lden (2017)



Source: Transport Infrastructure Ireland (TII)



2019



Key Consideration and Opportunities for Tipperary Town?

United Nations Sustainable Development Goals (UN SDGs), Programme for Government, TCF and CTCHC Approach

The CTCHC Programme is included in the Programme for Government (PfG) and is at the centre of the Town Centre First (TCF) Policy, i.e. the CTCHCP is the key collaborative framework to gather and lead actions around the country. The new TCF policy presents significant opportunities and potential benefits for Tipperary's historic core. In addition, the CTCHC Programme has been selected as one of five best practice case studies by EU ESPON, which seeks to promote Cultural Heritage and Societal Well-being throughout Europe. As Tipperary is a member of the CTCHC Programme, it is envisaged that links with EU Member States will widen and deepen significantly in the future through ongoing programme operations, as part of the UN SDGs New European Movement (NEB) and the EU Green Deal.

Regional Development and Regional Spatial and Economic Strategy (RSES)

The Southern Regional Assembly's RSES acknowledges the importance of the strategic inter-regional road (and rail corridor) and connections between Waterford and Limerick, including the N24 which passes through Tipperary Town (a designated 'District Town'). A renewed focus on rail-based freight traffic at this regional level would help ease the volume of roads-based traffic in Tipperary Town Centre. The RSES also supports the delivery of the UN SDGs along with the concept of 10-Minute Towns, Place-making and regeneration. In addition, the new county development plan (CDP) should assist Tipperary Taskforce through the Town Centres First policy and the National Connected Hubs Strategy.

Community Health and Well-being

However, Tipperary Town's historic core is quite literally being choked by heavy goods vehicular traffic marauding through its historic streets, resulting in significant damage to the local economy, its historic townscape and traditional buildings – which were designed for people and carts, not 5/6 axel trucks. Crucially, there is now an overwhelming need to address this

growing malaise in the town centre, as the overall health and well-being of the local community is also at stake. Immediate investment is needed in relation to enhancing active travel in the historic town i.e. cycle lanes/parking and a safe and healthy walking environment, in order to reduce air and noise pollution to more normal levels.

Regeneration, Heritage and Tourism Funding

Tipperary Town will also benefit from regeneration projects funded under the NDP, RSES, Rural Regeneration Development Fund (RRDF) and the Historic Towns Initiative (HTI). The historic town has enormous untapped potential in terms of heritage-led tourism, e.g. the rich layers of tourism associated with military conquest & independence is an untapped jewel in the crown, as are the enormous potential for public events and festivals. A town by-pass will transform traffic management in the historic core and enable the upgrade of the public realm and repurposing of the town's neglected traditional and historic building stock. Based on the results of the CTCHC surveys, it is unlikely that the historic core will recover until a by-pass is put in place.

Built and Natural Heritage – Tangible and Intangible

Heritage assets – tangible and intangible – are a significant yet under-utilised feature of Tipperary Town and its historic catchment, which date back to the Bronze Age and beyond to the prehistoric era. Reasserting and re-establishing the collective value and importance of Tipperary unique 'time-depth' and heritage's potential to shape Tipperary's image and rebirth are key.

Heritage-led regeneration represents a significant opportunity to transform the historic town centre and connect to important heritage sites within Tipperary Town's wider historic landscape including the Glens of Aherlow.

E-commerce – Need to 'Clawback' Online Trade

The CTCHC surveys for Tipperary Town clearly revealed that there is significant leakage from the town to non-indigenous, online websites', e.g. Amazon – according to the CTCHC surveys, this leakage increased during Covid-19 lockdown. This business potential, i.e. 'clawback', could be better targeted by enhancing the overall 'consumer experience' in order to capitalise on dwell time and total spend in Tipperary Town Centre.

An innovative digital strategy is also needed to improve the overall digital presence of businesses, to establish a town focused 'Click and Collect' service, along with a co-operative marketing strategy and fund. Local business leaders would also benefit from a capacity building and digital mentorship project through the RSES and the Department of Enterprise.

Ireland's CTCHC Programme and proposed Tipperary Towns CTCHC Network

Tipperary Town is the first town in County Tipperary to undertake and create a CTCHC Phase 1 Baseline. It is envisaged that Tipperary Town can be an exemplar for other historic towns throughout the county. In support of this collaboration, it is recommended that a Tipperary Towns CTCHC Network be established to enable more historic towns to exchange and share knowledge re. CTCHC surveys and data sets and best practice regeneration processes – national and international. This will become particularly important as the CTCHC Programme moves into Phase 2 – Town Centre and Building Renewal and Investment Plans, with support from the EC.

Harnessing Tipperary's Global Diaspora – Emigrant Support Programme (ESP) and Networks?

Finally, it is strongly recommended that Tipperary Town's civic and business leaders embrace and harness Tipperary's wonderful global diaspora through the newly established CTCHC Irish Towns Diaspora Network, the Emigrant Support Programme (ESP) and the EU Diaspora Strategy.

Stakeholders and CTCHC Project Team

The Tipperary Town CTCHC Project is a partnership between the Heritage Council and local stakeholders. If you would like to get involved in the regeneration of Tipperary Town, please contact the following:

For information on the CTCHC Programme, please contact:

The Heritage Council's CTCHC Programme

Ali Harvey

CTCHC Programme
Founder & Co-ordinator

Email:

aharvey@heritagecouncil.ie

Tel. +353 87 419 3458



An Chomhairle Oidhreachta
The Heritage Council



Tipperary Town Revitalisation Task Force

Michael Begley

Tipperary Town Task Force
Manager

Email:

info@tipptownrevitalisation.ie



A wide-ranging number of stakeholders came together to form the Tipperary Town CTCHC Steering Group. Their names and organisations are as follows in alphabetical order:

Michael Begley

Tipperary Town Revitalisation Task Force

Anthony Coleman

Tipperary County Council, District Administrator

Rita Fenton

Tipperary Town Chamber of Commerce

Carmel Fox

Tipperary Town Revitalisation Task Force

Ali Harvey

Heritage Council

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