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Tipperary Town Consumer Survey

December 2021

Collaborative Town Centre Health Check Programme





Background & Contents

This research was conducted on behalf of the Heritage Council and Tipperary Town Chamber as part of the Collaborative Town Centre Health Check Programme. Undertaking Consumer surveys in historic town centres is Step 5 in the overall 15-Step CTCHC 'process'.

Data has been collected in order to fully understand the current attitudes and opinions on several different aspects of Tipp town.

The consumer questionnaire was designed by the CTCHC Programme with input from Tipperary Taskforce, Tipperary Chamber and Tipperary County Council

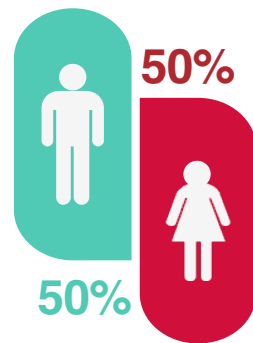
A total of n=218 Tipp Town consumers took part in the survey. The research was conducted using both face to face interviewing (n=168) and via online (n=50).

Fieldwork ran between the 25th October and 6th November 2021

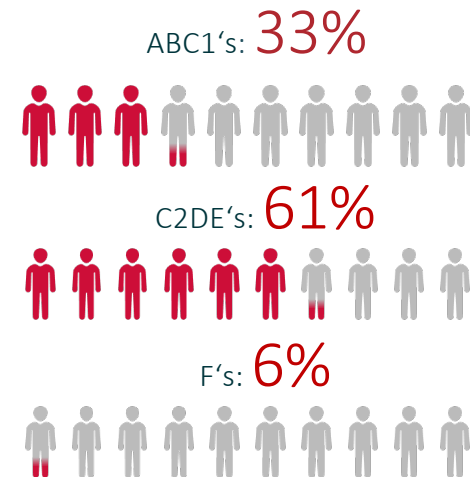
- 01** | Tipp Town Centre Visitor Attitudes and Ratings
- 02** | Tipp Town Centre Usage & Impressions
- 03** | Consumer Behaviours
- 04** | Transport and Cycling
- 05** | Public Events and Developments

Analysis of Sample for Tipperary Town CTCHC Consumer Survey

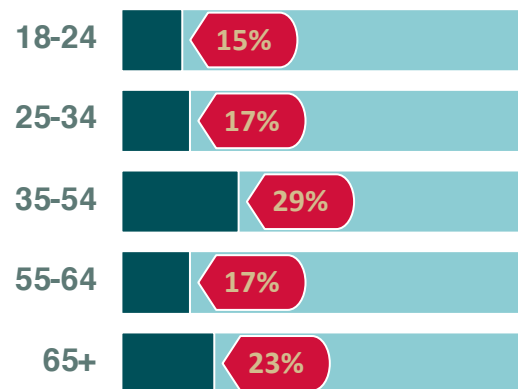
Gender



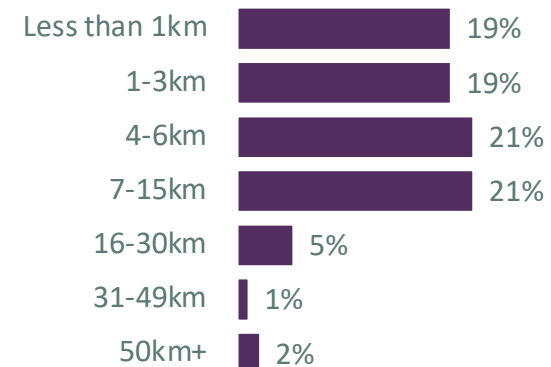
Social Class



Age



Proximity of residence to Tipp Town Centre



Summary of Key Findings -1



Tipperary Town Centre Usage

1. Most visitors to Tipperary town centre do so on a regular basis, with almost 9 in 10 (88%) coming into town at least once a week. Limerick and Clonmel are our largest competitors, however visitors are much less likely to visit these areas on a weekly basis.
2. Consumers in Tipperary Town are most likely to visit for the purpose of shopping, representing 37% of the main missions into the town. Visiting their place of employment is also a leading driver of visits.
3. Most visitors (70%) that come into the town centre spend money on their visit, with supermarkets (59%) and chemists (23%) being the most common places visitors spend their money.
4. Almost two-thirds (63%) of visitors have noticed that town centre has gotten busier with lockdown restrictions easing in recent months.

Consumer Behaviours

5. About half of those who visit the town centre also do online shopping, and about 1 in 4 buy something at least once a month. Clothes are by far the most popular item, followed by event tickets and tech.
6. Almost 8 in 10 people believe their online clothes shopping behaviour has increased as a consequence of Covid-19. 22% of people now buy at least 51% of their clothes virtually. On average clothes shopper missions are worth €85 to the retailer.
7. Clothes shops for young people (56%) and independent retailers (50%) are the most sought-after types of new developments customers would like to see in the centre.
8. An increasingly amount (79%) of consumers are moving online for shopping. 75% of consumers only use 10% or less of their online spend on online platforms for Tipperary Town-based stores. Two thirds of online purchases are higher than €50.
9. However, almost 5 in 10 people would avail of Click & Collect services if available. A further 26% of people are unsure but could be convinced to engage more in online shopping with Tipperary shops if these services were available.

Summary of Key Findings -2



Attitudes towards Tipperary Town

10. The majority of Tipp town visitors recognise that the town has several issues that need to be addressed. Poor traffic (68%) and lack of investment (57%) are top of mind associations when people are asked to think about the town.
11. Additionally, poor traffic (31%) and derelict buildings (18%) are cited as the most unlikeable things in Tipperary Town centre.
12. On a more positive note, over 1 in 3 (32%) associate the town primarily with the friendliness of the people. A similar number (37%) cite the people as the most likable feature of the town.

Tipperary Town Centre Visitor Ratings

13. Visitors to Tipp town centre rate the standards of service quite highly, with 58% rating it as good or excellent compared to the 16% who rate it negatively.
14. Most visitors (55%) rate the town as safe during the day, however this shifts somewhat during the night time. More people rate feeling of safety and security as poor (34%) than good (25%).
15. Shopping is an area where the town performs okay, with generally most people rating it more good than bad, however in some cases such as value for money, the difference is not significant.
16. Traffic stands out as key area for improvement, with two thirds associating the town with traffic, 75% rate traffic flow as poor and 74% rate provisions for cycling as poor.
17. Parks and green spaces and areas to congregate within the town area also areas where more visitors than not, rate the town as poor.

Summary of Key Findings -3



Cycling and Transport

18. 7 in 10 of those that drive into Tipperary Town prefer to park in surface car parks rather than on street.
19. Cycling is currently not utilised in Tipperary Town centre as a means of reducing traffic congestion. Virtually no one traveling into the town centre surveyed used a bicycle. Moreover three quarters of consumers cite lack of bike lanes and parking facilities for bikes as areas where the town does poorly.

Public Events and Developments

20. 62% of visitors would attend public events in the town centre. Christmas events (79%), markets (68%) and food festivals (58%) were the most popular choices amongst visitors.
21. The enhancement of the Market Yard is appealing to most visitors. The redevelopment of Kickham Plaza (44%) also helps drive visits into town.



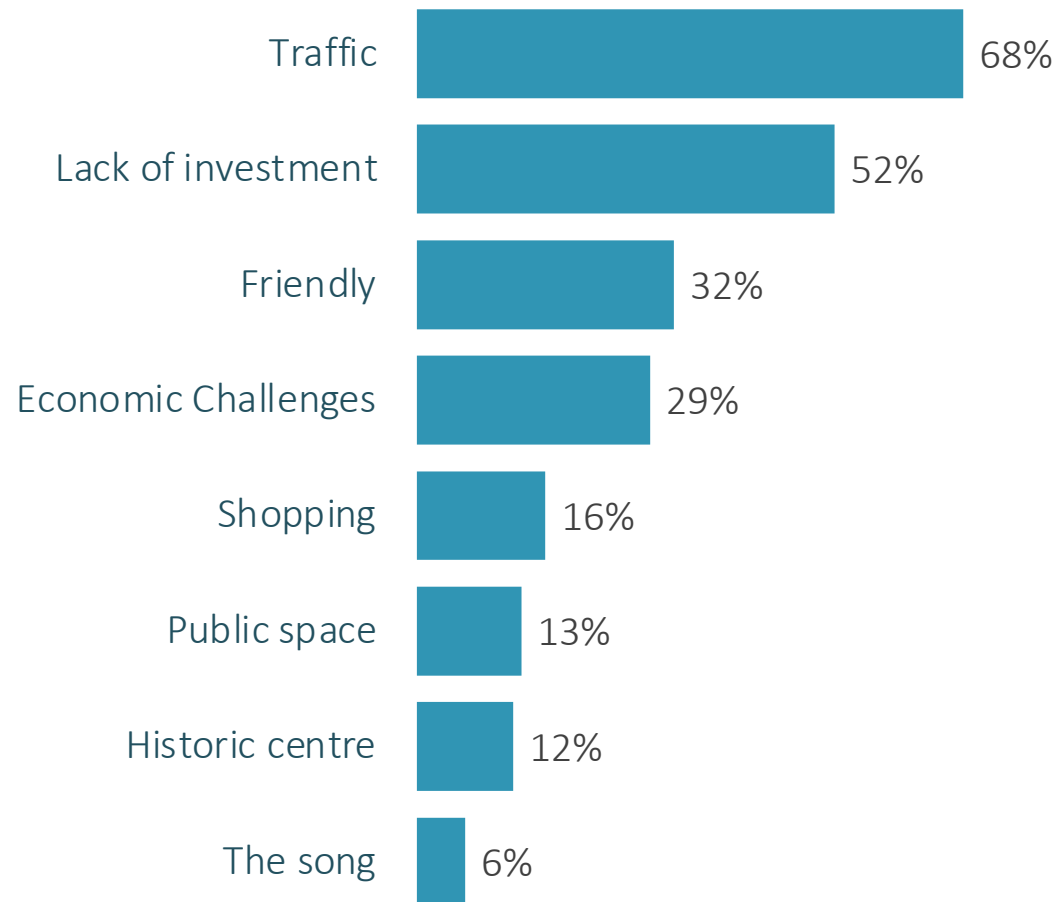
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Tipperary Town Centre Visitor Attitudes and Ratings

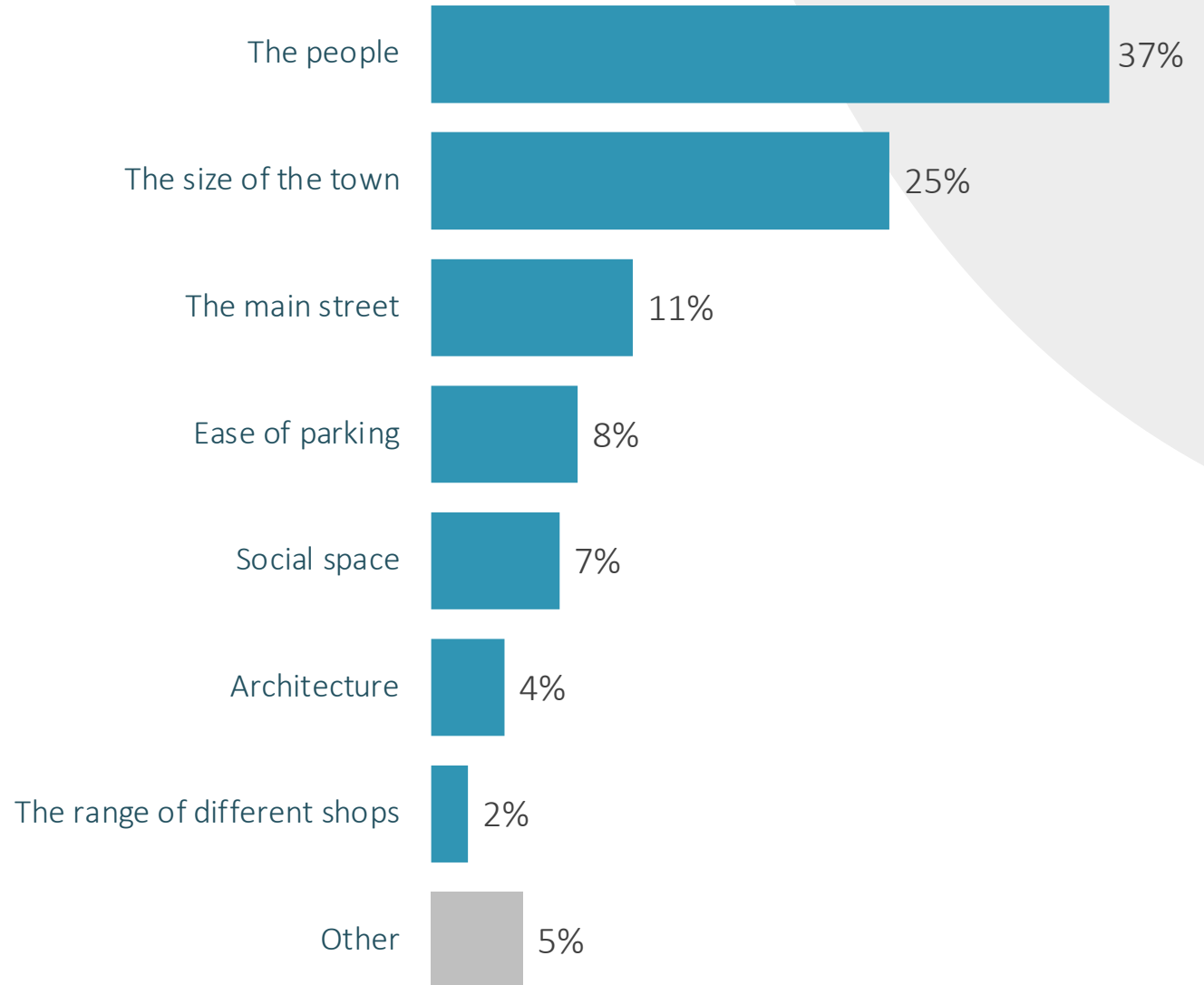
Despite many associating the town with its friendly residents and great standards of service, traffic and lack of investment are the stand out as two prominent issues negatively affecting the town centre.

Visitors mostly associate Tipp town centre with poor traffic

Lack of investment and the economic challenges the area faces are also top of mind for a significant amount of visitors

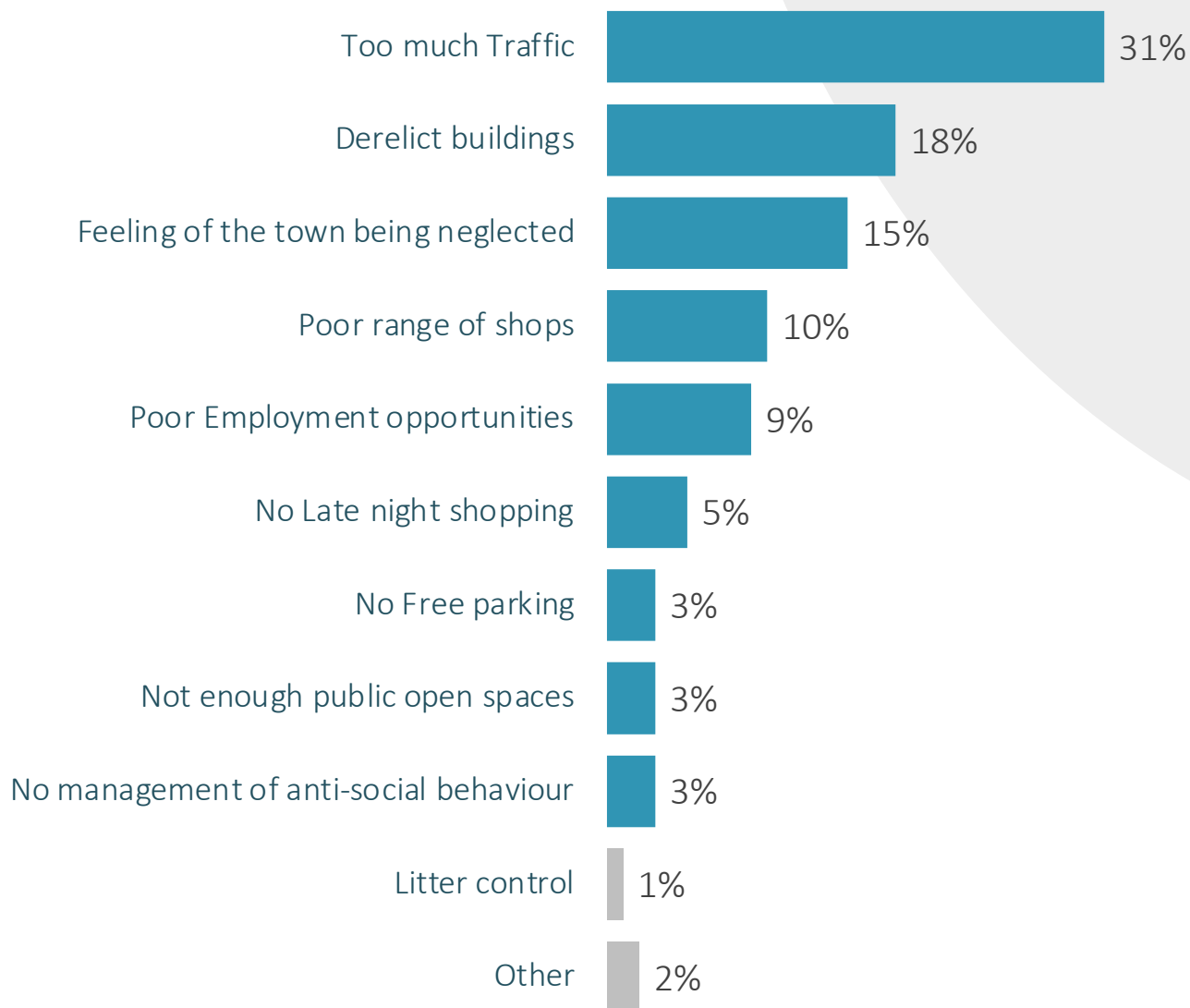


The people of Tipp town are recognised as the most likable aspect of the town



Traffic and signs of economic decay stand out as areas that visitors dislike

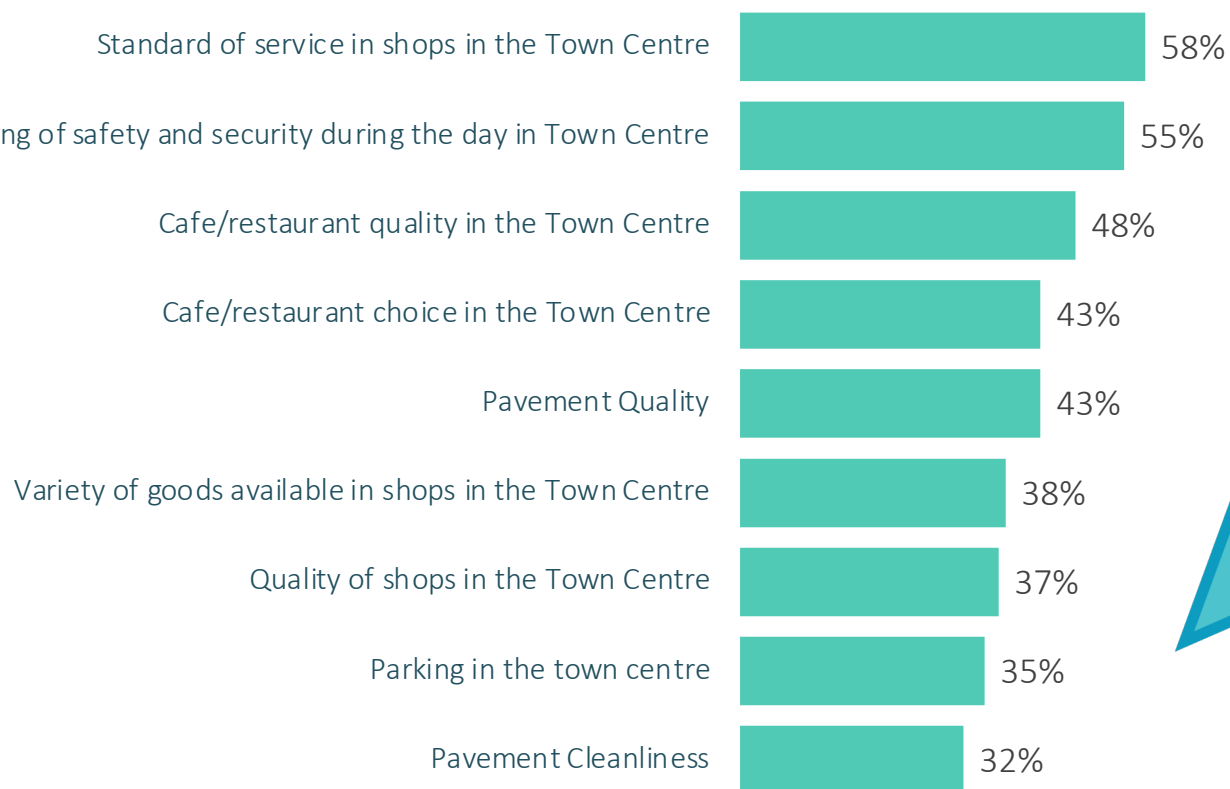
18-34s were less likely to dislike the traffic than those 55+



Service excellence, safety, and quality of hospitality key strengths



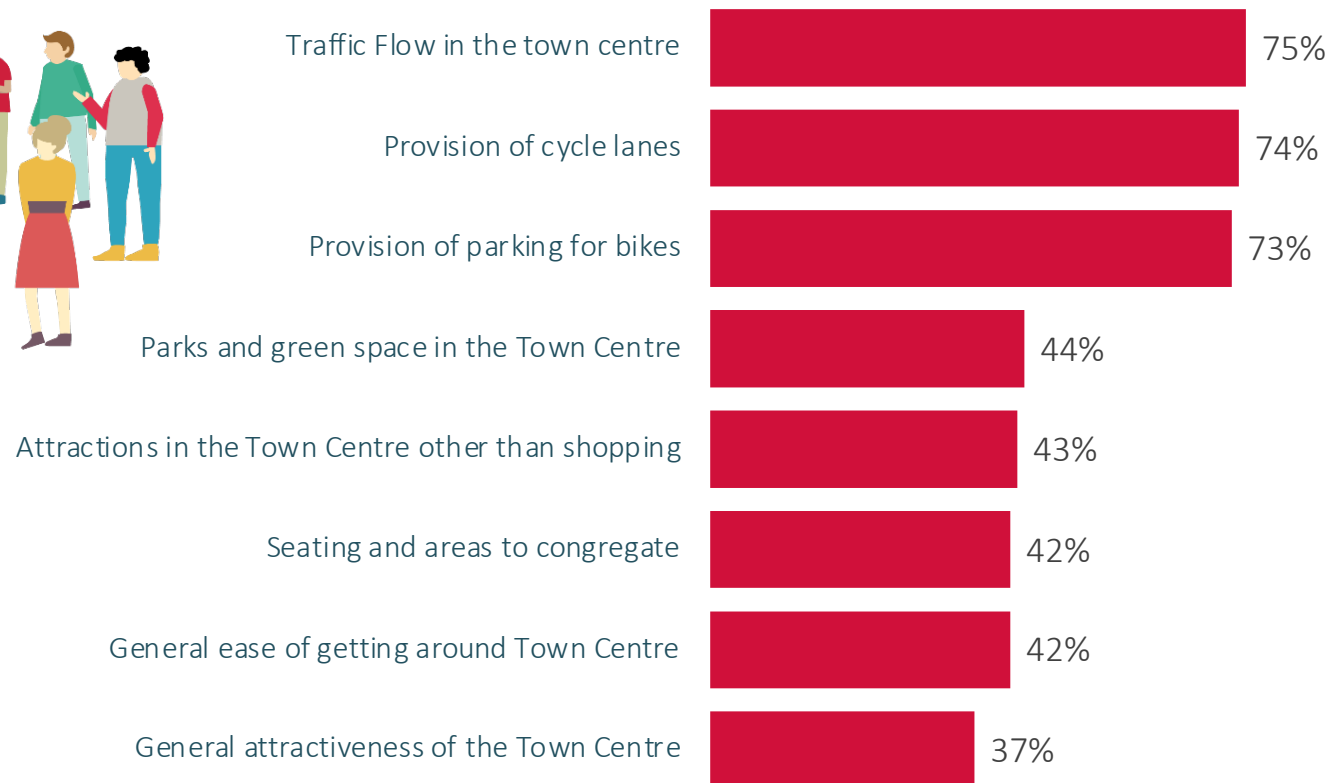
Where does Tipp Town do Well? (Net: Good/Very Good)



Traffic and the lack of provisions for bikes stand-out issues

Improving on cycling facilities will help improve both local traffic and parking within the town centre.

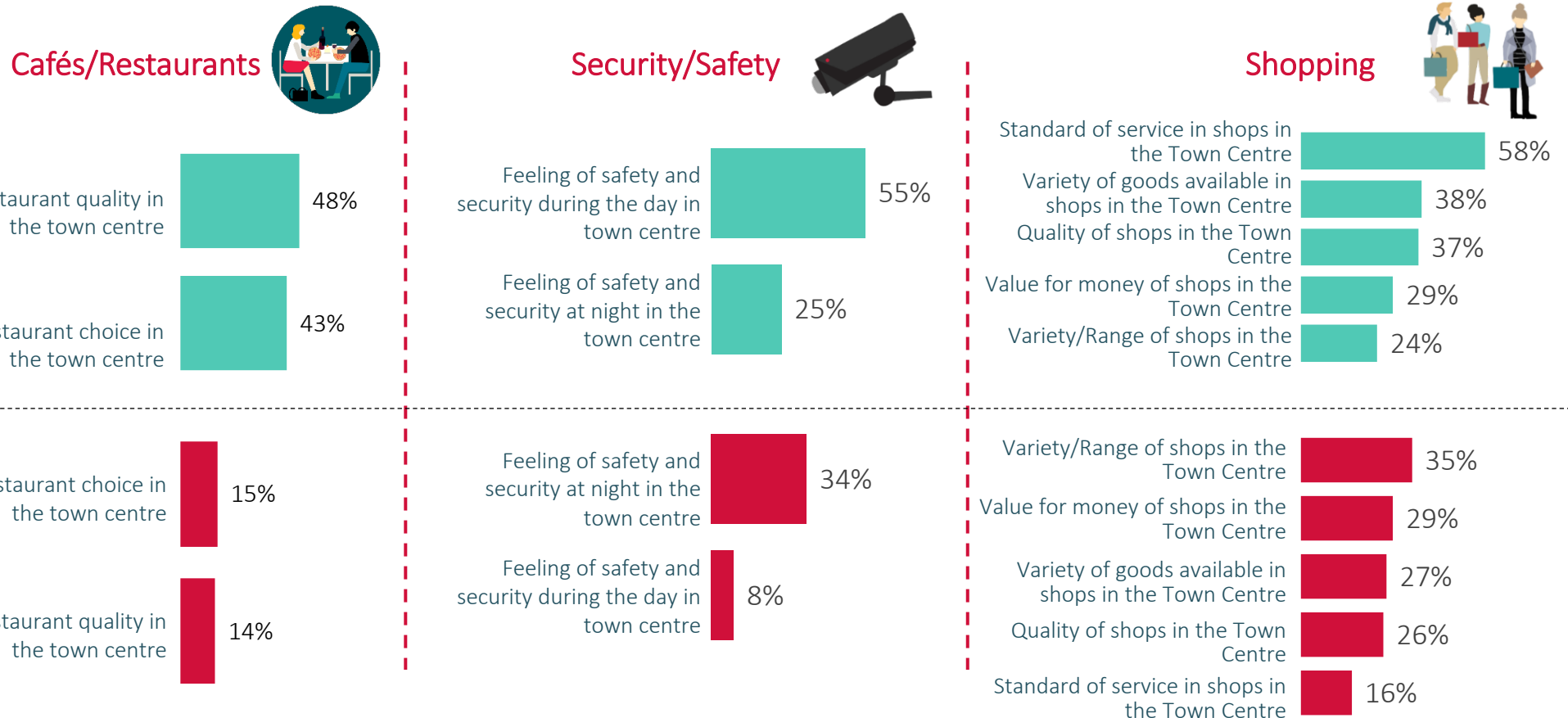
Where can we improve? (Net: Poor/Very Poor)



Café Culture, Safety and Shopping – Satisfaction higher than Dissatisfaction



Satisfaction/Dissatisfaction with Various Aspects of Tipperary Town Centre - II

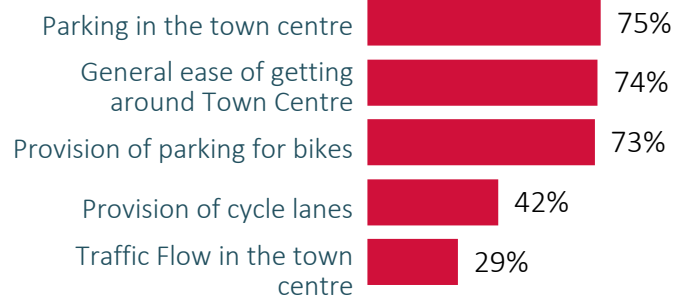
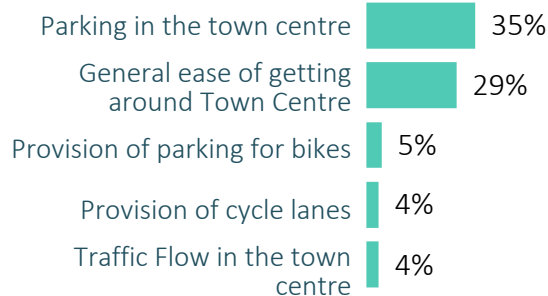


Traffic, Attractiveness and Tourism have higher dissatisfaction than Satisfaction – these are the town’s core issues.

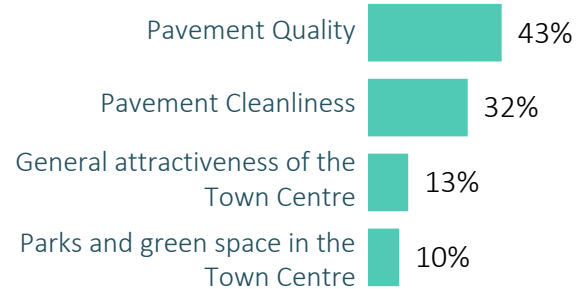


Satisfaction/Dissatisfaction with Various Aspects of Tipperary Town Centre - I

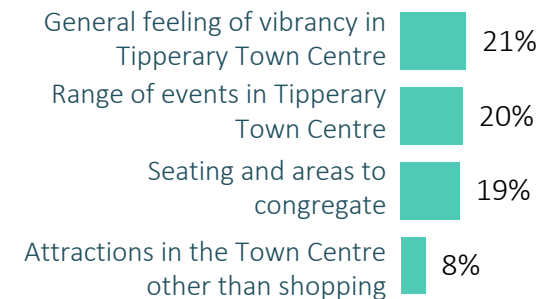
Traffic & Ease of Movement



Attractiveness



Tourism





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Tipp Town Centre Usage & Impressions

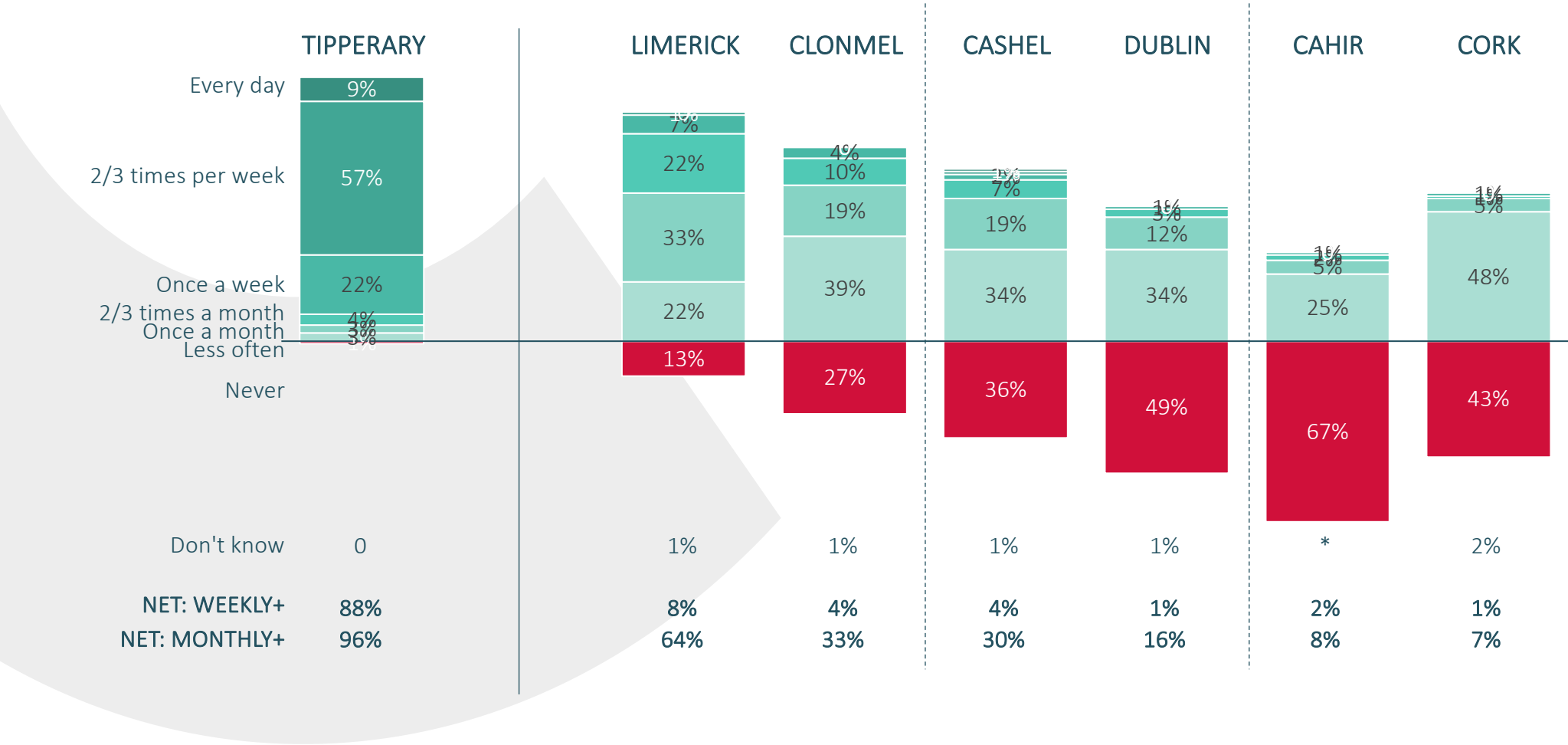
Most visitors to Tipp Town centre are regular users who use it several times a week. Retail and employment are the largest two drivers of visits. Most have felt the town get busier with lockdowns easing in recent months.

Most use Tipp Town Centre at least a couple of times a week

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

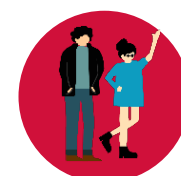
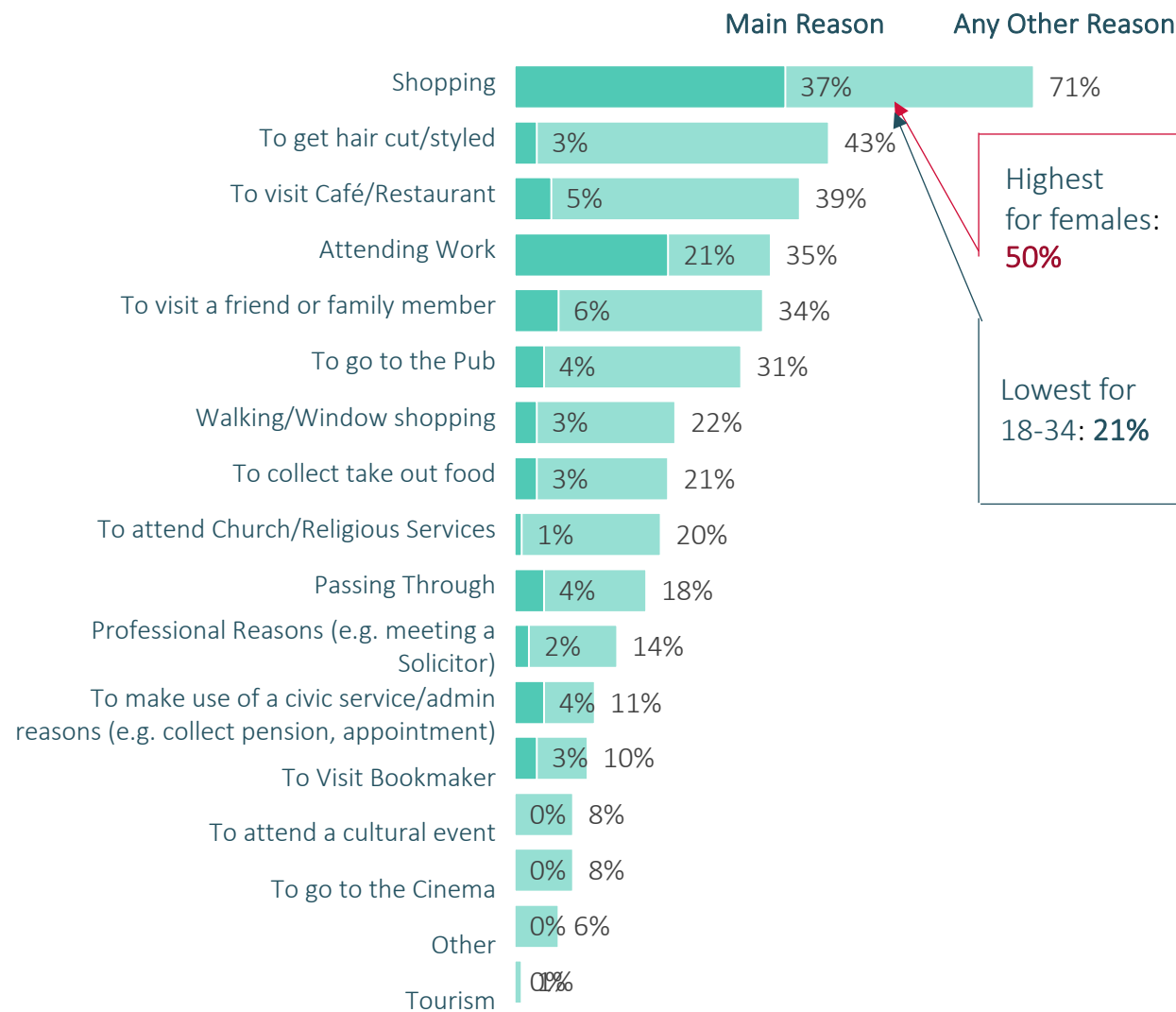


Rival Towns of Tipperary Town



Shopping is the main driver of visits in Tipp Town

Employment and social reasons are also associated with a large amount of visits



Most visitors spend money when coming to the town centre

Supermarkets pull the most amount of consumers, followed by pharmacies and hair/beauty

Almost 4 in 5 females went to supermarkets, compared to less than 2 in 5 males.

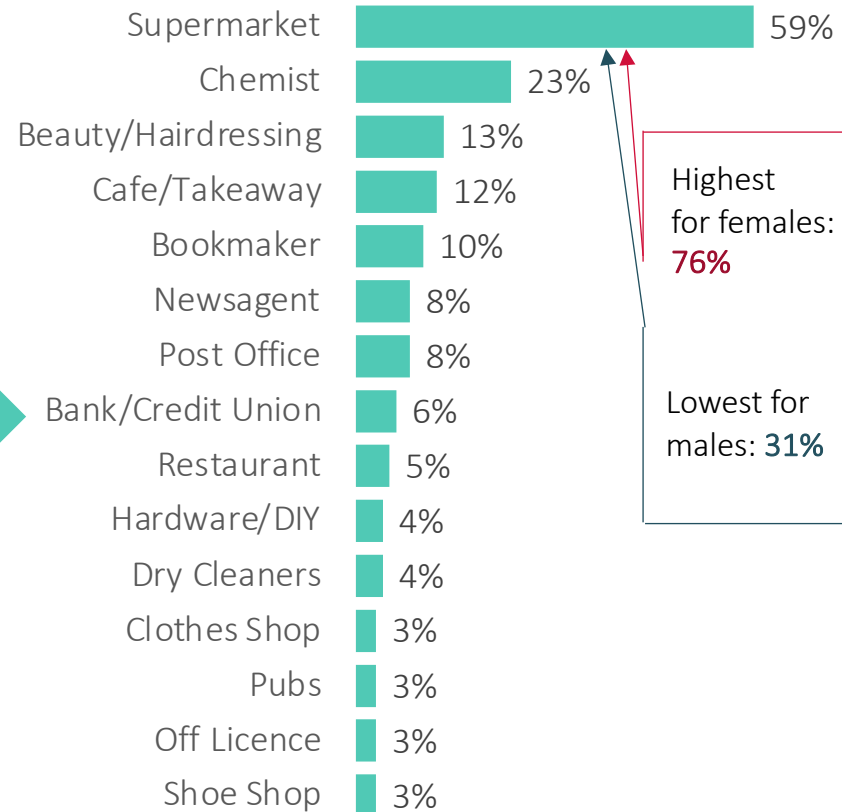
Spend money during their visit

69%

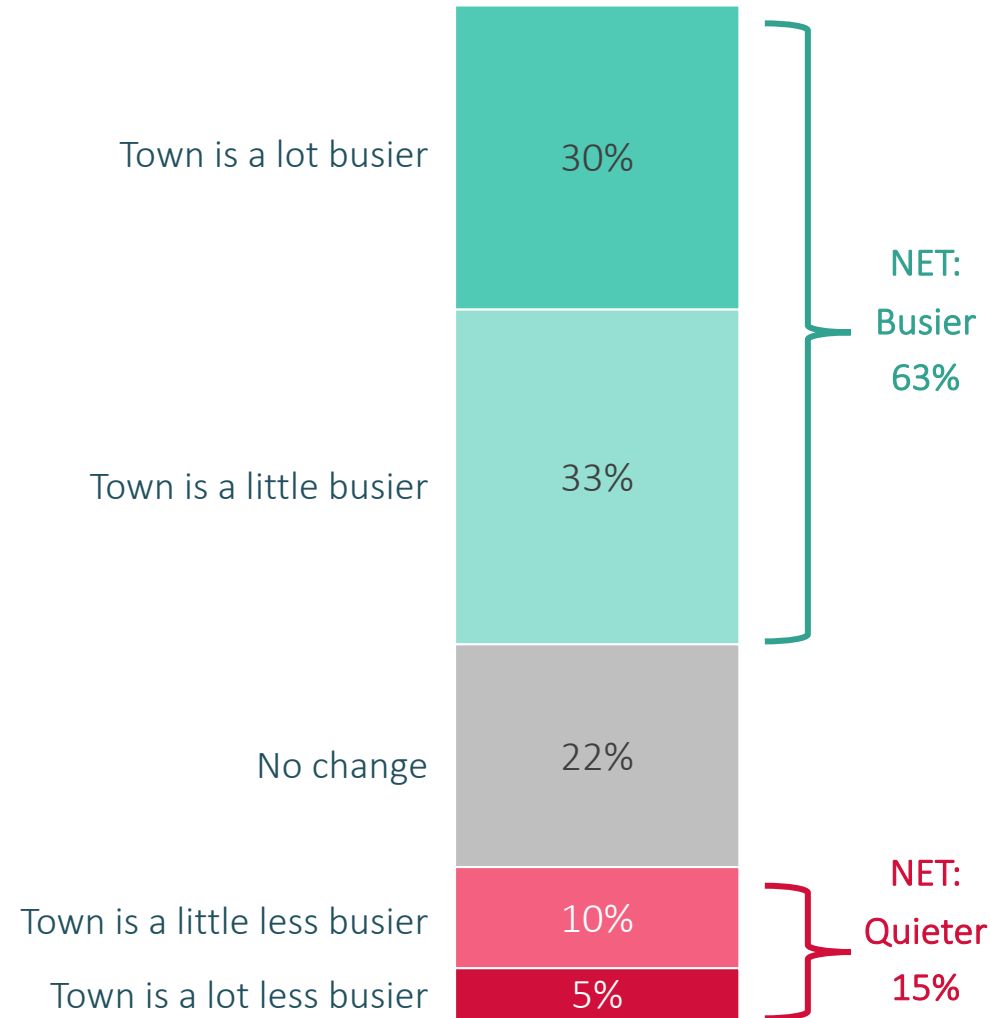


Where are shoppers going?

(Base: All Who have shopped, n=116)



Two thirds of visitors have noticed an increase in activity since lockdown measures were eased





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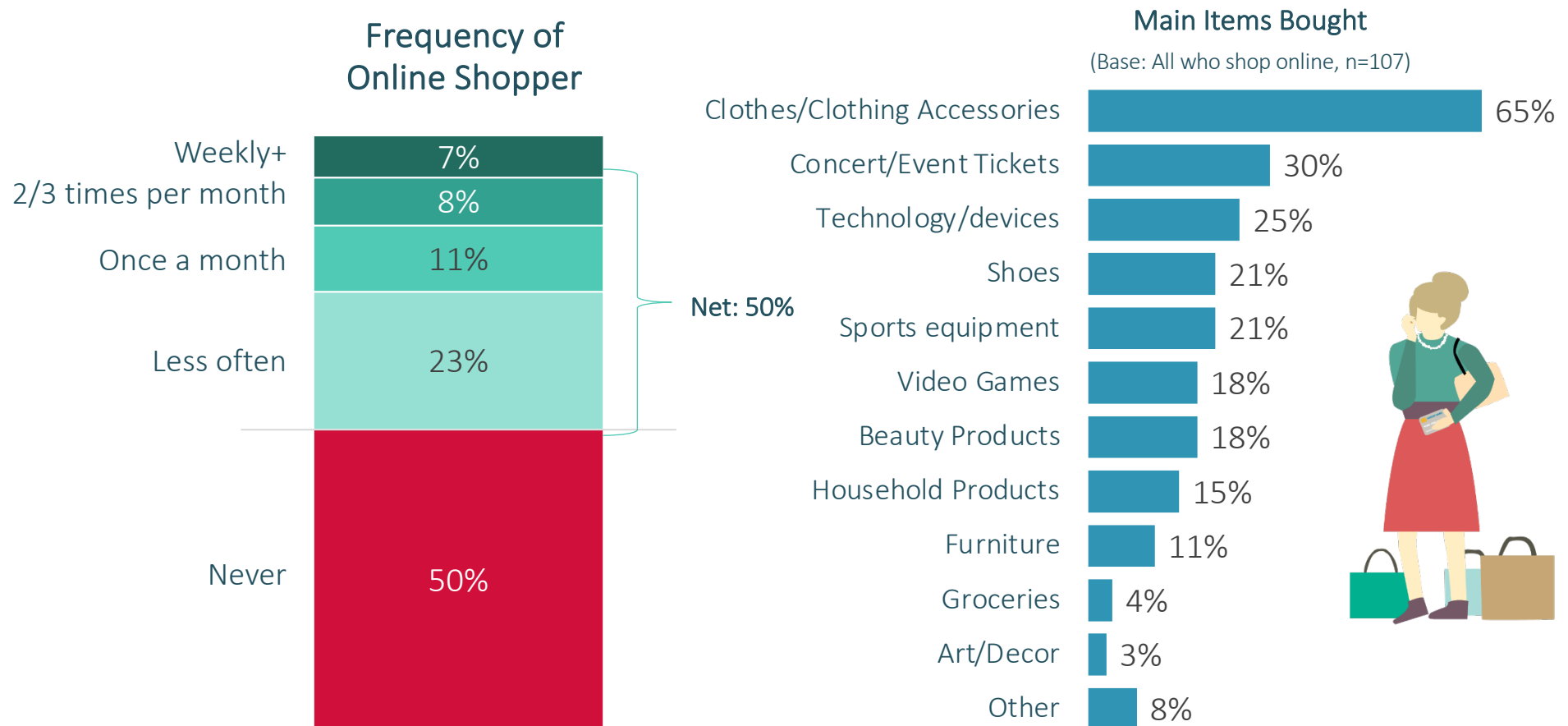
Consumer Behaviours

Consumers are increasingly spending more online through COVID-19, however there is an opportunity for Tipp town businesses to attract shoppers that want to support local. Improving online presence and, click and collect services will be a key element in this.

1 in 4 visitors order something online at least once a month

Clothes are by far the most popular purchase, with concert/events and tech also commonly purchases

Frequency of online shopping and main items bought



Most have turned online for clothes shopping through COVID

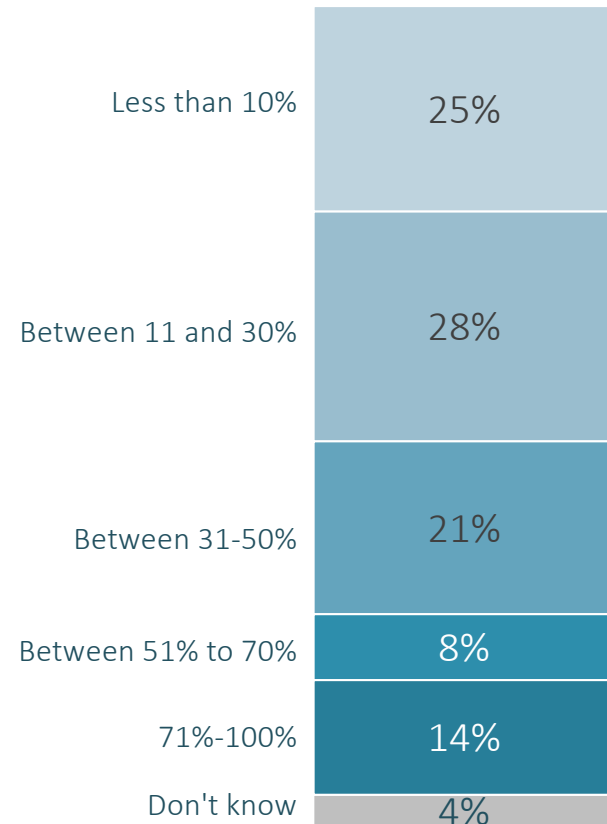


The increasing trend towards online options represents a threat to many businesses on the high street without an online presence.

Change in frequency of online shopping since Covid

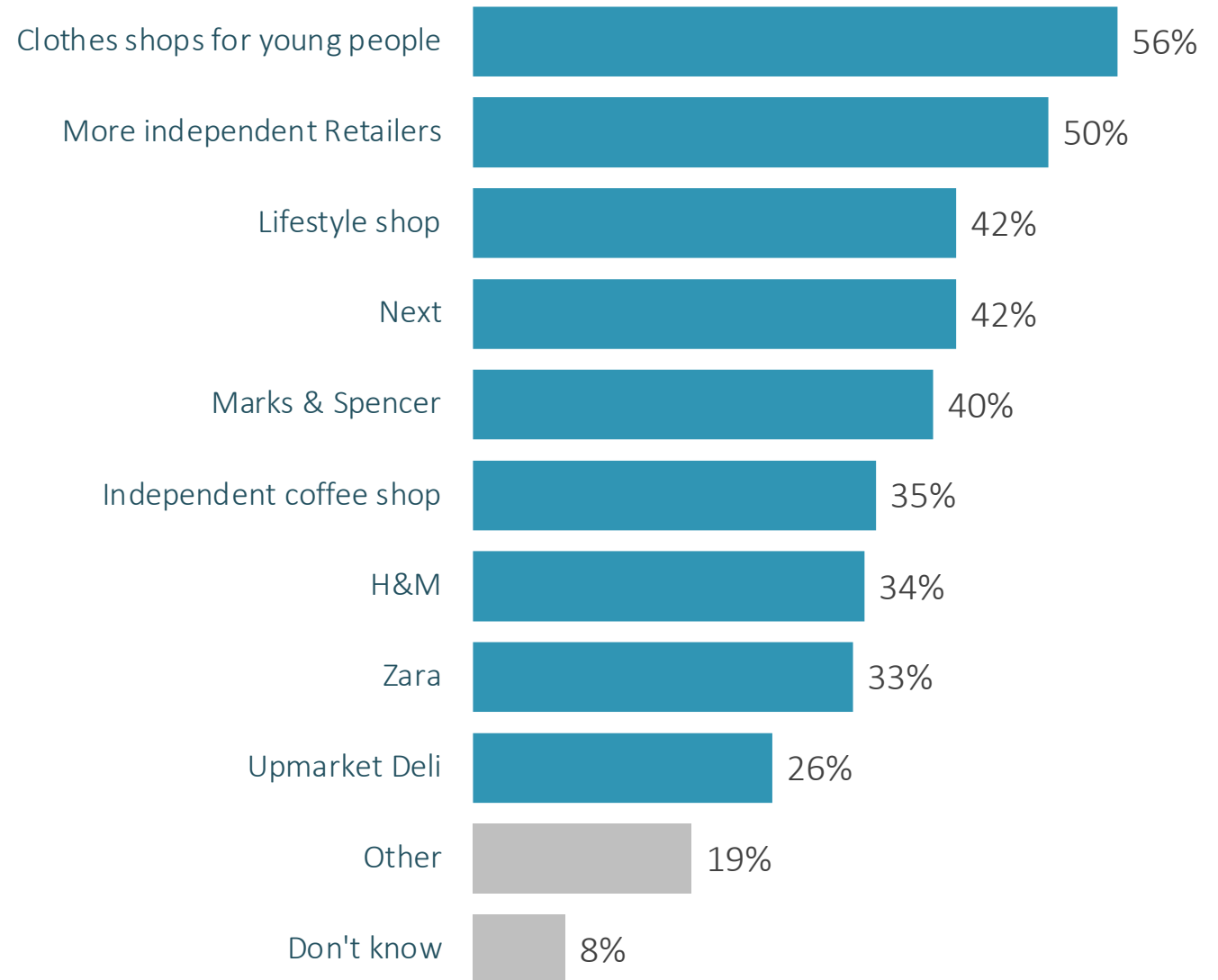


Proportion of Clothes bought online

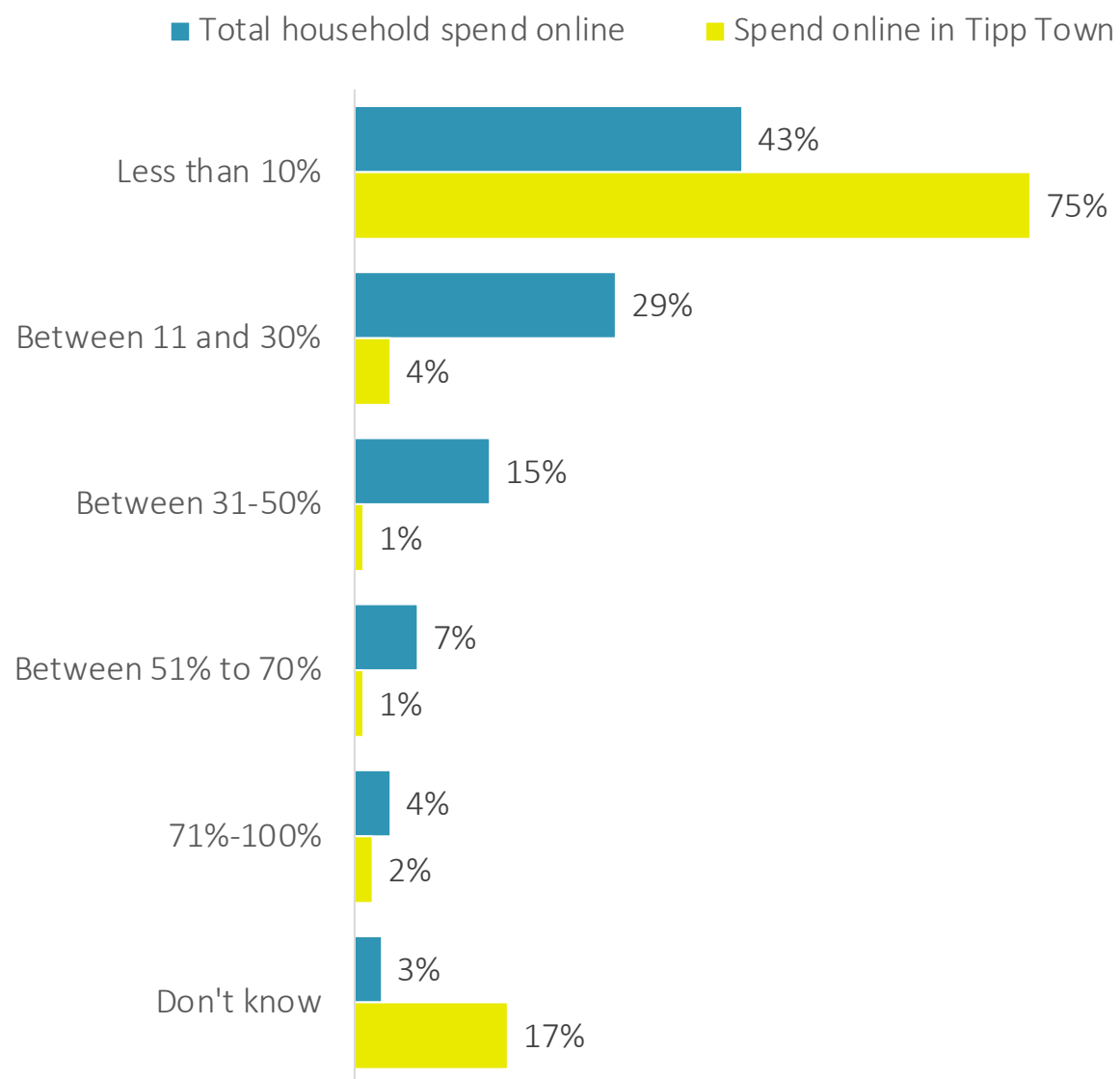


Clothes shops for young people is the most sought after retail in the town

Consumers also wish for more independent retailers.



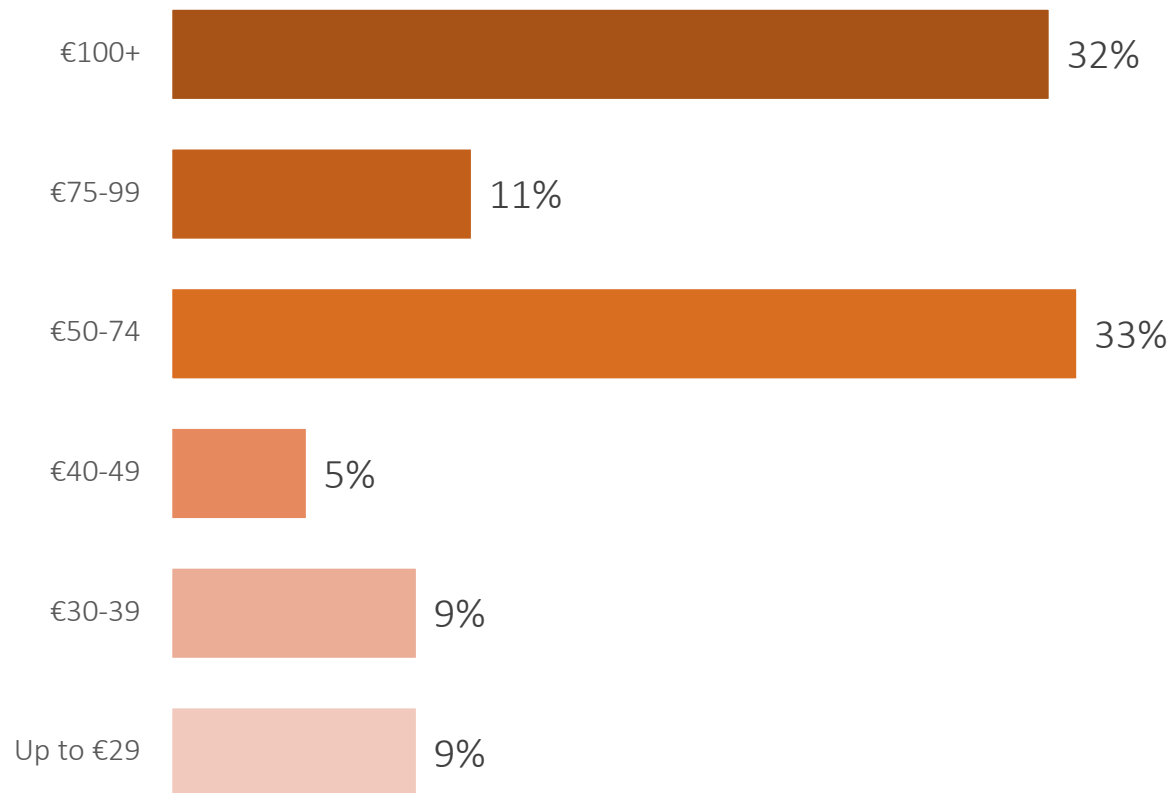
Online Spend in Tipp shops in relative low compared to wider online purchases



Typical online clothes missions are worth about €85 to the retailer

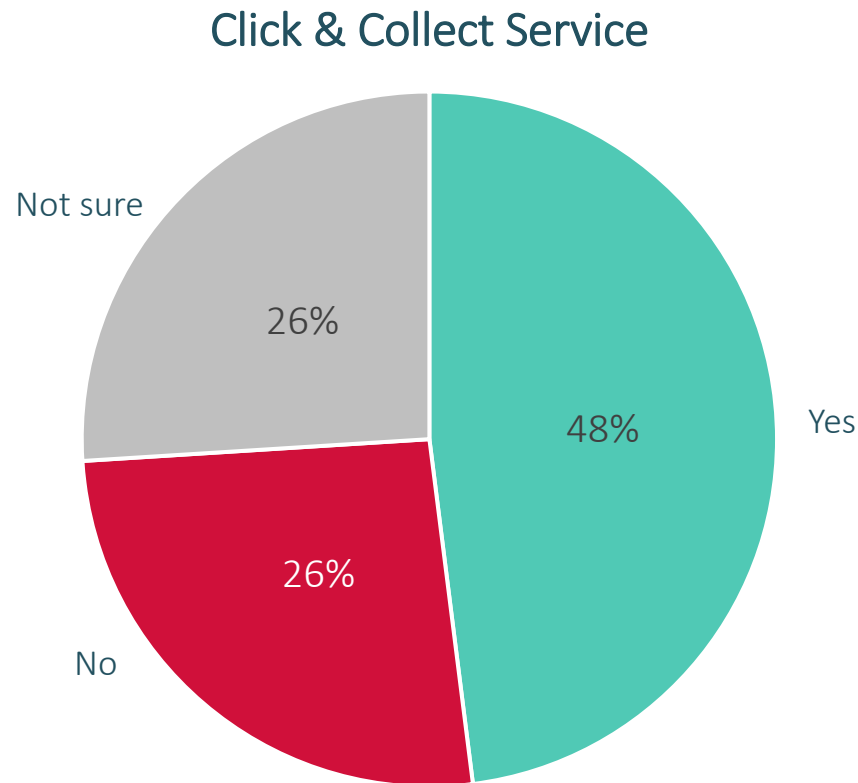
Two thirds of purchases are higher than €50.

Amount Spent on last clothes purchases



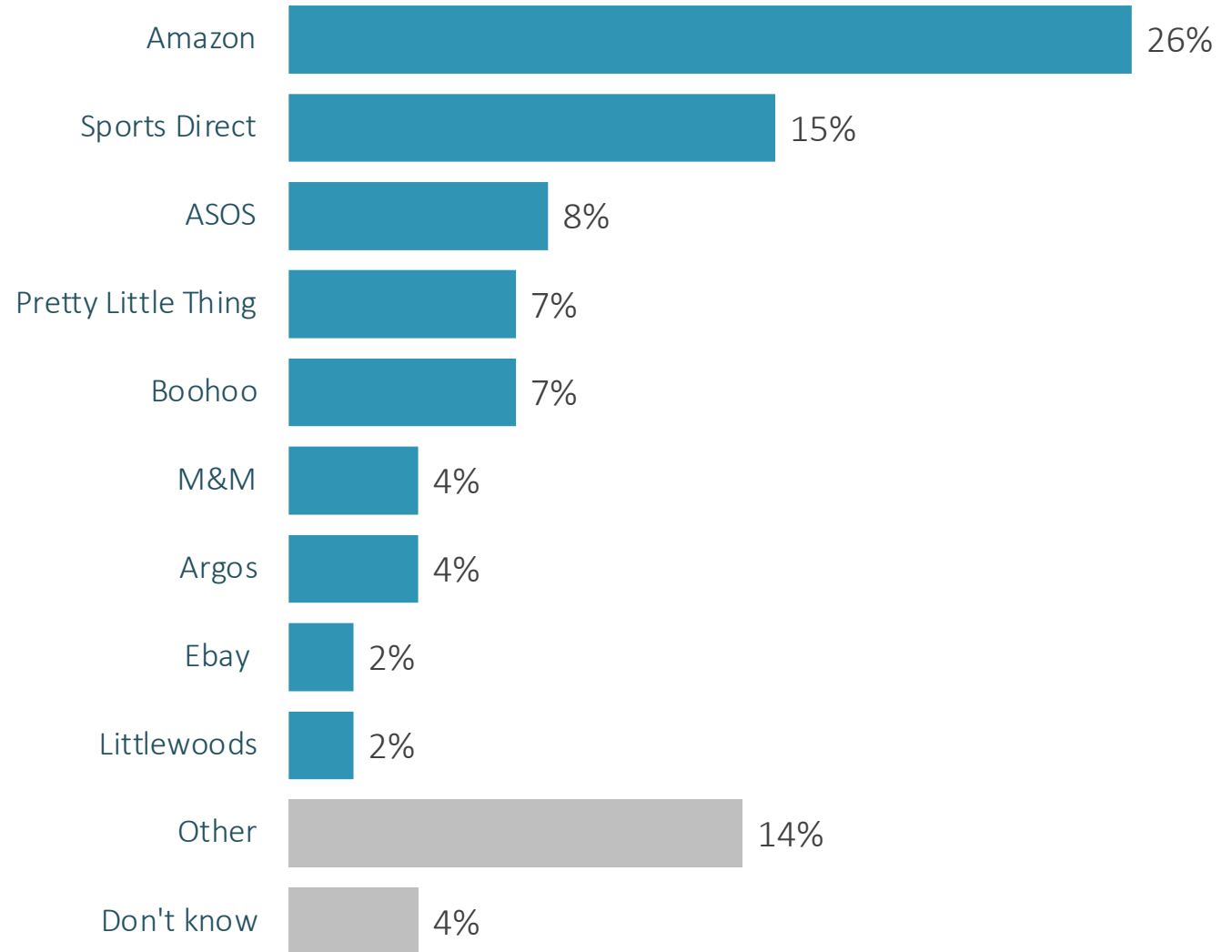
Half would be willing to avail of click and collect

A further 1 in 4 are unsure, but could be brought around if such as service was in place



Amazon is by far the most popular online site used by visitors of the town centre.

Sports Direct and other clothes retailers are also popular



Consumers shop in a variety of places in Tipp town.

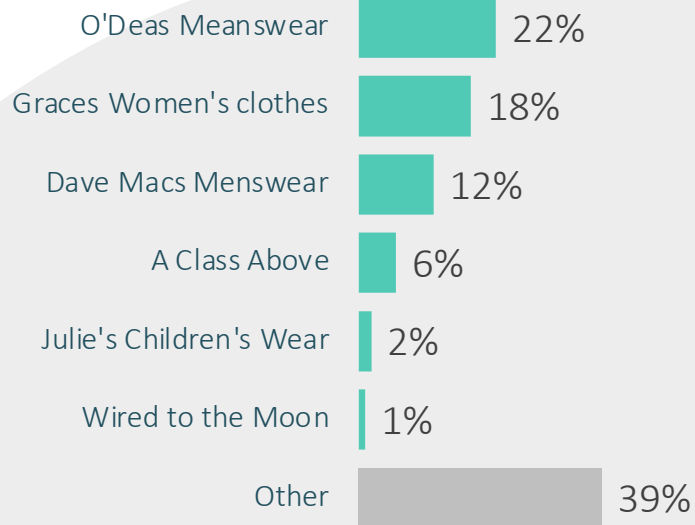


For clothes, other stores make up for a significant part of shopping by consumers.

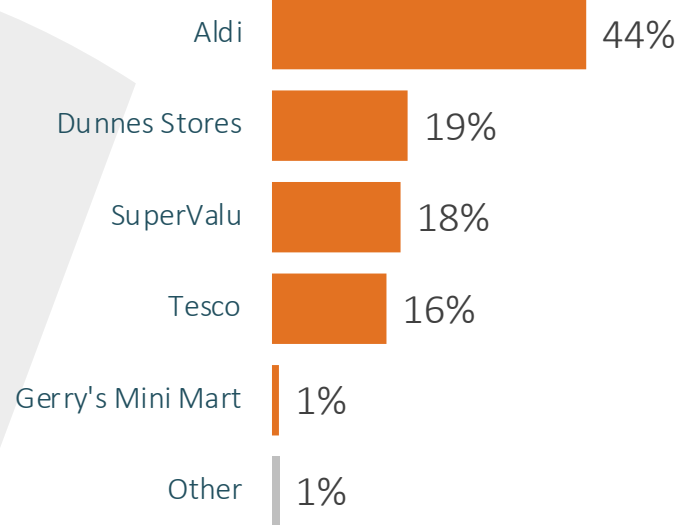
Most used stores in Tipperary Town Centre



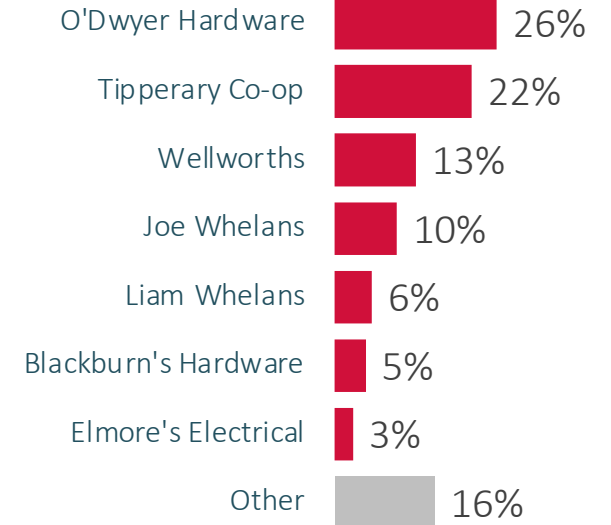
Clothes



Foodstuff/Grocery



Furniture/Durables





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Transport and Cycling

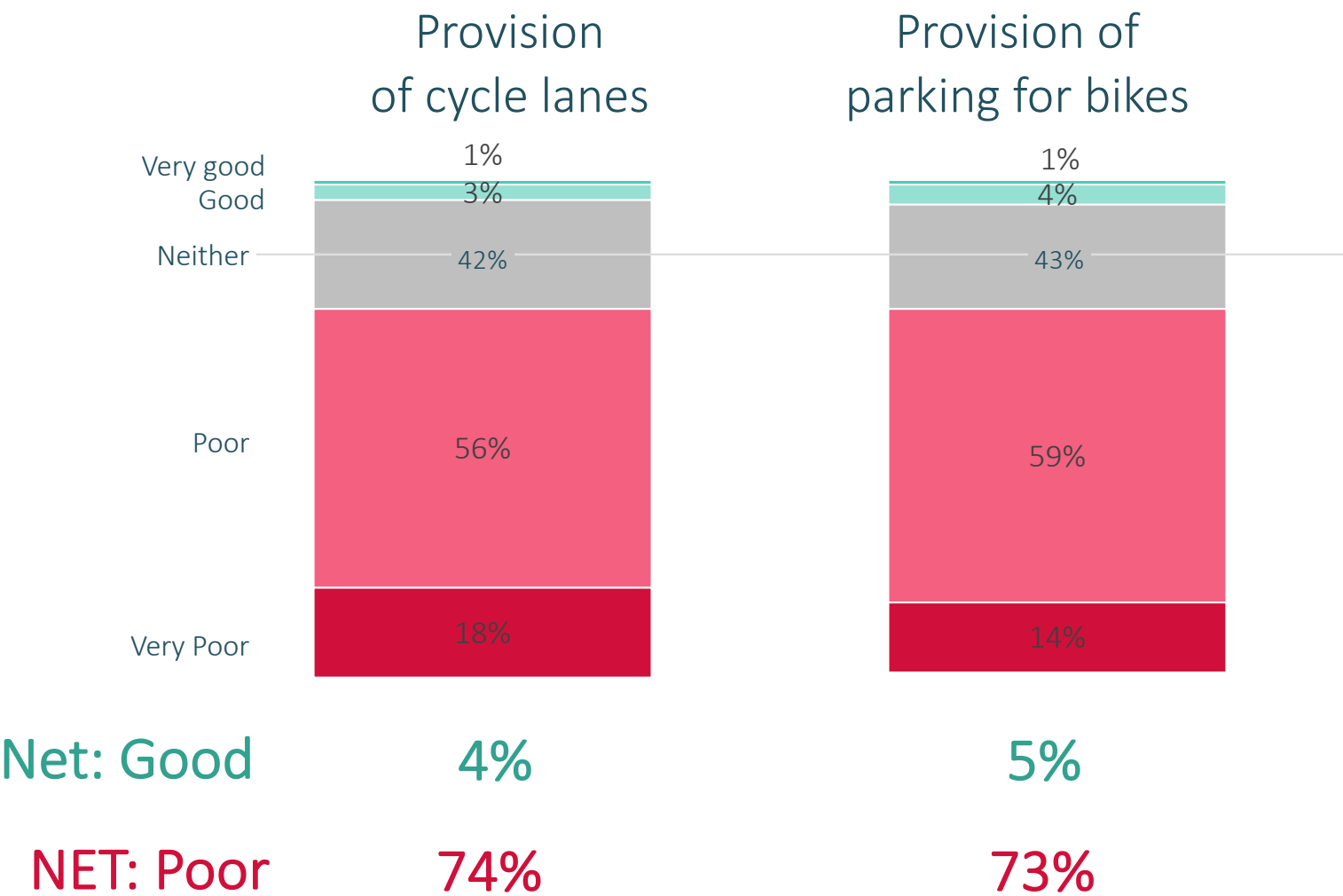
Most visitors of the town centre tend to arrive by car. 70% would prefer to park in a surface level car park than on the street. Improving on poor cycling provisions is an opportunity for the town to reduce local traffic congestion.

Cycling provisions are rated as poor by residents in the town



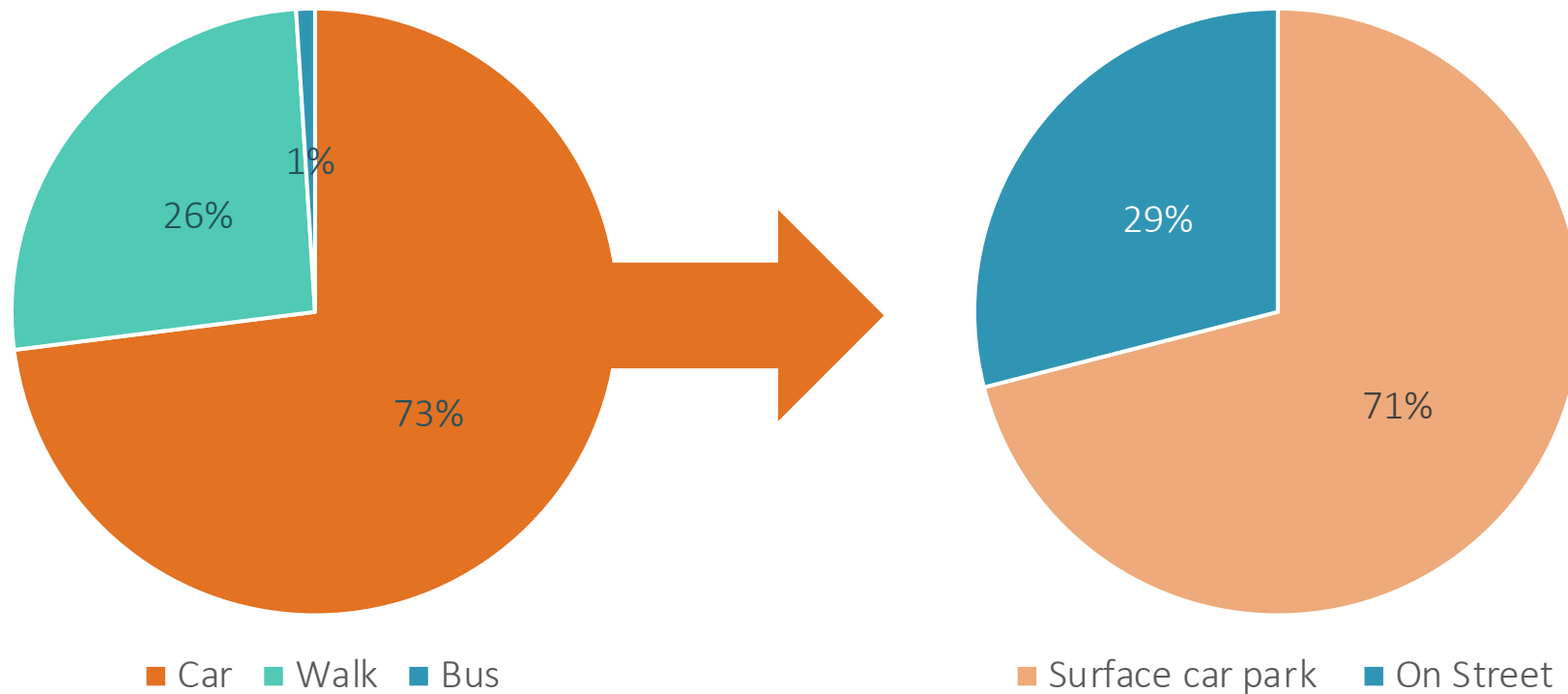
Improving on access, parking and safety for cyclists will be necessary to encourage travel by bike.

Town Ratings – Cycling Provisions



Most drive into Tipp town centre when visiting

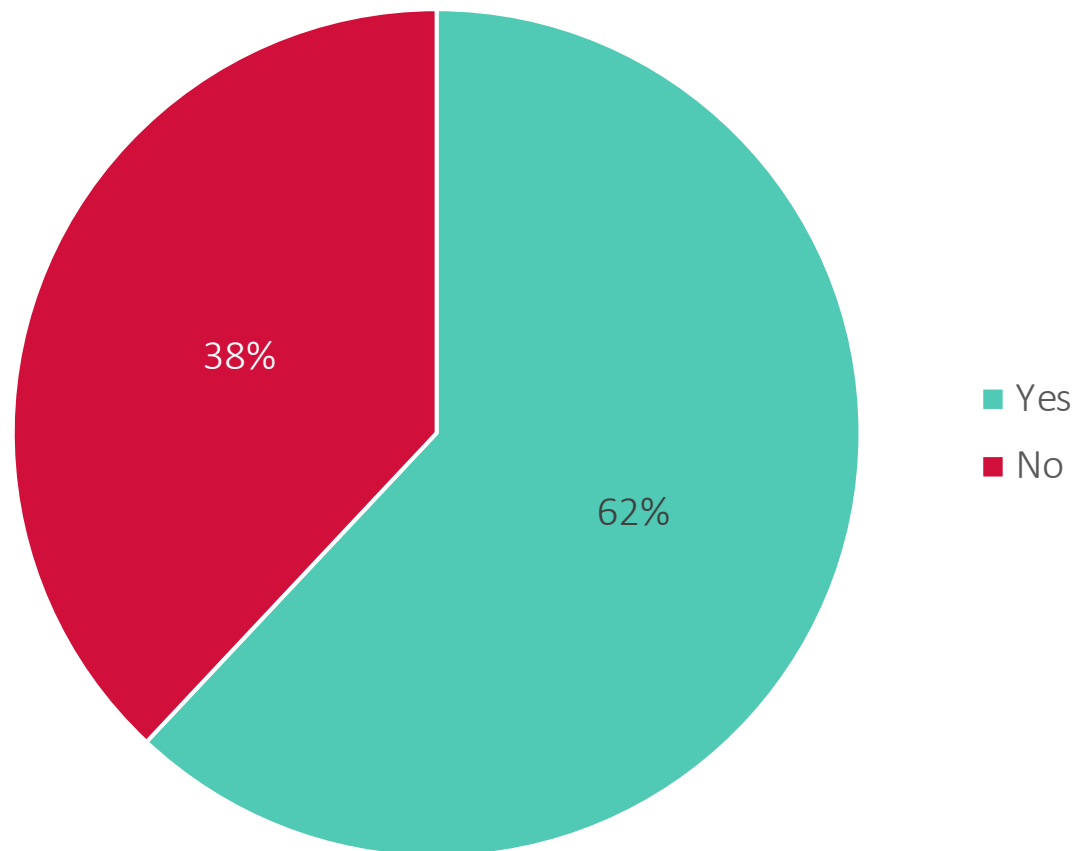
Almost 7 in 10 drivers prefer using a surface car park as opposed to on-street



Note: Cycling accounts for 0% of respondents mode of transport

Q.21 When in Tipperary Town Centre, would your preference be to park in
(Base: All Drivers, n=123)

Over 6 in 10
visitors paid for
parking while in
Tipp town





05

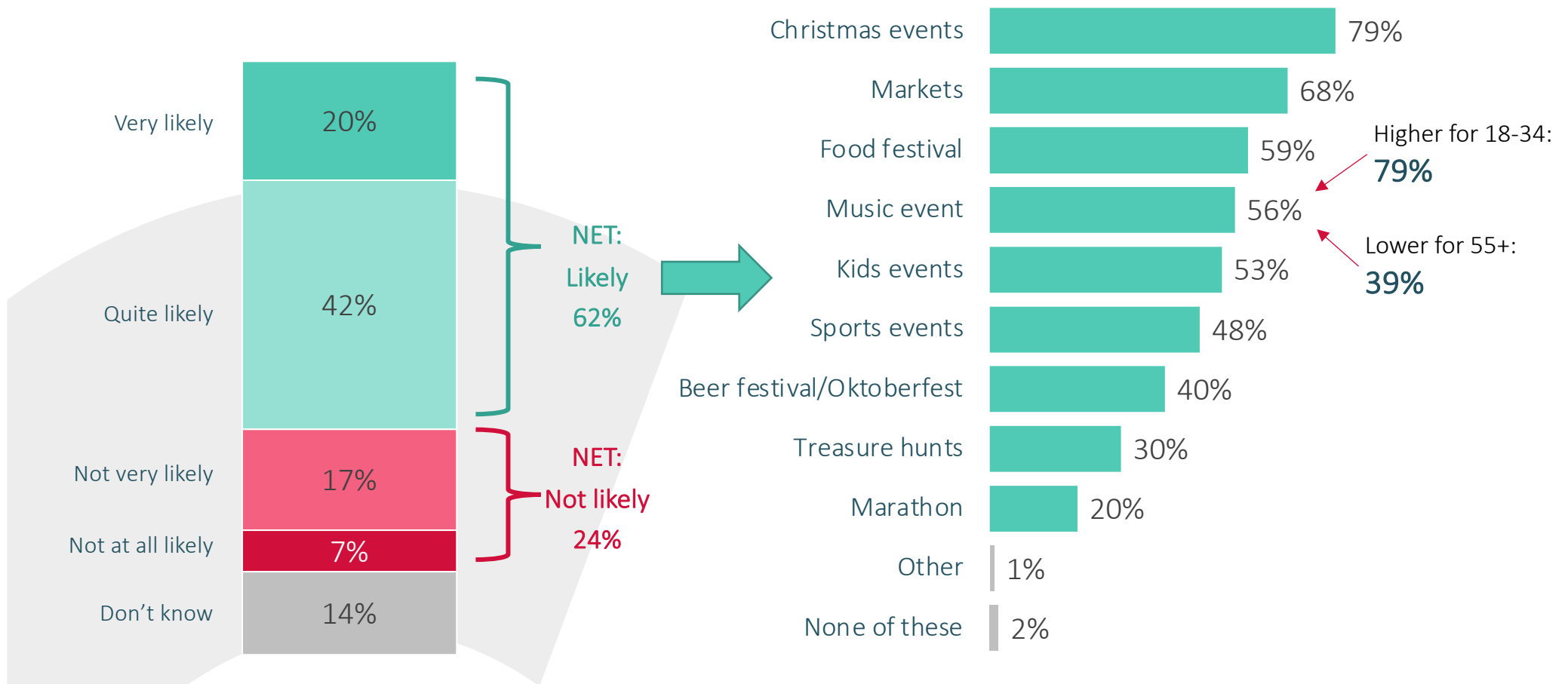
Public Events and Developments

Visitors of Tipperary town centre are receptive of public events to help draw in crowds to the town. There is also support of several developments to drive visits, particularly around Market Yard or Kickham Plaza.

Over 6 in 10 would visit Tipp town for public events

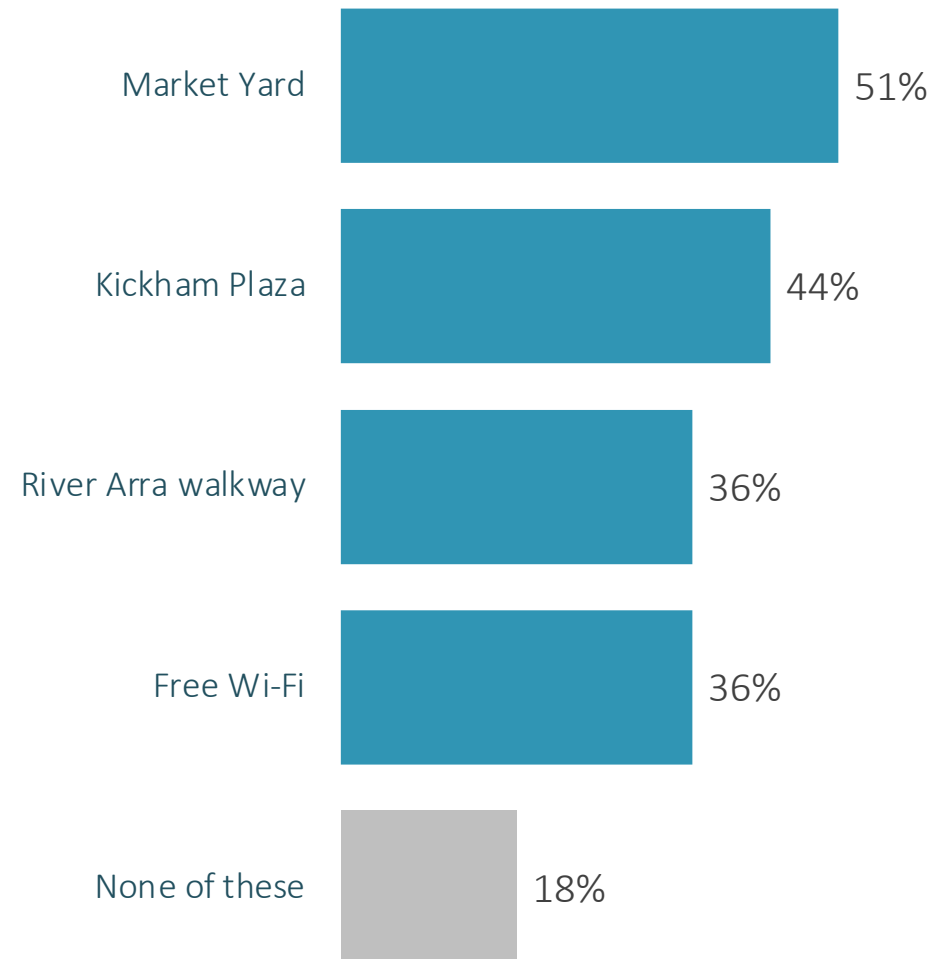
Christmas festivals, markets and events around food, kids and music are all popular options amongst a minority.

Likelihood of visiting the Town Centre for Public Events



The recent developments of the Market Yard and Kickham Plaza are playing a role in influencing visits.

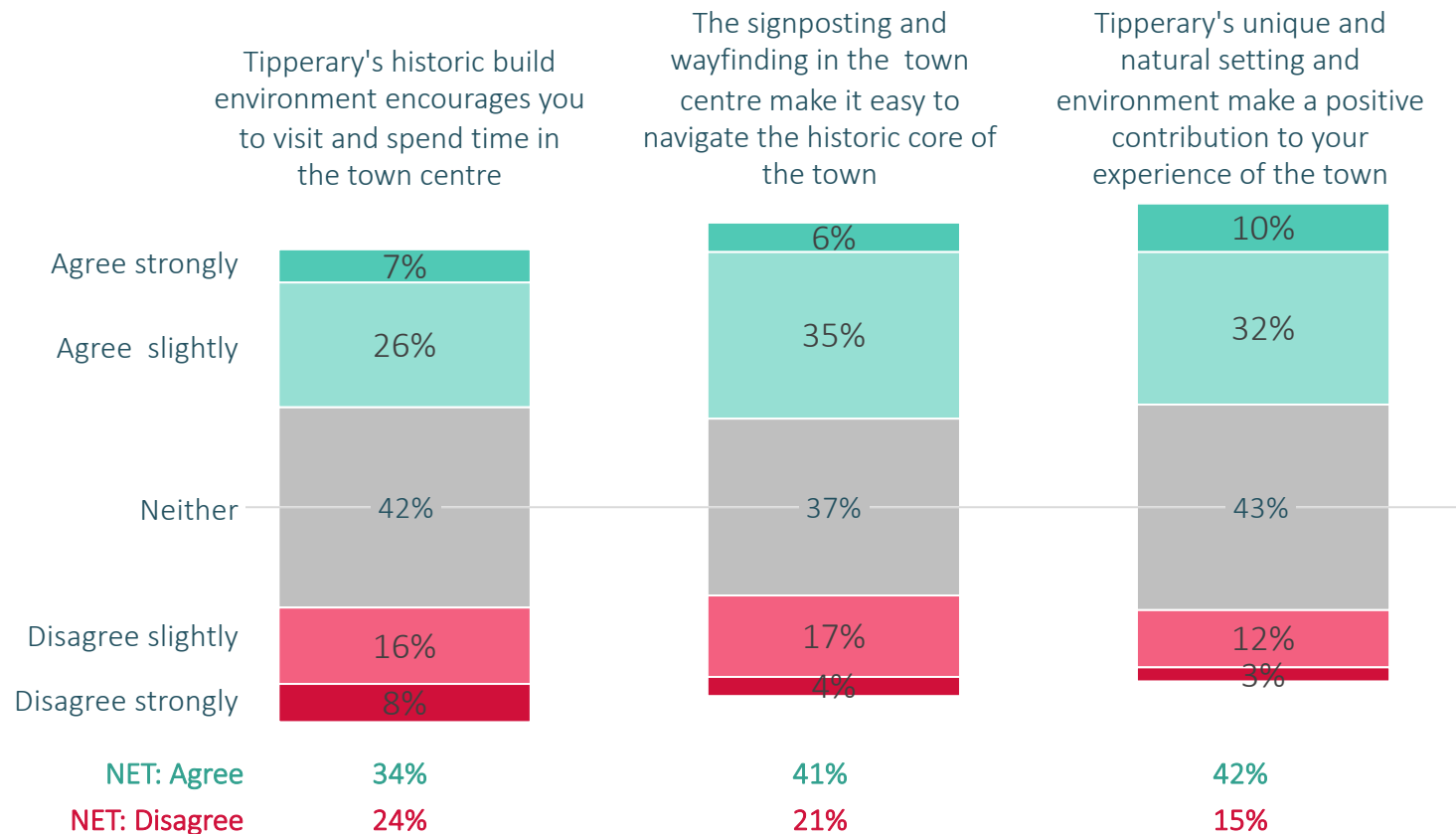
Visitors are also interested in the development of the River Arra walkway.



4 in 10 feel Tipperary's unique and natural setting is an asset



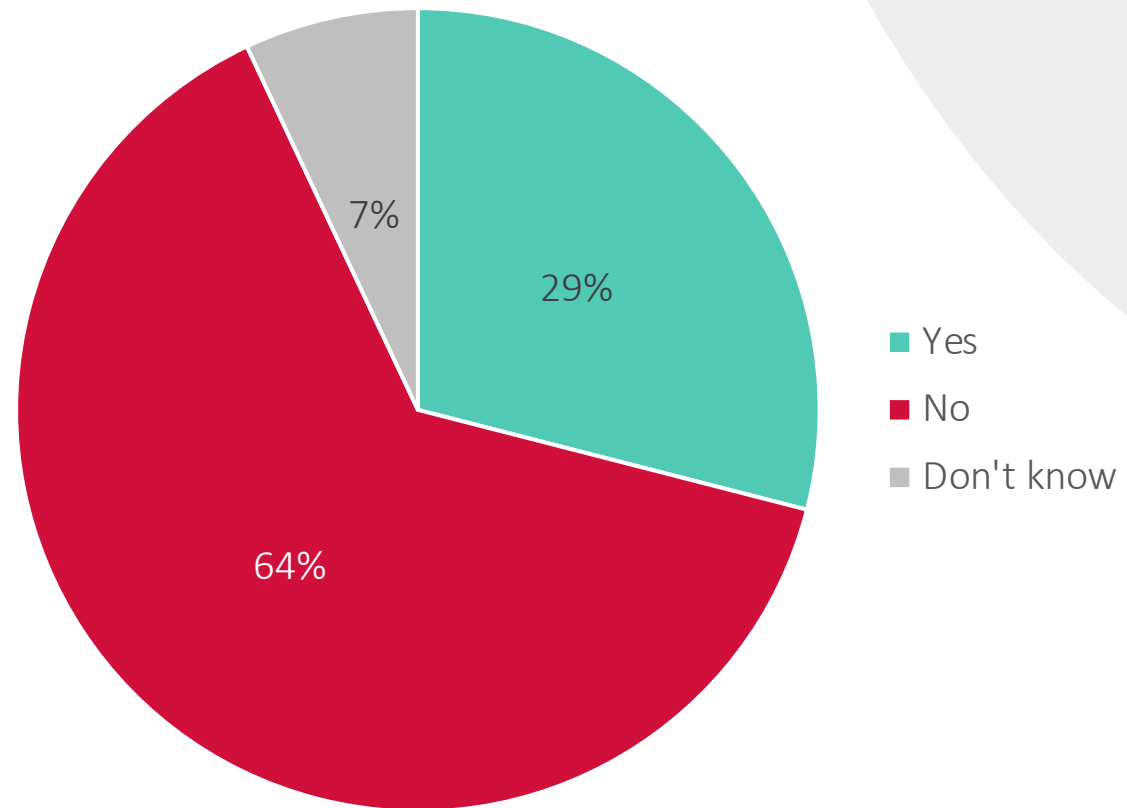
About 1 in 3 believe the towns historic build environment also encourages visits into the town centre.



Just under 3 in 10 are aware of County Tipperary Heritage Plan



Awareness of County Tipperary Heritage Plan





Key Findings

Main Findings of Tipperary CTCHC Consumer Survey



1

The friendly people residing and working in Tipperary town, in addition to high standards of service are recognized as some of the most likable elements of the town Centre.

2

Despite strong human elements, both traffic and lack of investment in the town centre stand out as the two most prominent issues that need addressing in the town.

3

Most visitors to Tipp Town centre are regular users who use it several times a week. Retail and employment are the largest two drivers of visits. Most have felt the town get busier with lockdowns easing in recent months.

4

Tipperary town visitors are increasingly spending more online as a result of the pandemic. Sites like Amazon are the most likely benefactor, cited as the most popular site by about 1 in 4.

5

Improving Tipperary businesses' online presence and embracing 'Click & Collect' will be key for Tipperary retail trying to tackle online leakage. Half of consumers would avail of click and collect if widely available in Tipperary.

6

Visitors of Tipperary town centre are receptive of public events to help draw in crowds to the town. Over 6 in 10 (62%) would be more likely to visit the town for a public event, with markets and events relating to food, music, kids or sport all popular options.

7

There is also support of several developments to drive visits to the town, particularly around Market yard, with 51% claiming it would increase their likelihood of visiting the town.

8

Raising awareness of the county Tipperary's heritage plan may also generate additional visits to the town centre. 1 in 3 already express that the town's historical build environment already encourages them to visit the town centre.

9

Most visitors of the town centre tend to arrive by car. 70% would prefer to park in a surface level car park than on the street.

10

Improving cycling provisions in the town is also an area where Tipperary can improve on reducing local traffic. Almost 3 in 4 rate the town poorly on cycle lanes and parking facilities for bicycles.





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.
- / Member of EirGrid's National Advisory Group (NAG) - nominated by EirGrid's Planning Unit.



Annemarie Ryan Shiner
Tipp County Council

- / Independent councillor for Tipp County Council and local business woman.
- / Founding member of grass roots community activist group March4tipp
- / A member of Tipperary Town Revitalisation Task Force, Tipperary Town CTCHC, March4tipp Tipperary Town Chamber and Light Up The Plan Committee.
- / Annemarie is a passionate advocate of community collaboration in the local decision making process and also advocates for place making and regeneration through community consensus.
- / Over twenty years working in Event Management with a history in delivering large scale events nationally and internationally.



Rita Fenton
Tipp Chamber of Commerce

- / Vice Chairperson of Tipperary Chamber of Commerce & Project Manager of Tipperary Town Enhancement Group
- / Local Business owner of Rita's Flowers.
- / A native of Co. Limerick, Rita lived and worked for many years in Tipperary. She opened a second shop there in 2018.
- / Rita attributes her success to customer loyalty, self belief and hard work.
- / Rita's first love is music and is well known in music circles. She is well known for her positive, determined attitude with a very strong attitude to self belief and work ethics.
- / Her personal life took a dramatic change in 2012 following an accident which she refers to 'as life changing not life ending' which left her with a permanent disability and limited mobility. However, though her personal workload has been greatly reduced she manages her business on a daily basis ,tailoring it around her new disability.



Michael Begley
Tipperary County Council

- / Michael joined the Tipperary Town Revitalisation Task Force as Programme Manager from his role as Business Advisor in the Local Enterprise Office Tipperary where he had worked since 2018, having previously acted as Rural Development Programme (LEADER) Officer & Coordinator for South Tipperary Development Company from 2011-2018, where he oversaw work on a great number of projects and initiatives in Tipperary Town and beyond.
- / Michael, who is a graduate of Galway Mayo Institute of Technology and University College Cork hails from Dingle, Co. Kerry, and relocated to Tipperary in 2011.



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.

THANK YOU



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