Revitalising Tralee

"Pilot" Town Centre Health Check Training Programme

1) Heritage of Tralee
2) Tralee Town Centre Health Check Findings
3) A bright future for Tralee

Kevin Burns
Economic Development Unit
Kerry County Council

Martha Farrell
Creative Media & Information Technology
IT Tralee

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

**Alison Harvey - Heritage Council**

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

**Kieran Ruttledge - CEO**
**Tralee Chamber Alliance**

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

**Mayor of Tralee - Councillor Norma Foley**

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

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

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

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

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

Survey Methodology

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

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

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

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

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

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

¹ Source: Agreed Project Charter for Pilot TCHC Training Programme, 2016. For further information on the Pilot TCHC Training Programme, please contact Alison Harvey, Heritage Council.
Shoppers’ Opinions of Tralee Town Centre…

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

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

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

Why do you shop in Tralee?

Out of habit/convenience 60%

For the selection of shops 8%

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

Top 5 Business Types Visited:

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

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

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

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

- Littlewoods
- iTunes
- ebay
- Amazon.com
- River Island
- Boohoo.com
- asos
- Sports Direct

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

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

When asked ‘What type of shop is missing in Tralee?’ respondents suggested popular high street and online retailers. Some of these brand names reflect the growing trend of online shopping as some suggested brands (e.g. boohoo.com) exist exclusively online:
The survey also invited respondents to rate 20 key aspects of the town centre. The most positive rating was achieved by the town’s cafés and restaurants and the standard of service in shops.

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

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

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

Top 5 event types suggested:
Many respondents suggested events as a means of improving the town centre and music events were the most frequently-suggested events.

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

Preferred Extended Shopping Hours
- Fridays 6pm - 9pm .................................. 31%
- Sundays 2pm - 6pm .................................. 21%
- Thursdays 6pm - 9pm ............................... 14%
- Other .................................................. 34%
Business owners/managers also rated 20 aspects of the town centre. The findings were similar to those of the shoppers as the most positive rating was achieved by the town’s cafés and restaurants and the standard of service in shops.

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Good</th>
<th>Neutral</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Café/Restaurant choice</td>
<td>86%</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Café/Restaurant quality</td>
<td>81%</td>
<td>12%</td>
<td>7%</td>
</tr>
<tr>
<td>Standard of Service in Shops</td>
<td>79%</td>
<td>16%</td>
<td>5%</td>
</tr>
<tr>
<td>Variety of Goods available</td>
<td>77%</td>
<td>22%</td>
<td>10%</td>
</tr>
<tr>
<td>Value for money</td>
<td>73%</td>
<td>21%</td>
<td>6%</td>
</tr>
<tr>
<td>Parks/Green Spaces</td>
<td>67%</td>
<td>12%</td>
<td>21%</td>
</tr>
<tr>
<td>Quality of Shops</td>
<td>72%</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>Variety of Shops</td>
<td>64%</td>
<td>11%</td>
<td>25%</td>
</tr>
<tr>
<td>Ease of getting around</td>
<td>49%</td>
<td>35%</td>
<td>16%</td>
</tr>
<tr>
<td>Feeling of safety during the day</td>
<td>49%</td>
<td>29%</td>
<td>22%</td>
</tr>
<tr>
<td>Attractiveness of Town Centre</td>
<td>45%</td>
<td>30%</td>
<td>25%</td>
</tr>
<tr>
<td>Traffic Flow</td>
<td>34%</td>
<td>39%</td>
<td>27%</td>
</tr>
<tr>
<td>Seating/Areas to congregate</td>
<td>32%</td>
<td>35%</td>
<td>33%</td>
</tr>
<tr>
<td>Pavement Cleanliness</td>
<td>39%</td>
<td>23%</td>
<td>38%</td>
</tr>
<tr>
<td>General feeling of vibrancy</td>
<td>41%</td>
<td>17%</td>
<td>42%</td>
</tr>
<tr>
<td>Range of Events</td>
<td>28%</td>
<td>29%</td>
<td>43%</td>
</tr>
<tr>
<td>Other Attractions</td>
<td>27%</td>
<td>28%</td>
<td>45%</td>
</tr>
<tr>
<td>Feeling of safety at night</td>
<td>25%</td>
<td>31%</td>
<td>44%</td>
</tr>
<tr>
<td>Pavement Quality</td>
<td>25%</td>
<td>19%</td>
<td>56%</td>
</tr>
</tbody>
</table>

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

Business Owners’ / Managers’ Opinions of Tralee Town Centre

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

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

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

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

- Parking: 46%
- Other: 19%
- Fill Vacant Units / More Shops: 16%
- Pavements: 14%
- Increased Vibrancy / Events: 5%

Business Owners’ Online Presence

- Website: 79%
- Facebook: 77%
- Instagram: 20%

Do you sell online?

- Yes: 38%
- No: 62%
Survey of Parking Spaces
According to the Tralee Transportation Strategy (2013), there are 2,050 spaces in off-street car parks, 1,000 spaces on-street; and significant volumes of non-designated on-street spaces.

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

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

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

Trading expectations for the next two years
- **Improving 55%**
  - ...expect trading to improve over the next 2 years
- **Worse 17%**
- **No Change 28%**

Over 50% of business respondents would like to see music-related events and 32% suggested having food events/markets in the town centre to entice people to spend more time there.
Revitalising Tralee
"Pilot" Town Centre Health Check Training programme

Tralee Town Centre Health Check
1) Heritage of Tralee
3) A bright future for Tralee
Kevin Burns
Economic Development Unit
Kerry County Council

Martha Farrell
Creative Media & Information Technology
IT Tralee

2) Tralee Town Centre Health Check
Findings

Map © Ordnance Survey Ireland (OSI)
Buildings based on OSI Data
Drawn by: Darren Burke
Survey of Footfall in Tralee

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

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

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

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

Horan’s Health Store 1345
Penneys 4280
Boots 1366
KDYS 806
St. John’s Church 2156
Key Considerations and Opportunities for Tralee

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

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

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

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

**Dr Noreen O’Mahony (Kerry County Council)**
- t: 066 7183500 | e: nomahony@kerrycoco.ie

**Kieran Rutledge (Tralee Chamber Alliance)**
- t: 066 7121472 | e: kieran@tralee.ie | www.facebook.com/tralee.ie/
Tralee Town Centre
Health Check Report 2017