

An Chomhairle Oidhreachta
The Heritage Council



IRISH TOWNS

Ignite Research 2015

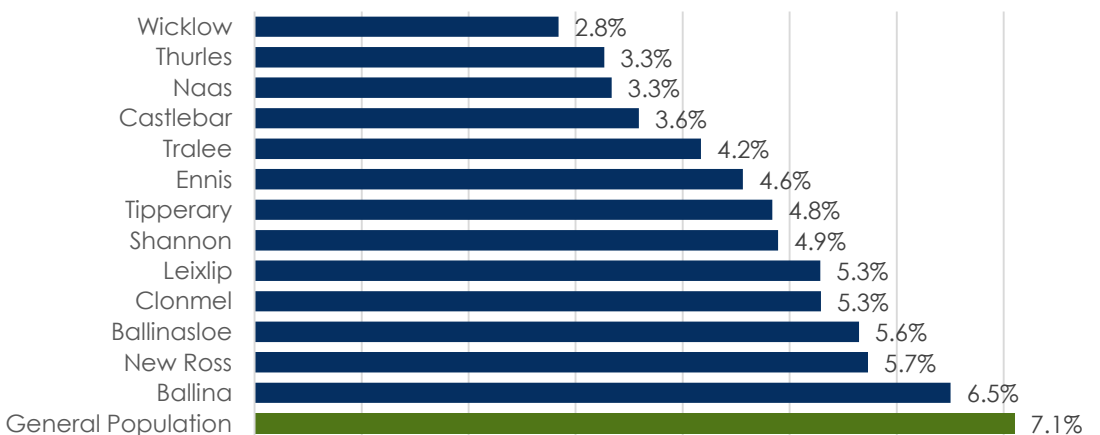


THE GROWTH OF URBANISATION

In the past decade, the global trend towards urbanisation has had a great impact across the world, including on Irish towns. In Ireland, people consider themselves living in cities, towns or rural areas. For many Irish towns, recent years has seen a reduction in services such as Post Offices and Garda Stations, a change in retail on the main street and an exodus of young people as they move to more urban areas or abroad in search of employment or life experiences.

Many Irish towns (particularly small to medium sized towns) have seen marginal increases in population growth from 2006 to 2011. In comparison to overall population growth during this period of 7.1% (CSO), many Irish towns have seen growth below this including well known towns such as Bray (-0.1%), Sligo (+0.3%), Naas (+3.3%), Tralee (4.2%) and Waterford (+4.7%).

Town population % change 2006-2011 (CSO)



Background to Research

While many towns have established a local community and commercial model, there are as many towns struggling to understand their identity and define their purpose for people who may choose to live there. This report, commissioned by The Heritage Council and researched by Ignite Research provides a snapshot of what people think about Irish towns and what people expect from the areas they wish to live in.

RESEARCH FOCUS

There are multiple reasons and factors involved in explaining population changes (e.g. job opportunities, housing stock, educational facilities), but this research will seek to understand **personal views and attitudes** which Irish people hold about why they choose to live or not live in a town. These are micro issues rather than macro reasons.

Research Objective

To understand the perceptions Irish people have towards living in towns.

Defining Irish Town Dwellers

For the purpose of this research brief, we have considered towns based on a population below 100,000, therefore less focus on Dublin, Cork, Galway and Limerick.

For the purpose of this consumer research, we asked people the time it takes them to travel to the nearest town centre or main street – this provides us with an indication of how far they are to a town, without relying on them to know the town status, population, or exact distance to travel.

Segmentation Three Town Types

We created a segmentation method based on two key questions:

1. Did people live within 5 minutes of a town - i.e. Town Dwellers
2. Do people like to live or wish to live in a town?

This allowed us to create four key segments or groups:

3. Those who lived in the suburbs and liked it.
4. Those who lived in the suburbs but would like to live closer to the town.
5. Those who lived in a town and liked it.
6. Those who lived in a town and did not like it.

Given the minimum volume of respondents who fell into the final group – living in town and didn't like it – we focused our research on the first three groups only.

These groups are key in understanding what the barriers to people living in a town are and to establish what opportunities there are for town planners to encourage people to live in a town.

RESEARCH METHODOLOGY

Qualitative methods informing quantitative validation

We developed two phases of research, beginning with six focus groups in two Irish town areas – Longford and New Ross - to understand qualitatively people's perceptions of towns, followed by a nationally representative survey of people living in or around Irish towns to understand quantitatively what key attitudes and perceptions they held.

1. Qualitative Research

Three focus groups held in New Ross, Co. Wexford on 28th April 2015

- a. Town Advocates – living within 5 minutes and like living in towns
- b. Aspirational Town Dwellers – living outside of the town, but would like to live closer to the main street or town centre
- c. Suburbians – living outside of the town, and would not like to live closer

Three focus groups held in Longford town, Co. Longford on 30th April 2015

- a. Town Advocates – living within 5 minutes and like living in towns
- b. Aspirational Town Dwellers – living outside of the town, but would like to live closer to the main street
- c. Suburbians – living outside of the town, and would not like to live closer

All groups had a split between male and female, two people under 35 years old, two people between 35-50 years old and two over 50 year olds. Each group also has a split between social classes.

2. Quantitative Research

We researched 1,000 Irish adults between 8th and 12th May 2015 and focused on the 712 who live within 20 minutes of an Irish town. Within this group we were then able to segment the respondent data based on the three groups outlined above to better understand what the key attitudes were towards town living.

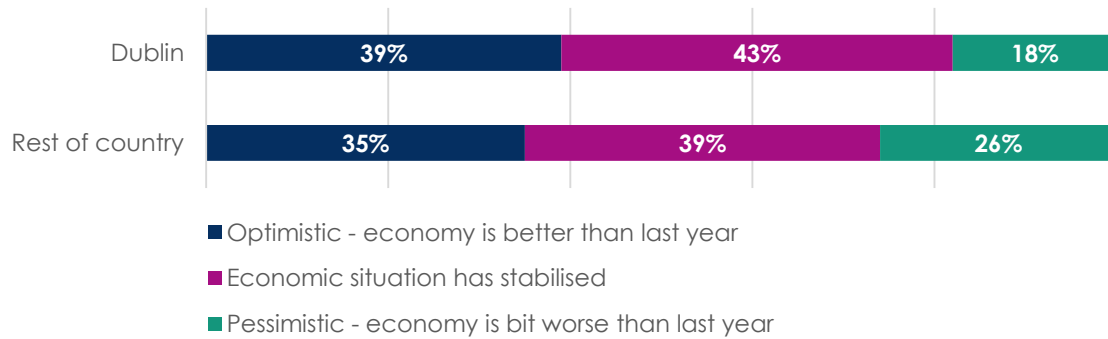
Our survey design was informed by the findings of the focus groups and included, but was not limited to some of the following key areas:

- Importance of being part of a community
- Distance from amenities – schools, shops, playgrounds, post office, Church, Garda station, parks, libraries
- Willingness to live in town centres
- Governance of the town centre
- Safety in towns – traffic, policing, at night, anti-social behaviour
- Cost perceptions to living in a town.

TWO TIER IRELAND

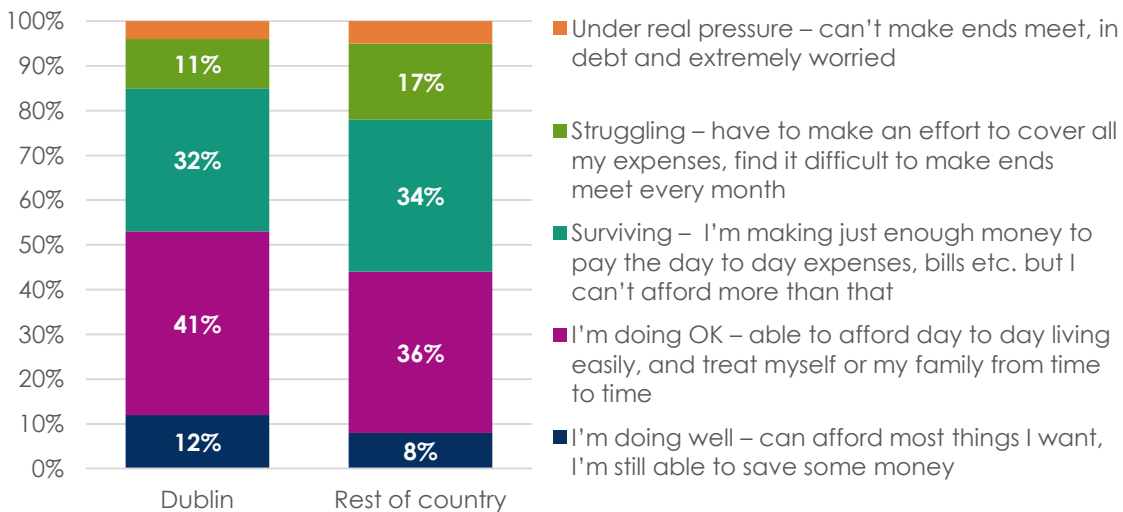
Ignite Research has measured sentiment of the nation for the past number of years and in 2015, there remains to be two tiers within Irish society – areas which feel recovery and areas which are still waiting to experience recovery.

Economic Recovery, April 2015



Most notably, there is a strong difference between those living in Greater Dublin and those living in Irish towns or rural areas. Our *State of the Nation* report published in April 2015, demonstrates this two tier society with 82% of people living in Dublin sensing the economy has stabilised or has gotten better in comparison to 74% of people living outside of Dublin.

Personal impact of Economic situation, April 2015



The majority of Dublin has now returned to feeling they are doing ok while the majority of the rest of the country believes they are still under pressure, struggling or surviving.

This sentiment was evident in discussions within our focus groups, with initial conversation points focusing on economic issues such as lack of jobs or commercial vibrancy in the areas of New Ross and Longford.

"Ah sure the dubs have it all and no one cares about the rest of the country"

- Suburbian, Longford

"Living in a town was great 30 years ago but then the factories went & construction declined"

- Town Advocate, Longford

"It says it all that this town used to have 4 hotels, everyone came to Longford for their wedding, now we barely have 1 hotel"

- Aspirational Town Dweller, Longford

It is important to note this background as people will always draw comparisons between their own area and the national sentiment, but we have designed this research to drill down into the local town sentiment.

"Up until they refurbished the quay area the town had nothing"

- Town Advocate, New Ross

"We live here because we grew up here really, everyone knows everyone and I like that."

- Aspirational Town Dweller, New Ross

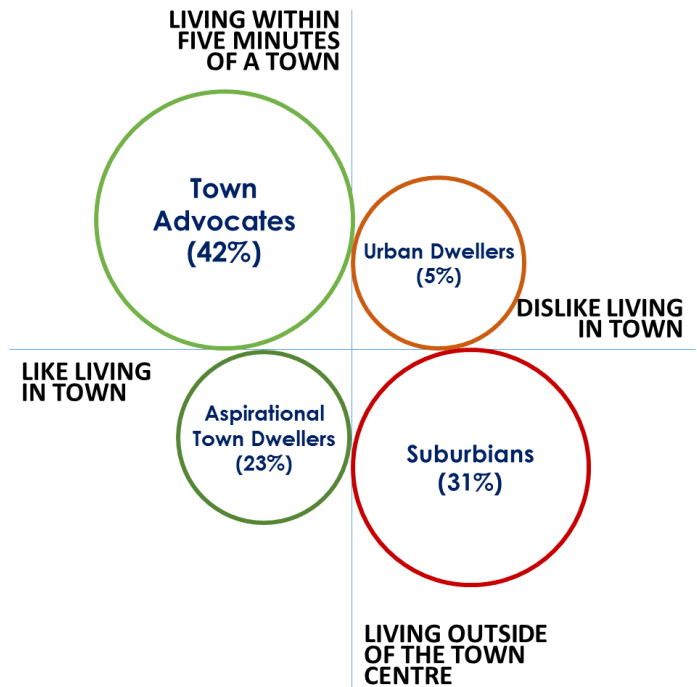
"The town got hit hard during the recession but things are starting to improve like shops and restaurants re opening."

- Suburbian, New Ross

THREE TOWN DWELLER TYPES

As outlined, we segmented our research respondents into four groups – but focused on three core groups because over 90% of those living in towns said they liked living there. As a result, there was only a small sample size (n = 25) who lived in towns but didn't like it – Urban Dwellers.

We can profile each group based on some key demographic information to provide context to attitudinal information outlined further on in the next section.



Town Advocates

This group was 53% male and the youngest group across all three with an average age of 42 years old – 43% of the group were aged between 25-44 years old. This group was also more likely to have a higher social class than the other groups and less likely to be married. 42% of the group had children under the age of 18 living in the household.

Aspirational Town Dwellers

Gender ratio in this group was 50:50 and the average age was 43 year old – with 40% of the group aged between 25-44 years old. This group of people were more likely to be skilled manual workers, unemployed or looking after home and family full time. Nearly half of this group (47%) had children living in the household.

Suburbians

Women respondents were more likely to say they preferred living outside the town (55% of this group) and this was the oldest group (average age of 47 years old) with 37% of the group between 25-44 years old. This group was most likely to be married, but least likely to have children in the household (63% had no children), suggesting this group was made up of empty-nesters.

Overall, there wasn't a great difference between demographic profiling of each of these groups. While life-stage and children in the household did have an impact on people living outside of a town instead of closer to the main street, there wasn't a significant difference and therefore understanding perceptions and attitudes should provide more insight into why people choose where to live.

CHANGES TO TOWN LIFE

To provide further context to our analysis of town life, we asked respondents and participants of the focus groups to consider what has changed in town life in recent years. This was an important step before we asked what was important to them when choosing somewhere to live.

In both our survey and focus groups, we asked people to consider what has changed for the better or worse in their area. We asked people to score a number of items on a five point scale and the results provide a rank:

Average Scores (higher: has improved | lower: has declined)

Playgrounds for children	3.14
Cleanliness of town	3.09
Local sports clubs	3.07
Families settling down	3.00
A sense of community	2.97
Upkeep of public parks	2.94
Transport to other towns and cities	2.82
Activities for young people	2.70
Transport around the town	2.69
Local banking services	2.65
Public safety – e.g. Garda presence	2.60
Traffic in your area	2.54
Town night life	2.53
Shops on your town's main street	2.45
Anti-social behaviour	2.36
Job opportunities	2.27

"The mall is a great place to bring the kids, there's plenty of space for them to run around in, it's so clean as well."

- Town Advocate, Longford

"There's still places you will find rubbish and needles but as a whole the place has cleaned up well."

- Town Advocate, New Ross

Town Advocates focused the most on upkeep of public parks as an area which has improved in recent years and anti-social behaviour as something which has gotten worse in recent years.

"I can get easily from Longford to Athlone but I struggle to get transport from one of the town to the other."

- Aspirational Town Dweller, Longford

"Like when I was growing up there's nothing to do for the kids, you see them on a Friday night getting on the bus to go to a bigger city."

- Aspirational Town Dweller, New Ross

Those living outside the town, but wishing to live closer focused on how the cleanliness of their nearest town had improved in recent years, but highlighted that retail life on their main street had declined.

"Back in the day I'd walk through Longford town at night and feel safe, now I just wouldn't."

- Suburban, Longford

"With the factories and construction there are no Jobs here."

- Suburban, New Ross

Those living outside the town and not interested in living in the town were less concerned about improvements but focused on a decline in transport, banking services and public safety as having changed for the worse in recent years.

IMPORTANCE IN LIFE

The main focus of our research was to understand what areas were important to people in the context of where they lived and establish why or why not towns were able to accommodate for these needs.

We included a number of factors which may determine the standard of living people experience in a certain area. This list was compiled based on what people suggested in the focus groups.

- A bank
- A cinema
- A disco or nightclub
- A Garda station
- A lively pub
- A lively town centre
- A sense of community
- A sense of safety
- A theatre or music venue
- Availability of schools
- Cleanliness
- Closeness to my extended family
- Closeness to my friends
- Nice public places such as parks
- Selection of restaurants
- Selection of shops
- Sports clubs
- Transport links to other towns – e.g. train or bus stations

We asked respondents in both the survey and within focus groups to rank the above factors in how important they are in their life and determining where they live. Respondents were asked to score these factors on a five point scale where 5 was most important and 1 was least important.

Average Scores

A sense of safety	3.45
Cleanliness	3.28
Nice public places such as parks	2.95
A Garda station	2.94
Selection of shops	2.93
A sense of community	2.93
A bank	2.89
Transport links to other towns	2.87
Closeness to my extended family	2.87
Closeness to my friends	2.86
Availability of schools	2.56
A lively town centre	2.50
Selection of restaurants	2.45
A cinema	2.35
A theatre or music venue	2.30
Sports clubs	2.30
A lively pub	2.23
A disco or nightclub	1.69

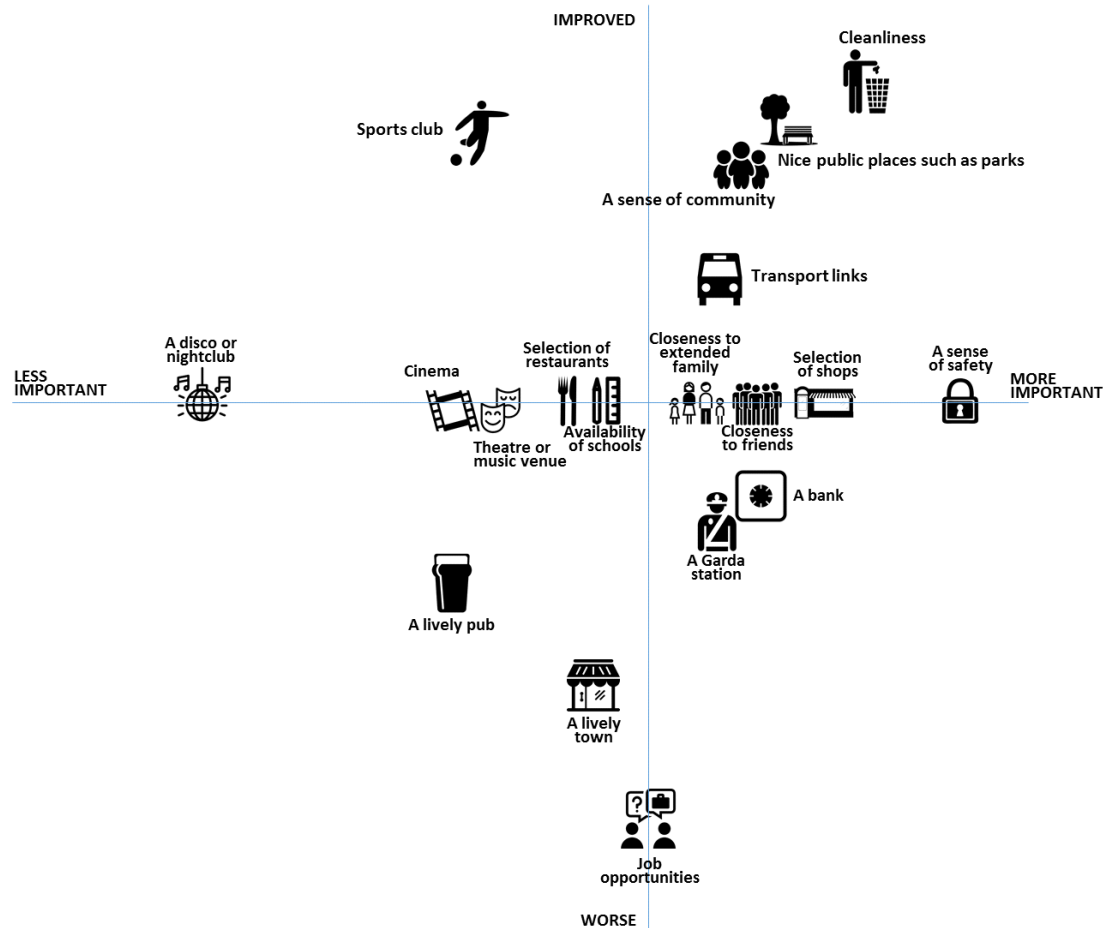


The top factors which were important for people living in or around a town was safety and cleanliness. Town advocates valued “a lively town” and a “selection of towns” as more important than other groups did. Those who aspired to live in towns valued their proximity to friends and a selection of restaurants as more important than other groups. While those living in the suburbs and content to stay there were more likely to cite proximity to extended family as a key importance in their choice of living area.

TOWN VALUE MATRIX

Through an understanding of what people believe has changed for the better or worse in the past number of years and what elements of a town are important in their life, we are able to construct the town value matrix.

This framework provides us with an understanding of what town elements people value and can help us cluster together elements into key themes.



The top right box (quadrant) indicates the town elements which people believe have improved in their local town in recent years, but which they also believe are important in their own life.

The elements in the top left box (in this analysis only one – Sports Clubs), show what is less important in people's life but elements they believe have improved.

The bottom left box indicates the town elements which people believe have gotten worse, but equally aren't as important as other elements in their personal life.

Those elements in the bottom right box are town amenities which have not improved in recent years, but people see as important in their life.

DISCOVERING TOWN THEMES

From this overall analysis, we are able to identify key themes and cluster groups of town elements which can help identify what people value within a town and how towns can become more attractive particularly to the Aspirational Town Dweller.

There are four themes which cluster together:

Functional & Economical

Parts of a town system which are less emotional, but are mechanics of a town.

Personal

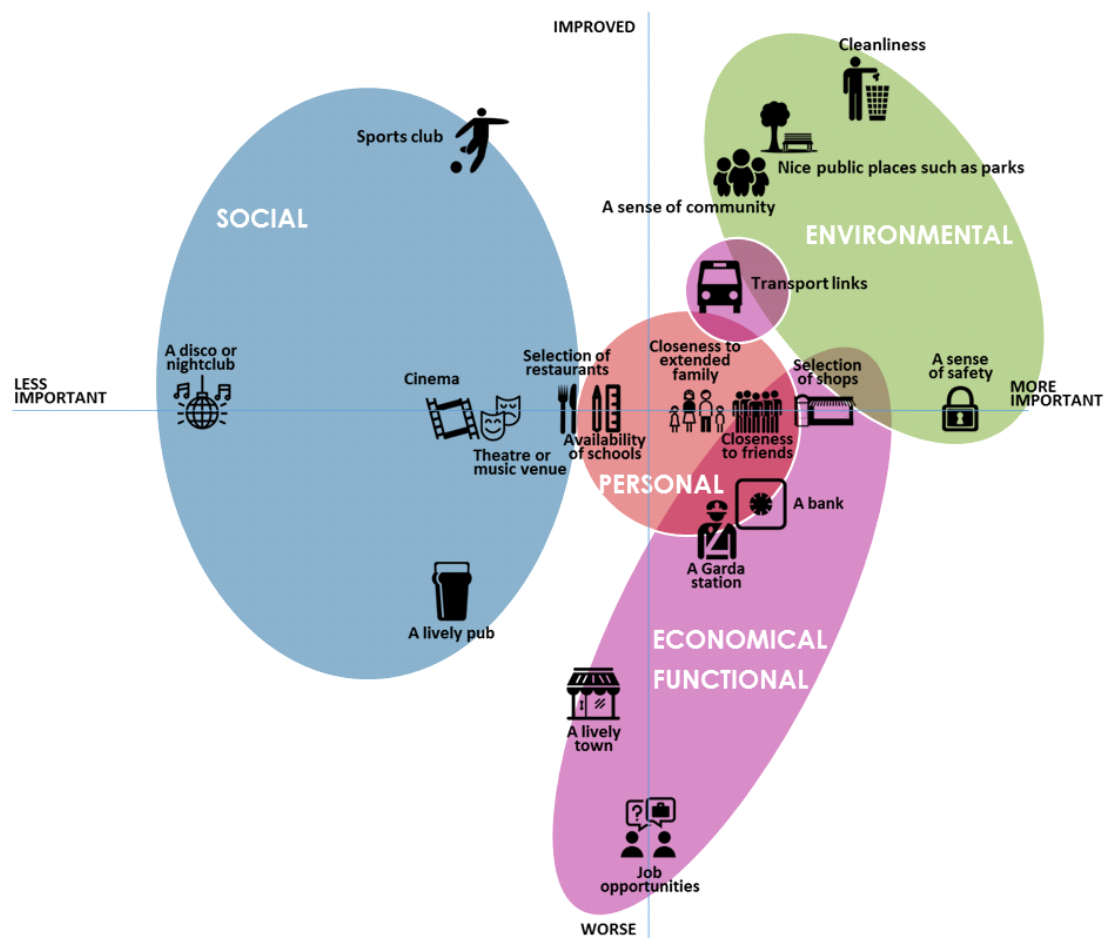
Needs of personal network – family, friends and extended family.

Social

Places to socialise, entertain and have fun.

Environmental

The surrounding area (not just eco), but public space and a sense of community.



FUNCTIONAL & ECONOMICAL

The majority of town elements which tend to be more functional – banking, job opportunities, shopping and transport – have a perception of being important in people's town life but have worsened in recent years.

Job opportunities

Given the media coverage about job losses and creation, there is no great surprise that 54% of the population believe job opportunities in their area have worsened in the past 5 years. Those living in the suburbs are 10% more likely than those living in towns to believe job opportunities have declined.

"If you're young and have any ambition you leave this town unfortunately, there's no decent jobs here for the young people"

- Town Advocate, New Ross

A lively town

Those living outside a town (Suburbians) don't give a lively town a high importance, with 57% of this group saying it is not important to them. This is in contrast to Aspirational Town Dwellers, 60% of this group says this is important and therefore create a vibrant town life would be important to attract them into the town.

"Back in the day the town was heaving with pubs, there was great craic, since all the employment went there's only a few quiet pubs!"

- Suburbian, Longford

Garda Station

Over 70% of each group believe a Garda Station is important in their life, but those living in the Suburbs are 29% more likely than the average respondent to believe that Garda presence has gotten worse in the past 5 years. We will look at the importance of town safety further on in this report.

"The Guards are scared to go into some part of Longford, some areas are like the Bronx" - Suburbian, Longford

Banking Services

News stories have indicated that local groups have protested against bank closures, but nearly half of people living in towns (48%) don't perceive either way banking services changing. Those who wish to live in a town are more likely to say local banking services are very important in their daily life – 32% vs. 24% general population.

A selection of shops

81% of people claim that a selection of shops in their local area is important in their daily life. This increases to 85% of people who live in towns and 83% of people who would like to live in towns. Nearly half of people (47%) believe shops on their main street have changed for the worse compared to just 19% who believe they have changed for the better (34% are unsure).

"I get my groceries in the town but if I want to go clothes shopping I'll just head to one of the cities like Waterford."

- Town Advocate, New Ross

Transport Links

For Aspirational Town Dwellers, transportation to other towns and cities is very important with 40% of this group claiming it is very important and this group is slightly more positive that links have improved in recent years.

"If you look around the town nearly every has 3 of 4 cars because you need one for every member of the family."

- Aspirational Town Dweller, Longford

SOCIAL

Town elements which are social or entertainment tend to be less important in people's daily life. Many are locations where people get together to relax or socialise.

A lively pub or night club

Much has been made about the closures of Irish pubs across the country, but in comparison to other town elements, people value a lively pub or nightclub as less important in their daily lives. 60% of people say a lively pub is not important in their life, and this increases to 65% for those living in the suburbs. Only 15% of people say a nightclub is important, while this does increase to 18% of those who would like to live in a town.

"Some of the rural pubs are fine but the ones in the town can be horrible, young people wouldn't go near them."

- Suburbian, New Ross

Sports club

In contrast to the pub, people believe sports clubs have improved in recent years – particularly GAA. 43% of people claim sports clubs are important in their daily lives, and while there is a high level of people who are unaware if their sports club has improved or not (54%), 29% of people believe it has improved for the better.

"The GAA clubs are great in the community and with the young and the new leisure centre should also give them something to do."

- Aspirational Town Dwellers, Longford

Cinema, theatre or music venues

Those living outside the town but would like to live in a town value cultural elements such as theatre or music venues more than any other groups – 47% claim they are important in comparison to 41% of the general population. The same is true for this group when it comes to valuing the importance of a local cinema.

"The Dunbrody festival is a perfect example of when something is put on for the people they will turn up."

- Town Centre Advocate, New Ross

A selection of restaurants

The most important social town element for people was a selection of restaurants – with 51% of people claiming this was important in their lives, increasing to 54% who wish to live in a town, but 57% of Suburbians don't think it is important.

"There's too many fast food and chippers in the town, there are good places to eat but we need more of them!"

- Aspirational Town Dweller, New Ross

PERSONAL

There are three elements which we have included in the personal cluster group that all have a higher importance than all of the social elements.

Availability of schools

Given the life-stage profile of Aspirational Town Dwellers, this group is more likely to value the importance with 59% of the group claiming it is important in their life, in comparison to 54% of Suburbians, and 57% of Town Advocates.

Closeness to extended family and friends

Family and friends play an influencing role on where people live, with 79% of people saying proximity to friends is important, slightly ahead of 72% of people saying proximity to extended family is important. Those living outside of a town centre but would like to live closer are 6% more likely to claim friendship would be important in their daily life.

ENVIRONMENTAL

The cluster of town elements which people believe have changed for the better the most in the past 5 years and are most important in their daily life tend to be based on their surrounding area – environment, security and community.

A sense of community

Over 50% of people believe community is important in their daily lives, with a further 27% claiming it is very important. Aspirational Town Dwellers are most likely to claim it is very important – 31% of the group – while those living in towns are most likely to believe that community has changed for the better.

One in three Town Advocates believe a sense of community has changed for the better in the past five years and 64% of this group claim that families settling down has changed for the better.

A sense of safety

The most important factor for people in considering where to live is a sense of safety – with 57% of the general population claiming it is very important and a further 38% believe it is important. Those living in the suburbs are most likely to value a sense of safety with 97% saying it important in comparison to 95% of general population.

49% of people feel that anti-social behaviour has changed for the worse in their area and this opinion is most prevalent in Suburbians with 54% claiming it has gotten worse.

Nice public places such as parks

People believe public spaces have changed for the better (28% of people) in comparison to 20% of people who believe they have changed for the worse. Public areas are a key element of towns with 78% of people believing they are important or very important. More Aspirational Town Dwellers (81%) value these public spaces.

Of those who were aware of changes to playgrounds, 69% also said that playgrounds for children had changed for the better.

Cleanliness

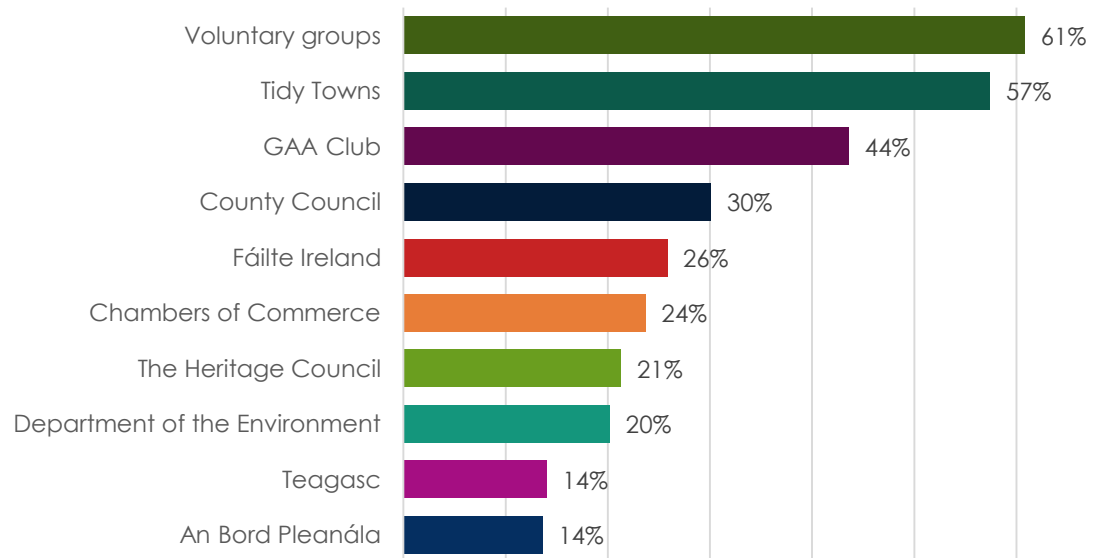
Over 90% of people believe that cleanliness of their area is important when considering where they live. This increases to 95% for people who would like to live in towns, but currently live outside the centre. 40% of this same group believe cleanliness has improved in the past five years (with a further 40% unsure if it has changed).

TOWN RESPONSIBILITY

Based on this town value matrix, it is clear to see that the town environment and upkeep of the surrounding areas is not only a town element which people feel has improved in recent years, but a key factor in deciding where people live.

Given the high importance and perceived improvement of public spaces, cleanliness and sports clubs, it is interesting to see which organisations or groups that people perceive as supporting towns the most. Voluntary groups (in general) and Tidy Towns have the highest percentage of people claiming they support the towns a lot, with GAA Clubs in third place.

Groups which support towns the most



In the focus groups, people were able to point to local groups who help tidy the town or refurbish areas of the town which is voluntary work. This has helped drive a sense of community amongst town dwellers as they have co-ownership of the projects.

KEY FINDINGS

People living in towns are proud of their area, but are also keen to make improvements to their surroundings. Sentiment towards living in towns is split between those who are happy to remain living in suburbs, therefore reinforcing their negative sentiment towards town living, and those who would like to live closer to the town centre for various reasons. This group is substantial in size with 1 in 5 people living close to a town wishing to live closer to the main street.

In contrast to the perception that town living maybe only for young single people, there is a demand from families to live closer to the town centre. Traffic and safety are concerns across the board, but those aspiring to live closer to towns value cultural elements, social elements and public spaces – which they feel are more available in towns.

While there has been a negative focus on jobs and local pub closures, aspirational town dwellers understand that with a good transport link, they can travel to work or value sense of community over pub conversations. Providing people with opportunities to involve themselves with local town activities, especially for younger people, where they contribute to the town and see their impact, will strengthen the value of town living.

This research has shown there is more emotional reasons for valuing town living ahead of economic reasons. While jobs and retail vibrancy is a key function, it is more the local voluntary and social projects which drive real value within town communities.