



Collaborative Town Centre Health Check Training Programme



Ballina Town Centre Consumer Survey

November 2019

An Chomhairle Oidhreachta
The Heritage Council



An Roinn Cultúir,
Oidhreachta agus Gaeltachta
Department of Culture,
Heritage and the Gaeltacht



An Roinn Tithíochta,
Pleanála agus Rialtais Áitiúil
Department of Housing,
Planning and Local Government



An Roinn Forbartha
Tuaithe agus Pobail
Department of Rural and
Community Development



**Ballina
Chamber**
Advancing business together



MAYO.IE



RGDATA
LOCAL SHOPS - LOCAL COMMUNITIES

REDC



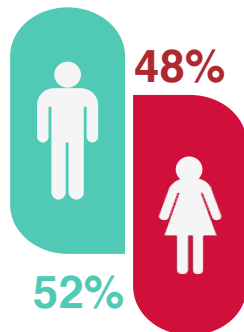
Ireland's Collaborative Town Centre Health Check Training Programme

- / Ballina, Co. Mayo is one of 12 towns participating in the Collaborative Town Centre Health Check (CTCHC) Training Programme, established by the Heritage Council and its partners in 2016.
- / This research was conducted by RED C on behalf of the Heritage Council and its partners as part of the CTCHC training programme; Consumer Surveys are Step 5 of the 15-Step CTCHC process.
- / Face-to-face research was conducted in areas of high footfall in Ballina Town Centre, to gain insight into the opinions and attitudes of both residents and visitors towards the town centre.
- / Fieldwork was carried out on dates between October 19th and November 11th 2018.
- / Sample size: n = 408

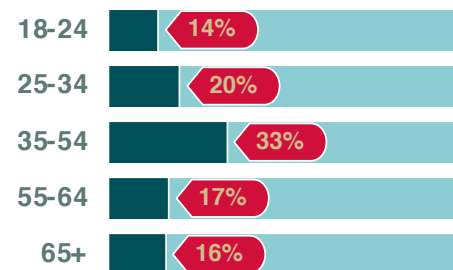
Fieldwork Locations



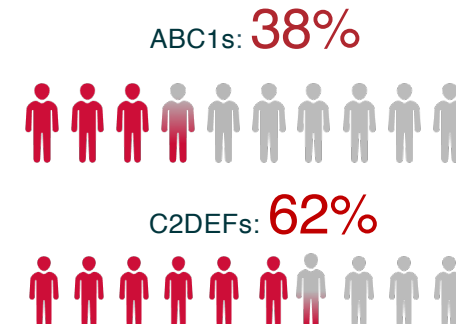
Gender



Age



Social Class*



*ABC1s – upper to lower middle class; C2DEFs – Skilled working class, working class and non working, and farmers

Summary of Key Findings - I

Reasons for Visiting Ballina Town Centre

1. Retail is the highest driver of visits to Ballina Town Centre, with just over half of respondents claiming shopping as the main reason for visiting the town. Following shopping, employment is the next most common reason why people visit the town centre, followed by social visits.
2. The vast majority of respondents visit Ballina Town Centre regularly, with 87% visiting at least once a week. Castlebar, followed closely by Sligo and then Galway, are the town's biggest competitors, however most are visiting these places less than once a month, if at all.
3. In relation to likes and dislikes of Ballina Town Centre, the people of Ballina are mentioned as the most likeable feature of the town (28%) followed by shops (18%). While most have no complaints, 1 in 10 dislike the traffic, parking or the lack of modern shops within the town centre.
4. 18 – 34 year olds are less likely to come into the town centre for shopping, and 1 in 5 of this age group say the lack of shops for young people/modern shops is something they dislike about the town centre. This suggests that they feel the current retail offering does not meet their requirements.

Satisfaction with Ballina Town Centre

1. In terms of traffic and ease of movement around Ballina Town Centre, two-thirds believe they can get around the town with relative ease. However, parking and traffic is an issue for some, with only half of respondents rating the town as good or excellent for parking and/or traffic flow.
2. Most users of Ballina Town Centre (75%) find the town generally attractive. Pavement cleanliness (75%) and quality (71%) are rated highly, however there is room for more seating areas with only 55% rating the town centre as good for seating or areas to congregate.
3. Cafés and restaurants within the town centre are rated highly, with approximately 4 in 5 respondents rating Ballina favourably across pricing, range and quality.
4. Ratings across tourism are similarly high, with just under 75% feeling a general vibrancy around the town centre, and that the town offers a wide range of tourist events.

Summary of Key Findings - II

Retail in Ballina Town Centre

1. Users of Ballina Town Centre rate the town highly for shopping, with approximately 3 in 4 rating it favourably across quality, value, range of goods and range of shops. 1 in 10 however desire more shops for younger people, and 18 – 34 year olds rate the quality of shops in the town centre lower than town users at a total level.
2. Most shoppers visit shops in Ballina out of habit (73%), however selection and quality of shops are important as to whether they will shop in the town.
3. Grocery shopping is by far the most popular mission when visiting the town centre, with 57% making a trip to a supermarket on the day of their visit, 16% visiting a café/takeaway and 15% visiting clothes shops, with these being particular drivers of visits for 18 – 34 year olds.
4. When presented with various potential options for extended opening hours, 43% of Ballina Town Centre users would prefer late opening on a Friday evening.
5. Large multiples account for the majority of clothes and groceries sold in the town. *Penneys*, followed by *Shaws*, is the most popular choice for clothes, whereas *Dunnes*, followed by *Tesco*, is the most popular for food items within the town centre.
6. *Next* and *Zara* in particular are very popular among 18 to 34 year olds. If one of these stores could be attracted to the town, it could help address the feeling among this age group that there is a lack of shops for young people/modern shops.

Online Shopping in Ballina

1. 1 in 3 users of Ballina Town Centre occasionally go online to shop for various goods and services. Of those going online to shop, 1 in 4 are doing so several times a month.
2. Clothing and clothing accessories are the most popular items bought online, with almost two-thirds claiming it is one of the main items they buy online. On average shoppers are spending €65 when they go online to shop for clothes.
3. Sports equipment is sought after online by about 1 in 5 of respondents who shop online. Reflecting this, *Sports Direct* is the second favourite website after *Amazon*.
4. Range of stores is the primary reason for shopping online, with 62% viewing it as a benefit. Pricing and value (45%) and convenience (43%) are other cited benefits.

Summary of Key Findings - III

Public Events and Festivals

1. The festivals in Ballina are popular among users of the town centre. The March Madness Festival (St Patrick's weekend) boasts the highest visitation levels at around 59%, with the Ballina Salmon Festival and Christmas Salmon Festival following closely behind.
2. Christmas and music-themed events are the most popular choices for potential future events, with just over half of respondents wanting to see more of both of these types of events. Music events or a beer festival appear to be particularly popular among 18 – 34 year olds.



1

Users of
Ballina Town
Centre

2

Satisfaction
with Ballina
Town Centre

3

Ballina Town
Centre
Shopping

4

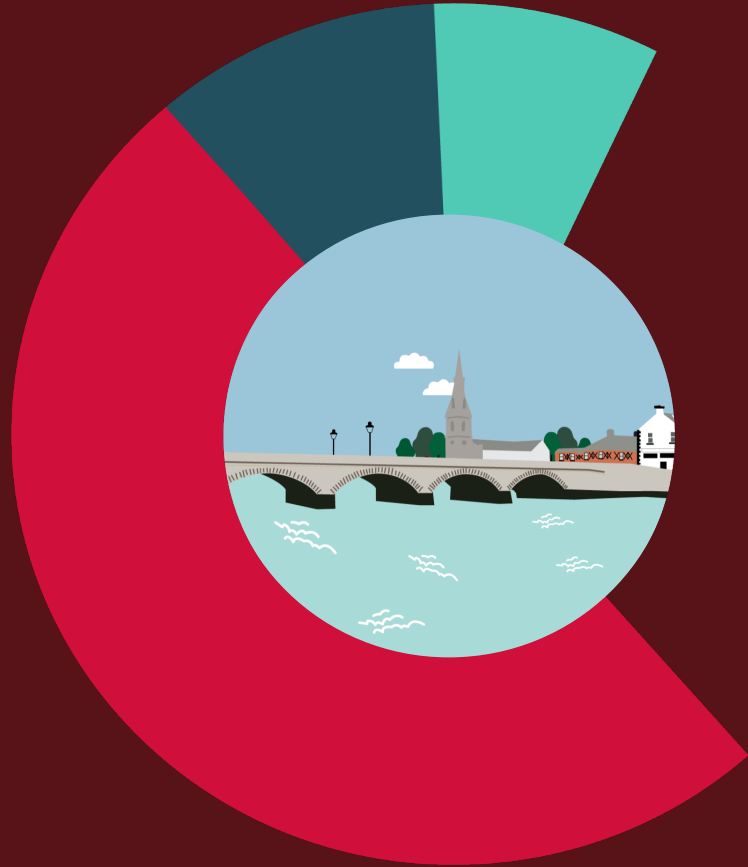
Online
Shopping

5

Public Events
and Festivals

6

Transport &
Parking



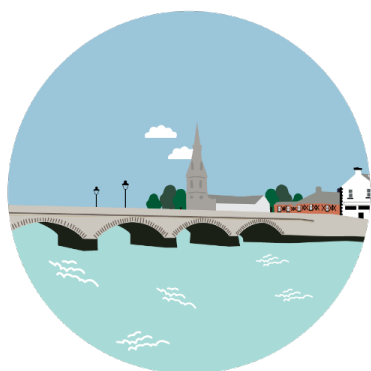
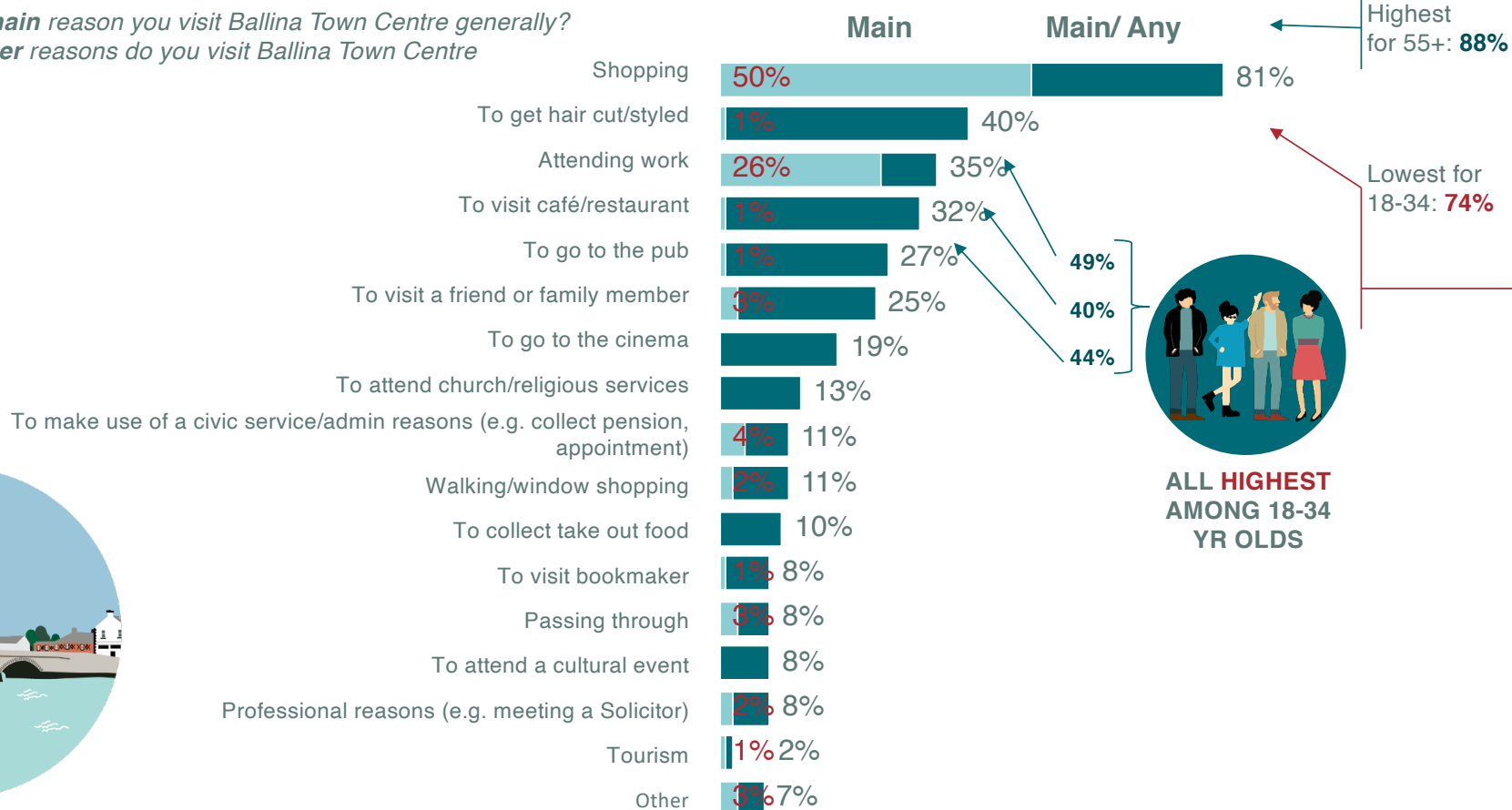
1. Users of Ballina Town Centre

Reasons for Visiting Ballina Town Centre?

(Base: All Users of Ballina Town Centre; n=408)

Q.1a What is the **main** reason you visit Ballina Town Centre generally?

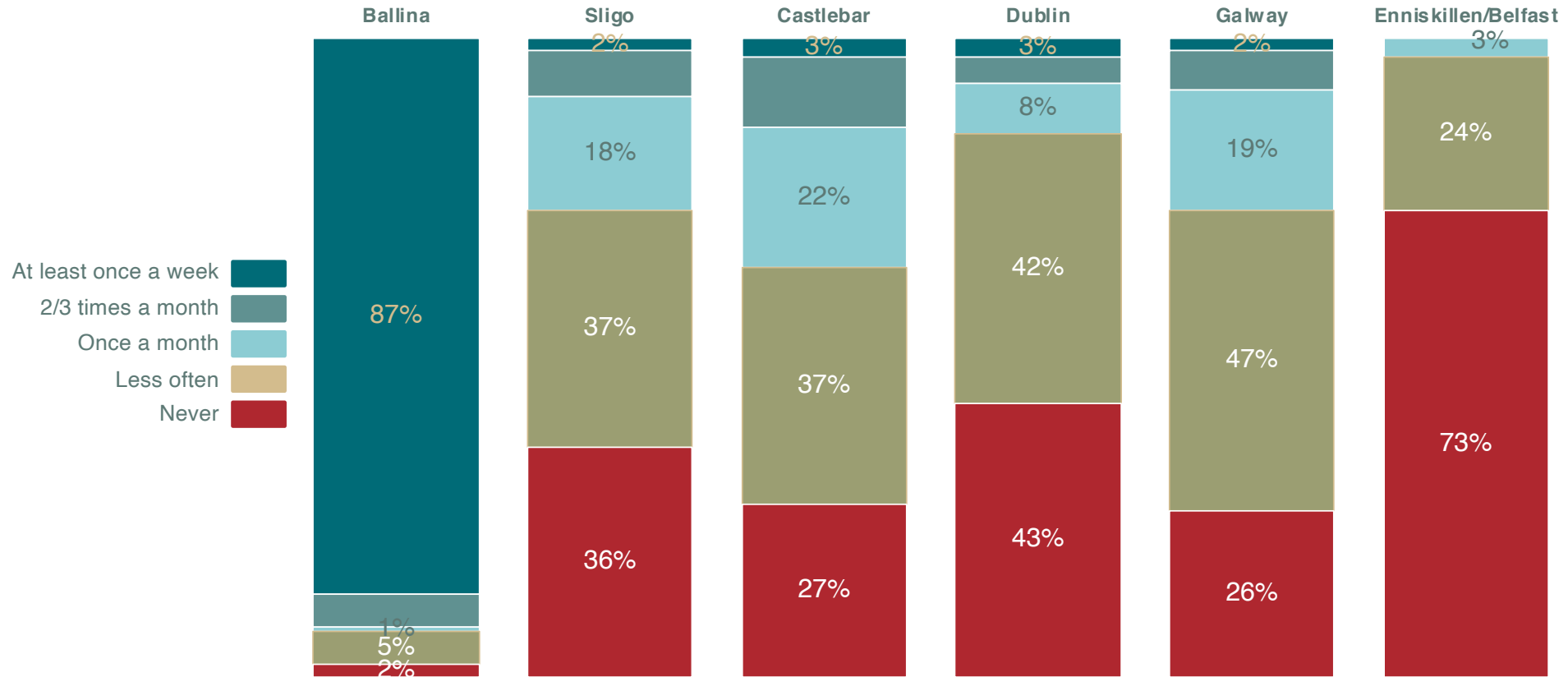
Q.1b And what **other** reasons do you visit Ballina Town Centre generally?



Shopping is the most common reason users of Ballina come to the town centre. Hair cuts/styling is the second most common reason for visiting the town centre. Social visits to places like cafés/restaurants and pubs, or visits to friends/family are also common reasons for visiting the town centre, in particular for those aged under 34.

Frequency of Visiting Ballina & Competing Towns

(Base: All Users of Ballina Town Centre; n=408)



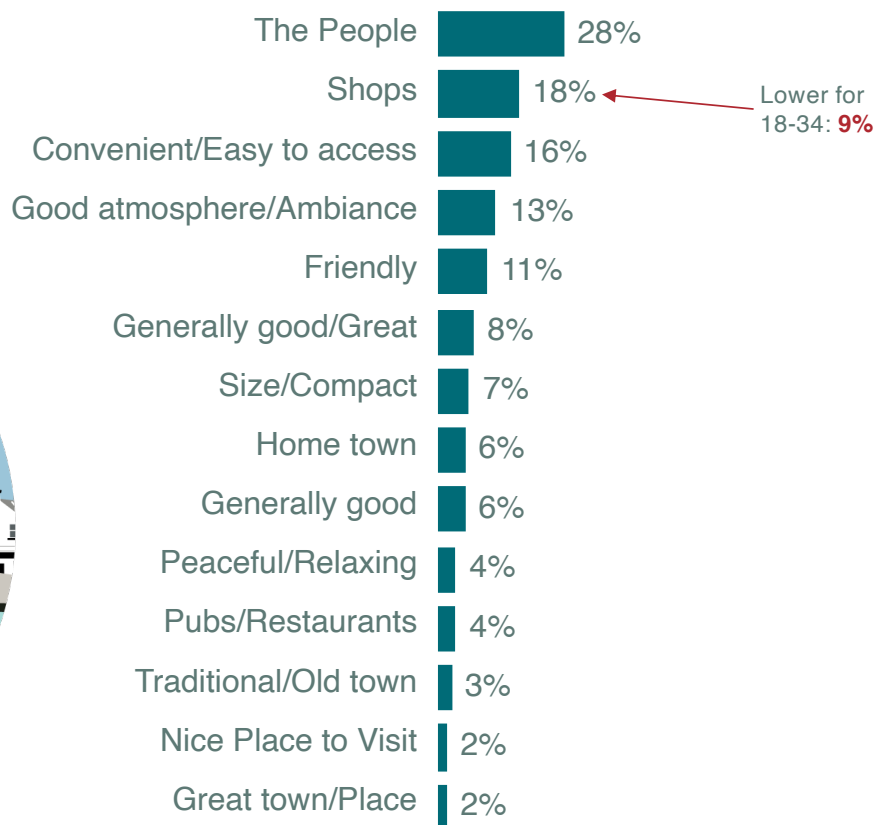
Most users of Ballina Town Centre make trips to the town centre at least once a week. Castlebar, Sligo and Galway are the next most popular destinations visited, generally just once a month.

REDC

(Q.4a)

What do People Like about Ballina Town Centre?

(Base: All Users of Ballina Town Centre; n=408)



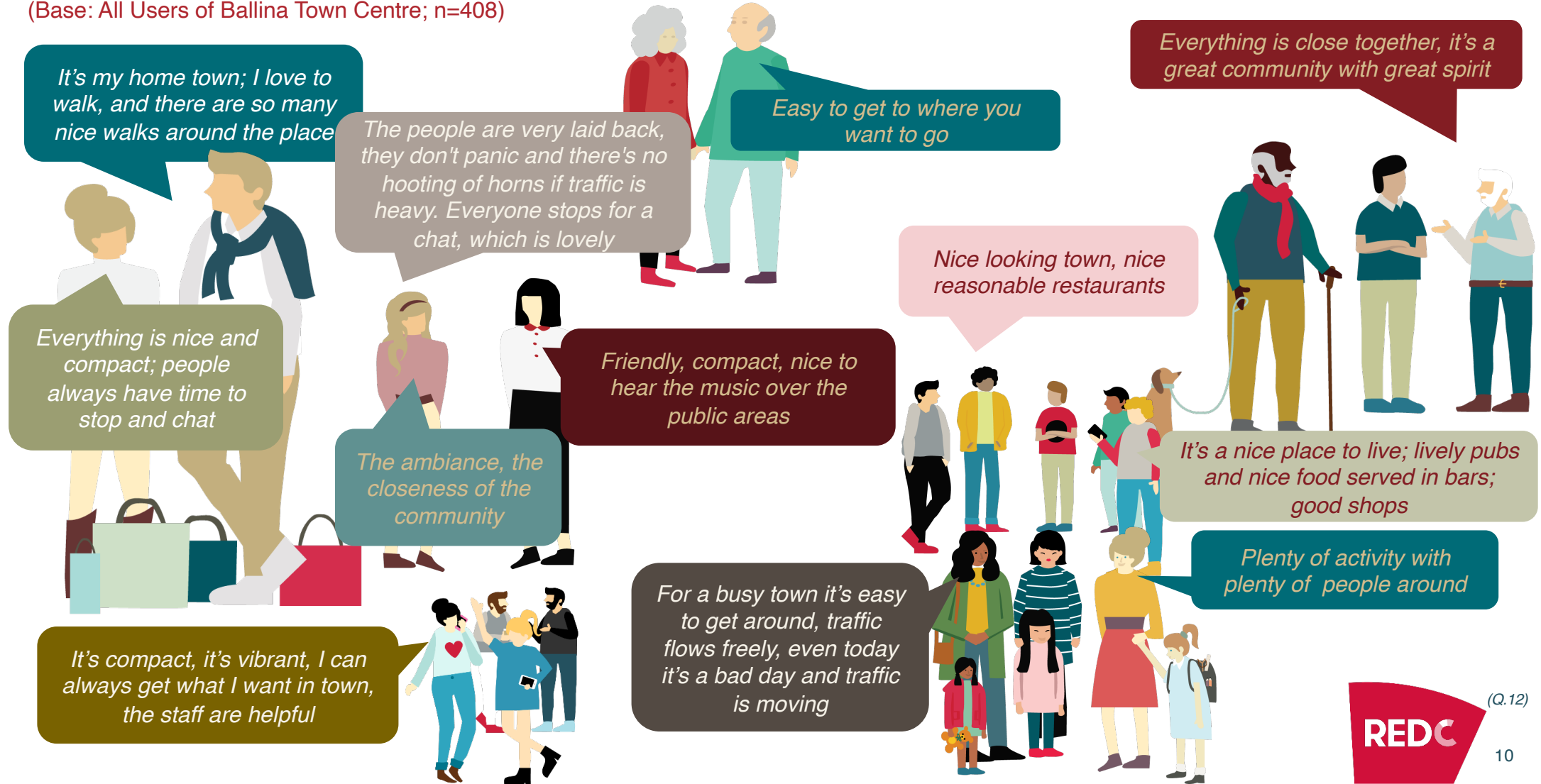
Lower for
18-34: 9%



Users of the town centre believe the people are the most likeable feature of the town. The shops, convenience and overall atmosphere/ambiance are also rated highly.

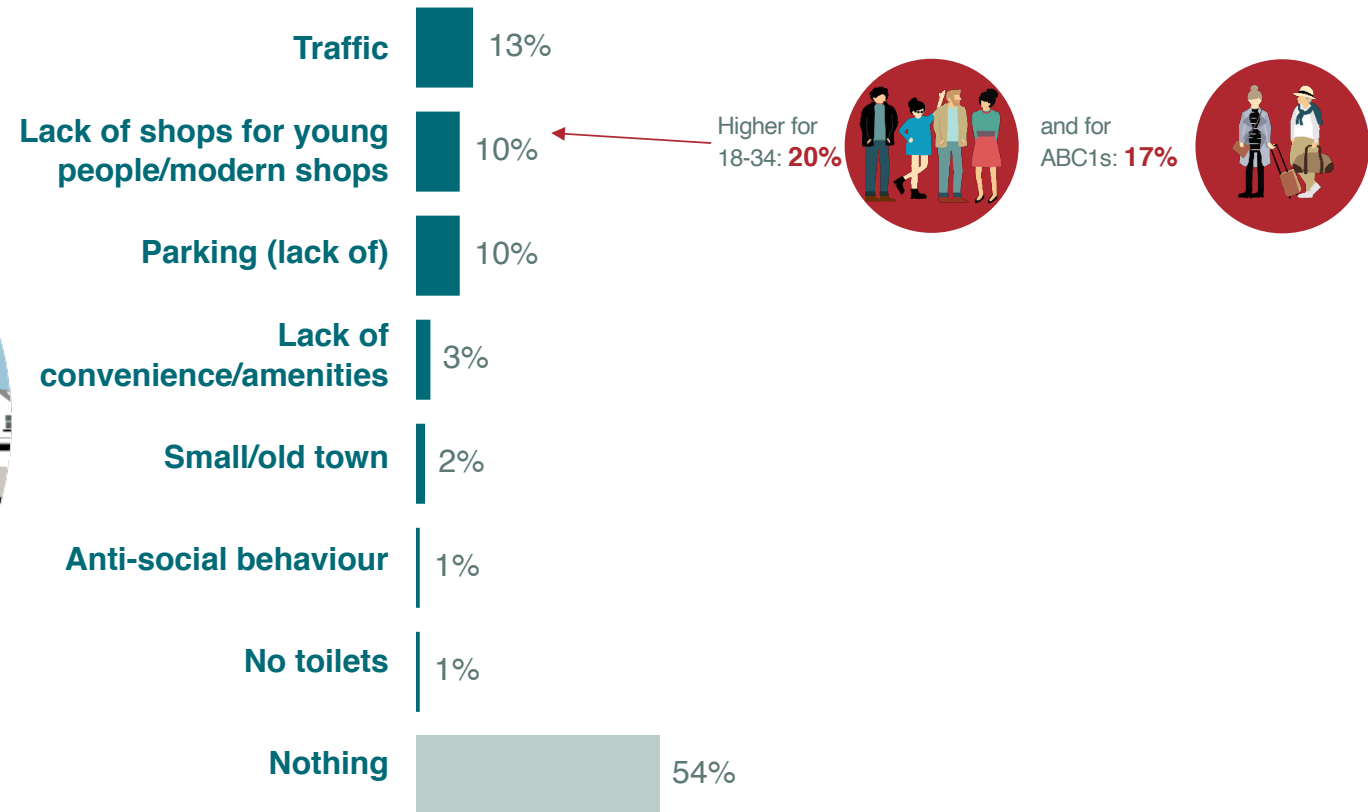
What do People Like about Ballina Town Centre?

(Base: All Users of Ballina Town Centre; n=408)



What do People Dislike about Ballina Town Centre?

(Base: All Users of Ballina Town Centre; n=408)

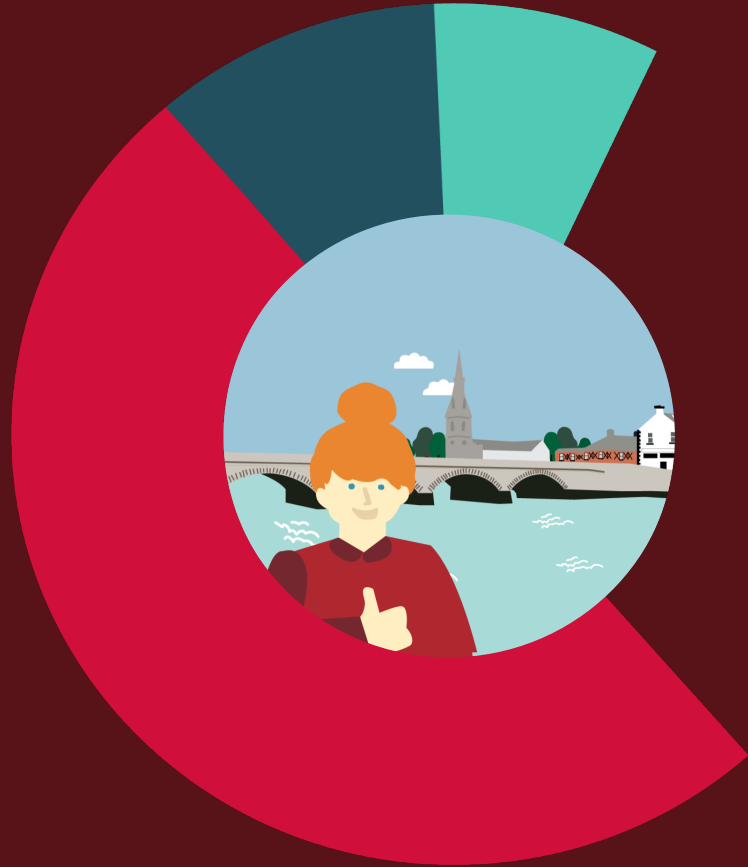


Over half of those surveyed reported nothing that they dislike about the town. Of those who aired dislikes, traffic, parking and the lack of modern shops were the most common complaints. Interestingly, 1 in 5 18 – 34 year olds mention the lack of shops for young people/modern shops as a dislike, suggesting they feel that the current retail offering does not meet their requirements.

What do People Dislike about Ballina Town Centre?

(Base: All users of Ballina Town Centre; n=408)





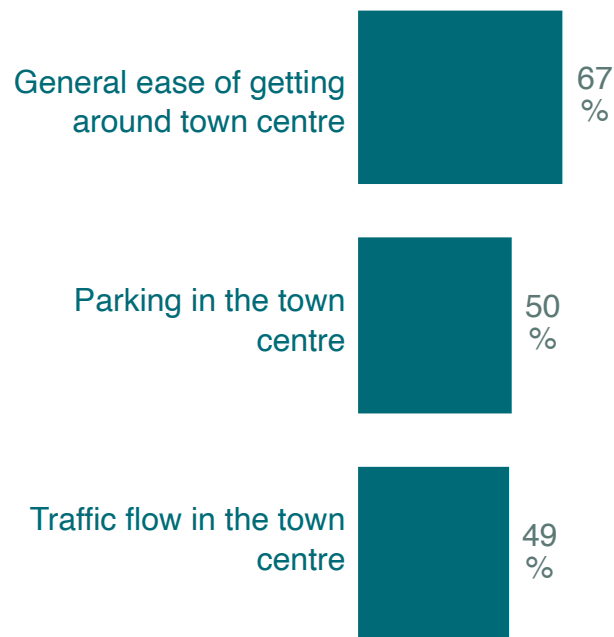
2. Satisfaction with Ballina Town Centre

Satisfaction with Various Aspects of Ballina Town Centre - I

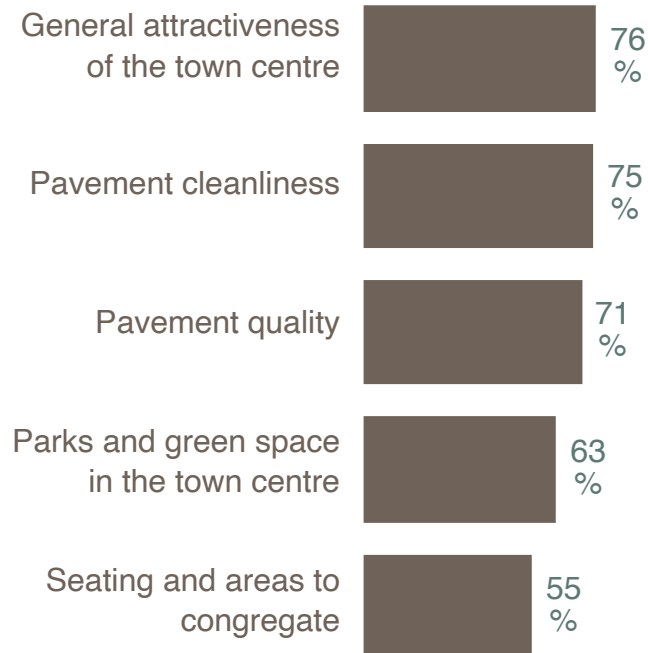
(Base: All Users of Ballina Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Ballina Town Centre. For each I want you to tell me how you would rate Ballina Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very Poor.

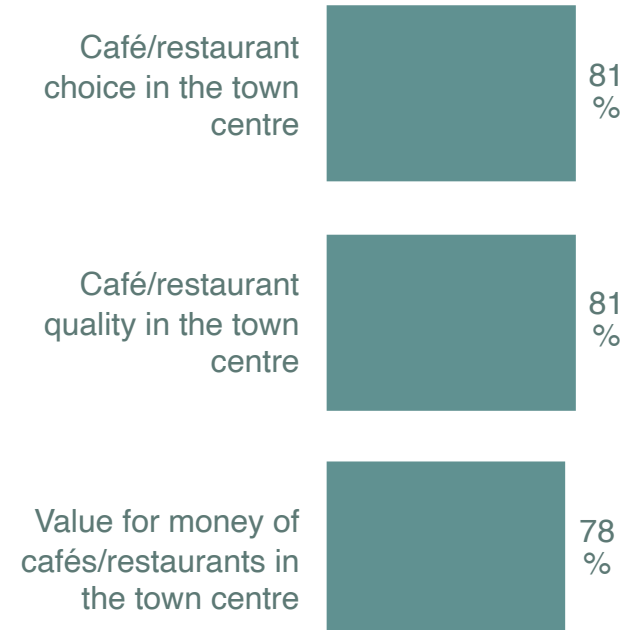
Traffic & Ease of Movement



Attractiveness



Cafés/Restaurants



Showing % that score 4 (Good) and 5 (Very Good)

REDC

(Q.17)

Satisfaction with Various Aspects of Ballina Town Centre - II

(Base: All Users of Ballina Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Ballina Town Centre. For each I want you to tell me how you would rate Ballina Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very Poor.

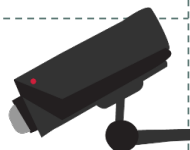
Tourism



Shopping



Security/Safety



Showing % that score 4 (Good) and 5 (Very Good)

REDC

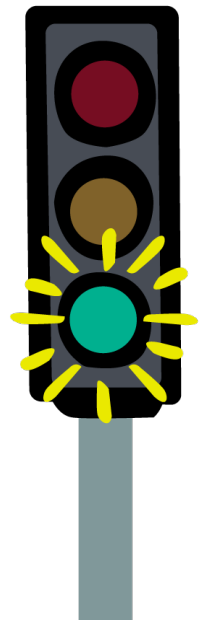
(Q.17)

Ballina Town Centre Ratings – Traffic & Ease of Movement

(Base: All Users of Ballina Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Ballina Town Centre. For each I want you to tell me how you would rate Ballina Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very Poor.

Traffic & Ease of Movement



General ease of getting around the town centre

67%

Parking in the town centre

50%

Traffic flow in the town centre

49%



Showing % that score 4 (Good) and 5 (Very Good)

Two-thirds of respondents believe it is generally easy to get around Ballina, though only half would rate the town as good or excellent with regard to parking or traffic flow.

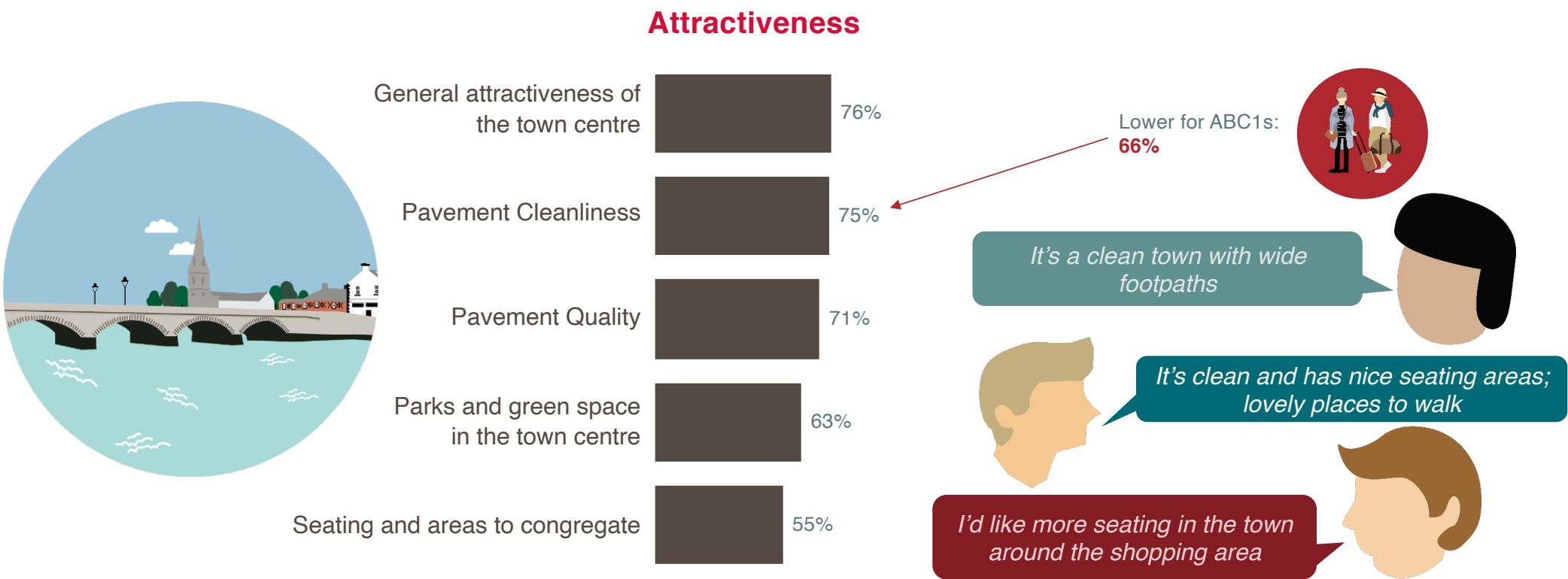
REDC

(Q.17)

Ballina Town Centre Ratings – Attractiveness

(Base: All Users of Ballina Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Ballina Town Centre. For each I want you to tell me how you would rate Ballina Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very Poor.



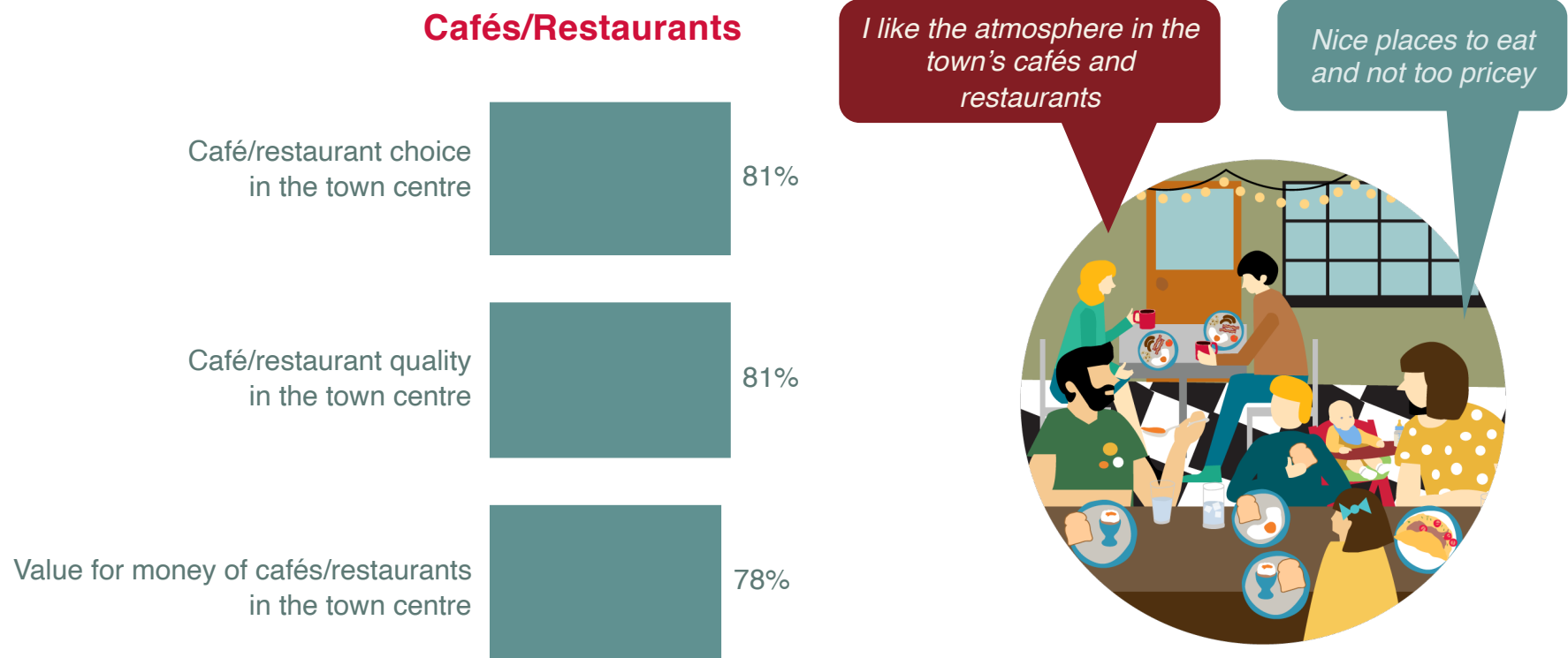
Showing % that score 4 (Good) and 5 (Very Good)

Ballina scores well for attractiveness, especially on pavement quality and cleanliness. Satisfaction with seating and areas to congregate is slightly lower at 55%

Ballina Town Centre Ratings – Cafés/Restaurants

(Base: All users of Ballina Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Ballina Town Centre. For each I want you to tell me how you would rate Ballina Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very Poor.



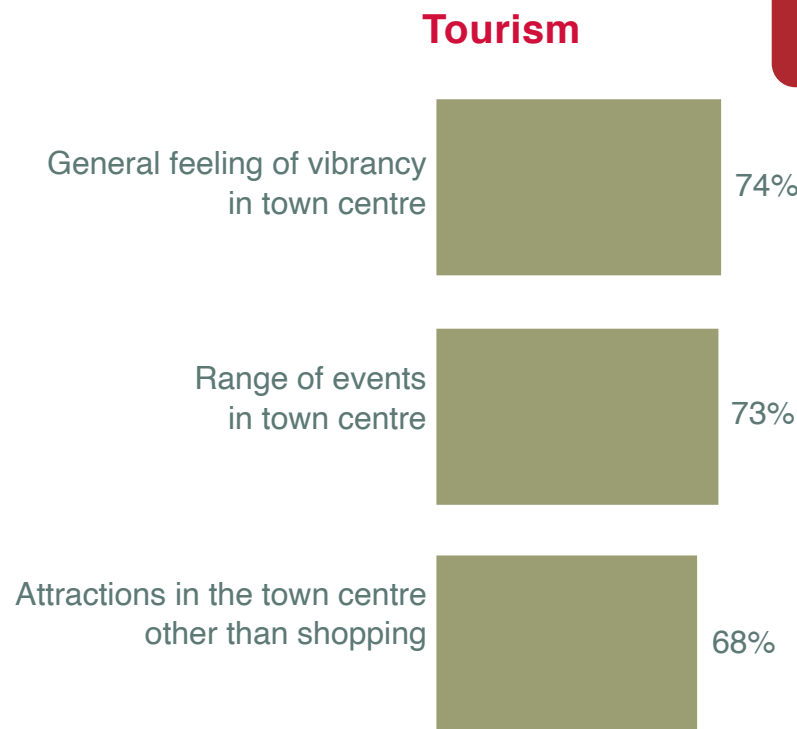
Showing % that score 4 (Good) and 5 (Very Good)

Cafés and restaurants are rated highly, with approximately 4 in 5 respondents endorsing Ballina for variety, quality and value for money.

Ballina Town Centre Ratings – Tourism

(Base: All Users of Ballina Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Ballina Town Centre. For each I want you to tell me how you would rate Ballina Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very Poor.



Lovely looking town, lively atmosphere

Good night life, there are plenty of options



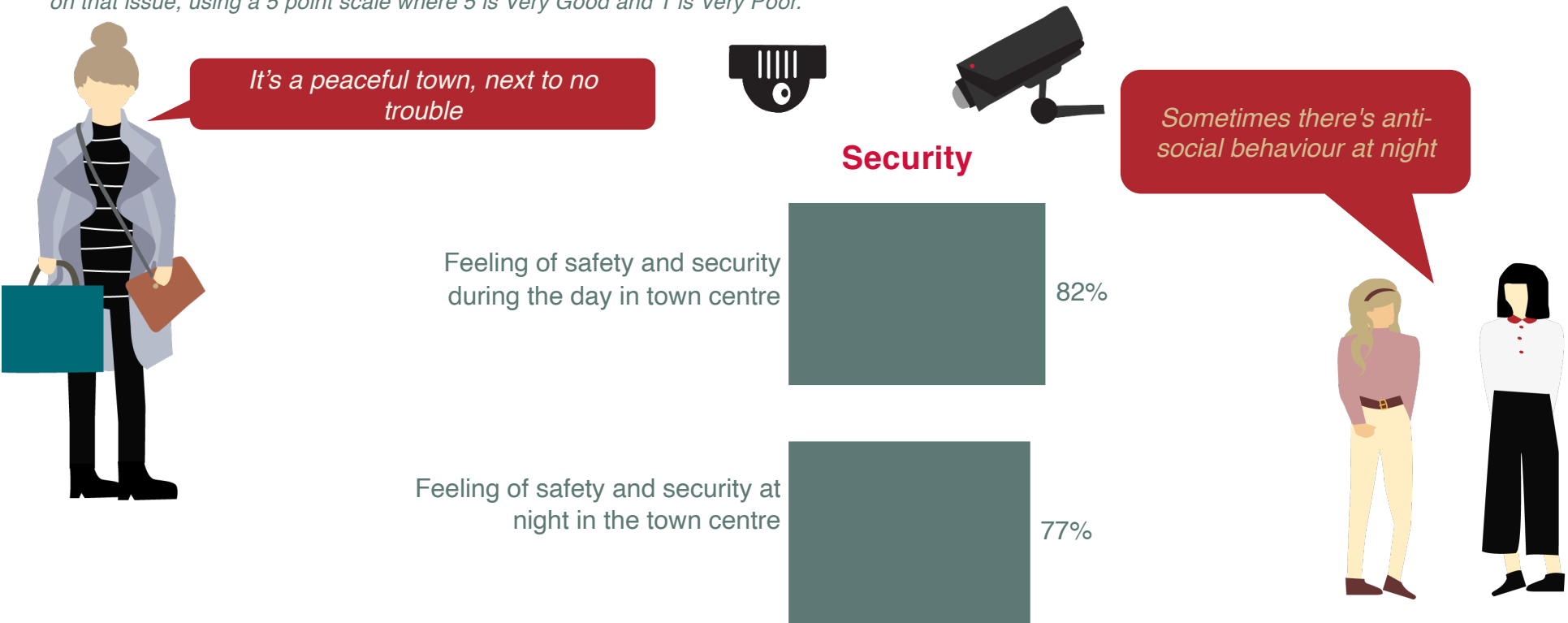
Showing % that score 4 (Good) and 5 (Very Good)

3 in 4 respondents report a general feeling of vibrancy around the town centre. Most also assert there is a good range of events around town for tourists, and for those looking for something other than shopping.

Ballina Town Centre Ratings – Security/Safety

(Base: All Users of Ballina Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Ballina Town Centre. For each I want you to tell me how you would rate Ballina Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very Poor.



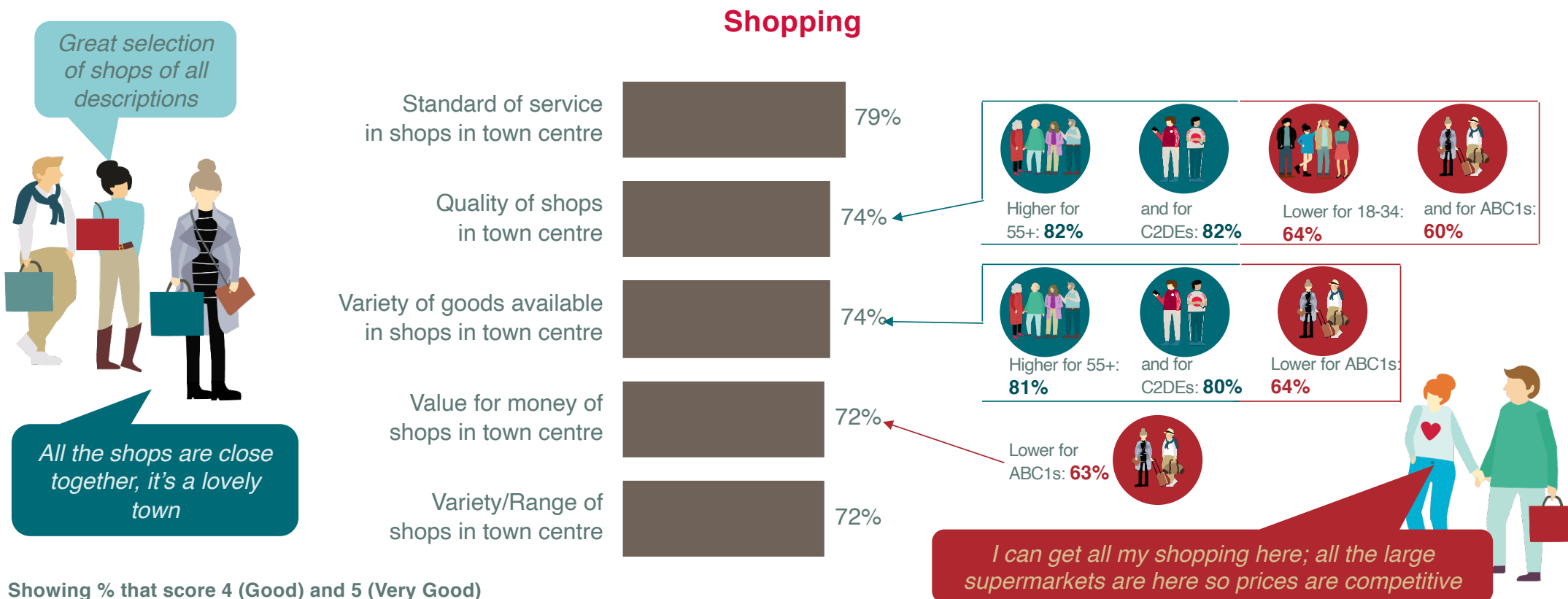
Showing % that score 4 (Good) and 5 (Very Good)

Most respondents feel safe in Ballina Town Centre, whether it be during the day or at night.

Ballina Town Centre Ratings - Shopping

(Base: All Users of Ballina Town Centre; n=408)

Q.17 I am now going to talk about the various aspects of Ballina Town Centre. For each I want you to tell me how you would rate Ballina Town Centre on that issue, using a 5 point scale where 5 is Very Good and 1 is Very Poor.



Showing % that score 4 (Good) and 5 (Very Good)

Shopping scores are positive for Ballina across standards, quality, range and value for money. While a majority (64%) of 18 – 34 year olds rate the quality of shops as good or very good, it is notable that this rating is significantly lower compared to the rating by all users of Ballina Town Centre.

REDC

(Q.17)



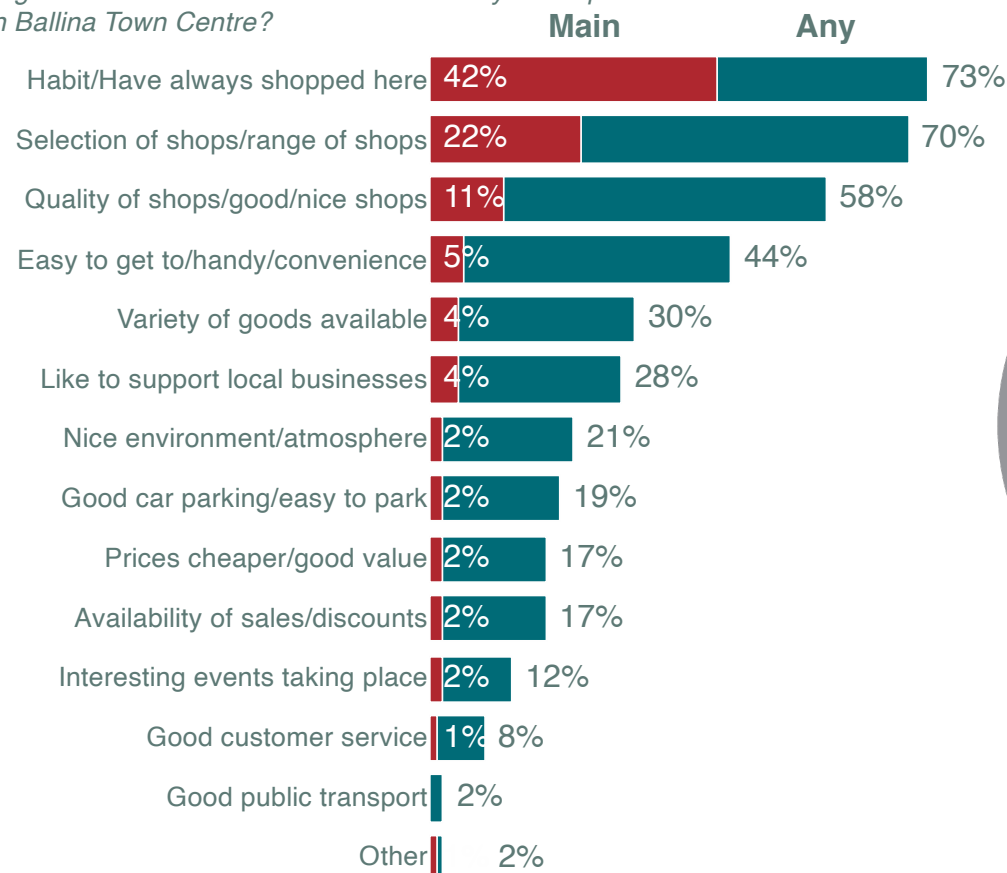
3. Ballina Town Centre Shopping

Reasons Why People Shop In Ballina Town Centre

(Base: All who shop in Ballina Town Centre; n=332)

Q.2a Thinking specifically about the shopping environment what is the main reason you shop in Ballina Town Centre?

Q.2b And what other reason do you shop in Ballina Town Centre?



Most shoppers in Ballina visit the town because they have always shopped there. Range of goods and quality are also driving visits to the town. Just over 1 in 4 claim to shop in Ballina in order to support local business.

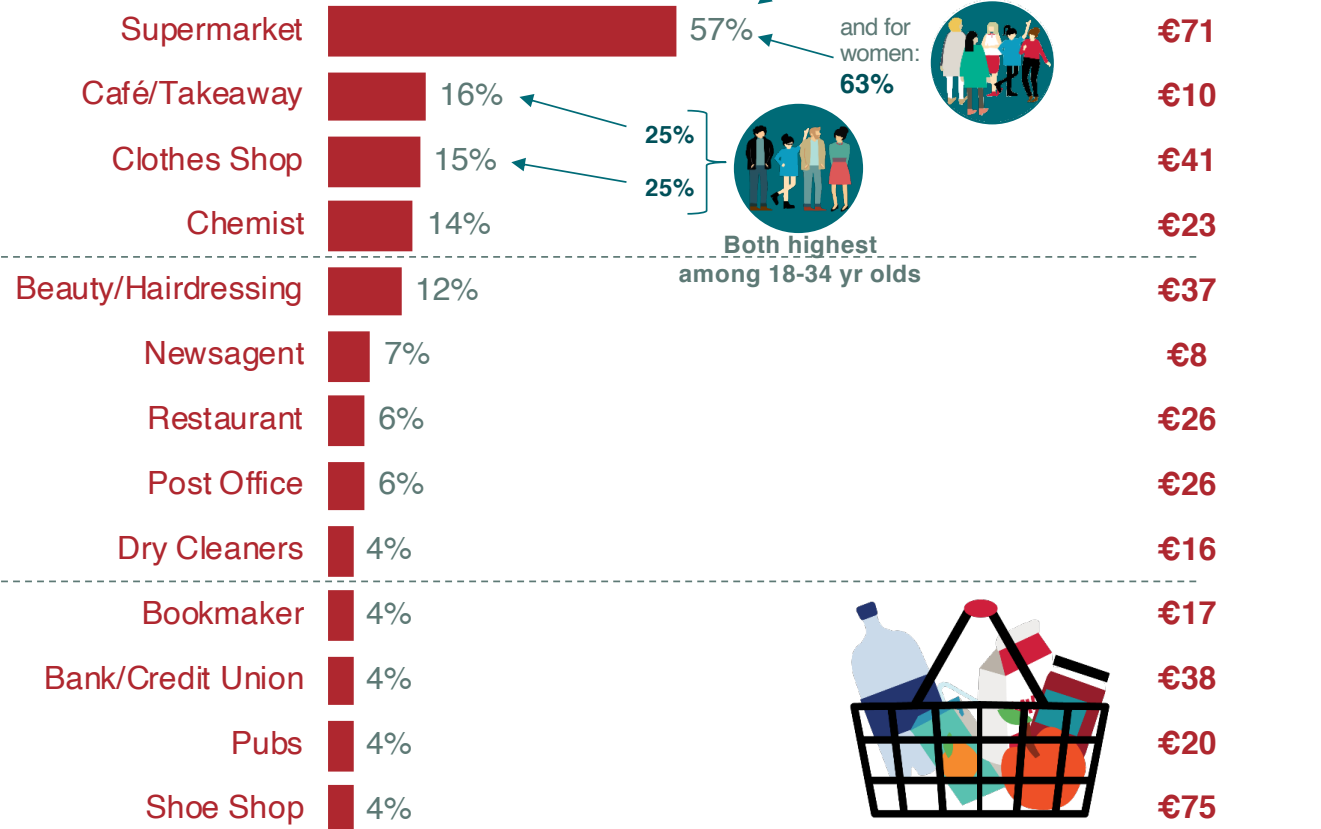
REDC

(Q.2a/b)

Businesses/Shops Visited Today

(Base: All who shop in Ballina Town Centre; n=332)

Q.3b And which types of businesses/shops did you visit today?

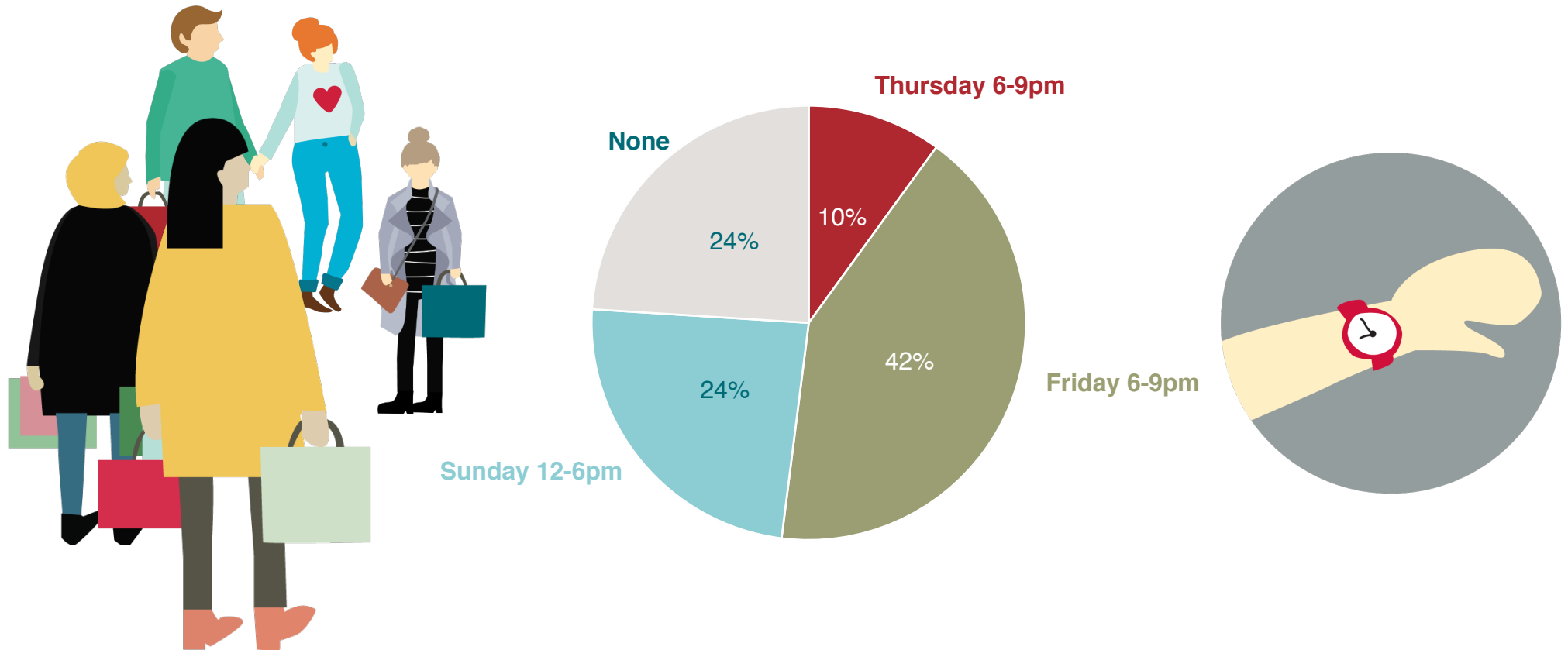


The largest proportion of town centre consumers come to Ballina to visit a supermarket, followed by cafés/takeaways, clothes shops and pharmacies. Interestingly, when they do come to town, 18 – 34 year olds are more likely to visit cafés/takeaways and clothes shops.

Alternative Shopping Hours

(Base: All who shop in Ballina; n=399)

Q.4b Which of the following 'extended opening hours' options would you avail of most often if they were available in Ballina?



When presented with various potential options for extended opening hours, just over 40% of Ballina Town Centre consumers expressed a preference for late opening on a Friday evening. 1 in 4 would consider shopping on a Sunday if it was available.

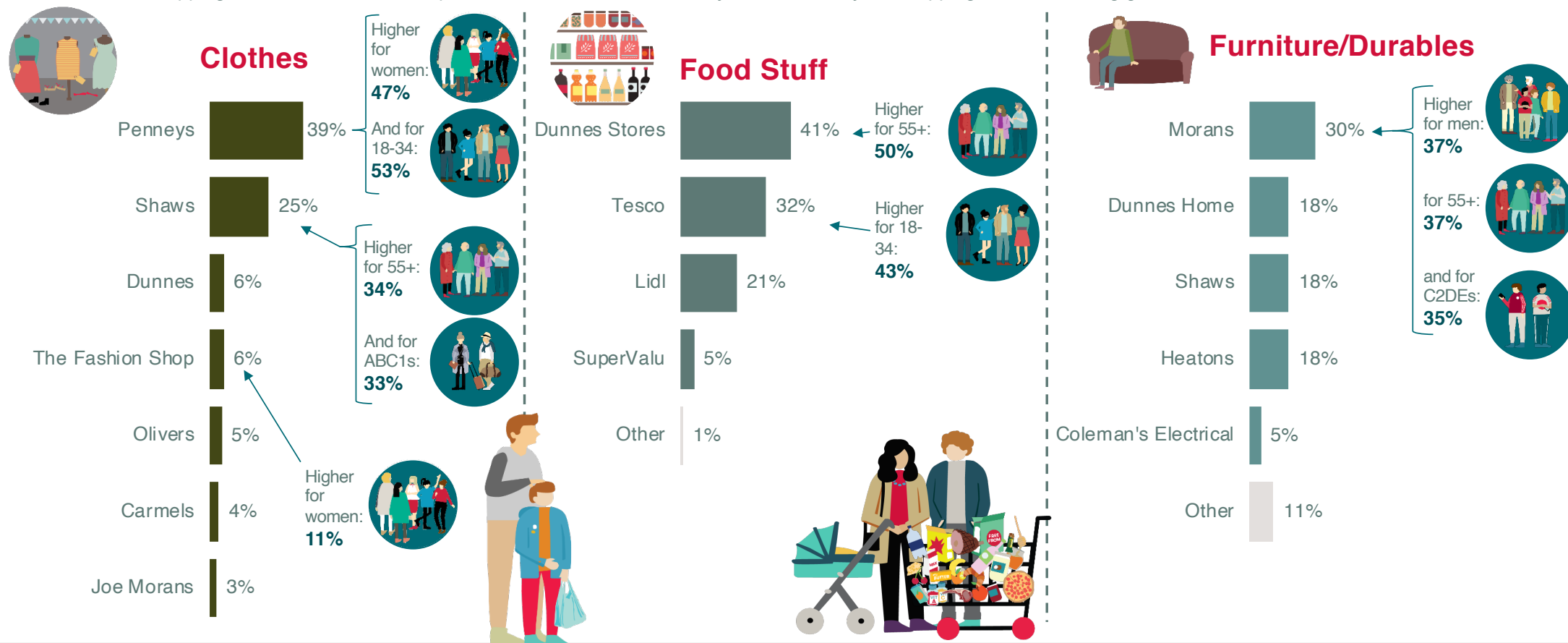
REDC

(Q.4b)

Stores Most Shopped In

(Base: All who shop in Ballina; n=399)

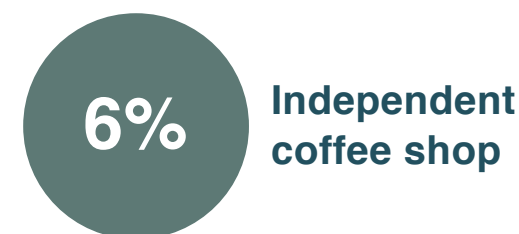
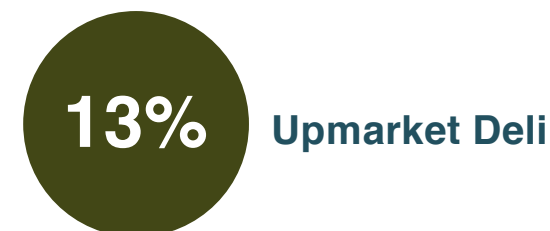
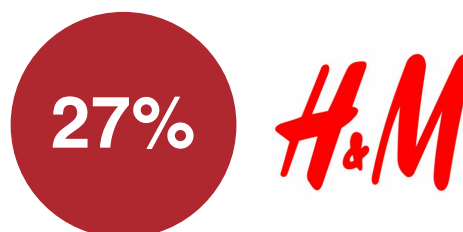
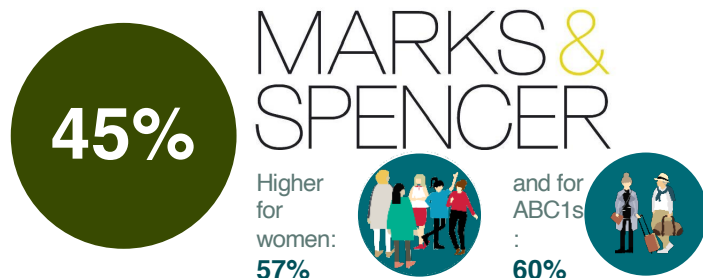
Q.10 When shopping in Ballina Town Centre, please name the store in which you do most of your shopping for the following goods.



Penneys and Shaws hold the majority share of clothes-related shopping visits in Ballina, whereas Dunnes and Tesco lead on food items. Dunnes appears to attract an older clientele with Tesco more popular with 18 – 34 year olds. Morans, followed by Dunnes, is the most popular for furniture or durables.

What Stores and Services are Missing from Ballina?

(Base: All users of Ballina Town Centre; n=408)



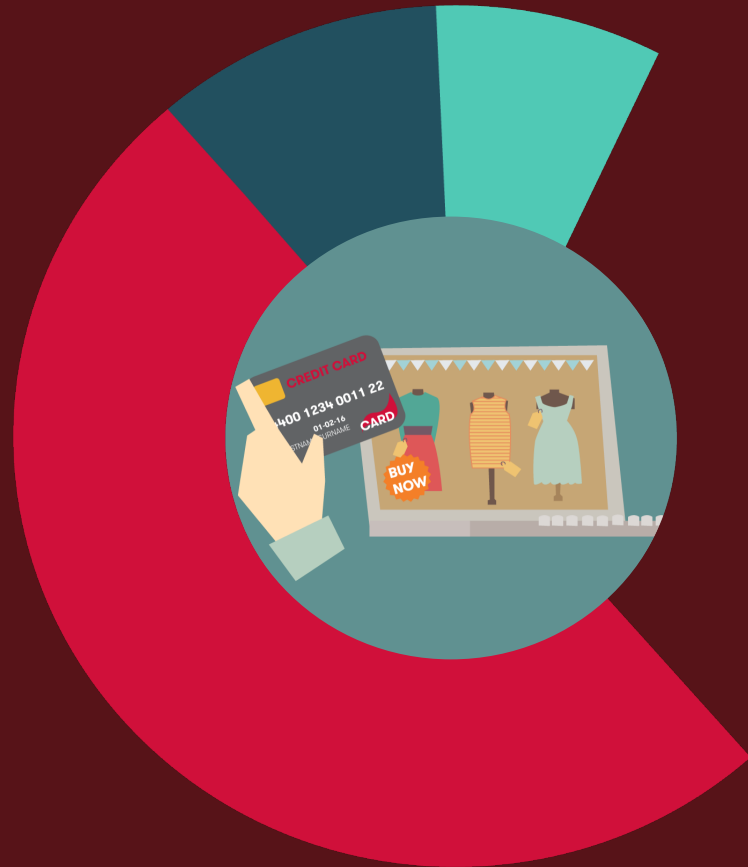
Note: Answers are from prompted list

Respondents were presented with a list of stores currently not in Ballina. Of the options presented, 45% of respondents would like to see *Marks & Spencer* in Ballina, followed by *Next*, *Zara* and *H&M*. *Next* and *Zara*, in particular, are very popular among 18 – 34 year olds. If one of these stores could be attracted to the town, it could help address the feeling among this age group that there is a lack of shops for young people.

REDC

(Q.11)

27



4. Online Shopping

Shopping Online

Q.5 And how often, if at all, do you shop online?

NET: Shop Online
32%



All Using Town
Centre
(n=408)

All Online
Shoppers
(n=131)

At Least once a week
2/3 times a month

3%

5%

Once a month

8%

Less often

16%

Never

68%

9%

16%

24%

49%

2%



Just under a third of shoppers go online to purchase goods, with about 1 in 6 doing this at least once a month.

REDC

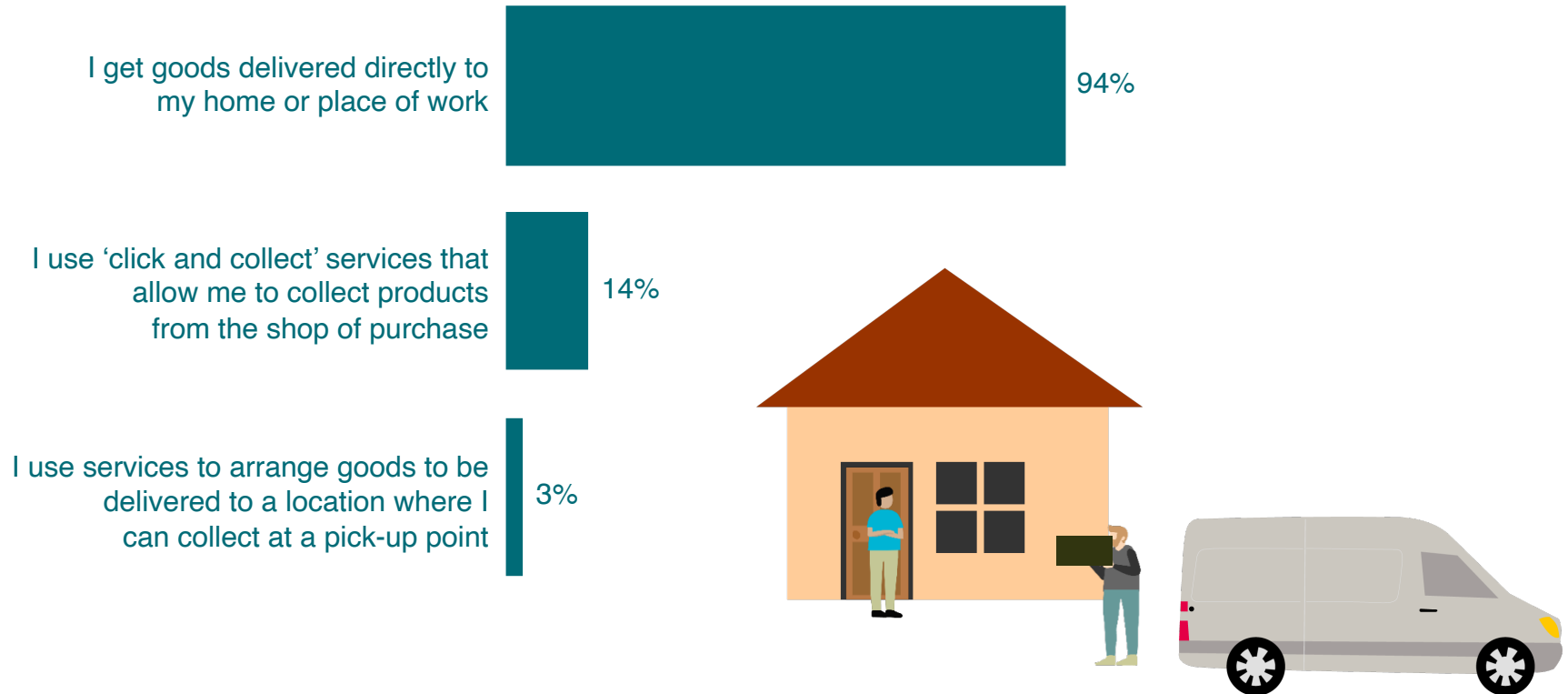
(Q.5)

29

Online Delivery Options

(Base: All who shop online; n=128)

Q.6 Which of the following do you do when purchasing goods online?



Online shoppers predominantly get goods delivered directly to their door. 'Click and collect' is used by 1 in 7 people. Drop-off services are not utilised by the majority of online shoppers.

REDC

(Q.6)

30

Main Items Bought Online

(Base: All who shop online; n=128)

Q.6b What types of goods do you mainly buy online?



Clothes/Clothing Accessories

64%

Higher for women:
81%



And for 18-34:
70%



Concert/Event Tickets

29%

Sports Equipment

21%

Technology/Devices

17%

Shoes

16%

Beauty Products

15%

Video Games

11%

Household Products

9%

Art/Decor

2%

Furniture

2%

Groceries

2%

Other

11%

33%

18%

Both highest among men



Two-thirds of online shoppers in Ballina buy clothing. Concert tickets are the second most popular commodity bought online, followed by sports equipment and tech. Over 4 in 5 (81%) of women who shop online say clothes are the main item bought.

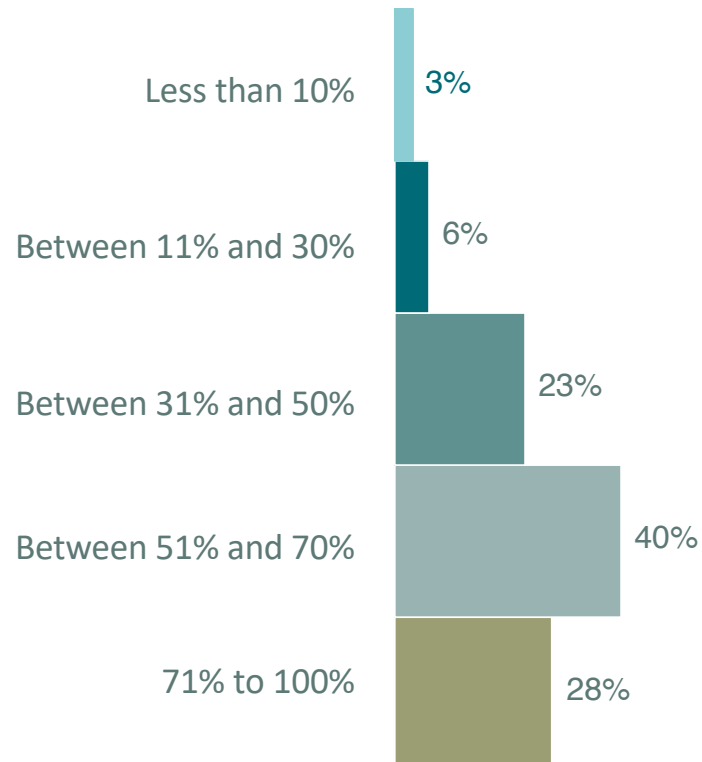
REDC

(Q.6b)

Proportion of Clothes and Accessories Bought Online

(Base: All who bought clothes online; n=82*)

Q.7a Roughly what percentage of your clothing and accessories do you buy online?



68%

of those who buy clothes online*
do so for at least half of
their clothes purchases

*Note: low base size

Of those who shop online for clothes, 68%* buy more than half of their clothes and accessories online, highlighting the potential risk to the town if online shopping trends were to increase.

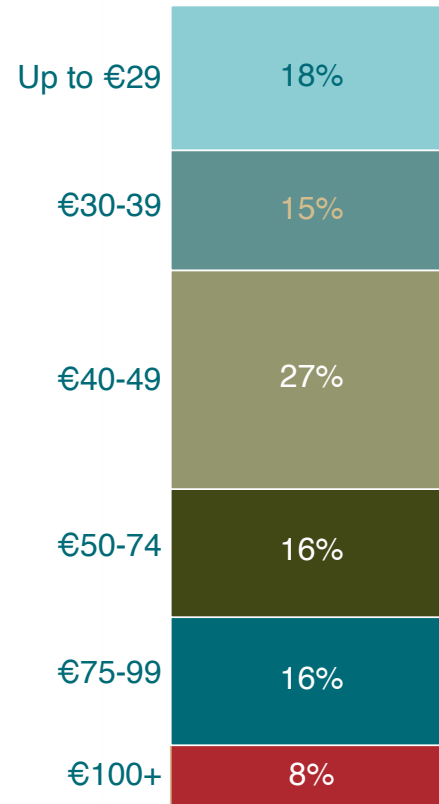
REDC

(Q.7a)

Online Spend on Last Clothes Purchase

(Base: All who bought clothes online; n=82)

Q.7b And thinking back to that last time you made a clothes/clothing accessories purchase online, how much did you spend? Please round up your estimate to the nearest euro.



Average Spend
€65.63

On average, shoppers are spending €66 per visit when buying clothes online.

REDC

(Q.7b)

Benefits of Shopping Online

(Base: All who shop online; n=128)

Q.8 What do you feel are the benefits of shopping online?

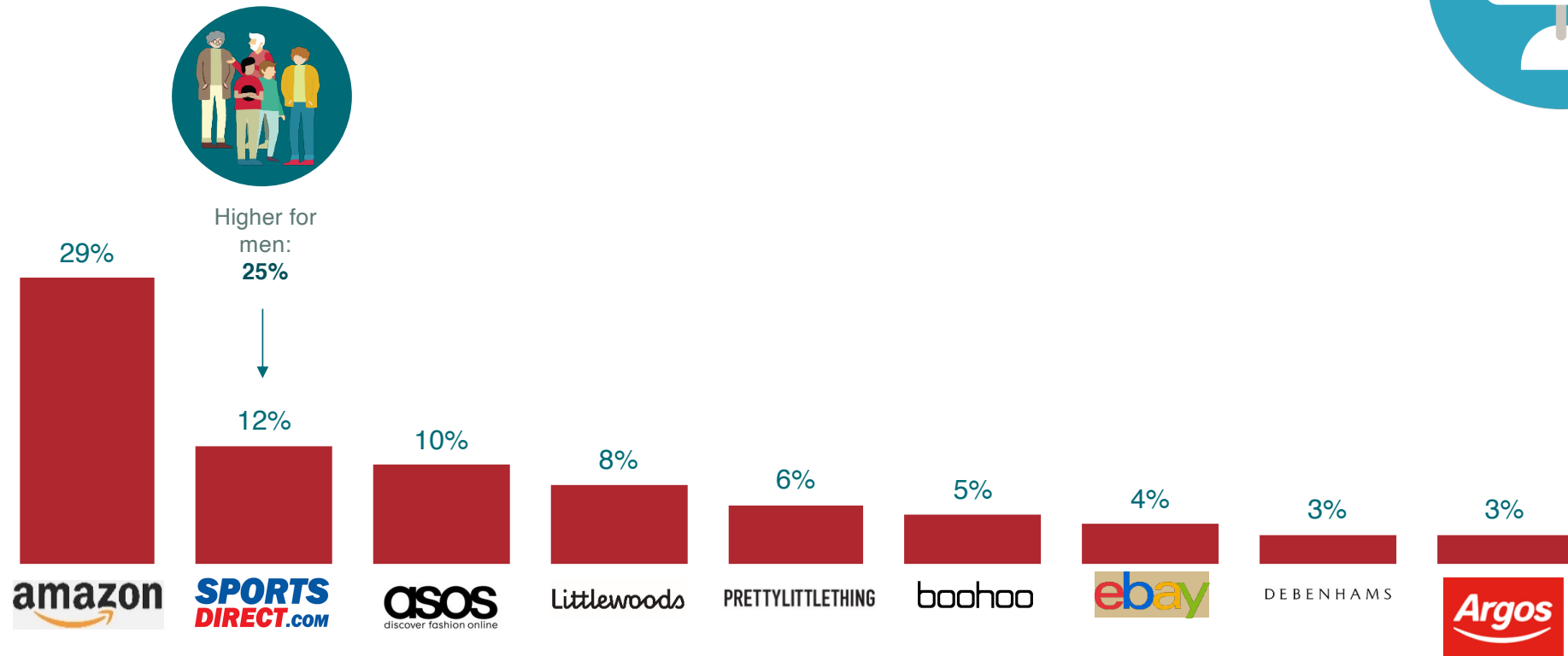


Selection of shops and range of goods available are the primary benefits of shopping online. Convenience, pricing and quality of shops are also mentioned as motivating factors.

Favourite Online Store/Website

(Base: All who shop online; n=128)

Q.9 Which is your favourite online store/website to shop?

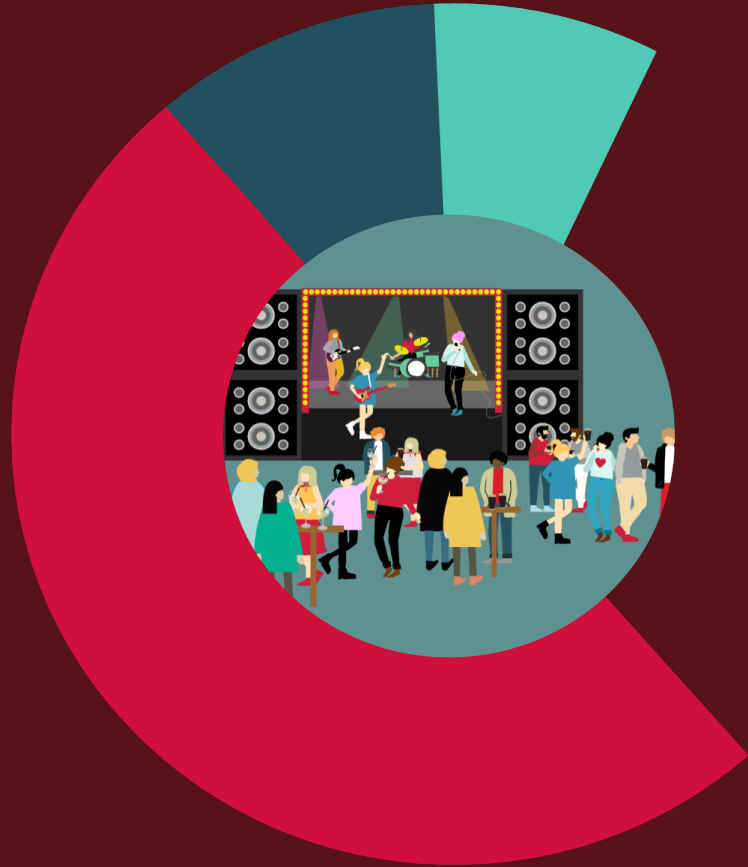


Amazon is the most popular online store visited by respondents who shop online. Sports Direct is the next most popular, being more commonly used by men.

REDC

(Q.9)

35



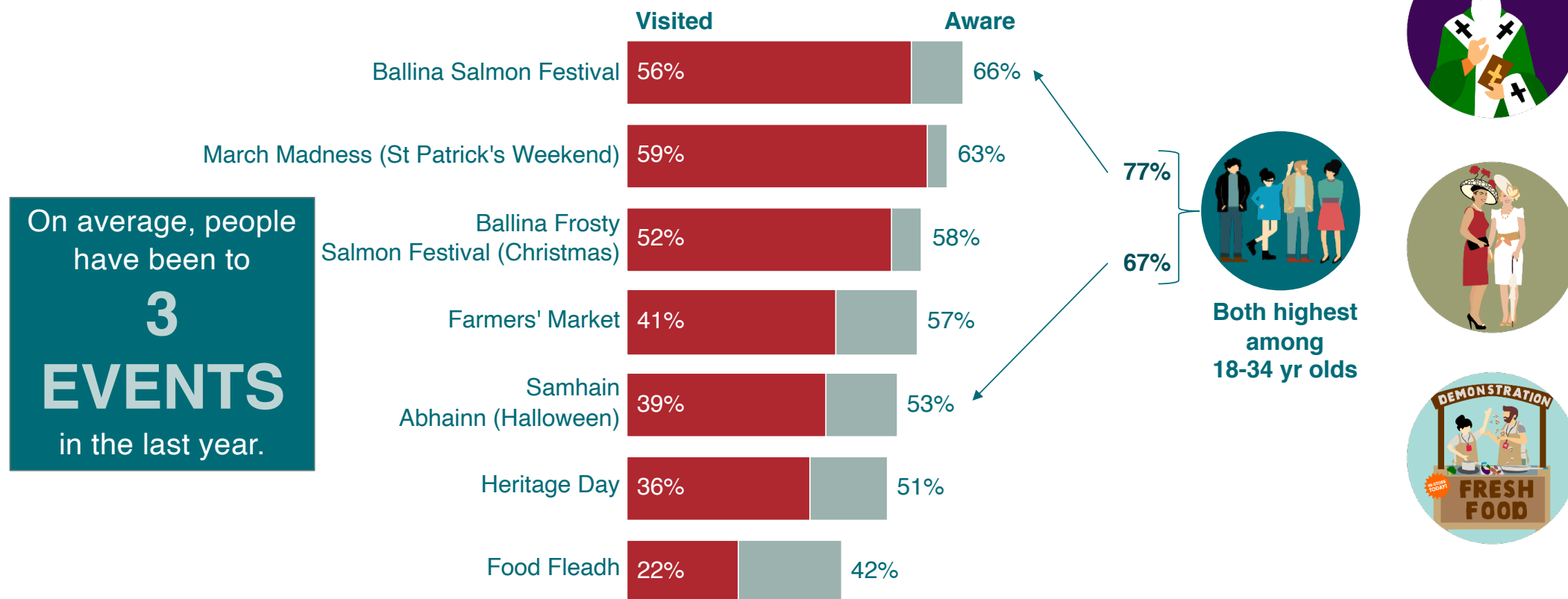
5. Public Events and Festivals

Public Events in Ballina

(Base: All users of Ballina Town Centre; n=408)

Q.14 Which of the following public events are you aware of in Ballina Town Centre?

Q.15 And which of these public events have you visited within the last year?



Ballina Town Centre users are most aware of the Salmon Festival and least aware of the Food Fleadh. Awareness of the Salmon Festival and Samhain Abhainn is particularly high among 18 – 34 year olds.

REDC

(Q.14/15)

Future Events in Ballina

(Base: All users of Ballina Town Centre; n=408)

Q.16 Which of the following types of event, if any, would you like to see take place in the town centre to entice you to visit and spend more time in Ballina?



Christmas or music events are the most popular choices for potential future events that could occur in Ballina, with 18 – 34 year olds particularly interested in a music event or a beer festival.

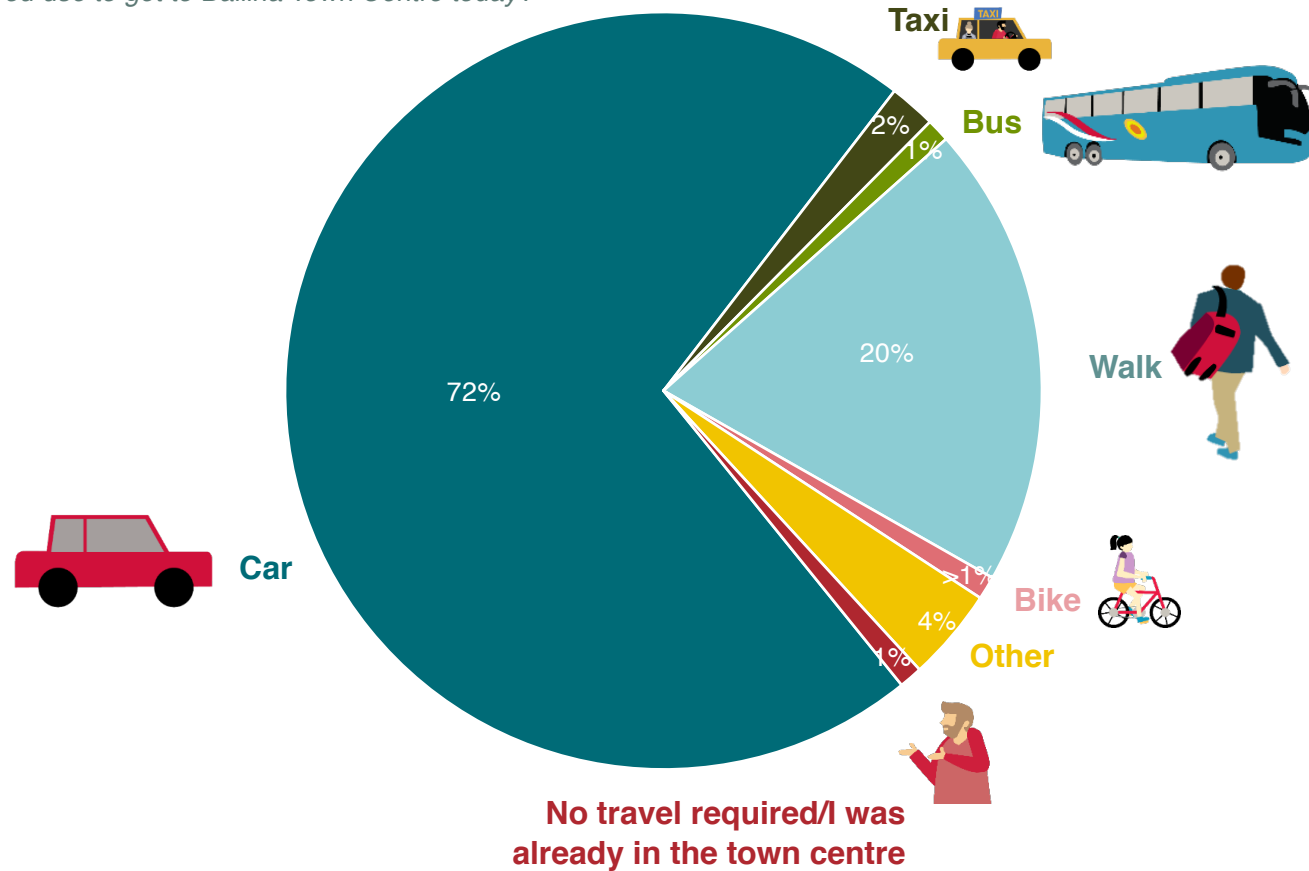


6.Transport & Parking

Mode of Transport

(Base: All users of Ballina Town Centre; n=408)

Q.18 What form of transport did you use to get to Ballina Town Centre today?

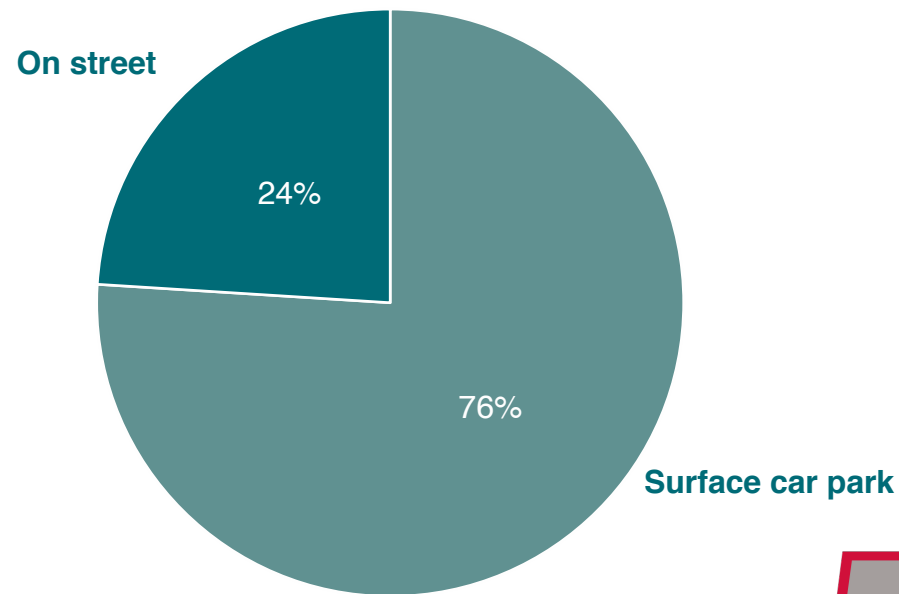


The majority (72%) of users of the town centre arrive by car, with just 1 in 5 arriving on foot.

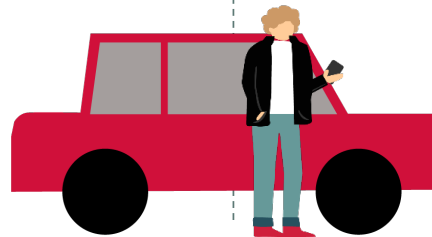
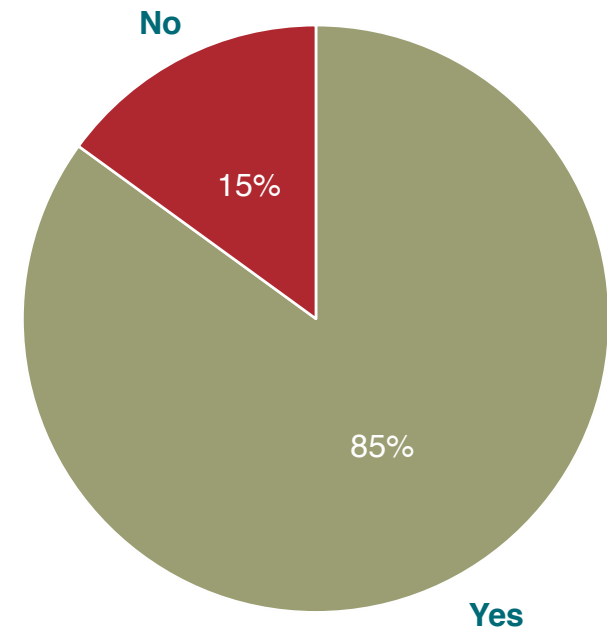
Parking Preference

(Base: All who drove; n=293)

Q.19 When in Ballina Town Centre, would your preference be to park in...



Q.20 Did you pay for parking today?



3 in 4 users of the town centre would prefer to leave their car in a surface level car park, with most paying for parking during their visit.

Ballina Catchment

(Base: All users of Ballina Town Centre; n=408)

Q.22 How far do you actually live from the Ballina Town Centre?

**All users of
town centre
(n=408)**

**Excluding those living
in the town centre
(n=363)**



I live in the town centre

Less than 1 km

1-3 km

4-6 km

7-15 km

16-30 km

31-49 km

50 km+

10%

15%

15%

30%

16%

6%

1%

7%

17%

17%

34%

18%

6%

1%

7%



Of those using the town centre, approximately 1 in 3 are from within a radius of 3 km, while a further third are from within a 4 - 6 km radius.

REDC

(Q.22)



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 sector)
- / Author of *the Community-led Village Design Statements Toolkit*, 2012
- / Founding Co-ordinator of the Irish Walled Towns Network (IWTN) in 2005.



Deirdre Cunningham

**Mayo County Council
Heritage Officer**

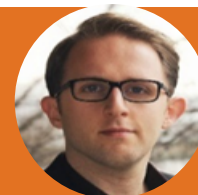
- / Local Co-ordinator of the Ballina Pilot Collaborative Town Centre Health Check Project
- / BSc in Environmental Science; and PhD from University College Dublin
- / Co-ordinated Village Design Statements and Public Realm Plans for a number of Mayo towns and villages
- / Works with community groups, businesses, third level institutions, individuals, NGOs and other agencies in the conservation and promotion of heritage in Mayo
- / Authored, edited and produced several publications on various aspects of Mayo's heritage.



Bryan Cox

**RED C Research & Marketing
Director**

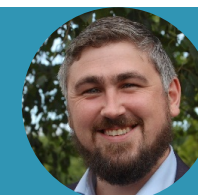
- / Bryan has 15 years' experience in market research
- / He has an honours degree in Marketing from Dublin City University
- / Bryan has worked in RED C for the past 13 years and has vast experience in a qualitative and quantitative capacity
- / He is the Research Project Director on consumer surveys for the ongoing Heritage Council Collaborative Town Centre Health Check Research Project.



Mark Curley

**RED C Research & Marketing
Associate Director**

- / 5 years' experience in market research; specialising in quantitative methodologies
- / Mark has an MSc in Marketing from Smurfit Business School and an MA from Trinity College in Business and Economics
- / Mark has extensive experience in the management of projects across a wide variety of industries including Governmental research, FMCG, Telecoms, Health insurance, Transport and Utilities
- / As a core member of the RED C polling team, Mark has overseen a significant number of F2F projects across Ireland.



John Rogers

**RED C Research & Marketing
Research Project Manager**

- / Joined RED C in early 2016 after completing an Honours Degree in Psychology and Masters in Cognitive Science from UCD
- / John is a Quantitative Specialist and is currently working with several Irish and international clients across a number of sectors including Retail, Telecoms, Insurance, Supermarkets and Tourism
- / Experience across several industries including Political Polling, Tourism, Telecoms and Retail.

