



ENNIS TOWN CENTRE HEALTH CHECK REPORT JANUARY 2018



E
ELECTRONICS

Electronics

Auntie's
BAKERY

1-202-87-1884

INTRODUCTION

Ennis town centre is at the economic, cultural and social heart of Ennis and County Clare. Recently voted 'Ireland's Friendliest Town' at the Retail Excellence Awards 2017, the town centre offers a vibrant mix of independent boutiques, national retailers, restaurants, cafés and service providers which combine to make Ennis a vibrant and popular shopping destination.

Ennis town is also a commercial, administrative and cultural centre, providing a range of services and amenities to both local residents and visitors to the area. The town hosts many festivals across a wide social and cultural spectrum throughout the year and is widely recognised as a centre for traditional Irish music and culture. It is also a hub for local and regional tourism, acting as a base from which tourists explore the attractions of the wider area. All of these positive attributes contribute to make Ennis a dynamic and welcoming County Town.



Similar to most towns across the country, Ennis town centre has encountered difficulties in recent years. There was a general decline in retail activity due to the global economic downturn combined with reduced consumer confidence and spending power. Town centre vibrancy has also been influenced by greater consumer mobility which allows consumers to travel to a wide range of locations and also avail of online options to meet their retail and service needs. However, Ennis together with the wider economy is now heading into a time of increasing consumer confidence and there is a renewed focus on the revival and enhancement of the town centre area.

In order to assist with the recovery of the town centre and to address any remaining issues of decline, a multi-agency approach was developed, bringing together a range of expertise to analyse the issues facing town centres and to develop an evidence-based approach to address the factors that support or inhibit town centre growth.

A pilot, trans-disciplinary National Town Centre Health Check (TCHC) Training Programme was developed and delivered in the form of two workshops which were held in September 2016 and March 2017 in Naas Town Hall and Dublin Castle respectively.

The agencies involved in the development of the programme were:

- The Heritage Council of Ireland (lead partner)
- Retail Grocery Dairy and Allied Trades Association (RGDATA)
- The Retail Consultation Forum
- Department of Arts, Heritage, Regional, Rural and Gaeltacht Affairs
- Department of Housing, Planning and Local Government
- The Irish Planning Institute
- Irish Landscape Institute
- Royal Institute of the Architects of Ireland
- Third-level Institutes

The purpose of the training was to support the creation of robust Town Centre Health Checks for 10 Irish towns, which are formally linked to the statutory planning system, through the review of county development plans and local area plans. Ennis was selected as one of the towns to participate in the pilot programme.

This detailed assessment of the current 'overall health' of Ennis town centre has been promoted by the Heritage Council, working in partnership with Clare County Council and Ennis Chamber of Commerce. The key aim of the pilot TCHC is to assess the vitality, vibrancy and viability of the town centre area and to highlight the critical role that town centres play in overall socio-economic, environmental and cultural growth and development, and on quality of life for both local residents and visitors to the town.

The key findings from this Ennis Town Centre Health Check and baseline will inform plans and strategies in relation to the following:

- Arts, heritage and culture
- Commerce/e-commerce and enterprise
- Cultural tourism e.g. music, food etc.
- Public realm improvements e.g. historic streetscapes, parks and public spaces
- Living in the town centre
- Strategic planning and place-making



The town centre health check embraces a number of different types of quantitative and qualitative primary research methods. The following indicators of vitality and viability were surveyed;

- Pedestrian count survey
- Town centre land use survey
- Retailer survey
- Consumer survey

It is envisaged that the Ennis TCHC, the survey work for which was undertaken in late 2016, will be the first step in an on-going strategic management programme of health checks for Ennis going forward



OBJECTIVES OF THE STUDY

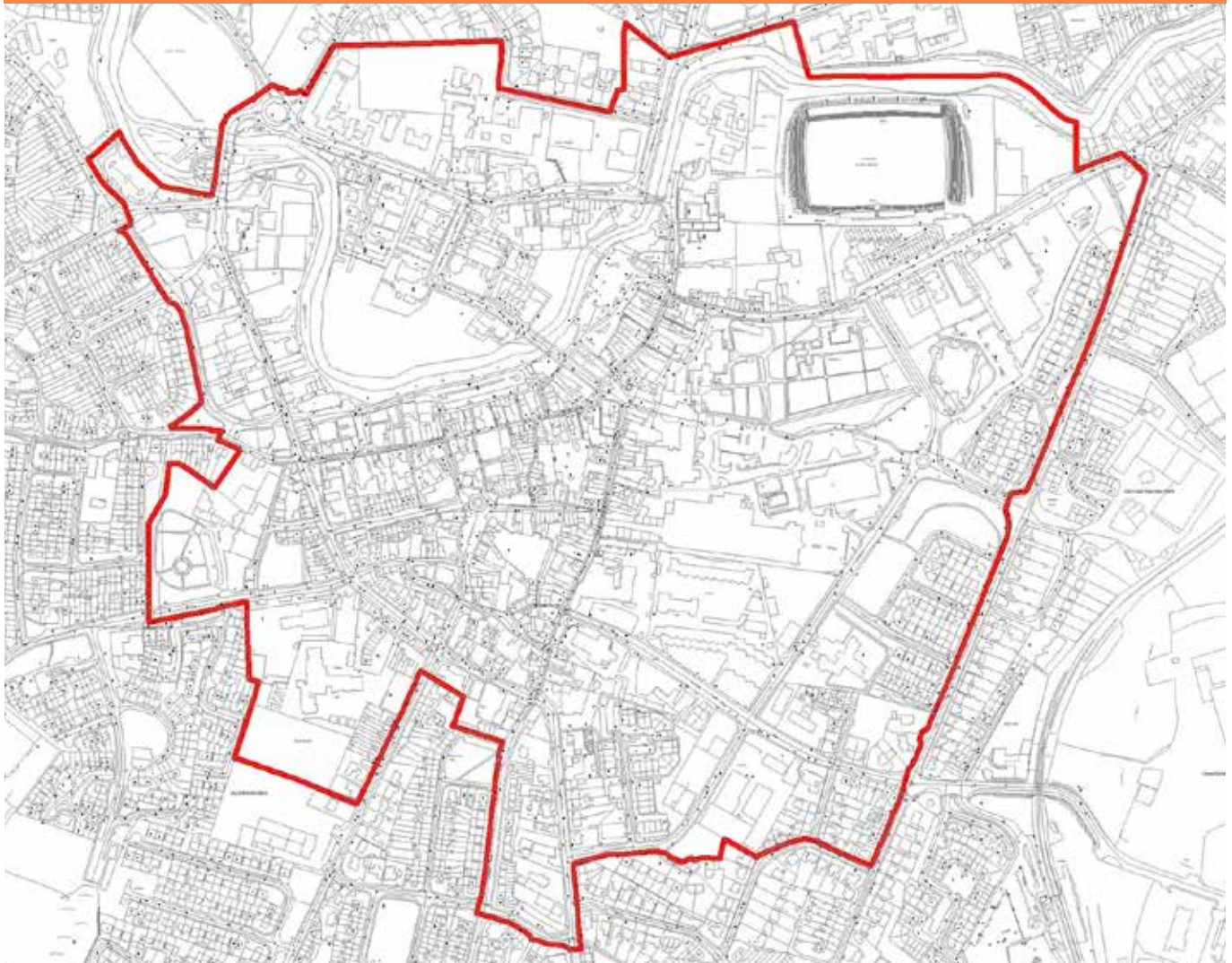
The key objectives for the Ennis TCHC are to:

- Develop a comprehensive health check for Ennis town centre.
- Provide an evidence base for use in other studies and strategies carried out in the Ennis town centre and in the wider County Clare area.
- Support the preparation of Ennis Town and Environs Local Area Plan, particularly helping to inform economic development, tourism and retail policies contained in that plan.
- Provide a best practice baseline for assessing the impacts of proposed retail development on the town centre

THE STUDY AREA

The study area encompasses the primary retail area in the town centre of Ennis. The boundary of the study area was mutually agreed by representatives of Ennis Chamber of Commerce and Clare County Council.

ENNIS TOWN CENTRE HEALTH CHECK STUDY AREA BOUNDARY



© Ordnance Survey Ireland. All rights reserved. License number 2016/18/CCMA/Clare County Council

TOWN CENTRE HEALTH CHECK METHODOLOGY

In order to assess the key indicators of the health of Ennis town centre a number of different types of surveys were undertaken and analysed, namely:

- Pedestrian footfall survey
- Land use survey, assessing the uses of buildings in the town centre
- Survey of business owners/managers in the town centre
- Survey of shoppers in the town centre

Of the four main assessments, the survey of footfall and the recording of town centre land use were undertaken in November 2016. The in-depth examination of the behaviour and experiences of the shoppers and businesses was completed in early December 2016.

A working group comprising Clare County Council, Ennis Chamber of Commerce and the Purple Flag team was set up to discuss the methodology for completing

the body of work. The survey structures were based on the model devised by the National Town Centre Health Check Training Programme, with some minor alterations to adapt to local circumstances.

The survey work itself was a large undertaking and a number of different resources were utilised. Ennis Chamber of Commerce undertook the survey of businesses in the town, while staff members from Clare County Council were primarily involved in the town centre land use survey. The work relating to pedestrians counts and shopper surveys was the most resource-intensive and for this volunteers were sourced from local secondary schools and through the Clare Volunteer Centre. The analysis of the collected data was primarily undertaken by Clare County Council.

In order to ensure public awareness of the surveys and to optimise participation levels, a media campaign was implemented involving local newspapers, local radio and social media resources.



ENNIS TOWN CENTRE PEDESTRIAN COUNTS

The assessment of footfall is necessary to understand the patterns of use in a town centre. Pedestrian counts are regarded as an important indicator of the vitality and viability of a town centre and the general level of activity in an area. Footfall is also seen as a surrogate indicator of potential retail trade. The outcome of pedestrian count surveys can help to inform proactive planning and investment in town centres.

The pedestrian counts were undertaken on Friday 2nd December 2016 and Saturday 3rd December 2016¹. Of the two days on which the pedestrian counts were undertaken, higher footfall was recorded on Friday 2nd December 2016.

Over the two days, a footfall of over 50,000 was recorded which is a very confident number in the town centre area. In terms of pedestrian movement, the majority of the survey locations had relatively similar patterns of movement in each direction.

Four locations were monitored:

- O'Connell Street
- Abbey Street
- Parnell Street
- The Market area (divided into three survey locations)

ENNIS TOWN CENTRE PEDESTRIAN COUNT



¹Parnell Street pedestrian counts undertaken on Friday 2nd December only

OUTCOME OF ENNIS TOWN CENTRE PEDESTRIAN COUNTS

Street & Day	Direction	Direction	Total
O'Connell Street	Towards The Height	Towards the Cathedral	
Friday 2nd December 2016	5,437	5,824	
Saturday 3rd December 2016	5,802	7,925	24,988
Abbey Street	Towards The Height	Towards Garda Station	
Friday 2nd December 2016	1,674	1,454	
Saturday 3rd December 2016	2,141	1,753	7,022
Parnell Street	Towards The Height	Towards Carmody Street	
Friday 2nd December 2016	2,716	2,784	5,500
Market Place	Ennis Market Building towards the roundabout		
Friday 2nd December 2016	1,079		
Saturday 3rd December 2016	2,743		3,822
Lower Market Street	Towards Dunnes	Towards Zest	
Friday 2nd December 2016	2,389	2,494	
Saturday 3rd December 2016	3,041	3,588	11,512
Market Street Centre	Between Jimmy's Discount Store and Cornucopia		
Friday 2nd December 2016	1,735		1,735
Market Area Total			17,069
Total for each Day			
Friday 2nd December 2016	15,030	12,556	27,586
Saturday 3rd December 2016	13,727	13,266	26,993

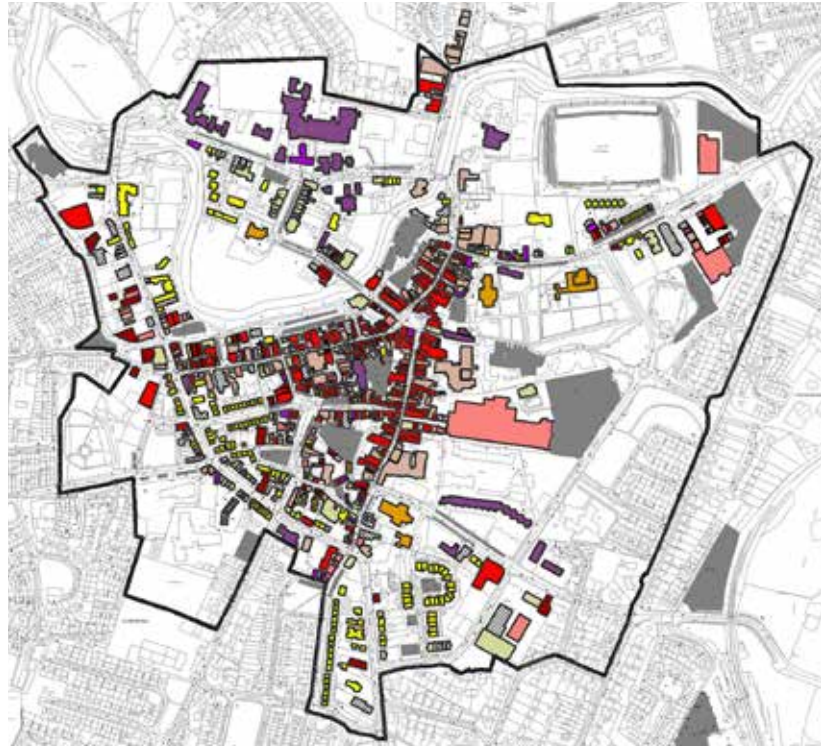
TOWN CENTRE LAND USE SURVEY

ENNIS TOWN CENTRE

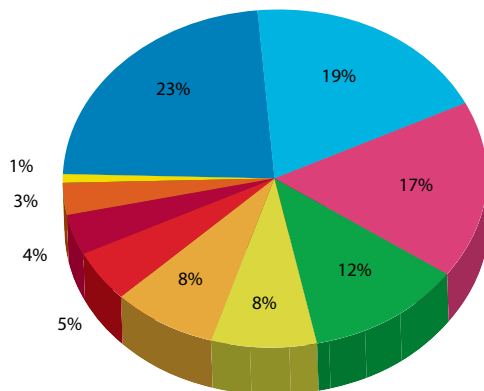
MAP OF GROUND FLOOR USES

GOAD Sub Classification

- Comparison
- Convenience
- Financial & Business Services
- Health & Medical Services
- Leisure Services
- Public Service
- Religious Service
- Residential
- Retail Service
- Vacant Unit
- Car Parks



©ORDNANCE SURVEY IRELAND. ALL RIGHTS RESERVED.
LICENSE NUMBER 2016/18/CCMA/CLARE COUNTY COUNCIL



ENNIS TOWN CENTRE

GROUND FLOOR USES

- 23% Residential
- 19% Comparison
- 17% Vacant Unit
- 12% Leisure Services
- 8% Financial and Business Services
- 8% Retail Services
- 5% Convenience
- 4% Public Service
- 3% Health and Medical
- 1% Religious Services



©ORDNANCE SURVEY IRELAND. ALL RIGHTS RESERVED.
 LICENSE NUMBER 2016/18/CCMA/CLARE COUNTY COUNCIL

ENNIS TOWN CENTRE

MAP OF FIRST FLOOR USES

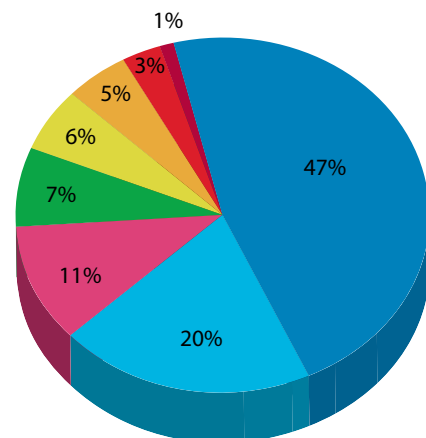
GOAD Sub Classification

- Comparison
- Convenience
- Financial & Business Services
- Health & Medical Services
- Leisure Services
- Public Service
- Religious Service
- Residential
- Retail Service
- Vacant Unit

ENNIS TOWN CENTRE

FIRST FLOOR USES

- 47% Residential
- 20% Vacant Unit
- 11% Retail Services
- 7% Comparison
- 6% Financial and Business Services
- 5% Leisure Services
- 3% Health and Medical



BUSINESS OWNERS'/MANAGERS' OPINIONS OF ENNIS TOWN CENTRE

The primary aim of the survey of business owners/managers was to examine the views and attributes of businesses in Ennis town centre with regard to a range of issues.

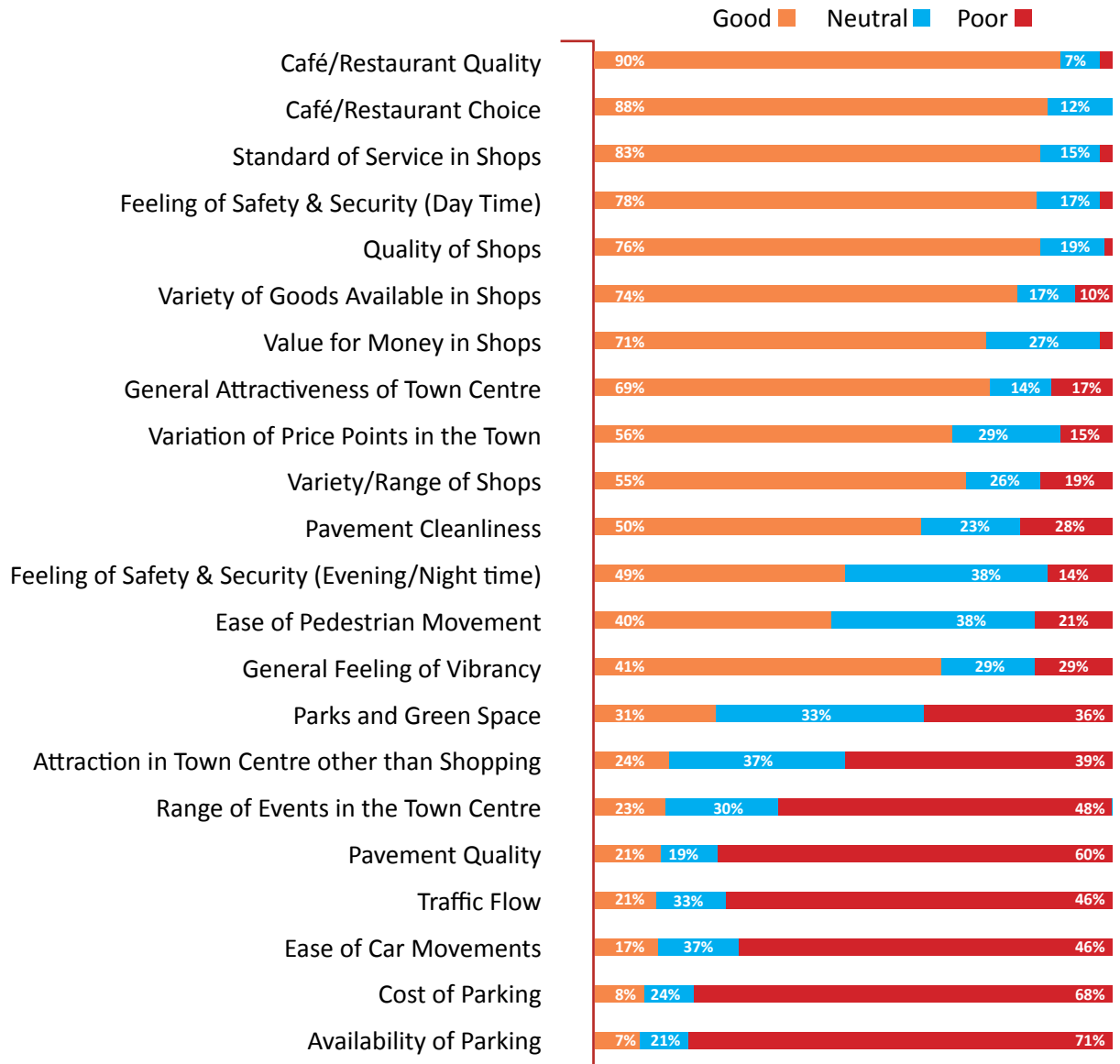
Business respondents were asked to give their first thoughts when they think of Ennis. 41% used a positive descriptive word such as 'quaint', 'traditional' or 'beautiful', 28% mentioned traffic and parking issues, 15% replied by mentioning a potential enhancement to the town and 12% mentioned the number of boutiques and independent retailers.



Retailers were asked what they considered to be the one main thing that attracts consumers to Ennis town centre. A similar question was asked in the survey of shoppers, thus providing a useful overview of the consumer choices in Ennis town centre. The top 3 responses from business participants were:



Over 40 business respondents were invited to rate 22 keys aspects of Ennis town centre in order to get an overview of their opinions and views on a range of issues. Shoppers in the town centre were asked similar questions and it is interesting to compare and contrast the views on different issues. The opinions of business respondents are set out below.





WEBSITE	63%
FACEBOOK	83%
INSTAGRAM	30%

28% OF RESPONDENTS CURRENTLY TRADE ONLINE.

OF THOSE WHO CURRENTLY DO NOT TRADE ONLINE, **34%** INTEND TO DO SO IN THE NEAR FUTURE.



Town centre businesses were asked what they consider to be **THE MAIN STRENGTH OF ENNIS TOWN CENTRE**. The most common responses included the compact nature of the town, with all the main areas of interest within close walking distance; the traditional character of the town and its lovely streets; and the friendly atmosphere and friendly people.

BUSINESS RESPONDENTS WERE ASKED ABOUT THE IMPROVEMENTS THEY WOULD MOST LIKE TO SEE TAKING PLACE IN THE TOWN CENTRE. THE TOP 5 RESPONSES WERE:



- MORE PARKING
- CHANGES TO THE PRICE STRUCTURE FOR PARKING
- PEDESTRIANISATION OF TOWN CENTRE STREETS
- BETTER SECURITY/INCREASED GARDA PRESENCE
- IMPROVEMENTS TO PARNELL STREET



93% THE NUMBER OF BUSINESSES SATISFIED WITH THEIR CURRENT PREMISES

84% THE NUMBER OF BUSINESSES SATISFIED WITH THEIR CURRENT LOCATION IN THE TOWN CENTRE

60% THE NUMBER OF BUSINESSES WHO CONSIDER THE CRESCENT SHOPPING CENTRE IN LIMERICK TO BE THEIR PRINCIPLE COMPETITION.

TRADING EXPECTATIONS FOR THE NEXT TWO YEARS

↑59%
IMPROVING

↔27%
NO CHANGE

↓15%

Business owners/managers would like to see **MORE EVENTS** organised in the town centre. Respondents most commonly mentioned festivals, events for children and families and more concerts in spaces like Cusack Park and Tim Smyth Park.

90% OF BUSINESS RESPONDENTS INDICATED THAT THEY INTEND TO CONTINUE TRADING IN ENNIS TOWN CENTRE IN THE FUTURE

84% ARE WILLING TO PARTICIPATE IN ORGANISING EVENTS IN THE TOWN CENTRE IN THE FUTURE.

SHOPPER OPINION OF ENNIS TOWN CENTRE

The primary aim of the shoppers' survey was to establish the attributes of shoppers in Ennis town centre and to examine their views on a range of issues.

Shoppers were initially asked for their first thoughts when they think of Ennis town centre. A wide range of responses were given but the most common responses received were: the friendly, welcoming nature of the town (12%); the cleanliness and tidiness of the area (7%) and difficulties with parking (7%).

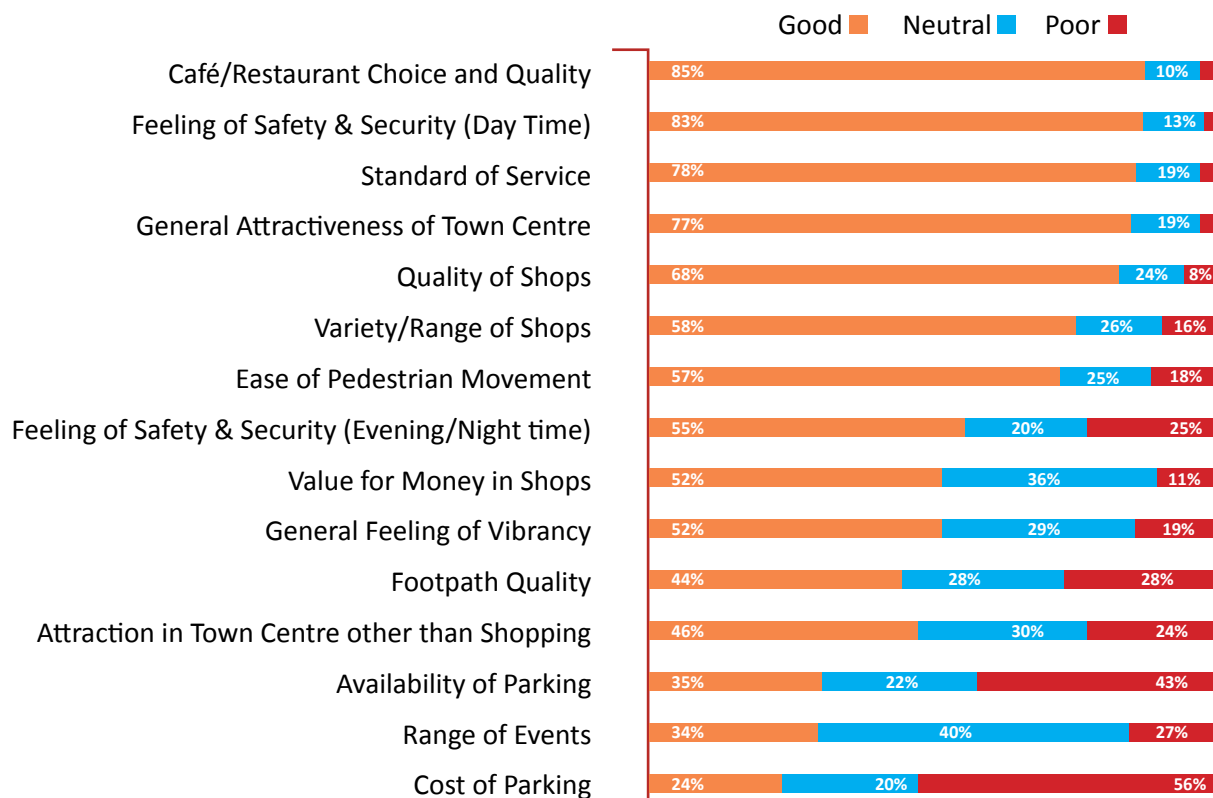


When asked what they particularly like about shopping in Ennis town centre, the top answers from shoppers were:

- 20%** CONVENIENT, CLOSE TO HOME
- 19%** COMPACT AND EASY TO GET AROUND
- 16%** FRIENDLY



In order to get a general overview of perceptions on the town centre shopping experience, shoppers were asked to rate a range of key aspects of the town centre shopping experience.



It is interesting to compare and contrast the opinions of shoppers and businesses on town centre issues. Both groups rated the quality and choice of cafés/restaurants, the standard of service provided and the feeling of safety and security (day time) very highly. Both groups were also very satisfied with the generally attractiveness of the town centre, with 83% of businesses and 96% of shoppers rating this characteristic as either 'good' or 'neutral'. There was also general consensus between the groups that opportunities to expand the range of town centre attractions other than shopping need to be explored.

There was some divergence of opinion on issues relating to parking and mobility. 28% of businesses considered town centre parking availability to be 'good' or 'neutral', with the remainder rating it as 'poor'. Amongst shoppers, 57% considered the availability of parking to be 'good' or 'neutral' with 43% considering availability to be 'poor'. Differences of opinion were also evident in relation to footpath quality. Just 40% of business respondents considered footpath quality in the town centre to be 'good' or 'neutral' as opposed to 72% of shoppers.

There was however consensus on the quality of the shops and the variety/range of shops in Ennis town centre. Both groups also provided similar responses when asked about the general feeling of vibrancy in the town centre.

MAIN REASON FOR CHOOSING TO SHOP IN ENNIS TOWN CENTRE



BUSINESSES VISITED ON DAY OF THE SURVEY AND AVERAGE SPEND

Type of Business Visited	% of Respondents	Average Spend
Supermarket	41%	€77.80
Café/takeaway	23%	€11.00
Chemist	21%	€42.80
Clothing or shoe repair	16%	€49.00
Clothes shop	13%	€80.00



Shoppers indicated that Ennis is their preferred retail destination.

27% SHOP IN ENNIS DAILY
34.4% SHOP IN ENNIS 2-3 TIMES A WEEK
25.6% SHOP IN ENNIS WEEKLY

Limerick was the next destination most frequently visited by the survey respondents. However, less than 10% of respondents shop in Limerick on a daily or weekly basis. 10.6% of respondents stated that they shopped in Limerick 2-3 times a month, 35.5% shop there once a month. The remaining respondents shop in Limerick less often or not at all.



77% OF SHOPPERS TRAVELLED TO ENNIS TOWN CENTRE BY CAR. THE PREFERRED FORM OF TOWN CENTRE PARKING IS:

50% SURFACE CAR PARK **28%** ON-STREET PARKING **22%** MULTI-STOREY CAR PARK



SHOPPERS WERE ASKED TO NAME THEIR FAVOURITE SHOP IN ENNIS TOWN CENTRE. NEARLY EVERY RESPONDENT GAVE A DIFFERENT RESPONSE TO THIS QUESTION WITH 55 DIFFERENT SHOPS NAMED AS 'FAVOURITES'.

46.9% OF SHOPPERS STATED THAT THEY **SHOP ONLINE AT LEAST ONCE A MONTH.** CLOTHING & ELECTRONIC ITEMS ARE THE MOST COMMON PURCHASES.





THE MOST POPULAR ONLINE STORES ARE:

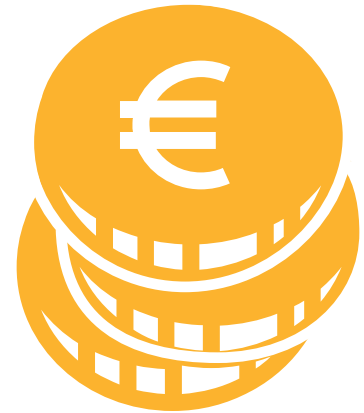
- AMAZON
- EBAY
- LITTLEWOODS
- BOOHOO.COM

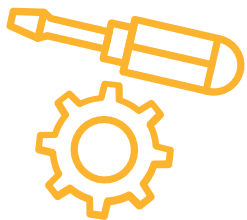
€91.⁸⁰

THE AVERAGE AMOUNT SPENT ON THEIR MOST RECENT ONLINE PURCHASE

77.5%

OF ONLINE PURCHASES HAD A VALUE OF **LESS THAN €100**, WITH ONLY A SMALL NUMBER OF HIGHER VALUE ITEMS PURCHASED ONLINE.





IMPROVEMENTS SHOPPERS WOULD LIKE TO SEE IN THE TOWN CENTRE

69 different responses were received to this question but a number of key themes emerged. The top 5 responses were:

- 29.9%** PARKING
- 16.6%** PEDESTRIANISATION
- 14%** NUMBER OF SHOPS
- 5.3%** FOOTPATHS AND PAVING
- 4.8%** ADDRESSING VACANCY

What shops are missing from Ennis town centre?

- 23%** MORE HIGH STREET SHOPS AND DEPARTMENT STORES
- 12%** MORE WAREHOUSE-BASED OUTLETS E.G. HARVEY NORMAN, ARGOS
- 5%** MORE SHOE SHOPS

SHOPPERS WERE ASKED WHAT TYPE OF EVENTS WOULD ENTICE THEM TO VISIT AND SPEND TIME IN ENNIS TOWN CENTRE:



- 18%** MUSIC AND STREET ENTERTAINMENT
- 17%** FESTIVALS
- 13%** LARGE CONCERTS
- 13%** FLEADH OR SIMILAR
- 11%** MARKETS

KEY CONSIDERATIONS AND OPPORTUNITIES FOR ENNIS

Ennis town centre has significant potential to grow and improve in the years to come and the results of the research and analysis undertaken as part of the TCHC will provide an important foundation on which to build. Events such as Fleadh Cheoil have been a significant boost to the town in recent years and planned projects such as the West Clare Railway Greenway and the enhancement of the Post Office Field will significantly enhance the amenity value of the town centre. Clare County Council and town centre business people and residents will continue to work together to ensure a strong and vibrant future for this unique town.

Ennis has received many accolades in recent years including the Purple Flag status, the award of Ireland's Friendliest Town and on-going success in the Tidy Towns competition. These awards are testament to the hard work of all those involved and great opportunity exists to further build on these successes in the years to come.

Clare County Council would like to thank the traders of Ennis town, the citizens and many groups who contribute to making Ennis town centre a vibrant and attractive destination.

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 Ennis 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 town centre enhancements. Benefit can also be gained from working with other stakeholders such as third level institutes and research groups to further analyse issues of relevance to town centre growth and prosperity and to bring forward projects that will enhance the town centre of Ennis in the future.

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 Ennis town centre stakeholders to enhance the town. This action plan will develop a sense of place, heritage and 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).

KEY ATTRIBUTES OF A SUCCESSFUL TOWN CENTRE



Source: A Framework for Town Centre Renewal (DoJEI Retail Consultation Forum 2017)



COMHAIRLE | CLARE
CONTAE AN CHLÁIR | COUNTY COUNCIL

Clare County Council

Áras Contae an Chláir,
New Road,
Ennis, Co. Clare, V95 DXP2

Tel: +353 (65) 682 1616
planoff@clarecoco.ie
www.clarecoco.ie

The Heritage Council of Ireland

Áras na hOidhreacht
Church Lane
Kilkenny, R95 X264

Tel: +353 (56) 777 0777
aharvey@heritagecouncil.ie
www.heritagecouncil.ie

