



Tullow Street & Dublin Street

Property & Consumer Survey Results

Published July 2015

Foreword



Dan McInerney
Carlow County Council
Chief Executive (Acting)

I am pleased to present this report conducted by the Council's Local Enterprise Office in partnership with Carlow Town Team on the Retail conditions on Dublin Street & Tullow Street. We are aware that County Carlow offers a particularly attractive base for enterprise, with its combination of prime location, excellent services, tourism potential, strong infrastructure but understand the challenges of our Retail Sector. This study was conducted in order to allow us to strategically plan and work with our partners in enterprise development to enhance the user experience for people who live , work and play in Carlow Town.



Derek Shannon
President

On behalf of County Carlow Chamber, I would like to welcome this timely Report on Tullow Street and Dublin Street. The Chamber is delighted to work in partnership with Carlow County Council and welcomes the four recommendations outlined in the Report.

The Chamber recognises the importance of a quality town centre offering and retailing, in addition to creating direct and indirect employment, plays a major role in attracting people into the centre of our towns. The past numbers of years have not been without significant changes and challenges for both retail and town centres and the production of evidence based report on property in these two prime locations along with key recommendations allows us to assess the current reality and act accordingly.



For County Carlow Chamber it is imperative that businesses, both new and existing, are supported and nurtured regardless of their location. The Chamber, as the representative voice for business in the County, is committed to building a strong town centre and recognises that a strong town centre acts as the focus for community life and economic activity of the town and its hinterland.

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This report is published in association with



Executive Summary

Carlow is one of Ireland's most charming inland counties. It is located in the South East of Ireland, which consists of counties Carlow, Kilkenny, South Tipperary, Waterford and Wexford.

Carlow Town is accessible by the new M9 motorway and commuter and intercity railway services. The N80 provides direct links between Carlow and Waterford port and to the Midlands region. Carlow is served by public and private bus services to principal towns.

County Carlow is host to a number of an annual arts and cultural festivals, which attracts large amount visitors to the county on an annual basis. It is also a destination for the many visitors and tourists who enjoy the natural amenities, heritage and cultural life of the County.

The town benefits from the presence of two third level colleges, Institute of Technology, Carlow and Carlow College; which is attended by a significant amount of students each year.

The retail sector in Carlow is an important part of the economic base of the County. It is a key element in attracting people to Carlow Town. However, due to economic circumstances and the increase in online trading, there has been a negative impact on retail businesses in Carlow. The effect of the economic conditions on local retailers is evident in the increase of vacant shops in Carlow town centre.

While it is noted that the Irish economy has recently returned to growth, there is still limited evidence to suggest at this stage that such recent growth has had a material effect on the health of the retail sector.



The scope of this study was to:

1. **Determine how many vacant properties there are in Carlow Town Centre through a Property Survey.**
2. **Determine the availability rate of vacant properties**
3. **Determine what products and services are desired by consumers in Carlow Town Centre**

The purpose of the study is to provide:

1. **A framework reference for vacant property rates in Tullow Street & Dublin Street**
2. **A fact based framework for the draft & design of Incentives , Interventions and campaigns to help improve vacancy rates in Tullow Street & Dublin Street.**
3. **Provide a framework for evaluation of interventions.**

The survey was conducted during May/June 2015 and contained the following two elements:

- **Carlow Town Retail Survey** (May/June 2015) – This was a survey based of 200 random individuals to determine what products and services were desired in Carlow Town Centre in particular in the areas of Dublin Street and Tullow Street.
- **Property Survey** (May 2015) – This was a survey to determine what kind of shops and services are currently available and how many vacant properties there are on Tullow Street and Dublin Street and how many are available on the open market.

Key Findings

Property Survey:

A survey of Tullow Street & Dublin Street property was conducted in May 2015. Overall there are 172 premises on Tullow Street & Dublin Street. Overall 73% of retail premises are occupied and 27% of retail premises are vacant.



There are a total of 116 premises on **Tullow Street**, 85 (73%) of these premises are currently in use as shops or services, 31 of these properties are not in use and left vacant, 14 (45%) out of the 31 properties are listed online on the open market.



There are a total of 56 premises on **Dublin Street**, 42(75%) of these premises are currently in use as shops or services, 14 of these properties are not in use and left vacant, 4 (28%) out of the 14 properties are listed online on the open market.

This survey will be repeated in Qtr 4, 2015

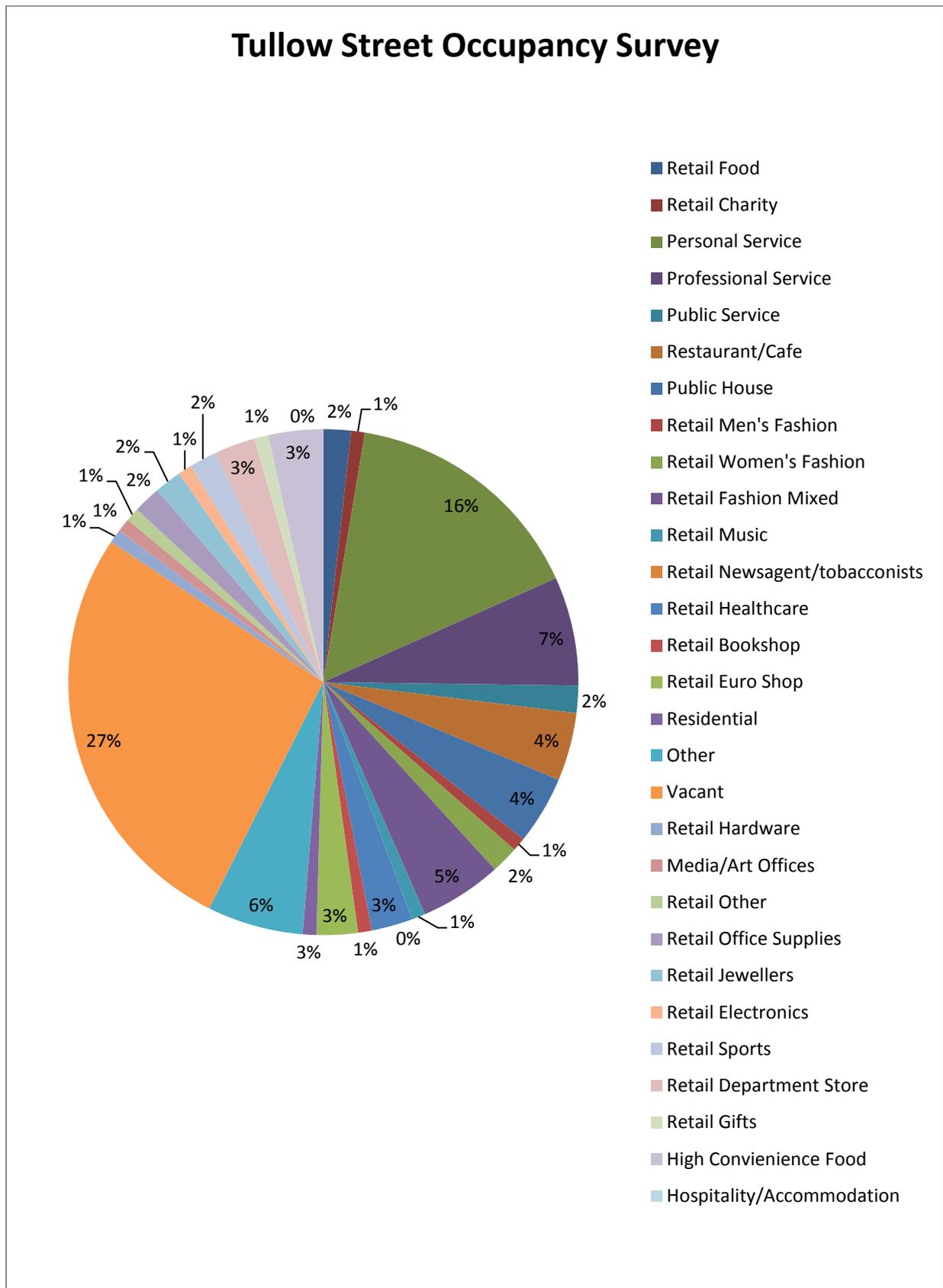
Property Survey Detail

A survey was carried out to determine how many vacant properties there are in Carlow Town Centre through a Property Survey

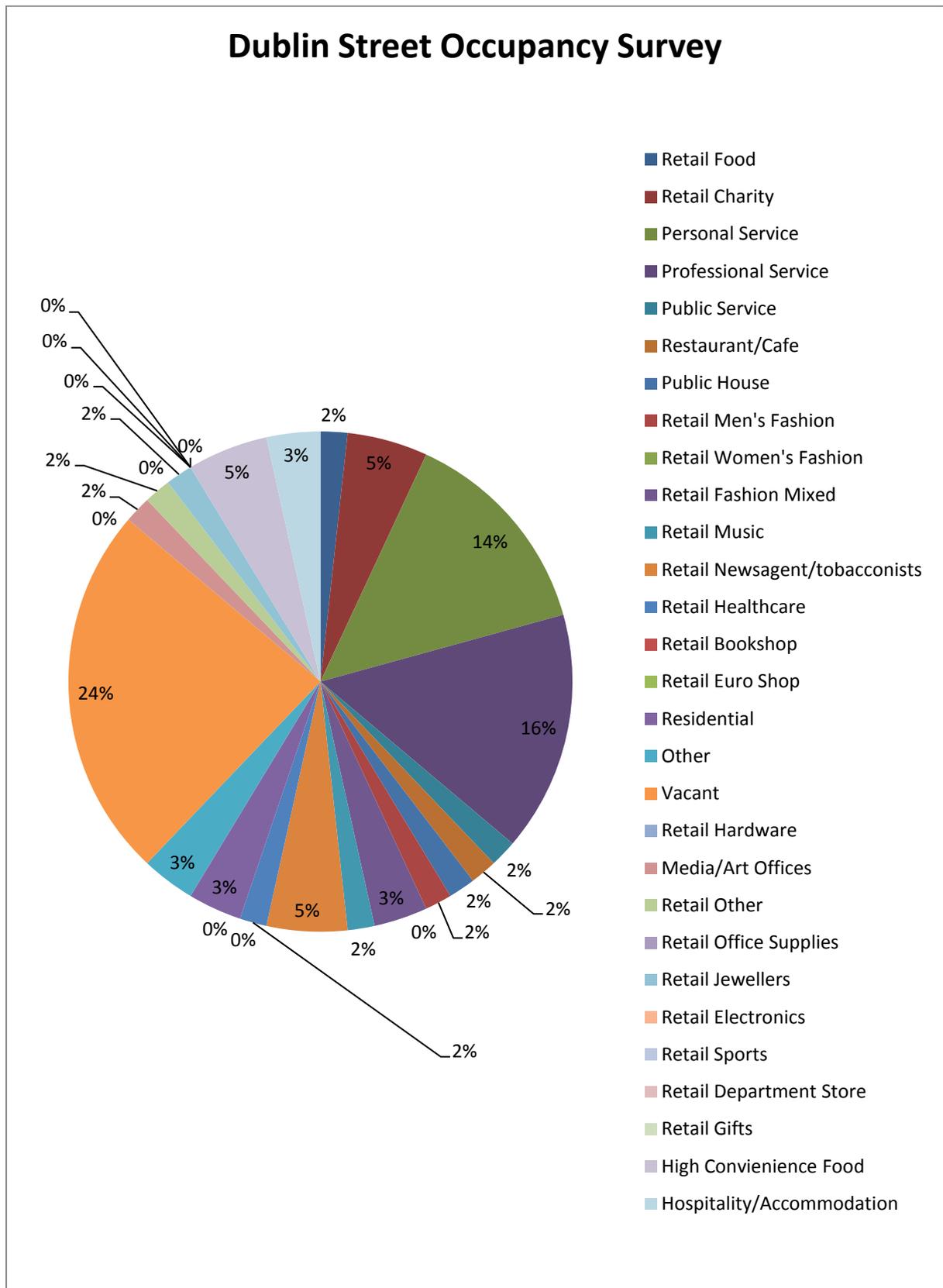
The Key findings were as follows:

- There are a total of 116 premises on **Tullow Street**, 85 of these premises are currently in use as shops or services, 31 of these properties are not in use and left vacant, 14 out of the 31 properties are listed online on the open market.
- There are a total of 56 premises on **Dublin Street**, 42 of these premises are currently in use as shops or services, 14 of these properties are not in use and left vacant, 4 out of the 14 properties are listed online on the open market.

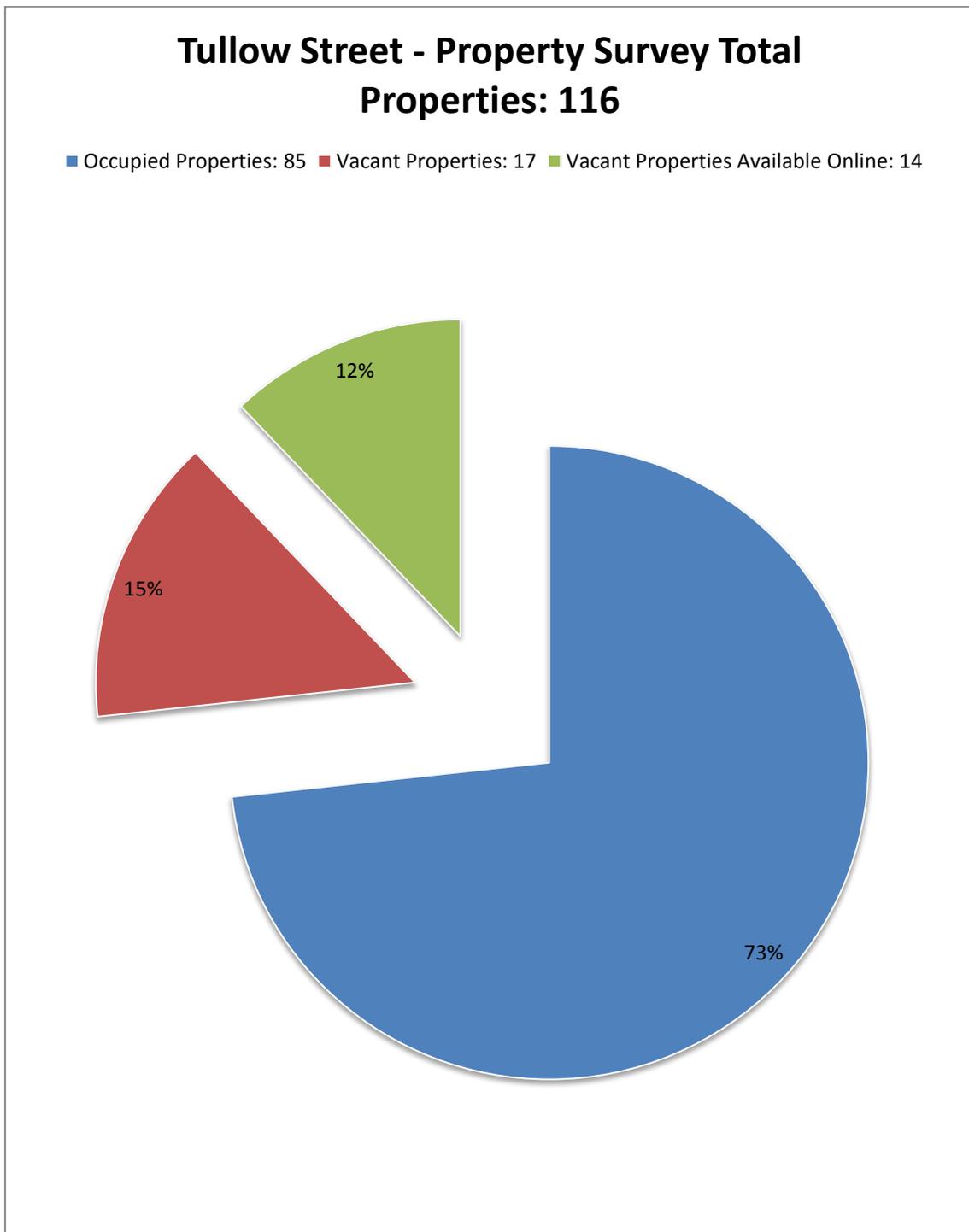
In following retail mix is currently located in Tullow Street:



In following retail mix is currently located in Dublin Street:

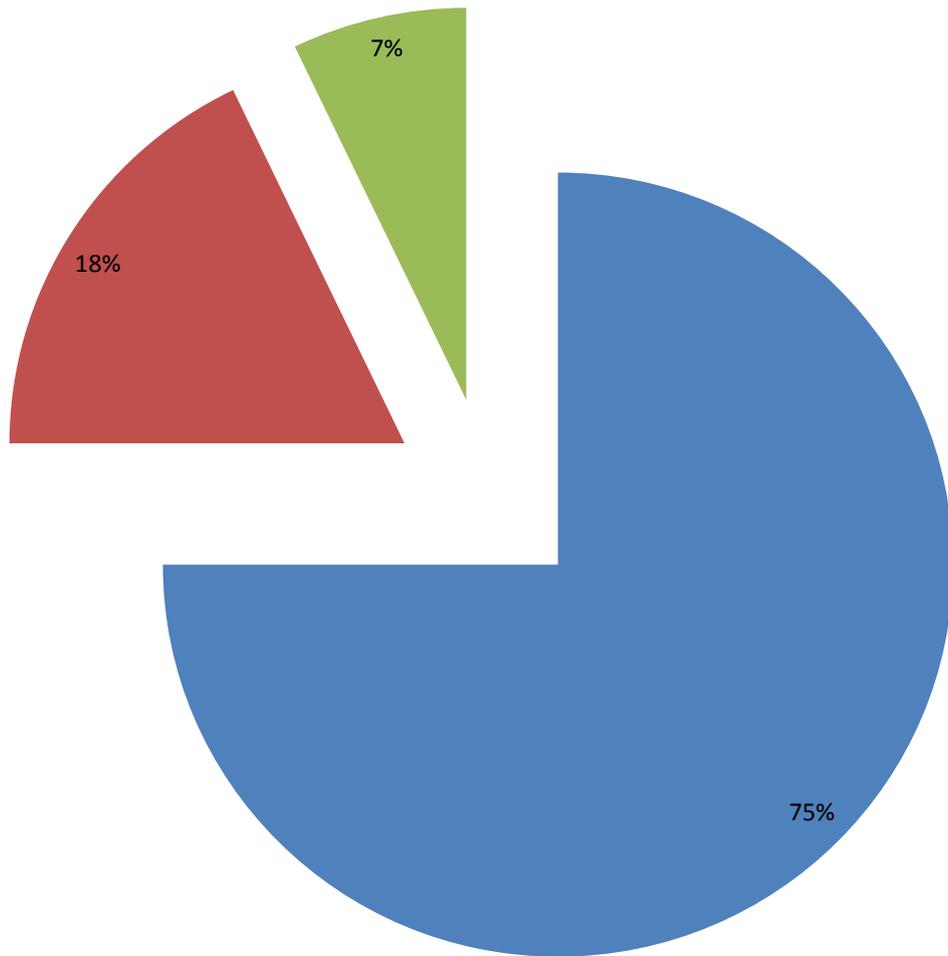


The following are the results of the overall property survey:



Dublin Street - Property Survey Total Properties: 56

■ Occupied Properties: 42 ■ Vacant Properties: 10 ■ Vacant Properties Available Online: 4



Carlow Town Retail Survey

A survey approach of 200 individuals was taken to determine what products and services are desired by consumers in Carlow Town Centre. The survey was carried out over a number of days in Carlow Town and an online survey was also available. The total number of respondents was 210; 104 (49.5%) respondents were online and 106 (50.4%) were in person. The survey contained two open questions which respondents could answer.

The following are the Top 7 types of Retail Experiences desired by consumers were :

- Clothing shops
- Cafes/coffee shops
- Bakeries
- Restaurants
- Bookshops
- Newsagents
- Craft & Art Shops

Overall results showed:

Products and Services Required by Carlow Respondents

■ Products and Services Required by Carlow Respondents

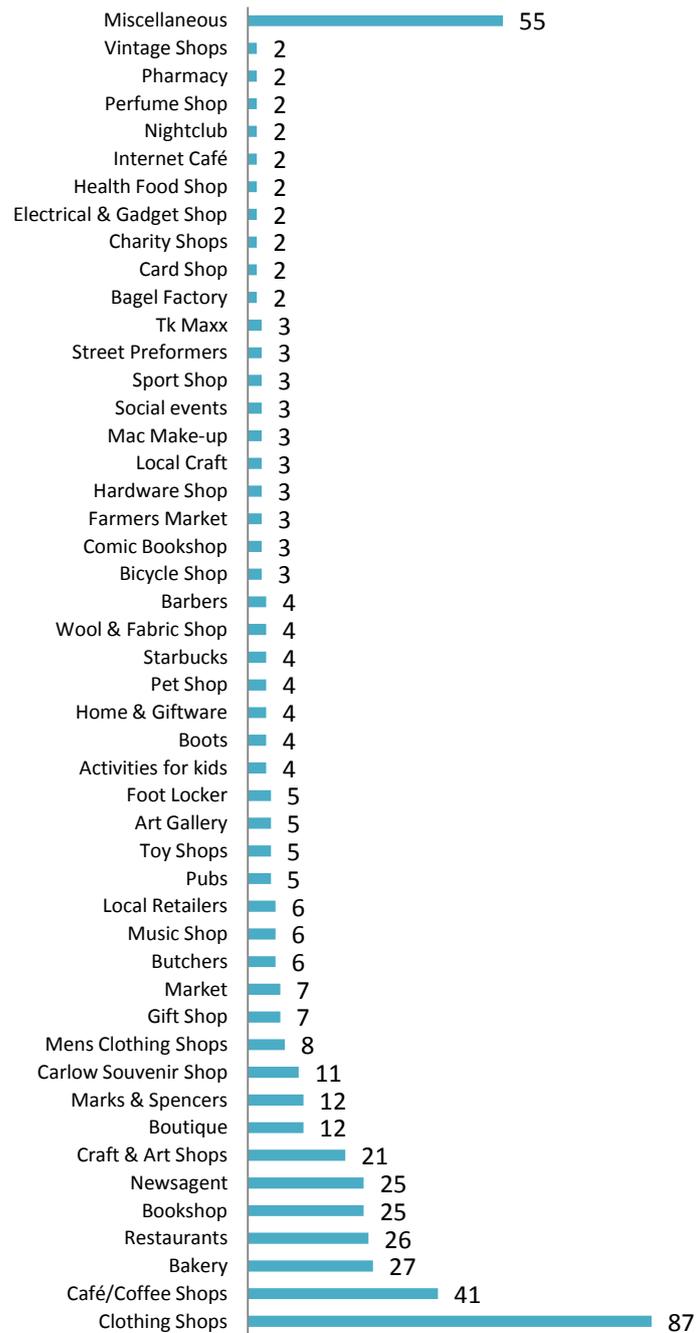
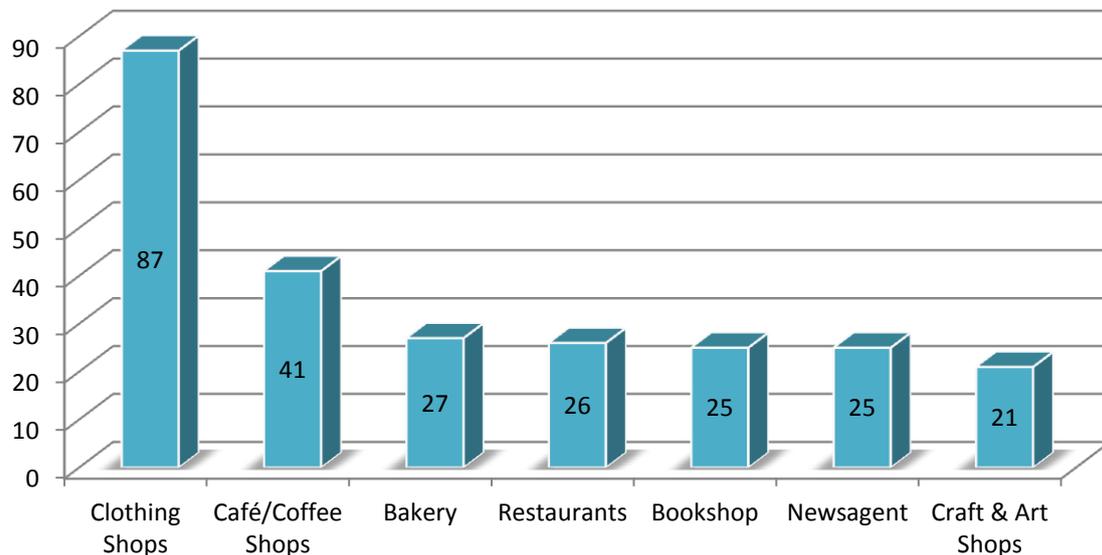


Chart 1 - Breakdown of Highest Survey Responses

Products & Services Required by Carlow Respondents



Background research of Products and Services required by Carlow Respondents:

Clothing Shops

From the results of the retail survey, clothing shops was the most popular service that the people of Carlow would like to see in the town centre. A total of 87 respondents answered clothing shops which makes up 41.4% of the total survey.

Clothing shops sell apparel, footwear and accessories. Different types and name brands of clothing shops were suggested during the survey including Men's, Children and Mixed clothing shops, Forever 21, H&M, Bershka, Debenhams and TK Maxx.

While undertaking the survey on the street, a number of people mentioned their frustration that most of the clothing shops in Carlow are located in the Fairgreen Shopping Centre. They further mentioned that if they needed to purchase clothing they would rather go to the Fairgreen as it has the most number of shops in the one area. They would complete their shopping in the Fairgreen as opposed to in the town centre.

Figures from the Central statistics Office show retail sales of textiles, clothing and footwear went up from 83.9% in value in January 2015 to 87.7% in value in April 2015 (CSO.ie, 2015).

The demographic for clothing shops depends on the type of clothing on sale, shops such as Forever 21 and H&M target females in their teens and early twenties; while shops like Debenhams and TK Maxx target families, middle-aged people and older generations.

The Fairgreen Shopping Centre has many big named brand stores including River Island and New Look. A popular fashion retail chain on Tullow Street or Dublin Street would be a great asset to Carlow Town centre and will bring in more consumers to the town centre.

Cafe/Coffee Shop

Consumers who were surveyed felt that Carlow town centre is lacking Cafés and Coffee Shops. A total of 41 respondents answered café/coffee shop which makes up 19.5% of the total survey. Major companies in Ireland include Insomnia Coffee, Starbucks & Costa.

Coffee shops are part of the specialty eatery industry, which also includes outlets specializing in products such as bread, cakes and ice cream. Consumer taste, convenience, personal income and location drive the demand. Cafés/coffee shops are not just for Coffee connoisseurs, a majority of consumers would also purchase a pastry, cakes and sandwiches.

During the survey, a number of respondents felt that they would like to see a child/family friendly café in the town, with children menus and possibly a play area.

Irishexaminer.com (2011) reports that the coffee industry has been at a steady pace during the recession:

“Almost three years into a recession, the coffee market in Ireland is proving to be surprisingly resilient. That's not to say that there haven't been shifts in both the market and in customer's attitudes and expectations. One of the biggest changes is the increase in popularity of home coffee-making machines: if the low-fat, double-shot, extra-hot latte in fashionable take-away cup with recycled heat-protection sleeve was an ubiquitous image from the boom years, the plastic portable coffee flask containing home-made brew is one for the post-Tiger era.”

Bakery

From the results of the retail survey a Bakery is a service the respondents would like to see on Tullow Street and Dublin Street. A total of 27 respondents answered bakery which makes up 12.9% of the total survey.

A bakery is an establishment that produces and sells flour-based food baked in an oven such as bread, cakes, pastries, and pies. Some retail bakeries are also cafés, serving coffee and tea to customers who wish to consume the baked goods on the premises.

In January 2012, German global discount supermarket chain, Lidl launched bakeries in their stores across Europe. They consist of a small baking area with a number of ovens, together with an area where bread and pastries, such as croissants, are displayed for sale and increasing their footfall and sales.

Older generations who were surveyed mentioned that Tullow Street went into decline after the closing of the popular Carlow bakery, Crotty's Bakery, in November 2001 after nearly fifty years of trading. At the time it employed sixteen full-time staff and had been named as All-Ireland Confectionery Champion on a number of occasions.

Demographic segmentation criteria in bakeries include age, gender, family status and income. Younger customers may order pastries from a bakery, while families would go for breads and rolls. Orders for cakes for birthdays and other special events may come from high-income households. The target market for bakeries and baked goods has risen in the last few years.

Bordbia.ie (2015) reports that:

"The latest figures from Kantar World panel (to 5th January 2014) show that the RoI ambient bakery market is up 2.2% in value and 1.2% in volume to reach €504m as higher prices per pack and higher volume per buyer adds value to the market.

Within the segments, Bread has regained some value and volume share this year at the expense of Cakes and Pastries while Morning Goods has the highest growth, increasing by 6.5% to take a 17.5% value share."

Restaurants

Respondents of the retail survey stated they would like to see more restaurants in Carlow town centre. A total of 26 respondents answered restaurants, which makes up 12.3% of the total survey.

Restaurants are businesses which prepare and serve food and drinks to consumers. Restaurants may be distinguished in many different ways; the primary factors are usually the food itself, the types of restaurants available include ethnic restaurants, diners and health food restaurants.

A restaurant's demographic include the following factors: age, income, and job types. 18 to 25 year olds tend to eat out more often than other age groups because of college or to meet friends, families like somewhere to go for special occasions or for a treat and people who work long hours like the convenience of not having to cook a meal after a long day.

While traditional cuisine remains popular in Ireland today, consumer interest in ethnic foods and healthier options is growing and opening up new opportunities for new restaurant concepts and for existing food service establishments to broaden their menus, with low-fat and gluten free options.

Bord Bia (2014) forecasts that consumer spending in the full service food industry will rise from 1.9% in the years 2011-2014 to 2.2% in 2014-2017.

Bookshop and Newsagent

Results show from the survey the respondents would like to see more bookshops and newsagents in Carlow town centre. A total of 25 respondents for each answered bookshops and newsagents, which makes up 11.9% of the total survey.

A bookshop is an establishment that sells different types of books, from novels to school books. There a number of well known book sellers in Ireland including Easons, WHSmith and Dubray Books to name a few. A newsagent is a business that sells daily newspapers, magazine, confectionary, stationary, cards, lottery tickets and cigarettes.

While there are two bookshops in Carlow town, Easons in the Fairgreen Shopping Centre and Book Station on Tullow Street, respondents feel that Easons is too far from the town centre and Book Station does not have a wide range available. A number of respondents survey also mentioned they would like to see a bookshop in the town centre that would sell school books for primary and secondary schools, as it would be more convenient for them.

The demographic criteria for a bookshop include, age, family, college/school and interest. Families with children of school age purchase books and stationary each year for the new school year. College students would also fall into this category. Elderly consumers have more time on their hands and devote their time to activities such as reading.

The demographic criteria for a Newsagent depend on age and interests. The older generation would purchase more daily newspapers while those in their teens to middle aged years would buy more general interest and fashion magazines.

ShelfLife, Ireland's Retail Authority reports the increase in sales of Irish published magazines (shelflife.ie, 2015):

"When magazines in other markets are showing steady declines in circulation, it demonstrates that the print magazine sector in Ireland is extremely buoyant and the Irish people are continuing to buy Irish magazines." Harmonia titles include Irish Tatler, U Magazine and the Woman's Way range.

Perhaps pride of place must be reserved for the publication Irish Country Magazine which posted a phenomenal increase of over 25% in extra sales in 2014 when compared with 2013. With 18,184 sales per issue (from a circulation of 22,707-itself up 43%), Irish Country Magazine has definitely found a niche in the market, for which Mairead Lavery, MD of the magazine and her team should be justifiably proud."

Figures from the Central statistics Office show retail sales of retail sale of books, newspapers and stationary went up from 61.3% in value in January 2015 to 62.3% in value in April 2015.

Craft and Art Shop

Craft and Art Shops are nonexistent in Carlow Town Centre. While a number of shops sell some craft supplies, the respondents suggested that there should be a Craft shop selling a wide range of supplies in the one place. A total of 21 respondents answered Craft and Art shops, which makes up 10% of the total survey.

A Craft shop is a business that sells material, supplies and tools to make an item using manual skills. Craft shops can sell items such as paint, jewelry supplies, art books and textiles.

A Craft shops demographic include, job profession, skills, age, interests, school and college. Art teachers would often buy supplies for art class. Secondary school and College students would buy art supplies for upcoming projects. There is a large amount of craft people in Carlow town from painters to pottery makers, who go into craft as a hobby or as a profession.

A Craft shop in Carlow town centre would be a great addition and save consumers travelling to other towns or counties to purchase supplies.

The Crafts Council of Ireland plans to sustain and grow the craft and design sector in Ireland in their Strategic Plan 2013 – 2015. The plan sets out priorities for the development of the sector with a special emphasis on growing sales of Irish craft (dcco.ie, 2013):

- Higher awareness levels and positive engagement with Irish craft among consumers paves the way for future growth
- Ireland's dynamic craft sector contributes almost half a billion euro to the economy, with huge potential for expansion

Key recommendations

Based on the survey results the following key recommendations are made following consideration by the executive of Carlow County Council & Carlow Town Team:

- (1) A Incentive scheme should be designed to provide a balanced approach to supporting current and new retail*
- (2) A database of vacant property should be compiled for marketing purposes and featured on key development websites i.e. LEO / Carlow Chamber etc.*
- (3) A marketing campaign should be designed to attract brand retail into Carlow Town Centre*
- (4) An examination of the vacant property rates system should be examined to help release vacant property into the marketplace.*

References

Bord Bia, 2014, *Consumer desire for 'treats' driving bakery innovation*, [online] available at:

<http://www.bordbia.ie/industry/manufacturers/insight/alerts/Pages/Consumerdesirefortreatsdrivingbakeryinnovation.aspx?year=2014&wk=19>

CSO.ie, 2015, *Retail sales index, Value, seasonally adjusted*, [online] available at: http://www.cso.ie/multiquicktables/quickTables.aspx?id=rsm03_1

Irishexaminer.com, 2011, *Brewing up a storm*, [online] available at:

<http://www.irishexaminer.com/lifestyle/features/brewing-up-a-storm-149929.html>

bordbia.ie, 2014, *Irish food service channel insights, page 62* [online] available at:

<http://www.bordbia.ie/industry/events/SpeakerPresentations/2014/FoodServiceSeminar2014Reports/2014%20Bord%20Bia%20Irish%20Foodservice%20Channel%20Insights.pdf>

www.shelflife.ie , 2015, *Great news for Irish Magazine sale*, [online] available at:

<http://www.shelflife.ie/great-news-for-irish-magazine-sales>

CSO.ie, 2015, *Retail sales index, Value, seasonally adjusted*, [online] available at:

http://www.cso.ie/multiquicktables/quickTables.aspx?id=rsm03_1

(www.dccoi.ie , 2013, *Ambitious Plans for Developing Ireland's Craft Sector Unveiled*,) [online] available at:

<http://www.dccoi.ie/media/press-releases/ambitious-plans-for-developing-irelands-craft-sector-unveiled>

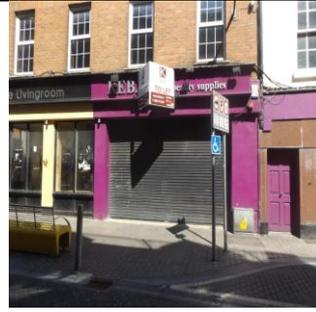
Appendices

Available Property:

Tullow Street

<p>Name of Property: 5 Lismard House, Tullow Street, Carlow</p> <p>Size of Property: 366 sq. feet (34 sq. metres)</p> <p>Available from: DNG McCormack Carlow Office</p> <p>Phone: 059 9133800</p>	
<p>Name of Property: 3 Lismard House, Tullow Street, Carlow</p> <p>Size of Property: 370 sq. feet (34 sq. metres)</p> <p>Available from: DNG McCormack Carlow Office</p> <p>Phone: 059 9133800</p>	
<p>Name of Property: 1 Cathedral Close, Carlow</p> <p>Size of Property: 770 sq. feet (70 sq. metres)</p> <p>Available from: REA Sothern</p> <p>Phone: 059 9131218</p>	
<p>Name of Property: 3 Cathedral Close, Carlow</p> <p>Size of Property: 1,000 sq. feet (93 sq. metres)</p> <p>Available from: REA Sothern</p> <p>Phone: 059 9131218</p>	

Name of Property:
130 Tullow Street, Carlow
Size of Property:
1,733 sq. feet (161 sq. metres)
Available from:
Kehoe Auctioneers
Phone: 059 9131678



Name of Property:
142 Tullow Street, Carlow
Size of Property:
13,982 sq. feet (1,299 sq. metres)
Available from:
Savills Molesworth Street
Phone: (01) 6181300



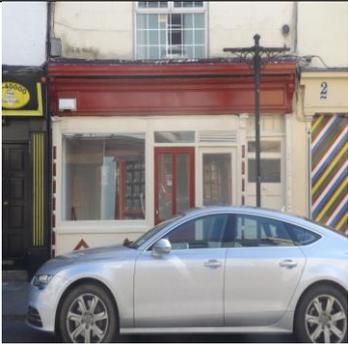
Name of Property:
38 Tullow Street, Carlow
Size of Property:
1,930 sq. feet (179 sq. metres)
Available from:
Purcell Properties
Phone: 086 2559576



Name of Property:
31 Tullow Street, Carlow
Size of Property:
1,899 sq. feet (176 sq. metres)
Available from:
CBRE
Phone: (01) 6185500



Dublin Street

<p>Name of Property: 3 Dublin Street, Carlow Size of Property: n/a Available from: REA Sothern Phone: 059 9131218</p>	
<p>Name of Property: 8a Dublin Street, Carlow Size of Property: 850 sq. feet (79 sq. metres) Available from: Navdeep Singh Phone: 085 7352695</p>	
<p>Name of Property: 49 Dublin Street, Carlow Size of Property: n/a Available from: Thomas M Byrne & Son Phone: 059 9132500</p>	
<p>Name of Property: 54 Dublin Street, Carlow Size of Property: 646 sq. feet (60 sq. metres) Available from: Kehoe Auctioneers Phone: 059 9131678</p>	