



In order to improve the shopping experience in the town, the respondents highlighted the need for improved parking facilities and more shops.

Grocery

The findings indicated that just under a third (32.6%) of respondents spend between €51 to €100 weekly in the supermarket, while 24.53% spend between €1 and €50. In addition, the highest spend on groceries is in the 35-54 age group where spending averages at between €101 and €150.

Entertainment

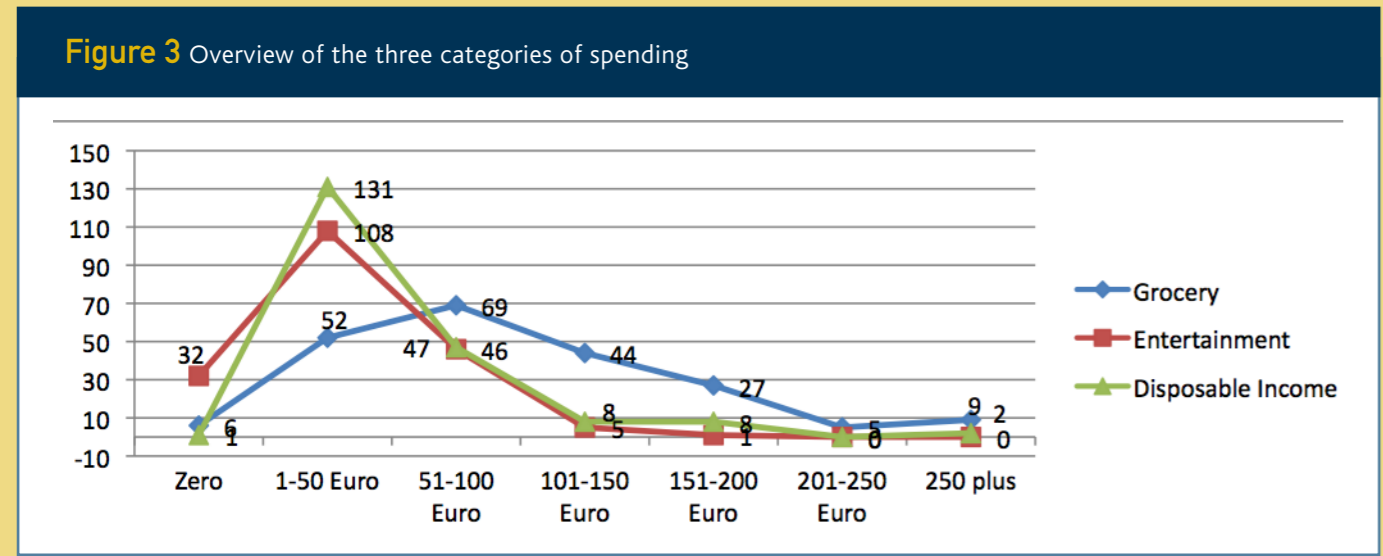
The results show that over a half of respondents (56.5%) spend between €1 and €50 on entertainment in an average week. While, only 16.7% of respondents indicated they spend nothing in an average week on pubs, restaurants, nightclubs and other entertainment. The respondents who spend between €51 and €100 a week on entertainment are most likely to be in the €40,001-€60,000 gross income bracket.

Disposable Income

In terms of levels of spending attributed to any products that fall outside of essential commodities, the results show that two thirds of respondents (66.5%) spent in the region of €1 to €50 freely on other products. This spending pattern seems to stay the same for all the gross income brackets.

Spend Overview

Figure 3 below presents a diagrammatical representation of the level of spending on groceries and entertainment (weekly disposable income is also presented). As evident, the majority of respondents indicated that they spend between €1 and €50 on entertainment (108 respondents) and similarly indicated their level of disposable income to be also in this region (131 respondents). The grocery spend shows a spike in the graph in spend on groceries over the €51-€100 category, indicating that this was the most frequently mentioned amount for this aspect of spending (69 respondents).



CLONMEL: Consumer Perceptions & Spending Patterns 2011

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Executive Summary

In light of the economic downturn and environmental conditions facing Irish retailers, this study aims to provide the Clonmel business community with insights into their local market conditions and perceptions of the current retail offering. This report specifically highlights consumer perceptions and spending patterns (based on 243 respondents' survey responses) with a view to informing future strategy both on a macro (town level) and micro (shop/store) level.

In terms of product purchases, it is interesting to note that all but five of the respondents indicated they purchase groceries (238 respondents / 97.9%), with almost all the respondents purchasing both footwear and personal care (222 respondents / 91.4%) (see Table 1 for further purchasing levels) in Clonmel. A key finding of this research was the result that only 2% of Clonmel residents' grocery spend (revenue generated from groceries based on entire sample population) is being spent in other shopping destinations (also see Figure 1 overleaf).

Figure 1 reflects very well on the grocery offering in Clonmel town. A further indication of the attractiveness of the grocery provision is the number of non-residents who indicated that Clonmel was their choice of destination for grocery shopping (as illustrated in Figure 1 below).

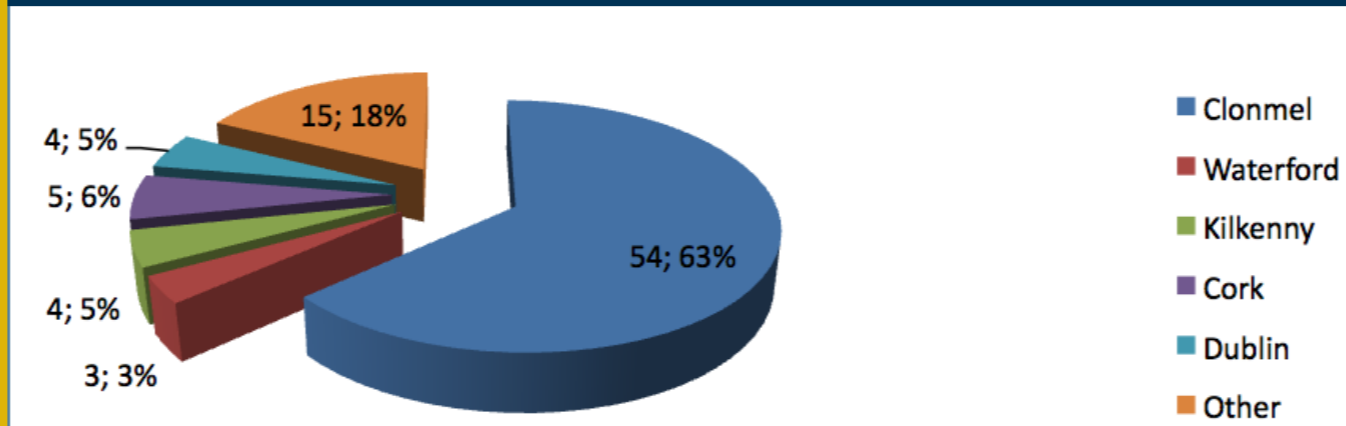


Figure 1: Non-residents choice of grocery shopping destination (n=85)

Figure 2 displays an overview of consumers' perceptions of the traffic and parking systems in Clonmel town (using a scale of 1 to 5, where 1= very poor, 5 = excellent).

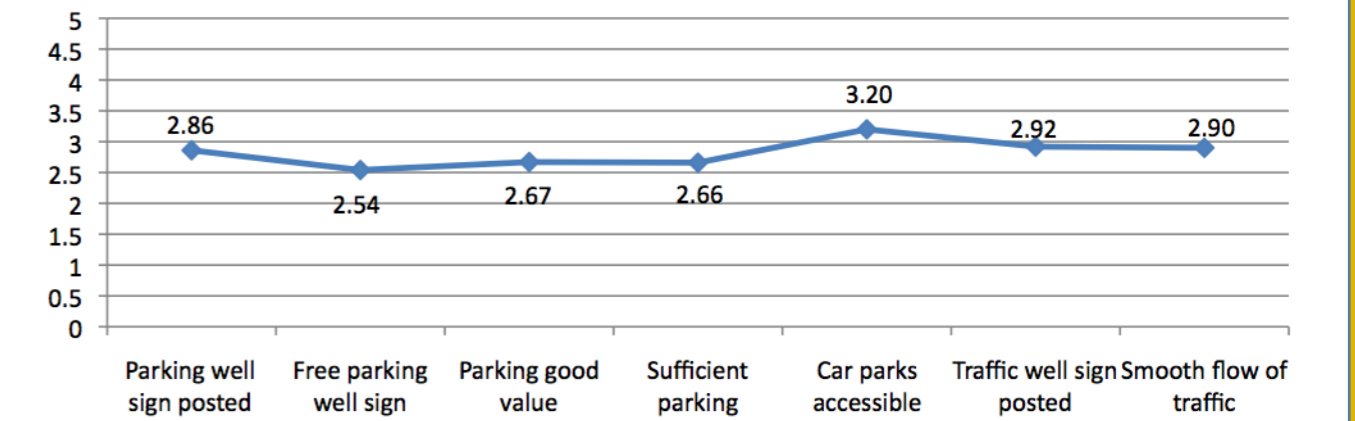


Table 1: Overview of product purchasing in all destinations

| Product Category | Frequency of Purchase in all destinations | % Population |
|------------------------------|---|--------------|
| Grocery | 238 | 97.9% |
| Clothes | 221 | 90.9% |
| Footwear/Shoes | 222 | 91.4% |
| Personal Care | 222 | 91.4% |
| Gifts | 217 | 89.3% |
| Books, Magazines, Newspapers | 220 | 90.5% |
| Electrical & Household | 218 | 89.7% |
| DVD and CD's | 217 | 89.3% |
| Toys/Video Games | 205 | 84.4% |
| Specialist Retailers | 192 | 79.0% |
| Hotels/B&Bs | 181 | 74.5% |

Table 2: Overview of product purchasing in Clonmel only

| Product Category | Frequency of Purchase in Clonmel | % Population |
|------------------------------|----------------------------------|--------------|
| Grocery | 197 | 81.1% |
| Clothes | 144 | 59.3% |
| Footwear/Shoes | 159 | 65.4% |
| Personal Care | 179 | 73.7% |
| Gifts | 147 | 60.5% |
| Books, Magazines, Newspapers | 166 | 68.3% |
| Electrical & Household | 154 | 63.4% |
| DVD and CD's | 152 | 62.6% |
| Toys/Video Games | 140 | 57.6% |
| Specialist Retailers | 111 | 45.7% |
| Hotels/B&Bs | 57 | 23.5% |

Table 3: Overview of shopping destinations visited in the last six months

| Destination | Frequency of mentions | % Population |
|------------------|-----------------------|--------------|
| Clonmel | 231 | 95.1% |
| Waterford | 99 | 40.7% |
| Cork | 85 | 35.0% |
| Kilkenny | 67 | 27.6% |
| Dublin | 59 | 24.3% |
| Internet | 43 | 17.7% |
| Other | 15 | 6.2% |
| Newbridge | 11 | 4.5% |
| Limerick | 10 | 4.1% |
| Northern Ireland | 5 | 2.1% |

In order to identify if the respondents shop around, the question was posed as to which shopping destinations they had visited in the previous six months. Outside of the 95.1% who mentioned shopping in Clonmel, the next biggest shopping destination was Waterford where 40.7% of the population have visited in the last six months (99 respondents), followed by Cork (35% / 85 respondents).

Store Environment

The next aspect addressed in this report surrounds the findings concerning perceptions of the store environment, which revealed that both store cleanliness (mean = 3.92) and the quality of products offered (mean = 3.90) are rated highly. The after sale service (mean = 3.84) and employee friendliness (mean = 3.76) were also 'adequate' to 'good'. Similarly, perceptions of both opening hours (mean = 3.76) and availability of top brands were also generally good, as they scored 3.76 and 3.50 respectively on a scale of 1 to 5, where 1 is very poor and 5 represents excellent.

- **Satisfaction:** 34.1% of respondents indicated that their level of satisfaction with their shopping experience was 'medium' based on a scale of 1 to 5, resulting in an overall mean score of 3.36.
- Perception of Clonmel as a shopping destination: 52% of respondents indicated that their overall perception was 'good' or 'excellent', resulting in an overall mean score of 3.45.

Clonmel is considered a strong shopping town, with the majority of respondents highlighting this strong association when asked what they think of when they think of Clonmel. Indeed, the feedback from the respondents indicates that when they visit Clonmel it is most likely to be to visit the supermarkets, restaurants and clothing stores. Notably, 76% of Clonmel residents prefer to shop in the town centre, due to its convenience and good selection of shops. When asked to consider what to put in an empty lot in the town centre, most often the respondents identified the need for improved dining options. The feedback also indicates a preference for Irish cuisine and family-friendly dining facilities.

An overview of perceptions of quality, value and satisfaction

When the respondents were asked to assess their overall consumer shopping experience in terms of quality, value and satisfaction – the quality aspect was rated most highly, with the other two dimensions indicating that there is room for improvement. The results show that Clonmel town scored as follows across the three dimensions:

- **Quality:** 44.9% of respondents indicated that the quality of their shopping experience was 'Good' based on a scale of 1 to 5, with a mean score of 3.68 indicating an overall above average response.
- **Value:** 39.6% of respondents indicated that the value of their shopping experience was 'High' based on a scale of 1 to 5, with a mean score of 3.57 respondents perceived value as medium to high.

The respondents indicated that they were most likely to visit Cork for stock they cannot access in Clonmel. Furthermore, the results reveal that the interviewees were most likely to go to other shopping destinations for clothes. Specifically Next and Debenhams were mentioned as brands that are sought after. Marks & Spencer's was identified as a shop Clonmel had which other destinations do not have.

Clonmel town far exceeded all other locations (see footnote 1) in terms of a shopping destination for groceries – 81.1% of respondents (197 out of the total 243 surveyed).

This research also found that, when respondents were questioned on where they purchase certain products, the highest percentages of products purchased in Clonmel town were:

- Grocery (81.1%),
 - Personal Products (73.7%),
 - Press & Stationery (68.3%)
 - Footwear (65.4%)
- (as illustrated in Table 2).

1. The other destinations measured in this study include: Waterford, Cork, Kilkenny, Dublin, Internet and "Any Other" mentioned destination were also recorded.

Town Centre Environment

Overall impressions of retail in Clonmel were assessed on a scale of 1 to 5, where 1 represented 'very poor' and 5 represented 'excellent'. The value for money (mean = 3.52) and standard of the shop fronts (mean = 3.62) received the highest scores in this category.

The results indicate that the cleanliness of the town (mean = 3.45) and access for disabled visitors (mean = 3.30) were adequate. However, responses considering the traffic system and parking showed that these represent areas for improvement in the town, with the majority of respondents scoring these aspects as poor.