



Collaborative Town Centre Health Check Training Programme



Sligo Town Centre Consumer Surveys

November 2019

An Chomhairle Oldhreachta
The Heritage Council



SLIGO
BID



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INTRODUCTION

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GAME CHANGERS

BACKGROUND

- With changing demographics and patterns of living, travelling and consuming, Ireland's historic town centres are being impacted and their overall viability and vitality threatened.
- The Heritage Council and its project Partners are seeking to improve the monitoring and performance of the historic core of town centres.
- Timely and reliable data on the issues that exist are required in order to develop investment programmes to support heritage-led regeneration.
- The Collaborative Town Centre Health Check (CTCHC) 15-Step methodology was developed by the Heritage Council in 2016, to provide baseline data and inform the operational programmes.
- The **consumer survey represents Step 5 in the 15-Step methodology.**
- The core purpose of the consumer survey was to **gather robust data that will help to future proof the historic town centre of Sligo.**

Notes for Interpreting the Data:

- *Due to rounding, the results for some questions will sum to 99% or 101%.*
- *Where multiple responses were permitted at a question, responses may sum to more than 100%.*
- *Where * appears on a chart it means that the result was less than 1%.*

METHODOLOGY

400 on-street interviews

5 Locations in Sligo Town Centre

Fieldwork from 25th August to 11th September 2019

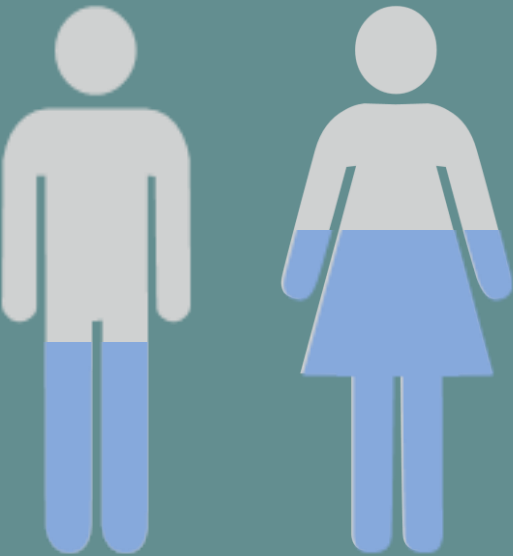
SAMPLE PROFILE

– DEMOGRAPHICS

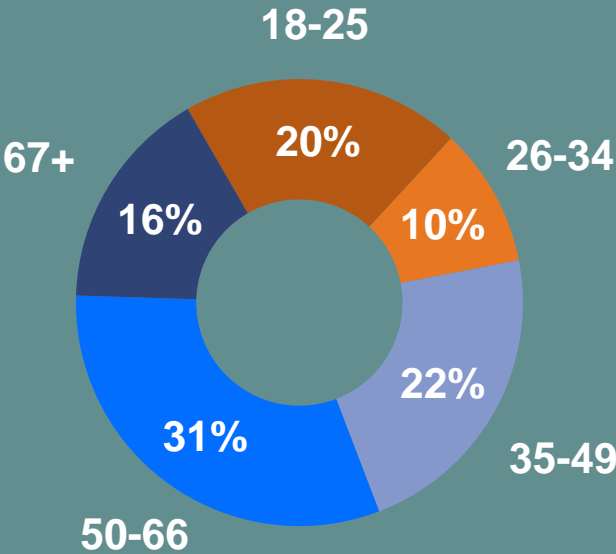
Gender

41%

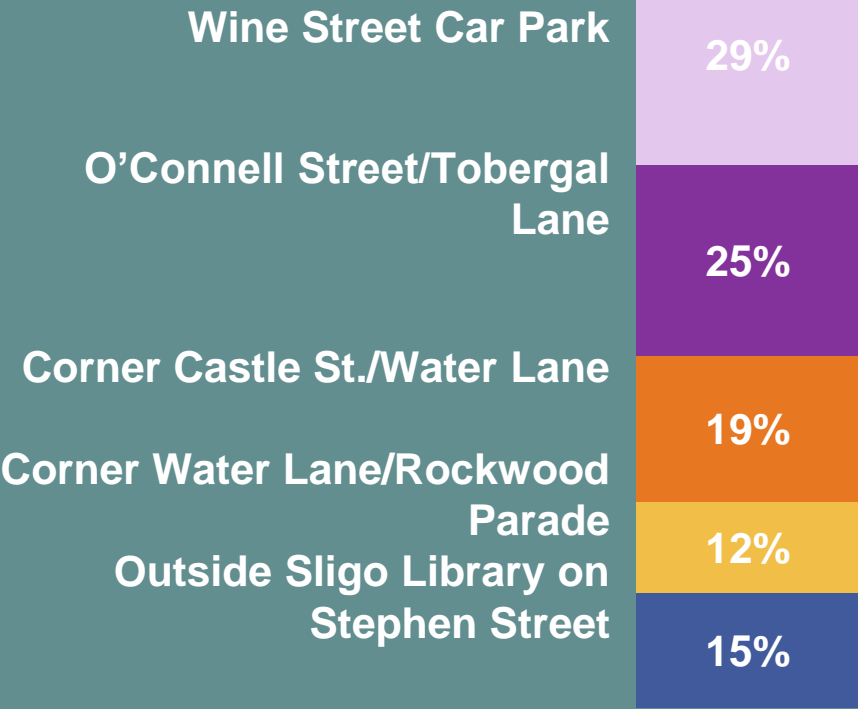
59%



Age



Interview Location



Base: All Respondents: 407

FINDINGS

2



A. KEY FINDINGS

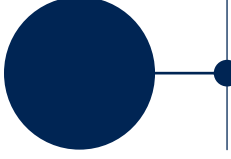
Opportunities

- 
- Consumers mentioned **affordability and good deals** can be found in Sligo Town Centre, this could be used as a positive attraction.
 - People are visiting Sligo Town Centre for **events**; the top mention was the Sligo St. Patrick's Day Parade. Is there an opportunity for further events to be launched?
 - 68% would avail of some form of **extended shopping hours** and 43% would be encouraged to spend money on **Sligo based Click and Collect Services**, presenting opportunities for retailers.
 - Whilst there are negative perceptions around availability of **parking** there are many areas within the Sligo Town Centre to park. Communication and signposting of these areas could help alleviate this.
 - The research highlights an opportunities to **increase utilisation of Historic Attractions**, with only 1 in 5 visiting in the past year.
 - 57% stated the continuous improvements on O'Connell Street would encourage them to spend more time in Sligo Town Centre.

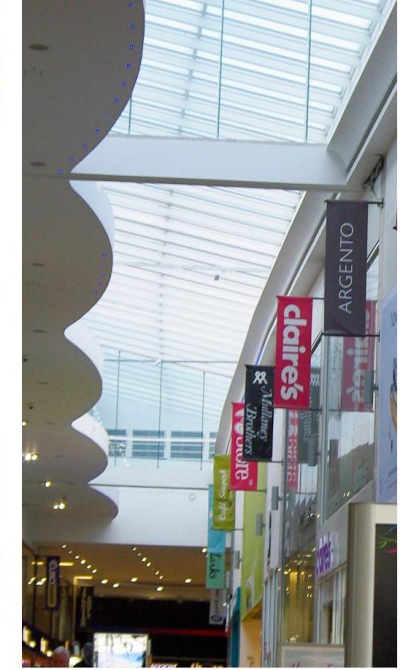
Macro Challenges

- 
- **Threat of Online Shopping:** 34% of Sligo Consumers shopped online in the past month.
 - **Uncertainty About Brexit:** 53% feel it will have a negative impact on Sligo Town Centre.

Micro Challenges

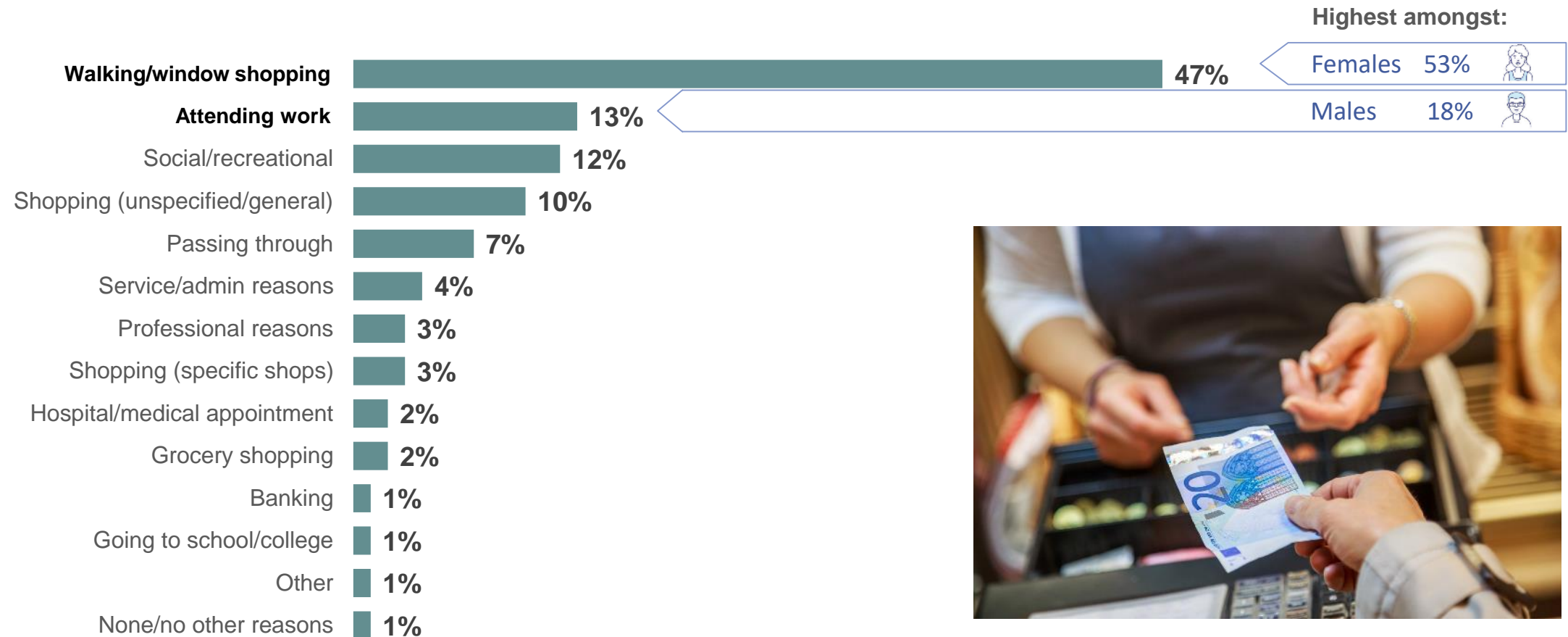
- 
- **Parking:** Availability and cost of parking perceived to be an issue within Sligo Town Centre.
 - **Under-Utilisation of Historic Attractions:** 80% have not visited any in the past 12 months.

B. SHOPPING IN SLIGO TOWN CENTRE



REASONS FOR BEING IN SLIGO TOWN CENTRE

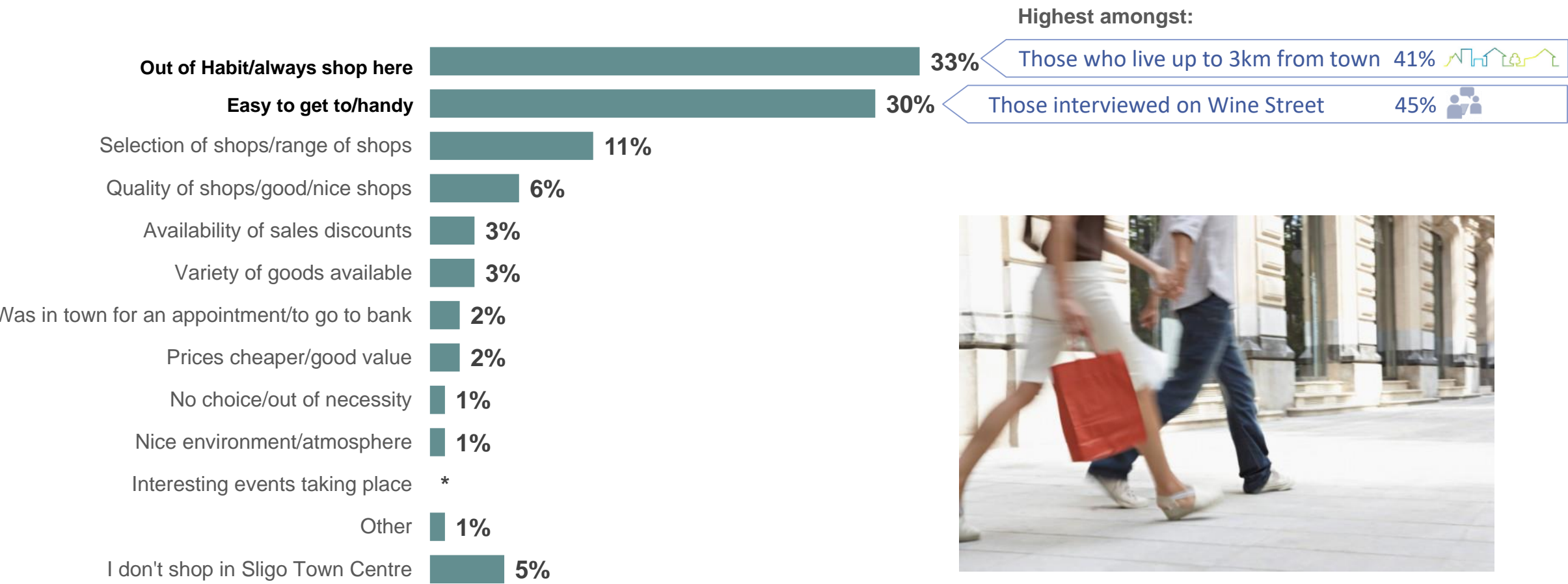
Walking/Window Shopping was the main reason for being in Sligo Town Centre for almost half (47%) of respondents



Q.1 For what reasons, if any, have you been in the town centre today?
Base: All Respondents: 407

MAIN REASON WHY PEOPLE SHOP IN SLIGO TOWN CENTRE

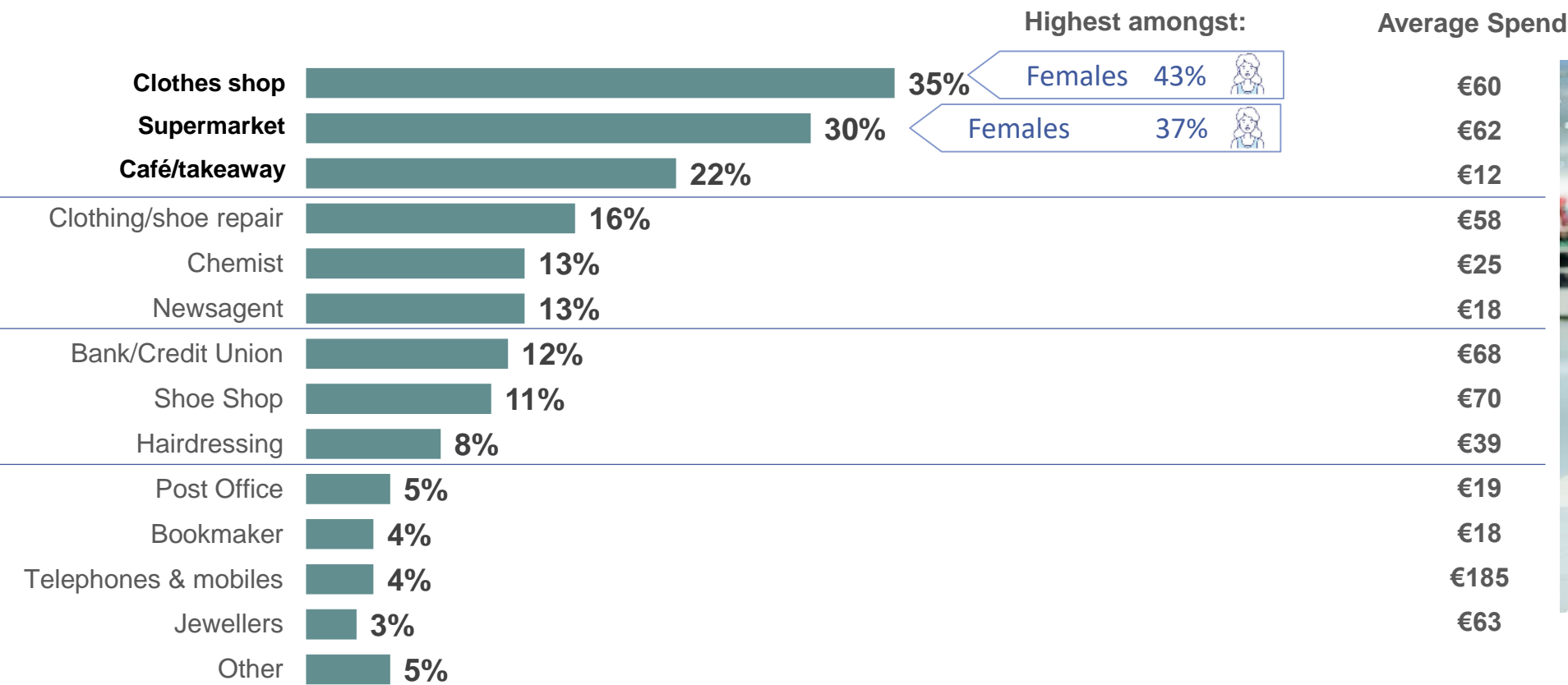
Habit and Ease of Access were the top 2 reasons for shopping in Sligo Town Centre



Q.2 What is the main reason why you shop in Sligo Town Centre , if any?
Base: All Respondents: 407

SHOPS/BUSINESSES VISITED

A variety of shops/businesses were visited by respondents, with clothes shops ranking number 1. The average spend in a clothes shop was €60



Shops/Business accounting for 2% or less not shown

Q.3 Which types of businesses/shops did you visit today, if any? Any others?
Base: All Respondents who visited shops/businesses: 368

C. SHOPPING LOCATIONS & ONLINE SHOPPING

FREQUENCY OF SHOPPING IN OTHER TOWNS/ONLINE

Shopping in other towns is a relatively infrequent occurrence however, 34% of respondents claim to shop online at least monthly

	Enniskillen	Ballina	Athlone	Dublin	Galway	Online
	%	%	%	%	%	%
Every Day	0	*	0	*	0	*
2/3 times a week	0	1	0	*	0	*
Once a week	*	3	*	1	1	5
2/3 times a month	*	1	0	1	1	6
Once a month	4	3	2	6	8	22
Less Often	35	13	16	46	45	14
Never	59	79	82	44	46	52
Don't Know	*	*	*	*	*	0
Net Monthly	5	8	2	9	9	34

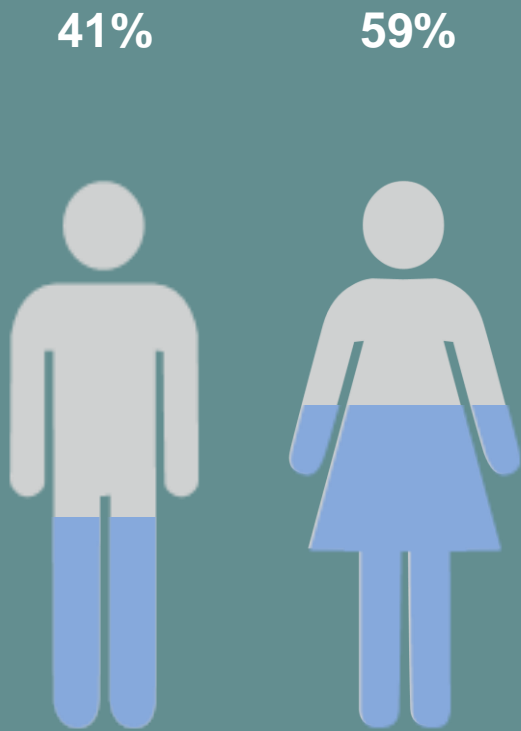
Q.5 How often do you go shopping in the following towns/cities/online?
Base: All Respondents: 407

*Less than 1%

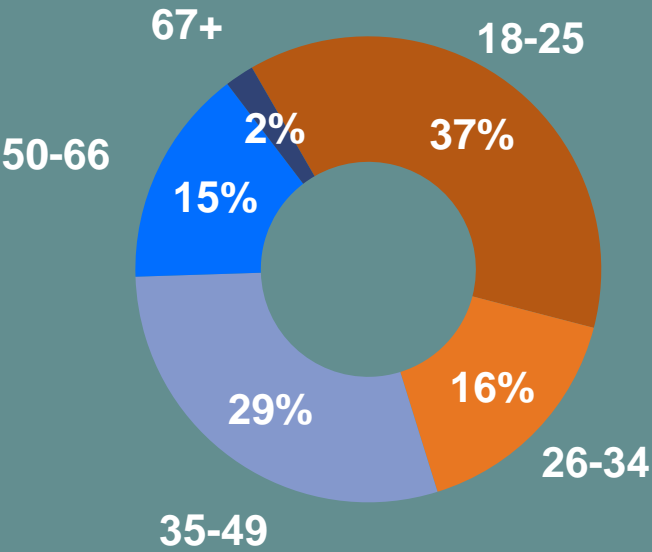
PROFILE OF ONLINE CONSUMERS

Unsurprisingly, the profile of online Consumers from Sligo is skewed towards younger age cohorts; almost 4 in 10 (37%) are aged between 18 and 25.

Gender



Age



Base: All respondents who shop online: 194

Clothing/clothing accessories are the top online purchase by a large margin, with highest purchase levels recorded among females and those aged 18-25

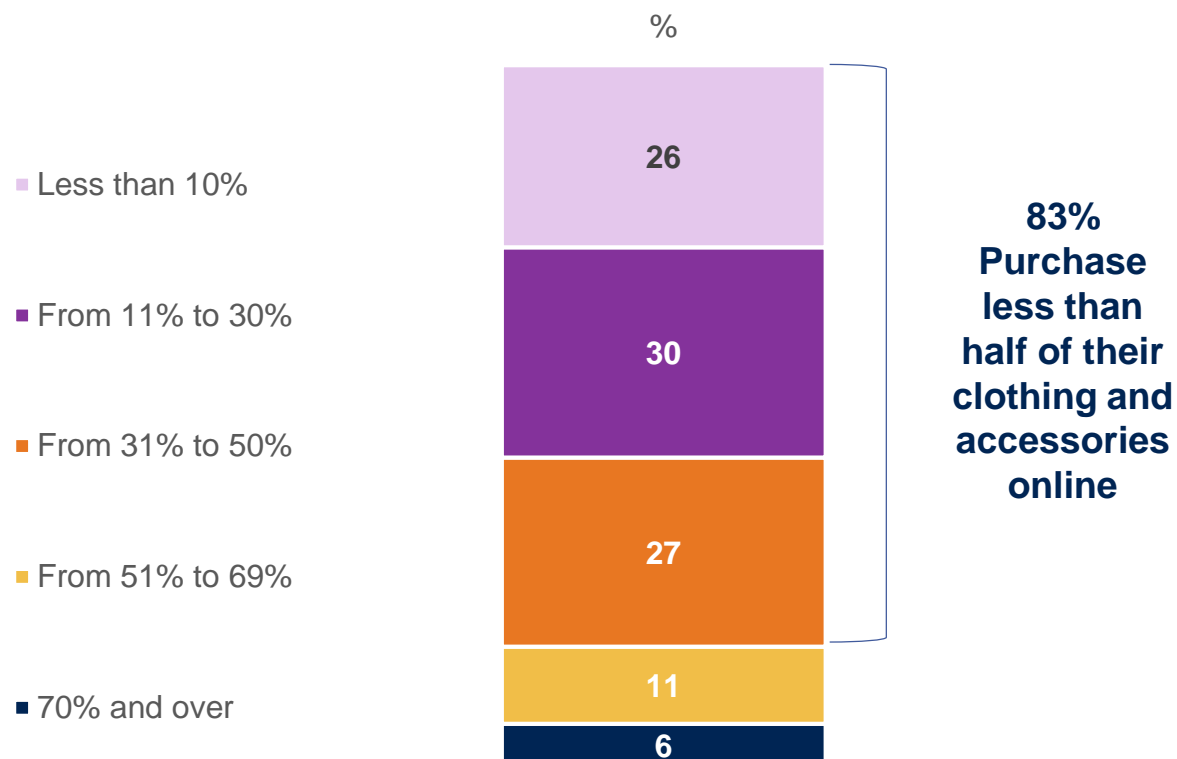
Females	70%
18-25 yrs	69%



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GAME CHANGERS

PERCENTAGE OF CLOTHING/CLOTHING ACCESSORIES BOUGHT ONLINE

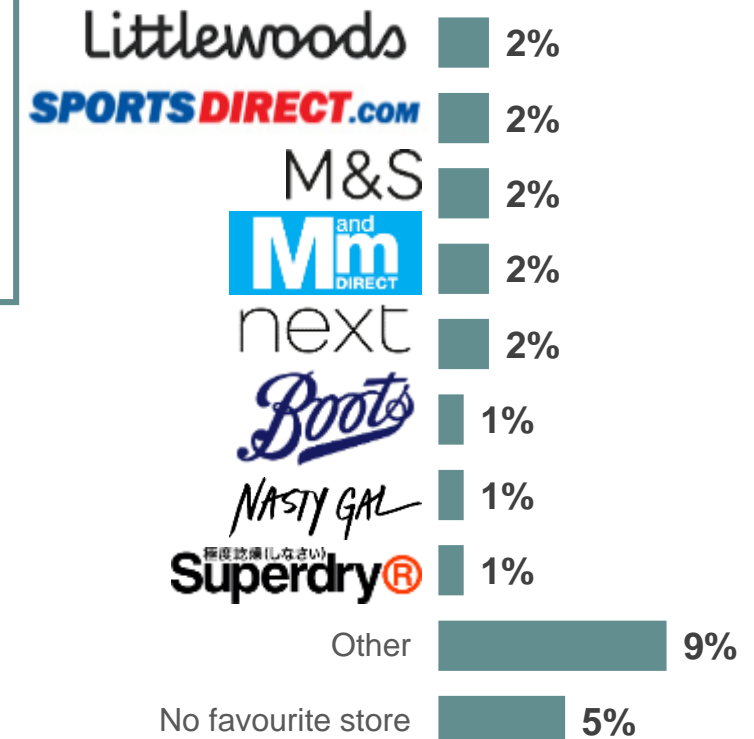
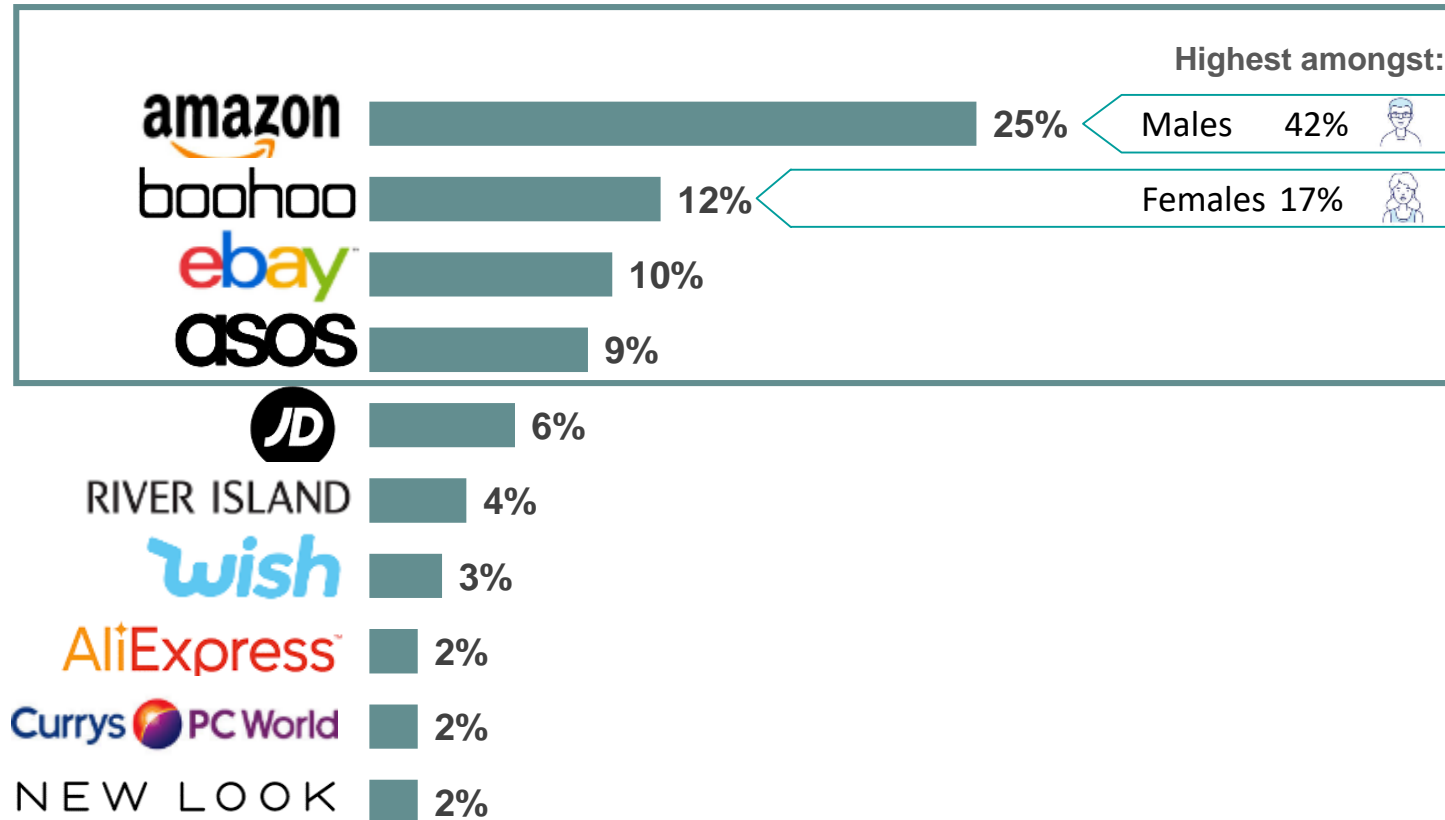
The vast majority (83%) of those who purchase clothing and accessories online, claim to purchase less than half of their clothing in this way



Q.7 What percentage of your clothing and accessories do you buy online?
Base: All who purchase clothing/clothing accessories online: 115

FAVOURITE ONLINE STORE

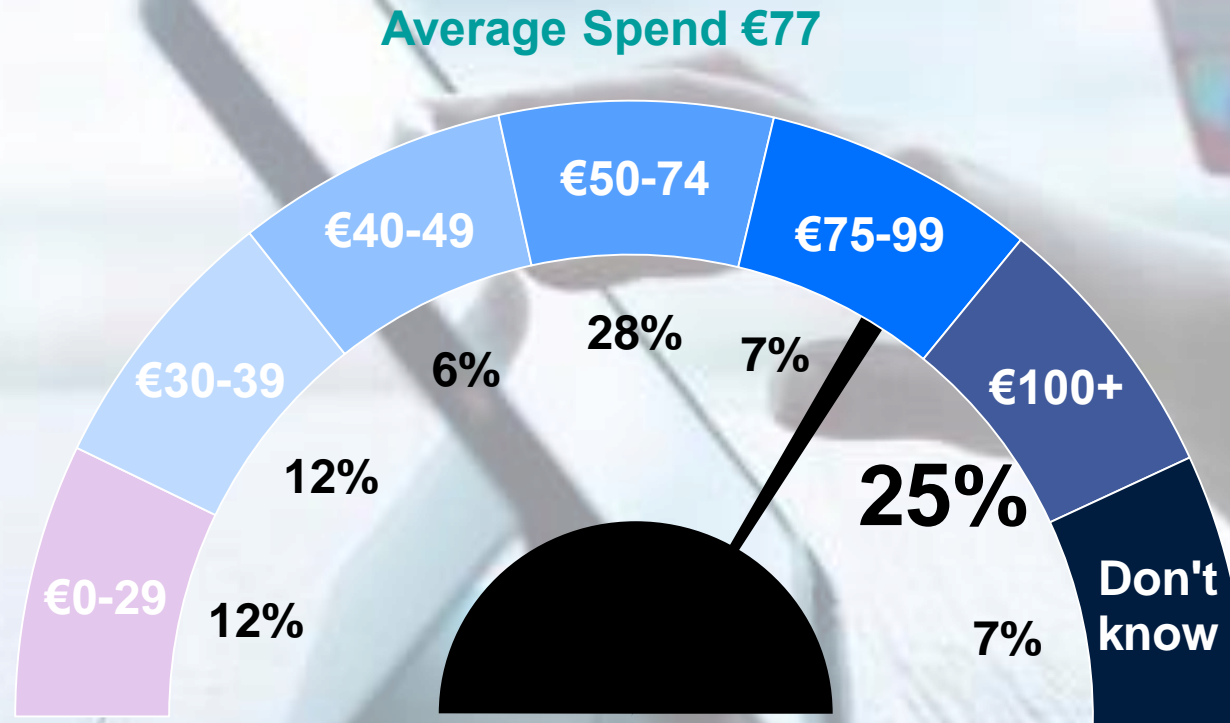
Amazon and Boohoo are the top two online stores, Amazon is more popular among males, while Boohoo is more popular among females



Q.8 What is your favourite online store, if any?
Base: All online Consumers: 194

AMOUNT SPENT ON LAST PURCHASE ONLINE

Average online spend was recorded as €77, 25% of respondents spent over €100 on their last online purchase

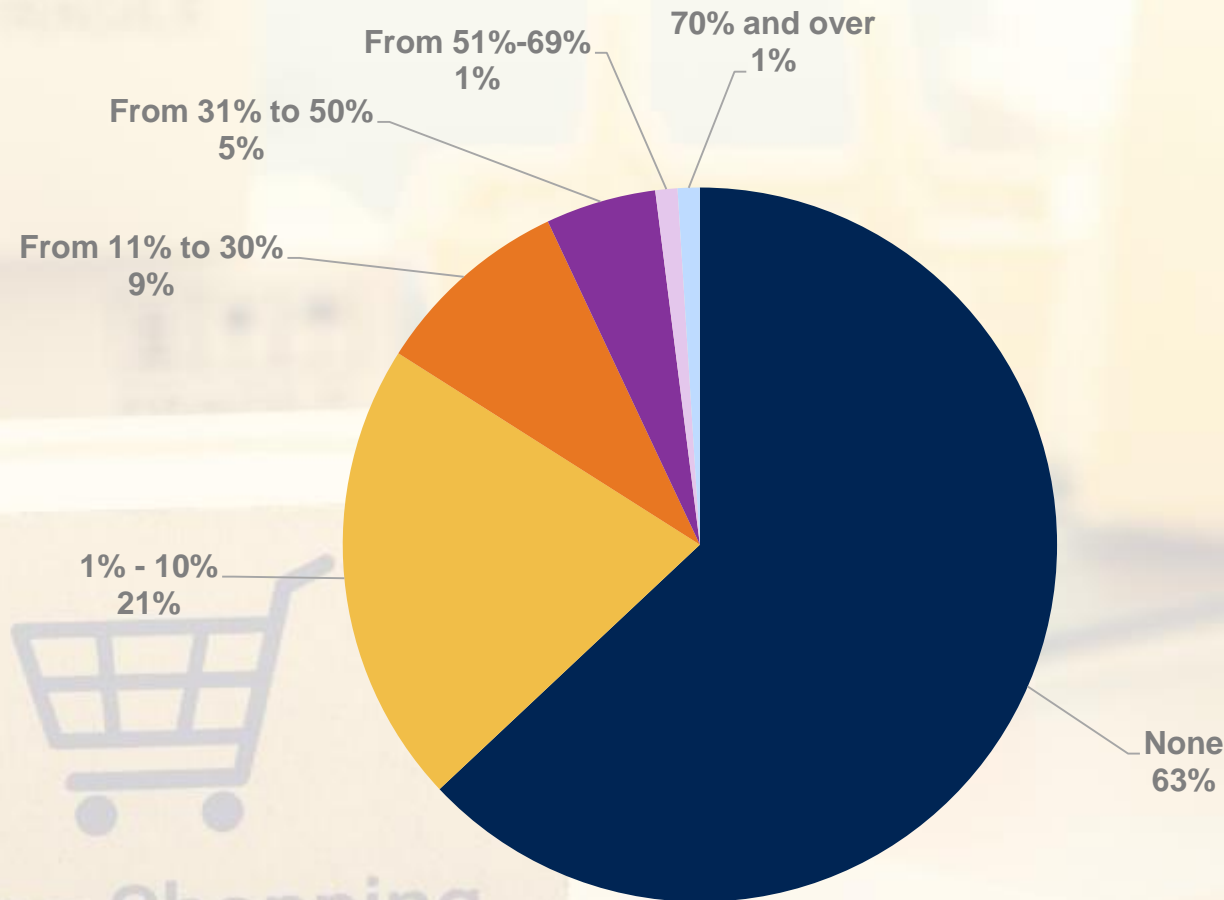


Q.9 How much did you spend on your last purchase online? Please estimate to the nearest euro.

Base: All online Consumers: 194

PERCENTAGE OF ONLINE SHOPPING DONE IN SLIGO-BASED ONLINE STORES

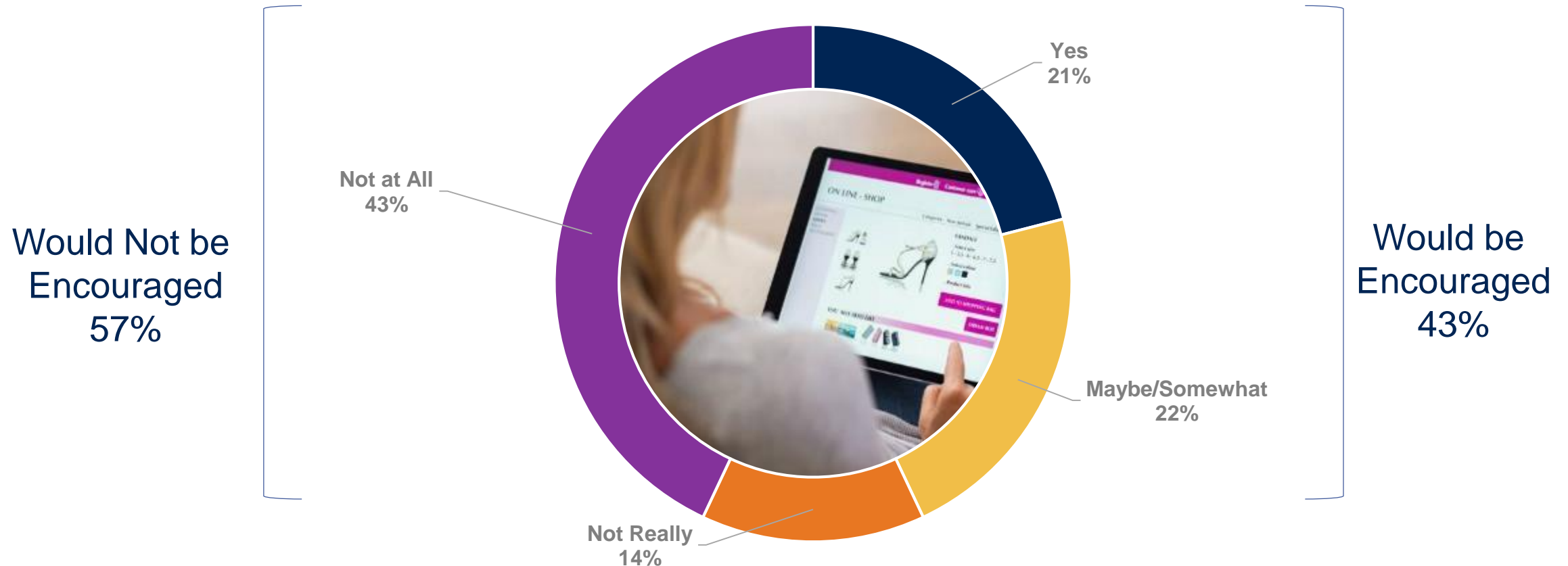
The majority of those who shop online (63%) do not purchase from Sligo-based online stores



Q.11 Of your Online Shopping, could you estimate roughly what percentage is done in Sligo-based online stores?
Base: All online Consumers: 194

SLIGO 'CLICK & COLLECT'

Just over 4 in 10 respondents claim that a Sligo 'Click and Collect' online facility would encourage them to spend more money in Sligo-based online stores



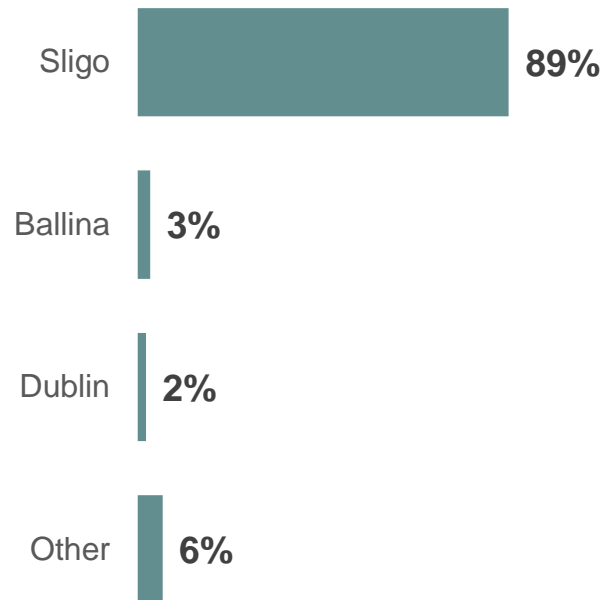
Q.12 Would a well-developed Sligo Retailers 'Click & Collect' online facility encourage you to spend more of your money in Sligo-based online stores, or not?
Base: All Respondents: 407

D. TOP TOWNS & STORES, LIKES & DISLIKES ABOUT SLIGO

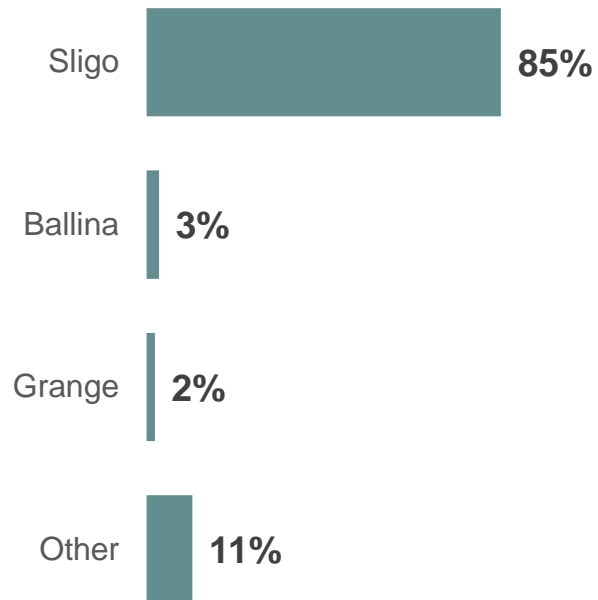
TOP TOWNS FOR SHOPPING

Sligo is the most popular town for Clothing and Accessories at 89% and for foodstuff and Groceries at 85%. When it comes to Furniture and Other Durables a wider ranges of towns are mentioned

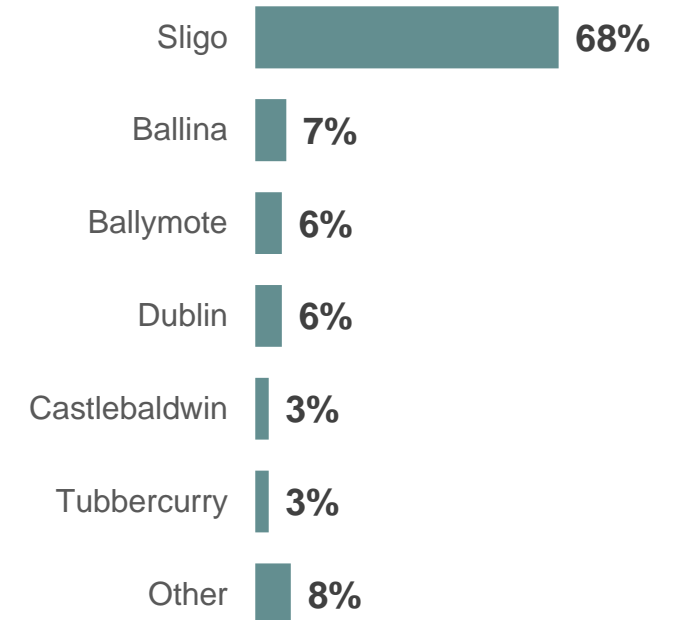
**For Clothing & Accessories
(382)**



**For Foodstuff & Groceries
(391)**



**For Furniture/Other Durables
(202)**

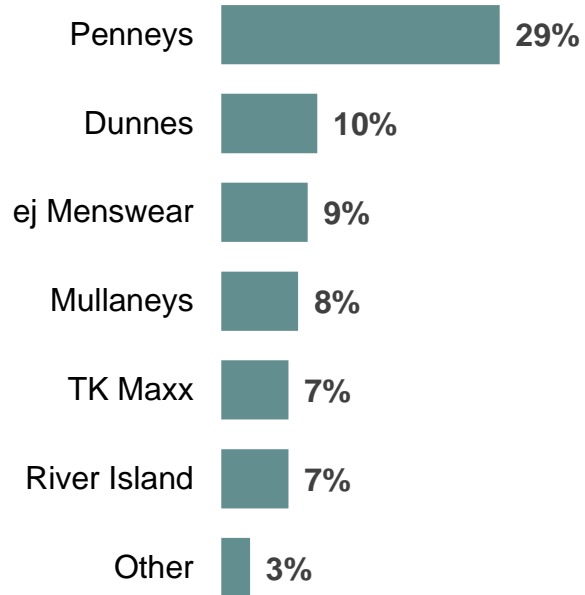


Q.13 Please name the Town and Store in which you do most of your shopping for the following goods?
Base: All respondents who mentioned a 'Top Town'

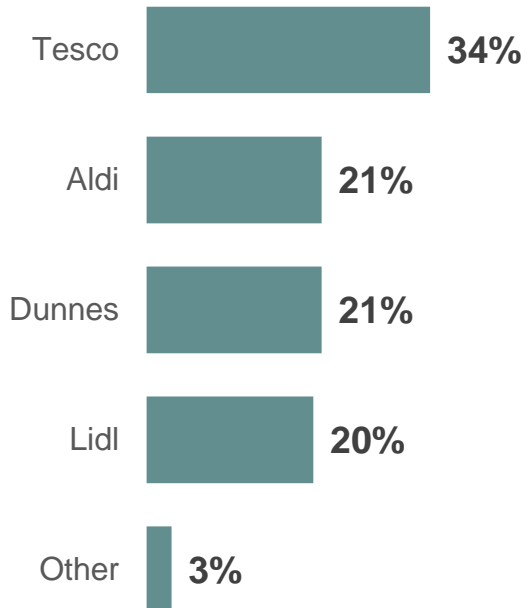
TOP STORES FOR SHOPPING IN SLIGO

Penneys (29%) is the top store in Sligo for Clothing and Accessories, Tesco (34%) is top for Foodstuff and Groceries and Roemer (24%) and EZ Living (23%) are top for Furniture/Other Durables.

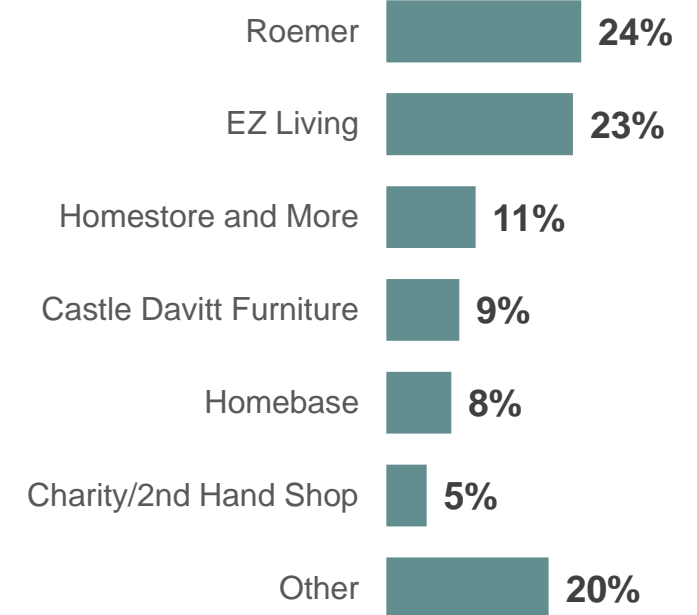
**For Clothing & Accessories
(341)**



**For Food Stuff & Groceries
(331)**



**For Furniture/Other Durables
(202)**

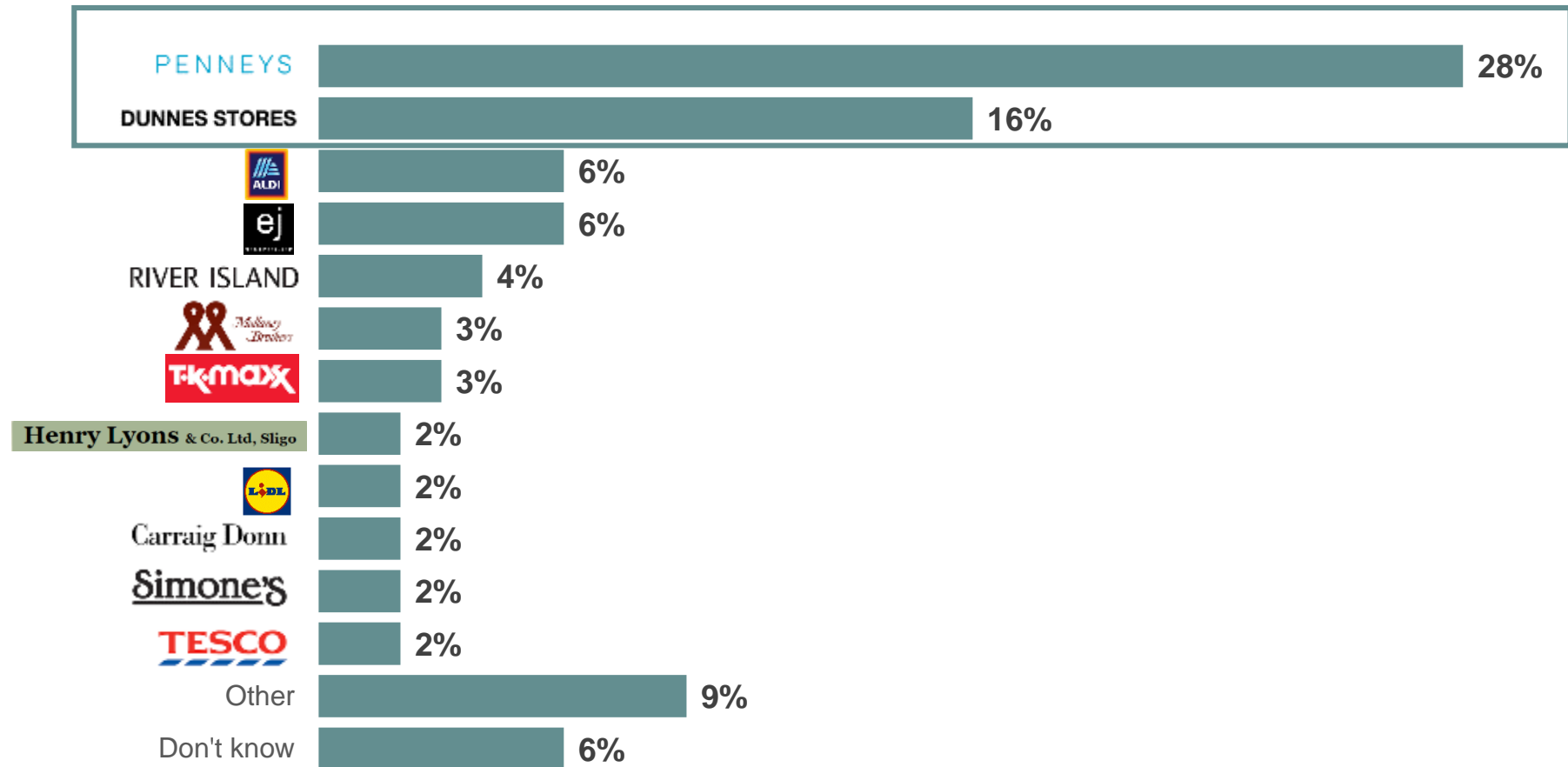


Q.13 Please name the Town and Store in which you do most of your shopping for the following goods?

Base: All respondents who mentioned a 'Top Town'

FAVOURITE SHOP IN SLIGO TOWN CENTRE

Penneys and Dunnes Stores rank as the top two favourite Sligo stores, with a variety of other stores recording lower figures

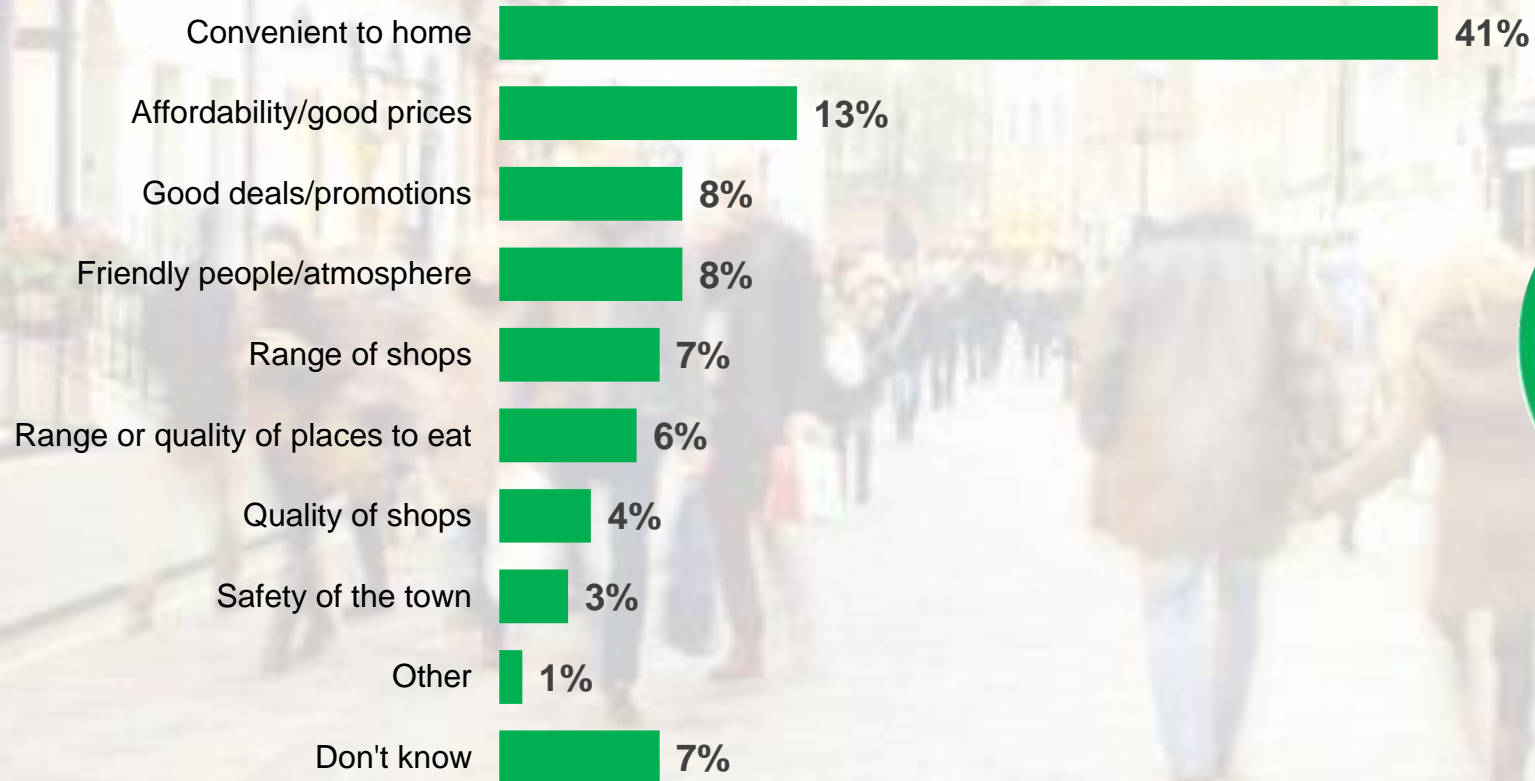


*Others 1% or less not shown

Q.14 What is your favourite shop in Sligo Town Centre , if any?
Base: All Respondents: 407

LIKES ABOUT SHOPPING IN SLIGO TOWN CENTRE

Convenience to home is the top reason why people like shopping in Sligo Town Centre at 41%

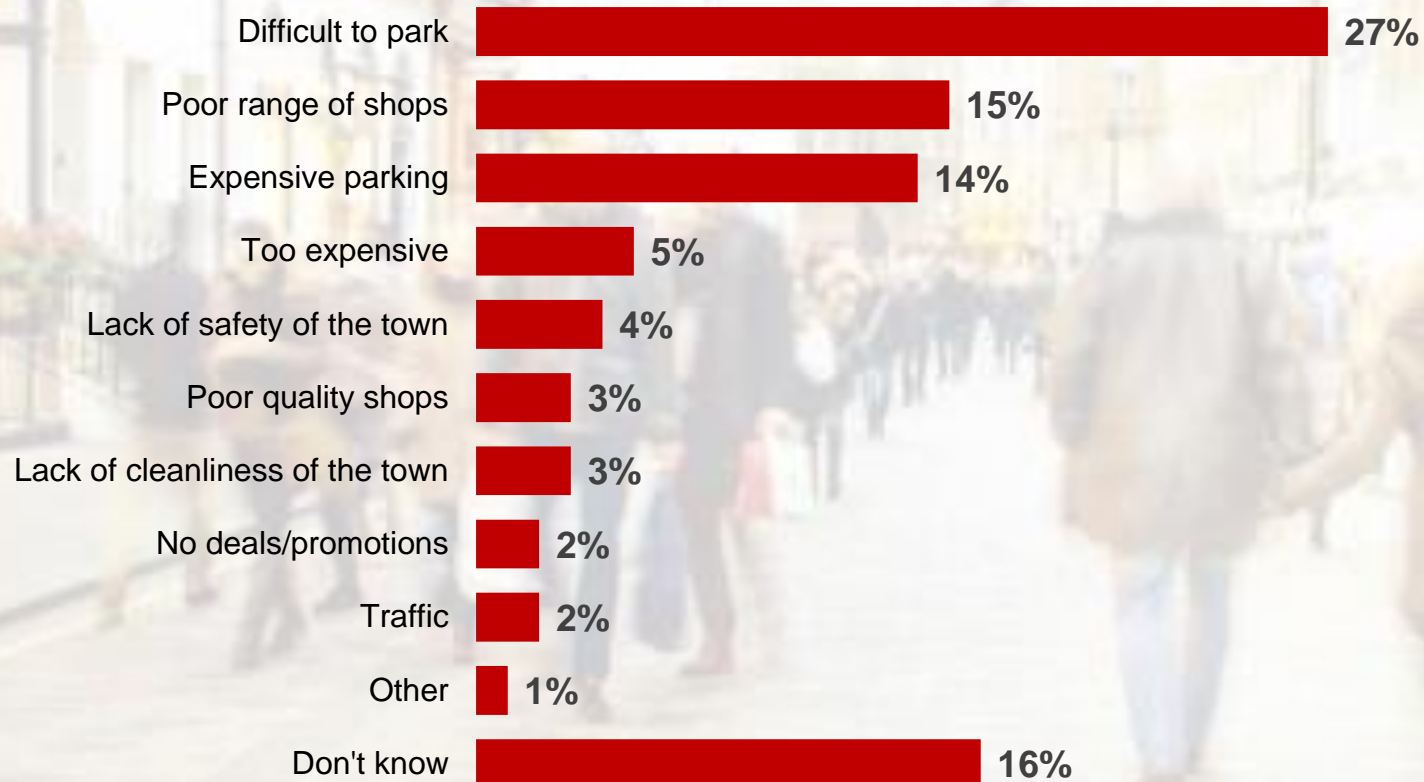


*Others 1% or less not shown

Q.16 What, if anything, do you particularly like about shopping in Sligo?
Base: All Respondents: 407

DISLIKES ABOUT SHOPPING IN SLIGO TOWN CENTRE

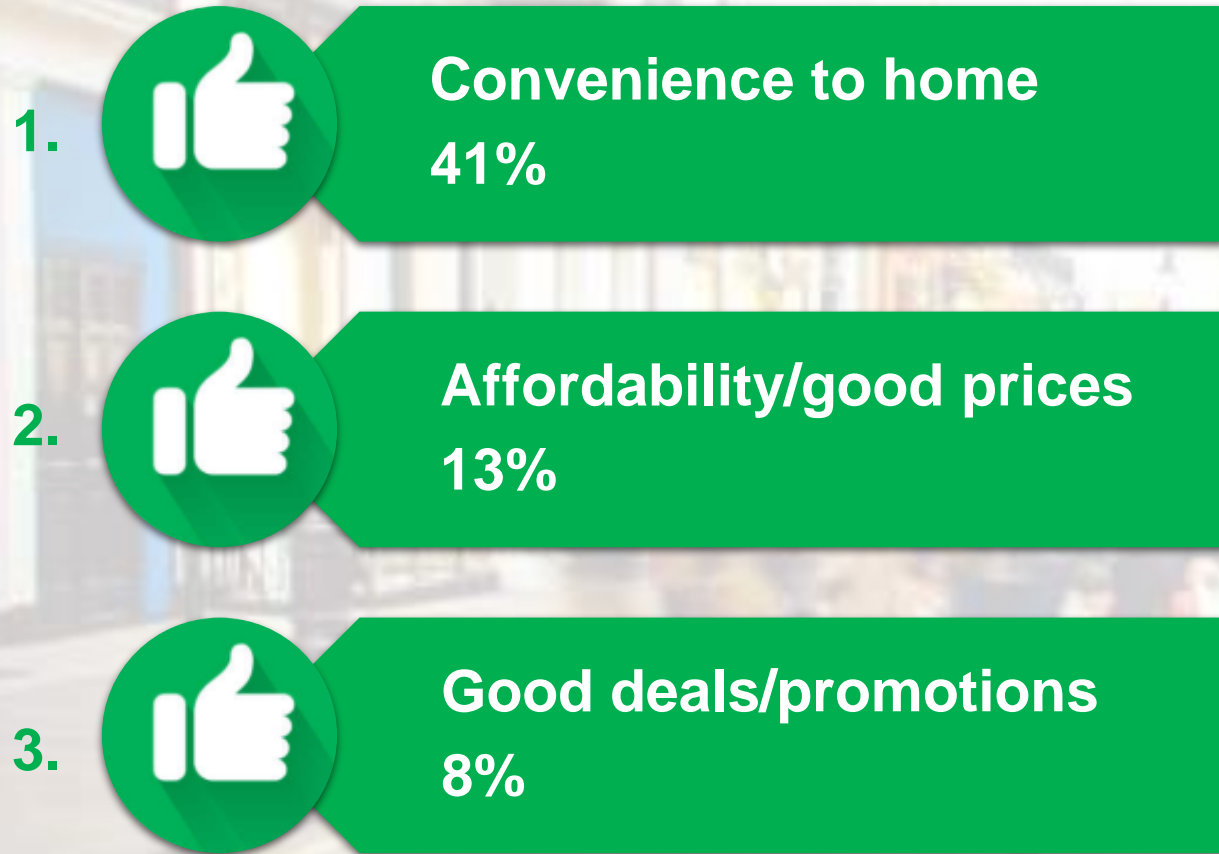
Difficulty parking (27%) is the top reason for disliking shopping in Sligo Town Centre.



Others 1% or less not shown

Q.17 What, if anything, do you particularly dislike about shopping in Sligo?
Base: All Respondents: 407

TOP LIKES VERSUS DISLIKES ABOUT SHOPPING IN SLIGO



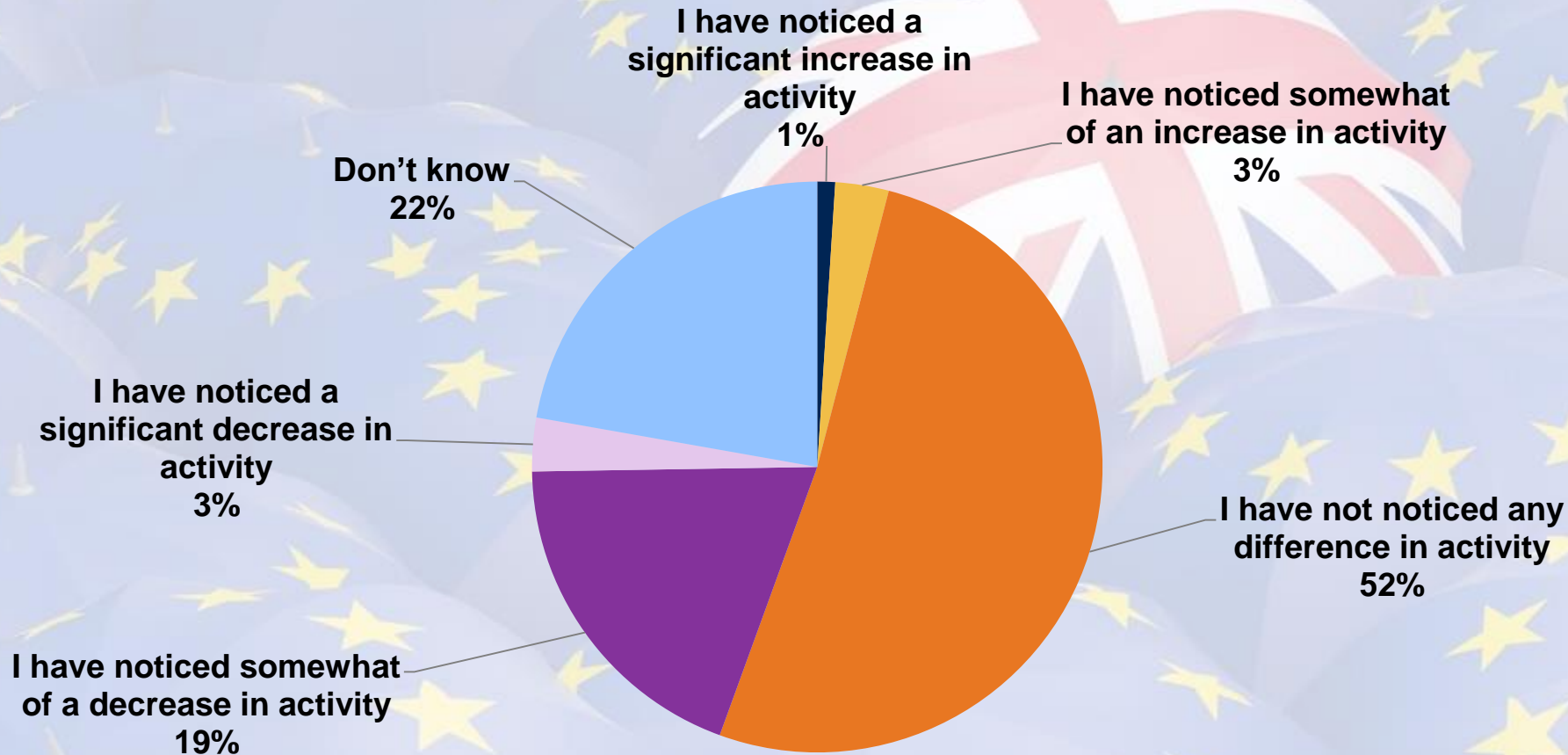
Q.16 What, if anything, do you particularly like about shopping in Sligo?
Q.17 What, if anything, do you particularly dislike about shopping in Sligo?
Base: All Respondents: 407

E. IMPACT OF BREXIT



CHANGES IN ACTIVITY DUE TO BREXIT

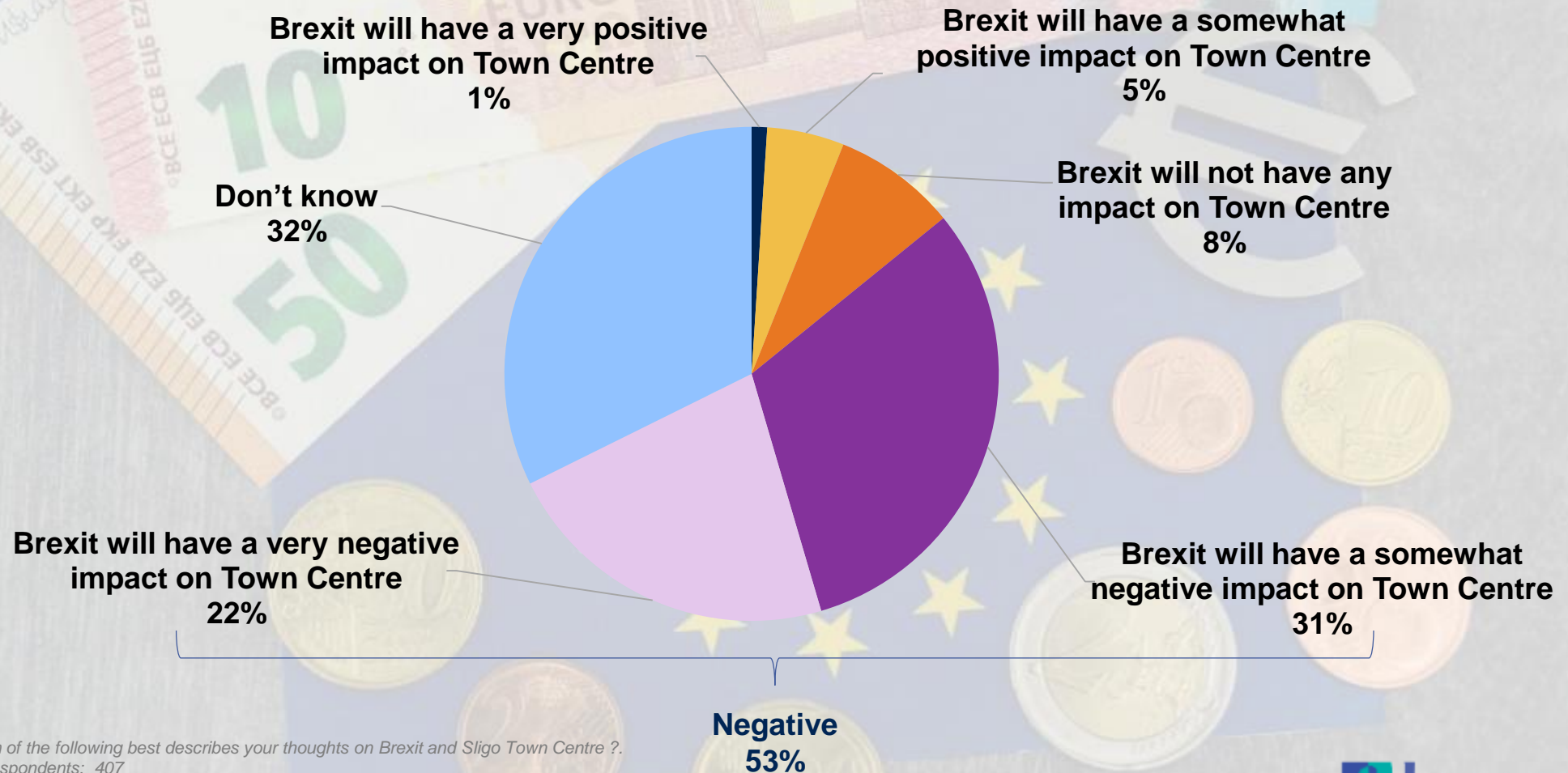
Just over half of respondents (52%) have not noticed any difference in activity in Sligo since the announcement of Brexit, while a further 22% are unsure



Q.27 Since the announcement of Brexit, which of the following best describes the extent to which you have noticed any change in activity in Sligo Town Centre ?
Base: All Respondents: 407

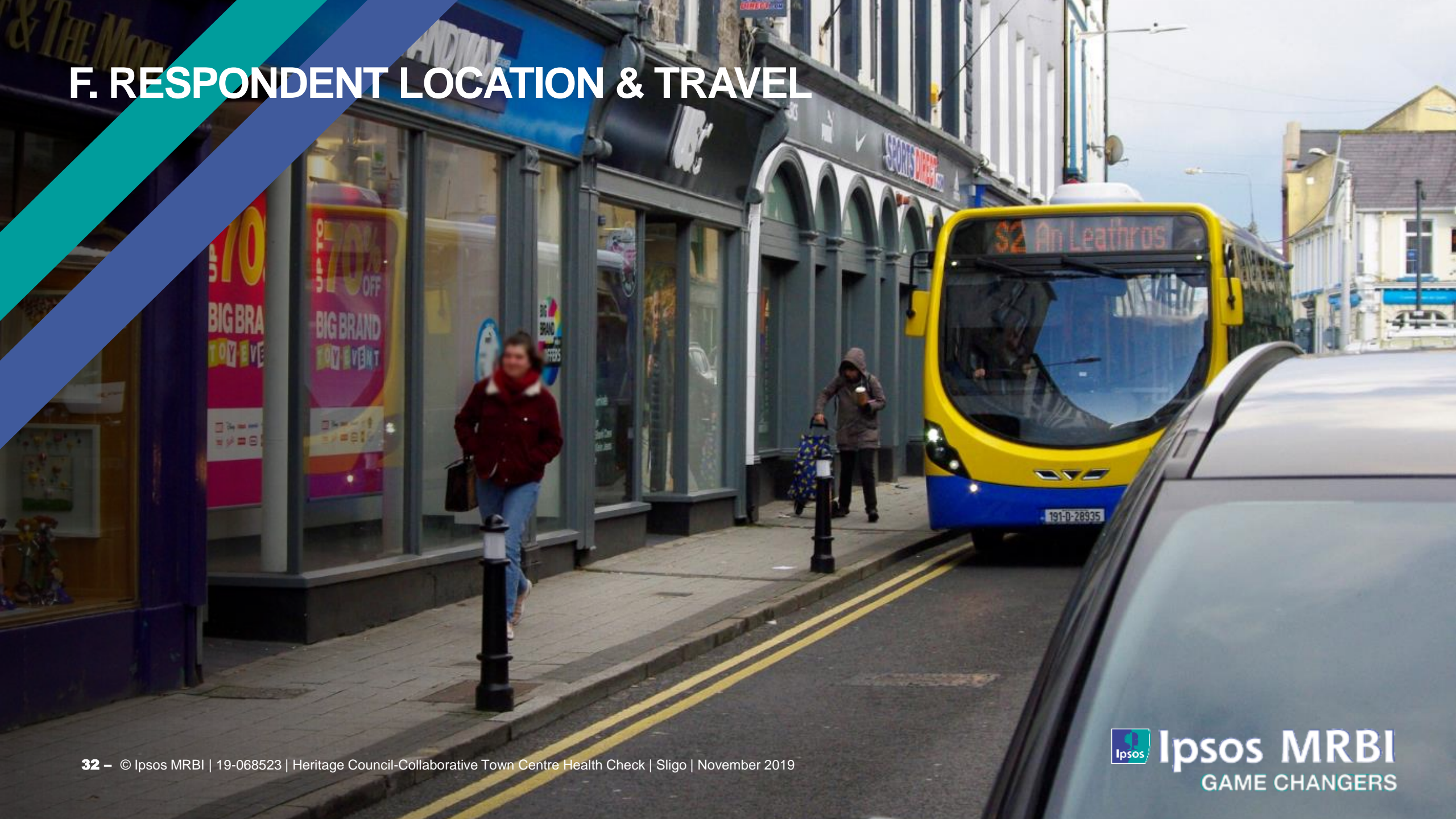
IMPACT OF BREXIT ON TOWN CENTRE

Just over half of all respondents (53%) feel that Brexit will have a negative impact on Sligo Town Centre



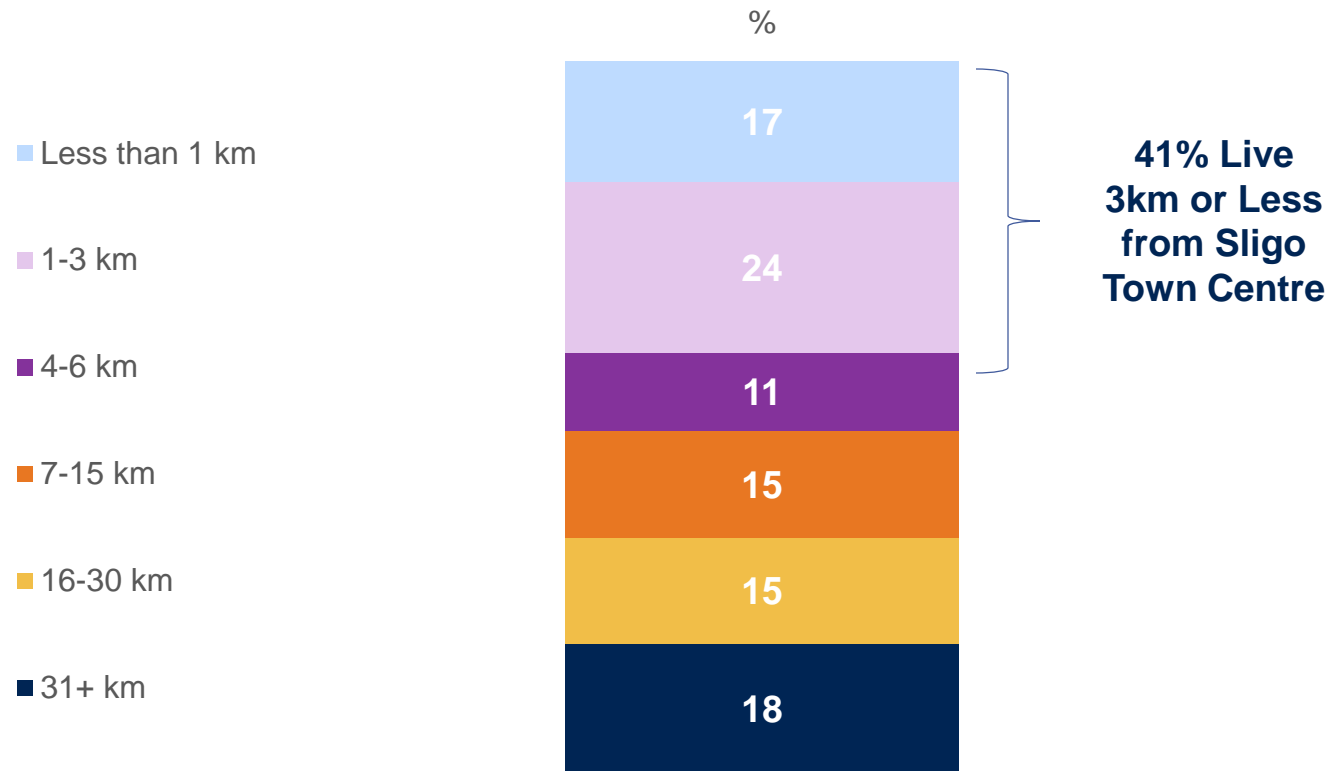
Q.28 Which of the following best describes your thoughts on Brexit and Sligo Town Centre ?
Base: All Respondents: 407

F. RESPONDENT LOCATION & TRAVEL



DISTANCE FROM SLIGO TOWN CENTRE

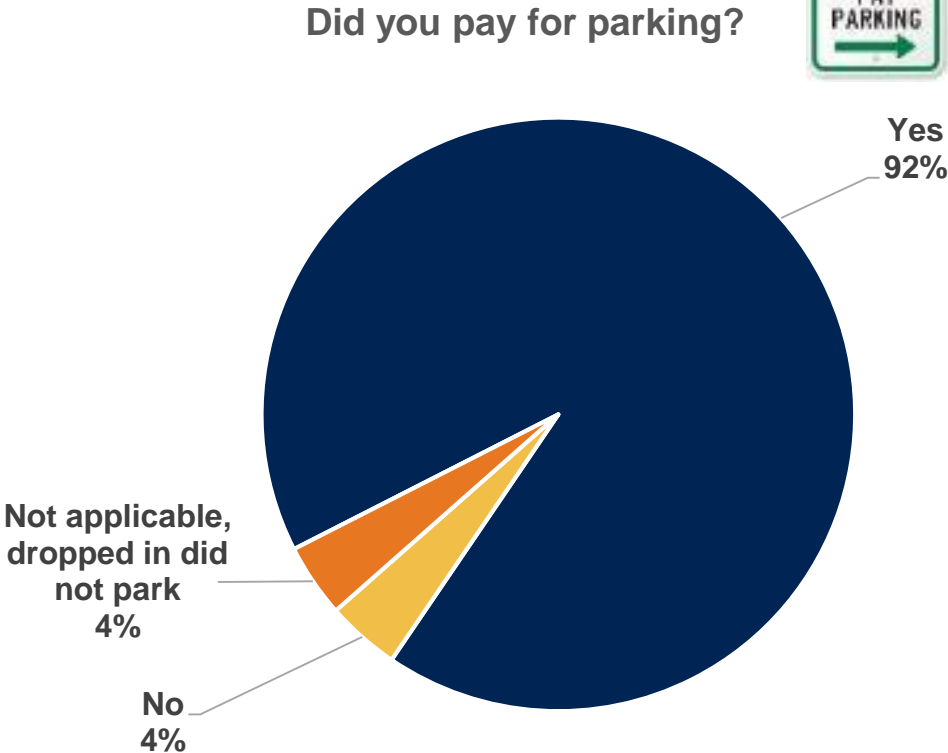
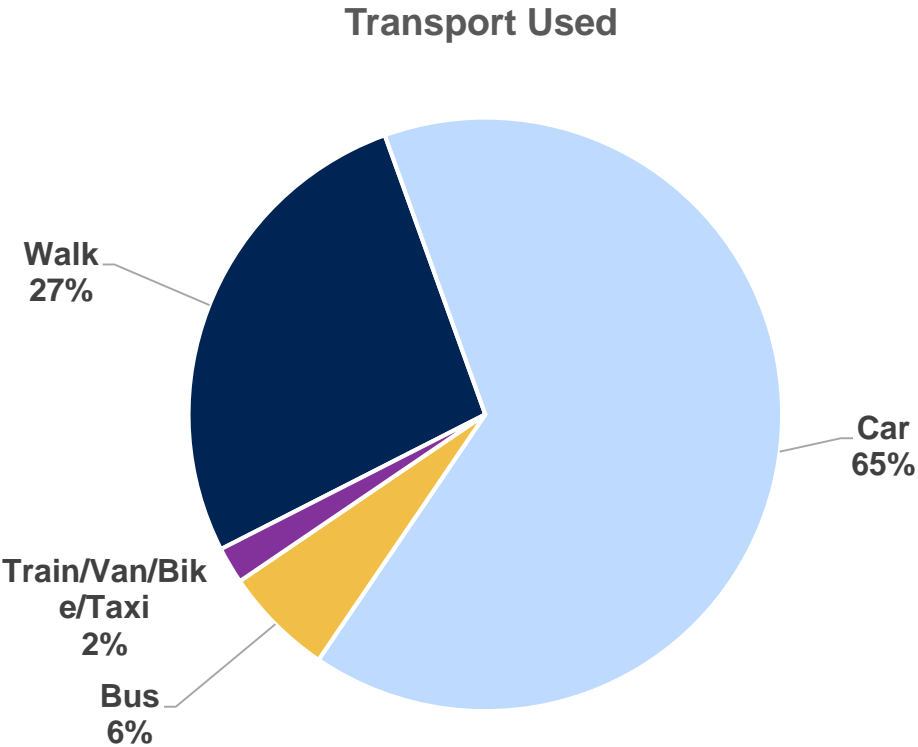
Just over 4 in 10 respondents live within 3 kilometres of Sligo Town Centre



Q.30 How far do you live from the Sligo Town Centre ?
Base: All Respondents: 407

TRANSPORT USED

The main method of transport used to get to Sligo Town was by car at 65%



**Less than 2% use trains, bikes, taxis or vans as a form of transport*

Q.31 What form of transport did you use to get to Sligo town centre today?

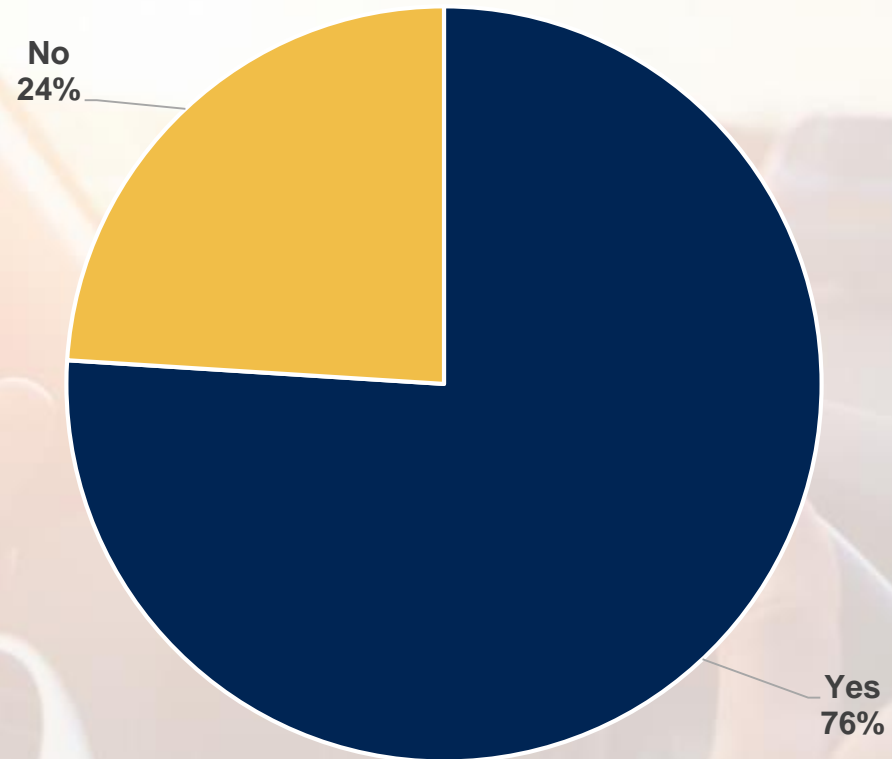
Q.34 Did you pay for parking?

Base: All Respondents: 407/ All who arrived by car/van/motorbike: 265

AVAILABILITY OF A CAR

Three-quarters of respondents (76%) usually have access to a car for transport

Car Availability

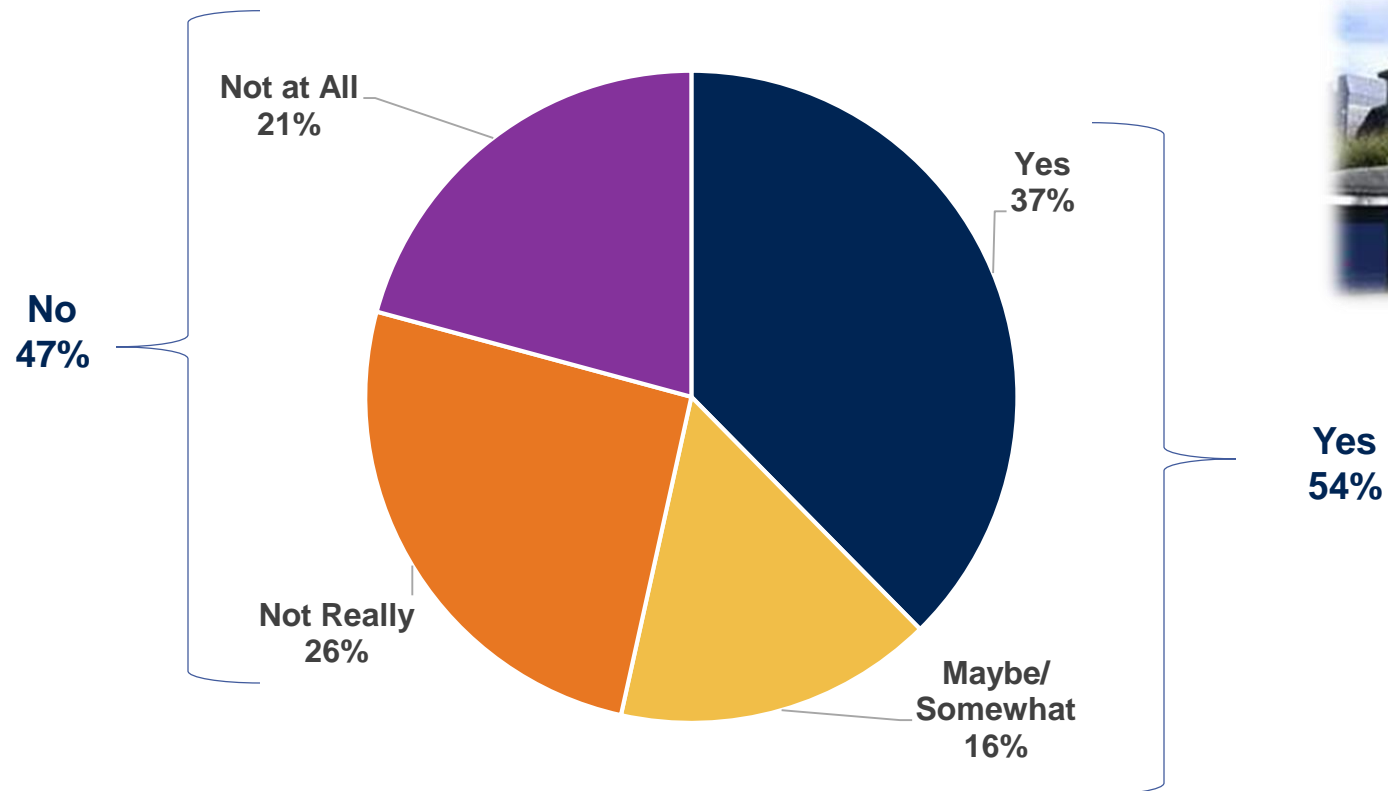


Q.32 Is a car normally available to you for shopping?
Base: All Respondents: 407

G. HISTORICAL ATTRACTIONS IN SLIGO

SLIGO'S HISTORICAL ATTRACTIONS

Just over half felt encouraged to visit Sligo Town Centre for historical attractions such as the Model Niland Gallery, the Yeats Building or Sligo Abbey

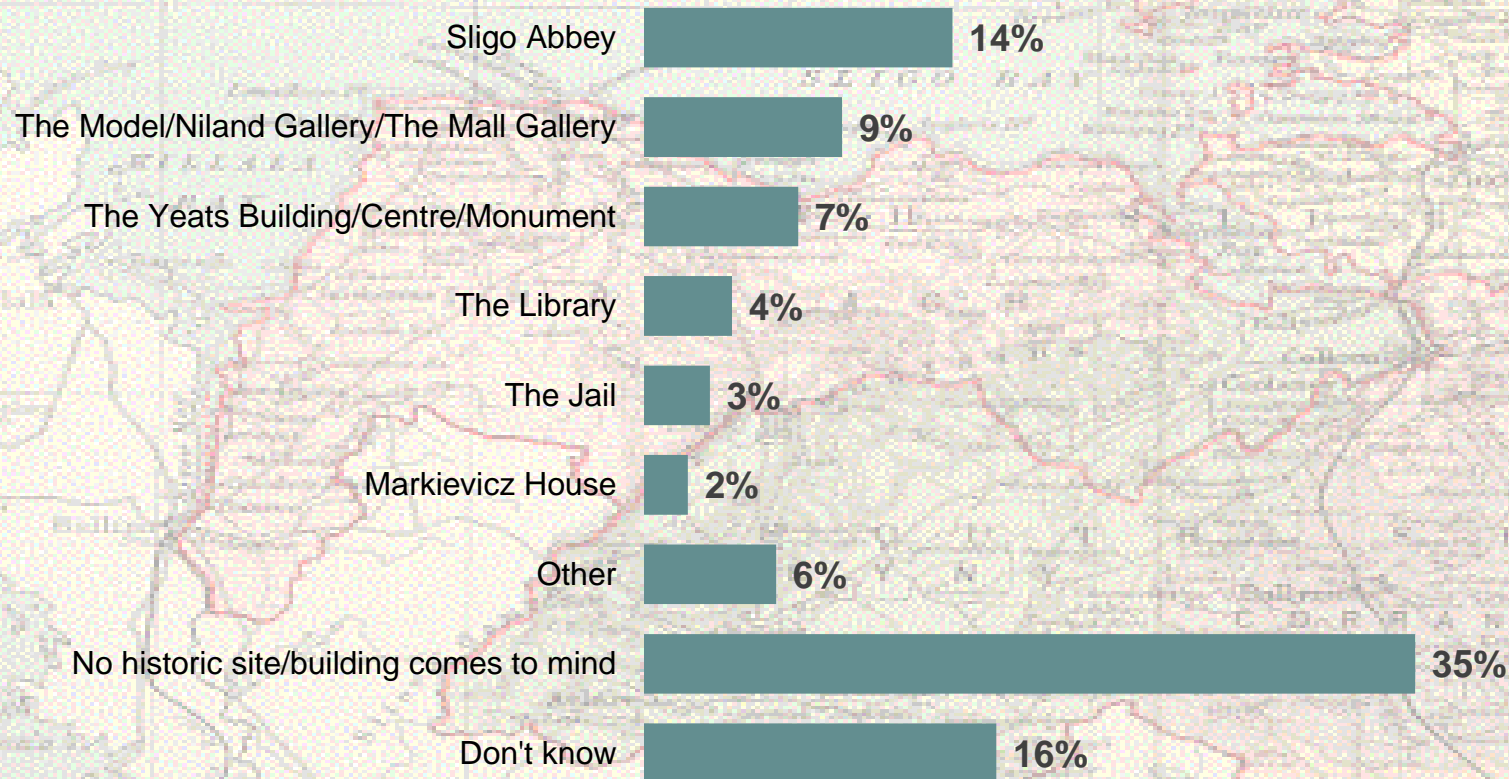


Q.35 As you may be aware, Sligo has many historical locations such as the Model Niland Gallery, the Yeats Building or Sligo Abbey, do these historical locations encourage you to visit and spend time in the town centre, or not?

Base: All Respondents: 407

KEY HISTORICAL BUILDING/SITE THAT WOULD BENEFIT FROM INVESTMENT/ACCESS

Sligo Abbey was the most popular site that respondents felt could benefit from greater investment, presentation and access



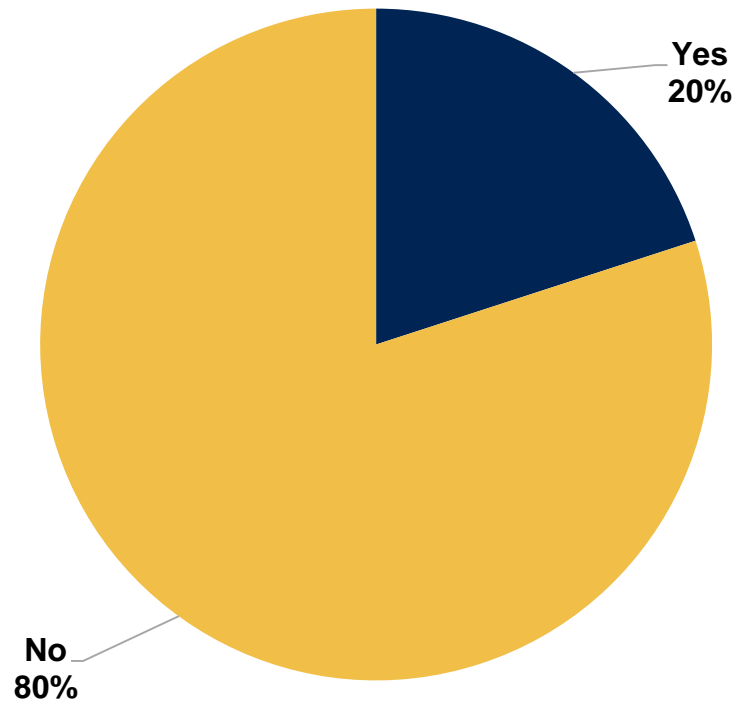
Others 1% or less not shown

Q.36 Do you know of a key historic building/site in the town centre of Sligo that would benefit from greater investment, presentation and greater public access? If yes, which one?
Base: All Respondents: 407

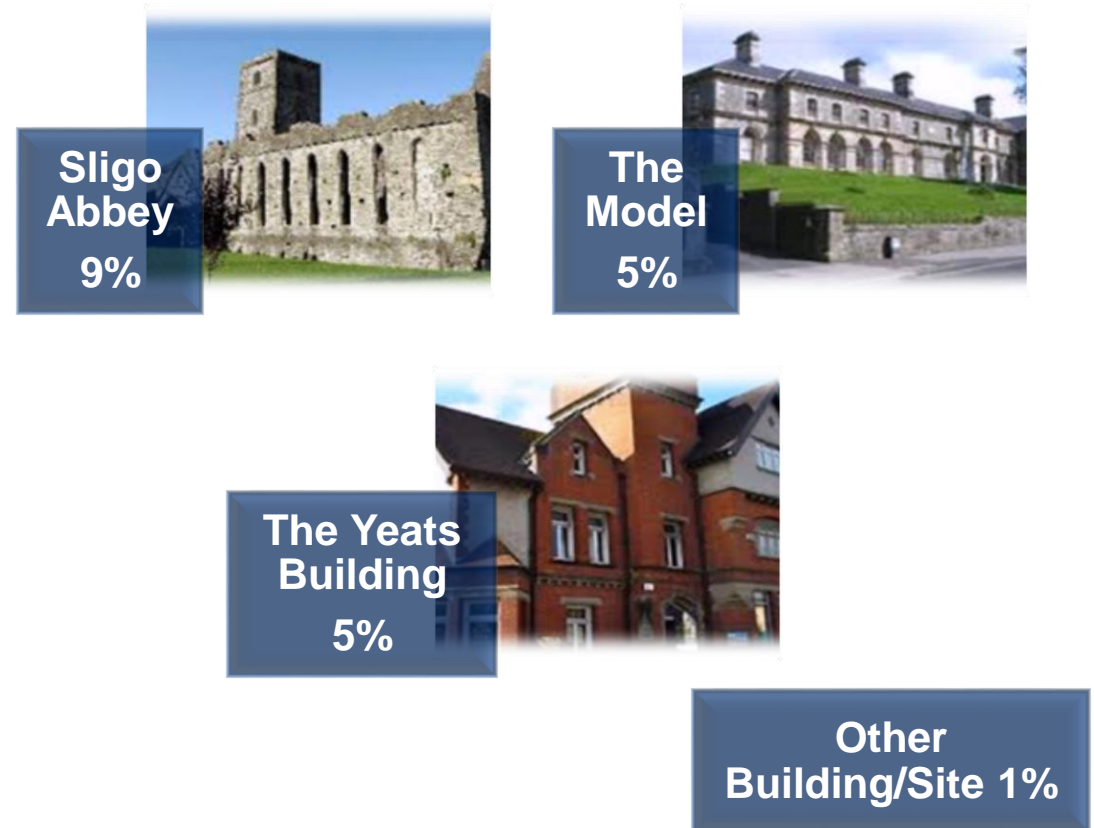
HISTORICAL BUILDING/SITE VISITED IN LAST 12

4 in 5 (80%) had not visited any historical site in Sligo in the past year

Visited an historic building in last year



The 20% who visited went to...

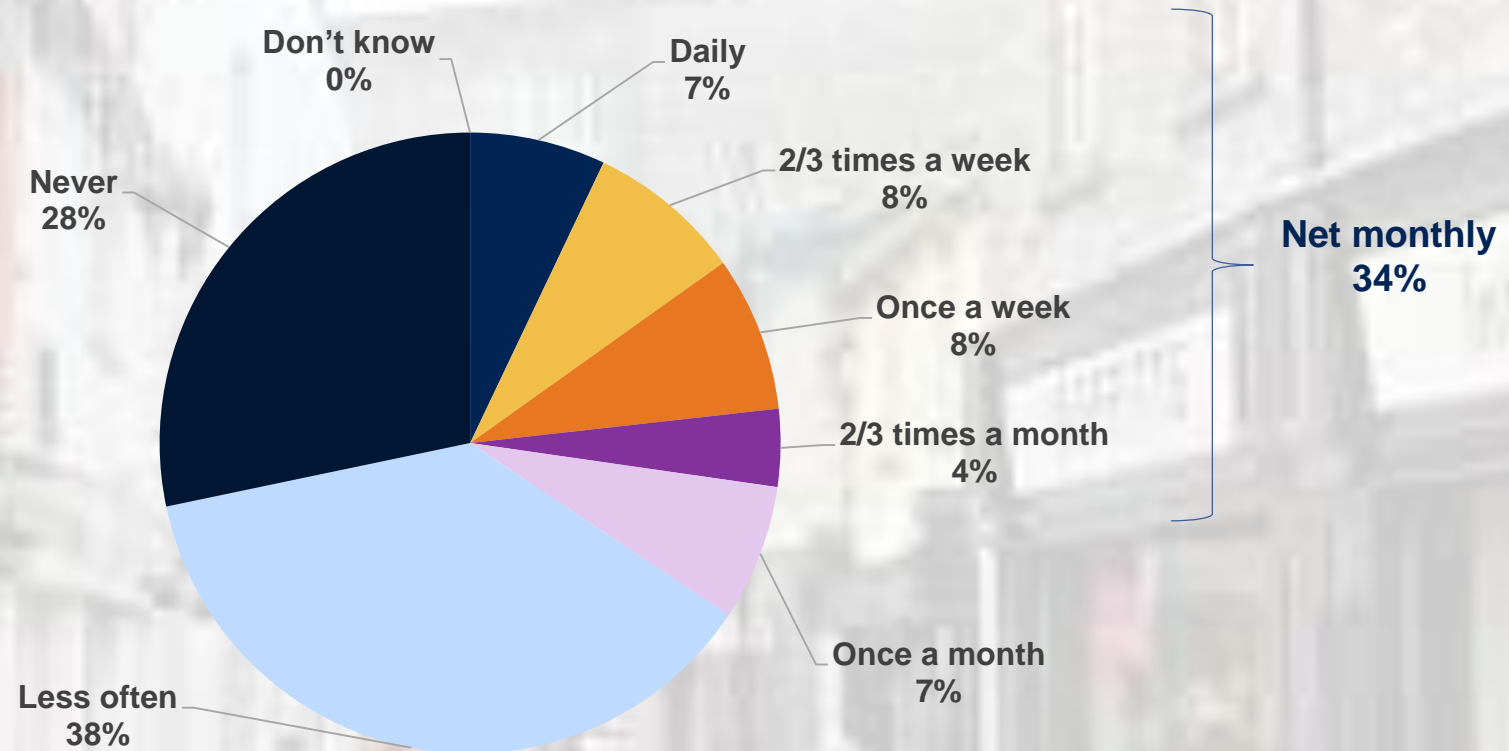


Q.37 In the past year, have you visited a historic building/site in the town centre? If yes where have you visited?
Base: All Respondents: 407

H. EVENTS AND RATINGS FOR SLIGO TOWN CENTRE

FREQUENCY OF VISITING PUBLIC EVENTS IN TOWN CENTRE

A third of respondents (34%) visit Sligo Town Centre at least once a month for public events



Q.18 How often do you visit the town centre for public events?
Base: All Respondents: 407

TYPE OF PUBLIC EVENTS ATTENDED IN SLIGO TOWN CENTRE

Over half of respondents (56%) attend the St. Patrick's Day Parade, 48% attend the Sligo Summer Festival at 48% and 35% attend Sligo Live



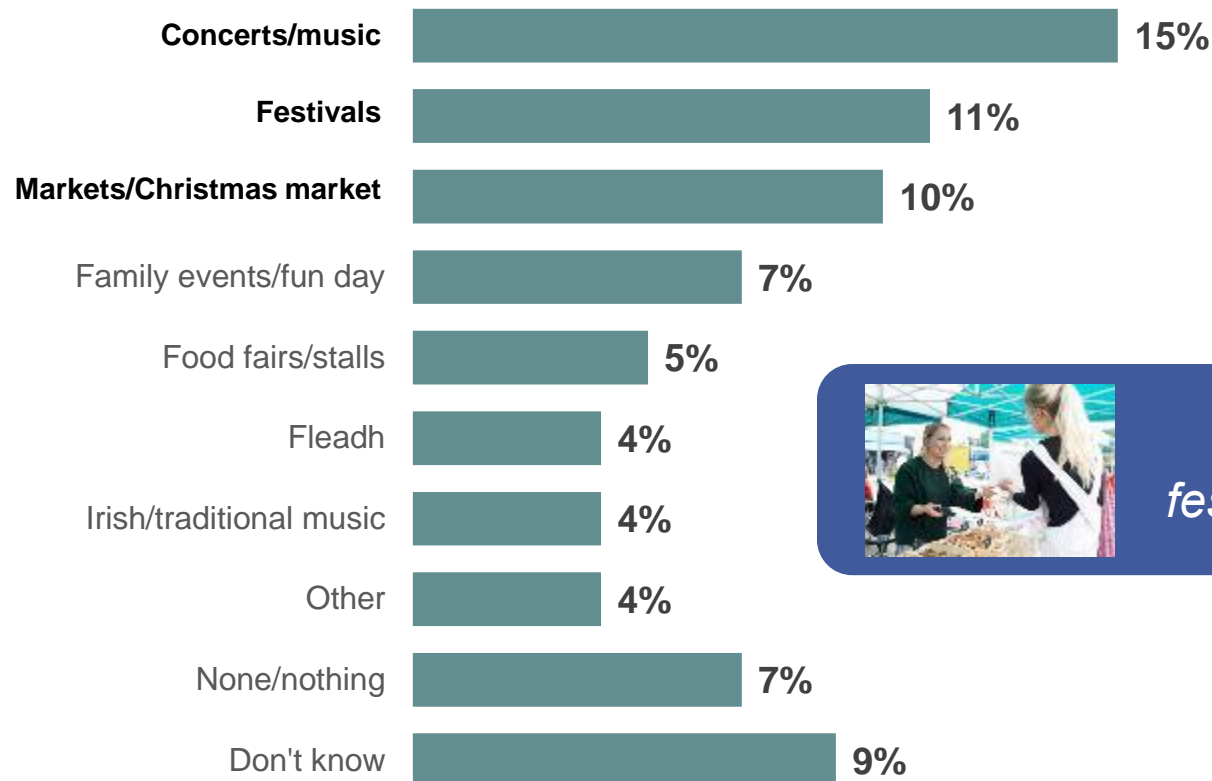
Q.19 What type of public events do you attend in Sligo Town Centre?
Base: All who visit the Town Centre for public events: 290

Other	2%
Not stated	14%

Multiple answers could be given at this question.

TOP SUGGESTED EVENTS IN SLIGO TOWN CENTRE

A range of suggested events were given by respondents, with the top 3 including Concerts/Music, Festivals and Markets/Christmas Markets



"Maybe a music event"



"More festivals and community events"



"Concerts, food festivals, markets"



"A good weekly market"

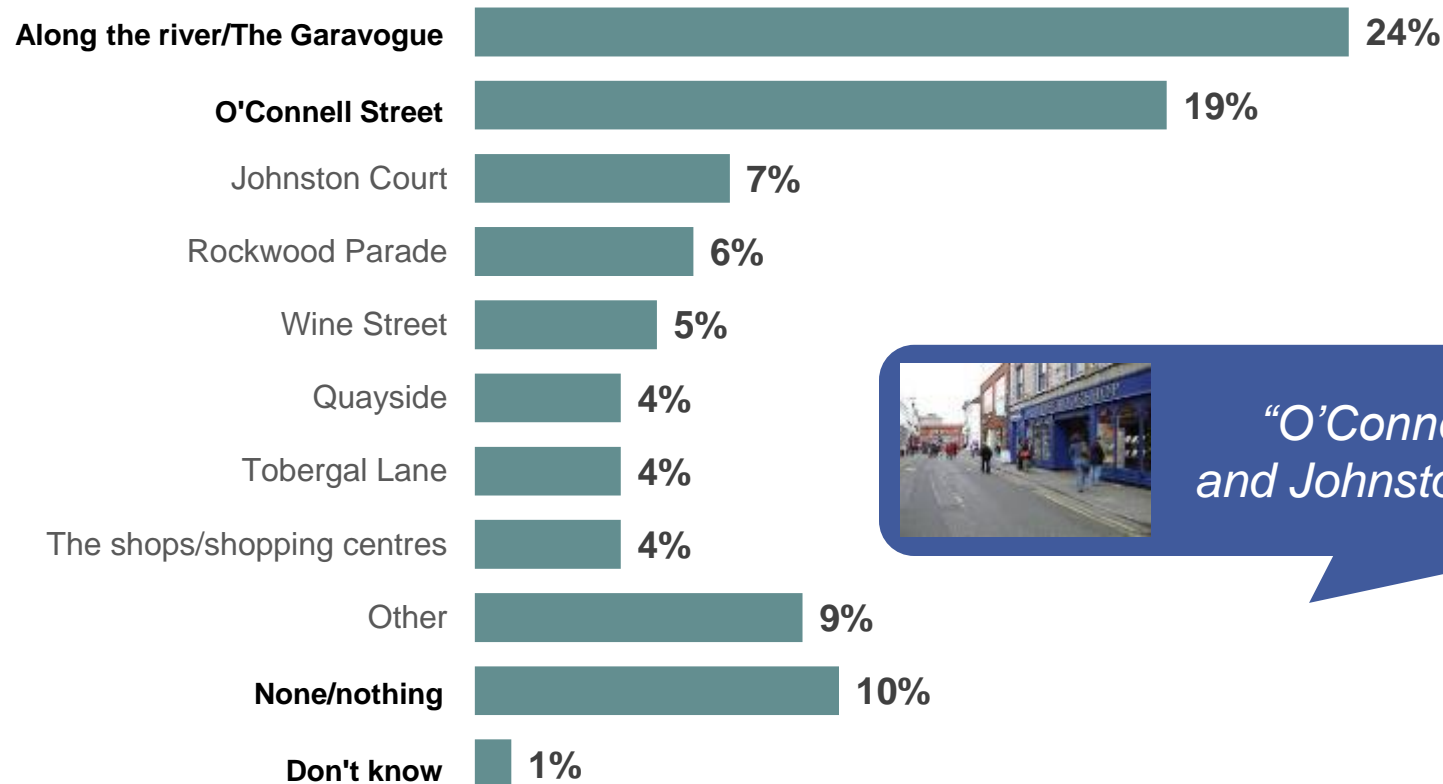


Q.21 What type of event, if any, would you like to see take place in the town centre that would encourage you to visit and spend time in the town centre of Sligo?
Base: All Respondents: 407

Suggestions accounting for 3% or less not shown

FAVOURITE PART OF SLIGO TOWN CENTRE

Respondents had a number of favourite areas within Sligo, along the River/the Garavogue was the top mention at 24%



*"Down by the river,
nice seating and
it's pedestrianised"*



*"Johnston Court
is the heart"*



*"O'Connell Street
and Johnston Court"*



*"Down by the
river very relaxing"*



Q.22 What is your favourite part of Sligo Town Centre, if any?
Base: All Respondents: 407

Favourite parts of Sligo accounting for 3% or less not shown

ONE KEY IMPROVEMENT FOR SLIGO TOWN CENTRE

When asked about one key improvement for Sligo town centre, no one improvement emerged well ahead. A variety of improvements are suggested below



“Open up more variety of shops”



“The parking is very difficult not enough of it around the centre of Sligo”



“Try to do something about the traffic congestion”

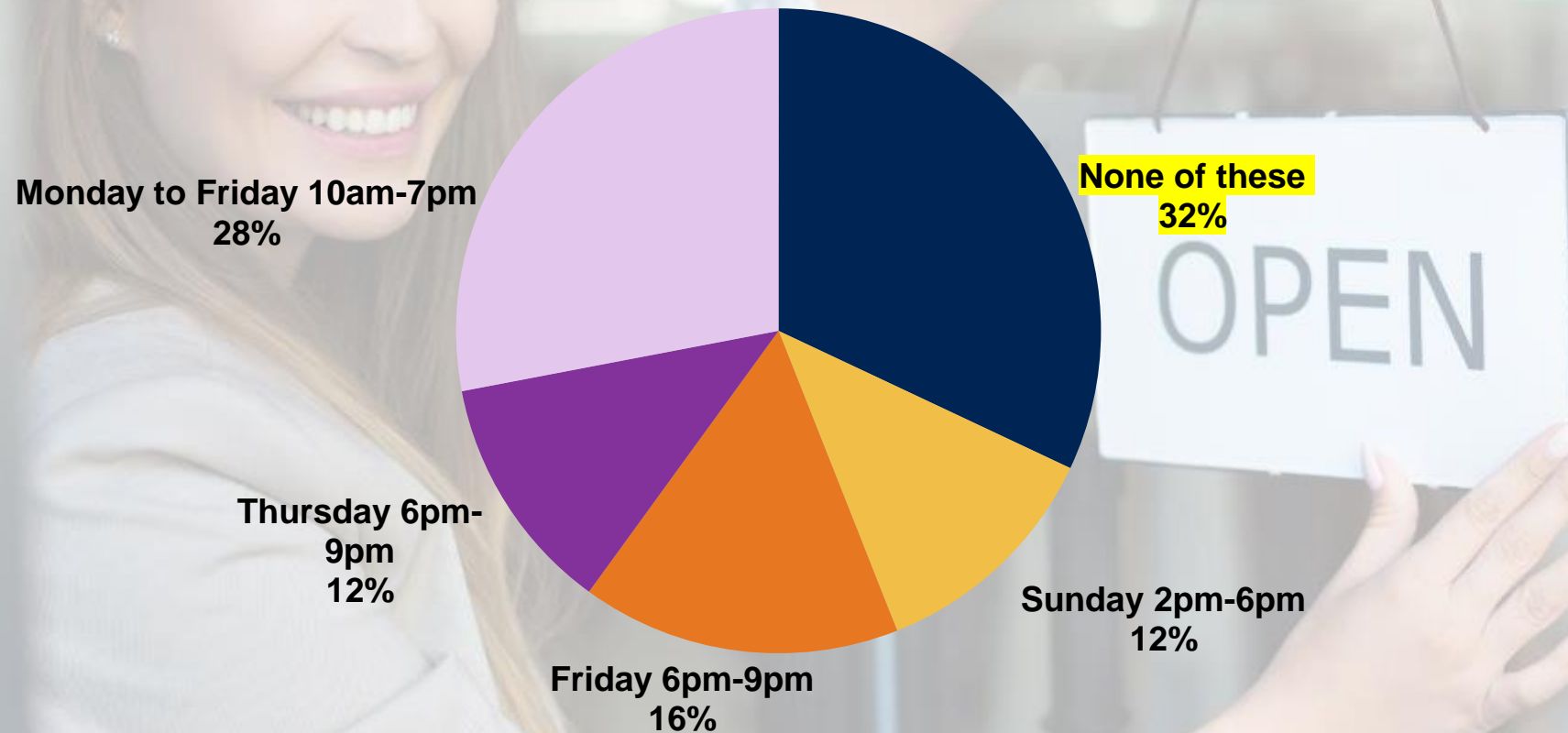


“A revamp, a total new look and make the town attractive to visitors and customers”

Q.25 What one key improvement, if any, do you think Sligo Town Centre could benefit from?
Base: All Respondents: 407

EXTENDED SHOPPING HOURS

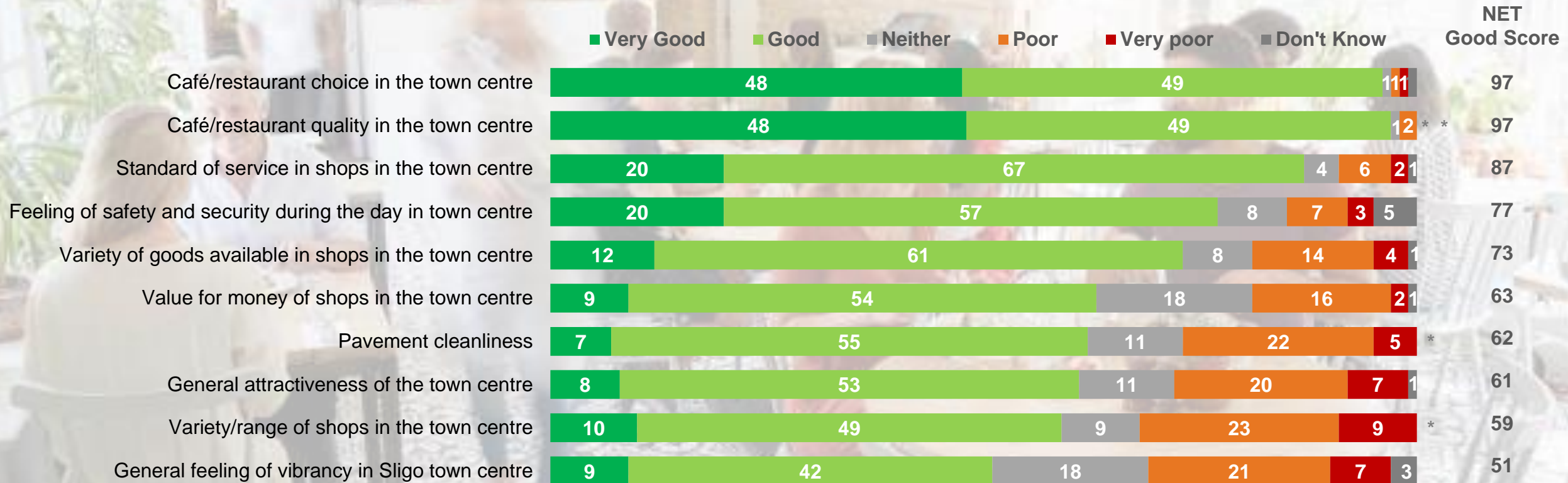
For those who would avail of extended shopping hours, 10am-7pm Monday to Friday ranked highest



Q.29 Which one of the following extended shopping hours options would you avail of?
Base: All Respondents: 407

SLIGO TOWN CENTRE RATINGS – I

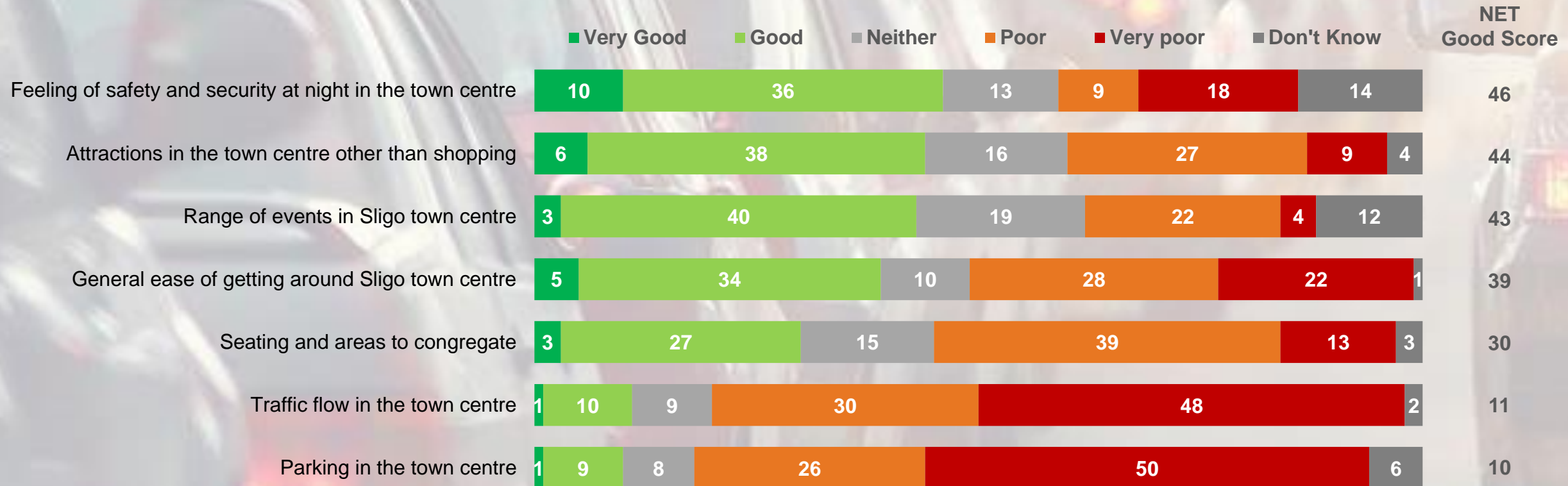
Café/restaurant choice and quality rank very highly for respondents at 97% positive.



Q.26 Please rate the following aspects of Sligo Town Centre using the following scale: very good, good, neither, poor or very poor.
Base: All Respondents: 407

SLIGO TOWN CENTRE RATINGS – II

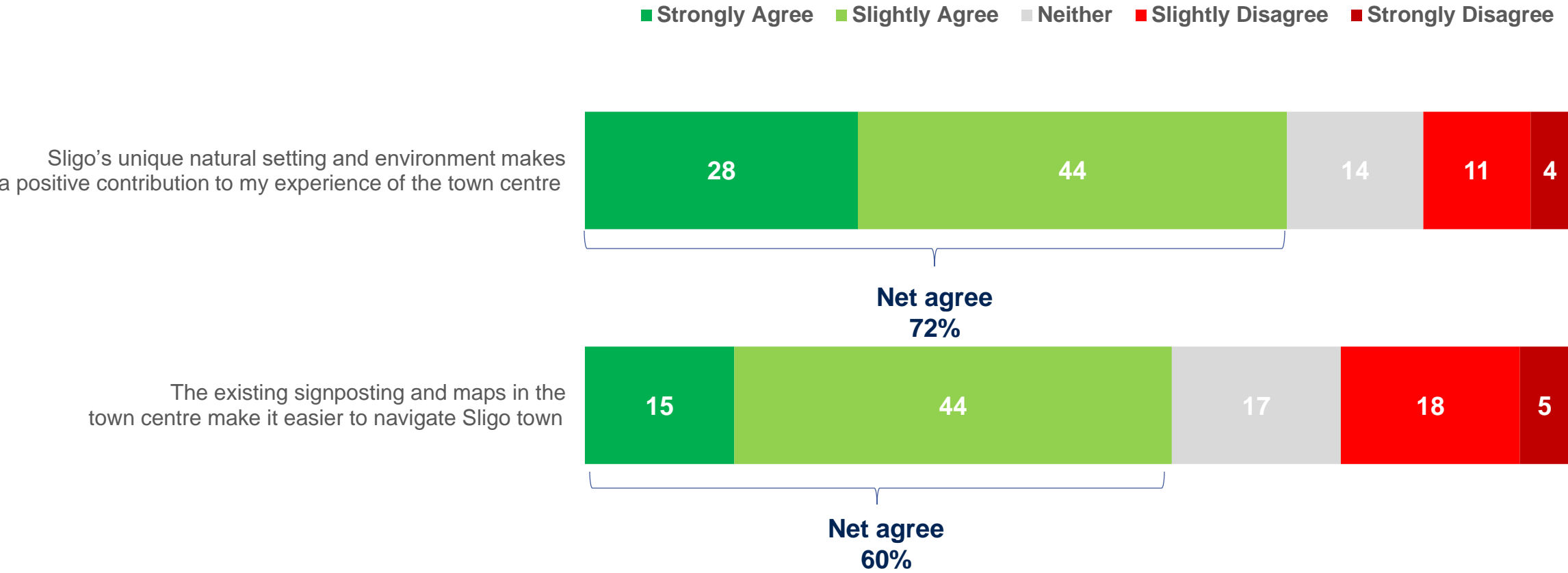
Traffic flow and parking ranked the lowest overall, with half ranking each as very poor



Q.26 Please rate the following aspects of Sligo Town Centre using the following scale: very good, good, neither, poor or very poor.
Base: All Respondents: 407

EXPERIENCE IN THE TOWN CENTRE

72% agree that Sligo's setting makes for a positive experience, while 60% agree the signposting and maps make it easier to navigate the town



I. PLANNED ENHANCEMENT OF O'CONNELL STREET

The new O'Connell Street design was well received, with 57% stating this would encourage them to spend more time in Sligo town



Encourage Visit/ Spend More Time %

- Yes
- Maybe/Somewhat
- Not Really
- Not at All



Highest amongst:

Those who live 4-15km away (67%)



Those aged 35-49 (64%)



Those aged 18-25 (64%)



Q.20 I'd now like to show you a picture of a future planned development for O'Connell Street.
Do you think this development would encourage you to visit and spend more time in the town of Sligo, or not?

Base: All Respondents: 407

PROJECT TEAM



Ali Harvey, The Heritage Council, is the founding Co-ordinator of the CTCHC Training Programme in Ireland. Ali is a Qualified Spatial Planner and Project Manager with a background in economics and urban development and has twenty-three years' experience of project managing planning and regeneration programmes and projects in Ireland (both private and public sectors). Ali is also the author of the Community-led Village Design Statements Toolkit, 2012 and Founding Co-ordinator of the Irish Walled Towns Network (IWTN) in 2005.



Gail McGibbon, CEO of Sligo Business Improvement District (BID), has worked at a senior level nationally and internationally. As the first Town Centre Manager in the Republic of Ireland, Gail has worked with business development units in towns and cities developing a cogent plan for a destination. Gail represents the ROI on the Association of Town and City Management, UK and Ireland, Chairs the national network of towns and cities and is a Senior Assessor for the ATCM Purple Flag International Award for towns and cities in the Evening and Night-time Economy. Gail is the project lead in Sligo for the Border Town Network and Atlantic Economic Corridor Network with the Heritage Council of Ireland.



Rebecca Porter is currently an Associate Director at Ipsos MRBI. For this project Rebecca was the project manager, involved at each stage of the research from set up, questionnaire design, script testing, data analysis and preparing the report. Rebecca has worked on a variety of research projects including telecommunications, customer satisfaction tracking, healthcare, pharmaceuticals, food safety and smoking research. She is a dualist researcher across both quantitative and qualitative work. She began her career with Ipsos MRBI in 2011 as a telephone interviewer, and advanced to the research team in 2013.



Hollie Power is a Graduate Trainee at Ipsos MRBI. For this project she was the project assistant, ensuring all milestones were met, liaising with internal departments and analysing the final data set. She graduated with an MSc in Marketing 1.1 from Dublin Institute of Technology and joined Ipsos in 2016 as a telephone interviewer, working primarily on largescale financial trackers. Hollie was brought into the research fold to offer support on HSE, a national healthcare study. Her primary focus is quantitative research with clients such as Volkswagen and Vodafone.

THANK



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