Collaborative Town Centre Health Check Training Programme

Sligo Town Centre Consumer Surveys
November 2019
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INTRODUCTION
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%.
400 on-street interviews

5 Locations in Sligo Town Centre

Fieldwork from 25th August to 11th September 2019
SAMPLE PROFILE
– DEMOGRAPHICS

Gender
- 41% Male
- 59% Female

Age
- 67+ 16%
- 50-66 31%
- 18-25 20%
- 26-34 22%
- 35-49 10%

Interview Location
- Wine Street Car Park 29%
- O’Connell Street/Tobergal Lane 25%
- Corner Castle St./Water Lane 19%
- Corner Water Lane/Rockwood Parade 12%
- Outside Sligo Library on Stephen Street 15%

Base: All Respondents: 407

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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.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking/window shopping</td>
<td>47%</td>
</tr>
<tr>
<td>Attending work</td>
<td>13%</td>
</tr>
<tr>
<td>Social/recreational</td>
<td>12%</td>
</tr>
<tr>
<td>Shopping (unspecific/general)</td>
<td>10%</td>
</tr>
<tr>
<td>Passing through</td>
<td>7%</td>
</tr>
<tr>
<td>Service/admin reasons</td>
<td>4%</td>
</tr>
<tr>
<td>Professional reasons</td>
<td>3%</td>
</tr>
<tr>
<td>Shopping (specific shops)</td>
<td>3%</td>
</tr>
<tr>
<td>Hospital/medical appointment</td>
<td>2%</td>
</tr>
<tr>
<td>Grocery shopping</td>
<td>2%</td>
</tr>
<tr>
<td>Banking</td>
<td>1%</td>
</tr>
<tr>
<td>Going to school/college</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>None/no other reasons</td>
<td>1%</td>
</tr>
</tbody>
</table>

Highest amongst:
- Females: 53%
- Males: 18%
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

Highest amongst:

- Those who live up to 3km from town: 41%
- Those interviewed on Wine Street: 45%

- Out of Habit/always shop here: 33%
- Easy to get to/handy: 30%
- Selection of shops/range of shops: 11%
- Quality of shops/good/nice shops: 6%
- Availability of sales discounts: 3%
- Variety of goods available: 3%
- Was in town for an appointment/to go to bank: 2%
- Prices cheaper/good value: 2%
- No choice/out of necessity: 1%
- Nice environment/atmosphere: 1%
- Interesting events taking place: *
- Other: 1%
- I don’t shop in Sligo Town Centre: 5%
## 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

<table>
<thead>
<tr>
<th>Shops/Businesses</th>
<th>Highest amongst:</th>
<th>Average Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothing/shoe repair</td>
<td>Females 43%</td>
<td>€60</td>
</tr>
<tr>
<td>Chemist</td>
<td>Females 37%</td>
<td>€62</td>
</tr>
<tr>
<td>Newsagent</td>
<td></td>
<td>€12</td>
</tr>
<tr>
<td>Bank/Credit Union</td>
<td></td>
<td>€68</td>
</tr>
<tr>
<td>Shoe Shop</td>
<td></td>
<td>€70</td>
</tr>
<tr>
<td>Hairdressing</td>
<td></td>
<td>€39</td>
</tr>
<tr>
<td>Post Office</td>
<td></td>
<td>€19</td>
</tr>
<tr>
<td>Bookmaker</td>
<td></td>
<td>€18</td>
</tr>
<tr>
<td>Telephones &amp; mobiles</td>
<td></td>
<td>€185</td>
</tr>
<tr>
<td>Jewellers</td>
<td></td>
<td>€63</td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Shops/Business accounting for 2% or less not shown
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

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

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

41%  59%

Age

18-25: 37%
26-34: 16%
35-49: 29%
50-66: 15%
67+: 2%

Base: All respondents who shop online: 194

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TYPE OF GOODS PURCHASED ONLINE

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

<table>
<thead>
<tr>
<th>Type of Goods</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothes/clothing accessories</td>
<td>59%</td>
</tr>
<tr>
<td>Technology/devices</td>
<td>7%</td>
</tr>
<tr>
<td>Concert/event tickets</td>
<td>7%</td>
</tr>
<tr>
<td>Beauty products</td>
<td>5%</td>
</tr>
<tr>
<td>Shoes</td>
<td>4%</td>
</tr>
<tr>
<td>Sports equipment</td>
<td>4%</td>
</tr>
<tr>
<td>Books</td>
<td>3%</td>
</tr>
<tr>
<td>Household products</td>
<td>2%</td>
</tr>
<tr>
<td>Fast food/takeaways</td>
<td>2%</td>
</tr>
<tr>
<td>Video games</td>
<td>2%</td>
</tr>
<tr>
<td>Art/decor</td>
<td>1%</td>
</tr>
<tr>
<td>Groceries</td>
<td>1%</td>
</tr>
<tr>
<td>Furniture</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
</tbody>
</table>

Highest amongst:
- Females: 70%
- 18-25 yrs: 69%

Q.6 What type of goods do you mainly buy online?
Base: All online Consumers: 194
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.

- Less than 10%: 26%
- From 11% to 30%: 30%
- From 31% to 50%: 27%
- From 51% to 69%: 11%
- 70% and over: 6%

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

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AMOUNT SPENT ON LAST PURCHASE ONLINE

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

Average Spend €77

- €0-29: 12%
- €30-39: 12%
- €40-49: 6%
- €50-74: 28%
- €75-99: 7%
- €100+: 25%
- Don’t know: 7%

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

- None: 63%
- From 1% to 10%: 21%
- From 11% to 30%: 9%
- From 31% to 50%: 5%
- From 51% to 69%: 1%
- 70% and over: 1%
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

- Would be Encouraged: 43%
- Would Not be Encouraged: 57%
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.

<table>
<thead>
<tr>
<th>For Clothing &amp; Accessories (382)</th>
<th>For Foodstuff &amp; Groceries (391)</th>
<th>For Furniture/Other Durables (202)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sligo</td>
<td>Sligo</td>
<td>Sligo</td>
</tr>
<tr>
<td>89%</td>
<td>85%</td>
<td>68%</td>
</tr>
<tr>
<td>Ballina</td>
<td>Ballina</td>
<td>Ballina</td>
</tr>
<tr>
<td>3%</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>Dublin</td>
<td>Dublin</td>
<td>Dublin</td>
</tr>
<tr>
<td>2%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>Grange</td>
<td>Ballymote</td>
</tr>
<tr>
<td>6%</td>
<td>2%</td>
<td>6%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Dublin</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Castlebaldwin</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tubbercury</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8%</td>
</tr>
</tbody>
</table>

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)
- **Penneys**: 29%
- **Dunnes**: 10%
- **ej Menswear**: 9%
- **Mullaneys**: 8%
- **TK Maxx**: 7%
- **River Island**: 7%
- **Other**: 3%

### For Food Stuff & Groceries (331)
- **Tesco**: 34%
- **Aldi**: 21%
- **Dunnes**: 21%
- **Lidl**: 20%
- **Other**: 3%

### For Furniture/Other Durables (202)
- **Roemer**: 24%
- **EZ Living**: 23%
- **Homestore and More**: 11%
- **Castle Davitt Furniture**: 9%
- **Homebase**: 8%
- **Charity/2nd Hand Shop**: 5%
- **Other**: 20%

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.

- **Penneys**: 28%
- **Dunnes Stores**: 16%
- **River Island**: 4%
- **TK Maxx**: 3%
- **Henry Lyons & Co. Ltd, Sligo**: 2%
- **Carraig Donn**: 2%
- **Simone’s**: 2%
- **Tesco**: 2%
- **Other**: 9%
- **Don’t know**: 6%

*Others 1% or less not shown*
LIKES ABOUT SHOPPING IN SLIGO TOWN CENTRE

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

- Convenient to home: 41%
- Affordability/good prices: 13%
- Good deals/promotions: 8%
- Friendly people/atmosphere: 8%
- Range of shops: 7%
- Range or quality of places to eat: 6%
- Quality of shops: 4%
- Safety of the town: 3%
- Other: 1%
- Don't know: 7%

*Others 1% or less not shown*
### DISLIKES ABOUT SHOPPING IN SLIGO TOWN CENTRE

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

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Difficult to park</td>
<td>27%</td>
</tr>
<tr>
<td>Poor range of shops</td>
<td>15%</td>
</tr>
<tr>
<td>Expensive parking</td>
<td>14%</td>
</tr>
<tr>
<td>Too expensive</td>
<td>5%</td>
</tr>
<tr>
<td>Lack of safety of the town</td>
<td>4%</td>
</tr>
<tr>
<td>Poor quality shops</td>
<td>3%</td>
</tr>
<tr>
<td>Lack of cleanliness of the town</td>
<td>3%</td>
</tr>
<tr>
<td>No deals/promotions</td>
<td>2%</td>
</tr>
<tr>
<td>Traffic</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>Don't know</td>
<td>16%</td>
</tr>
</tbody>
</table>

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

Others 1% or less not shown
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

1. Convenience to home 41%
2. Affordability/good prices 13%
3. Good deals/promotions 8%

1. Difficult to park 27%
2. Poor range of shops 15%
3. Expensive parking 14%
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.
F. RESPONDENT LOCATION & TRAVEL
DISTANCE FROM SLIGO TOWN CENTRE

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

- 17% live less than 1 km
- 24% live within 1-3 km
- 11% live within 4-6 km
- 15% live within 7-15 km
- 15% live within 16-30 km
- 18% live 31+ km

Q.30 How far do you live from the Sligo Town Centre?
Base: All Respondents: 407
The main method of transport used to get to Sligo Town was by car at 65%.

Transport Used

- Car: 65%
- Walk: 27%
- Train/Van/Bike/Taxi: 6%

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

Did you pay for parking?

- Yes: 92%
- No: 4%
- Not applicable, dropped in did not park: 4%
AVAILABILITY OF A CAR

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

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

Yes 76%
No 24%
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

- Yes: 54%
- No: 47%
- Not Really: 26%
- Maybe/Somewhat: 16%
- Not at All: 21%
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.

- Sligo Abbey: 14%
- The Model/Niland Gallery/The Mall Gallery: 9%
- The Yeats Building/Centre/Monument: 7%
- The Library: 4%
- The Jail: 3%
- Markievicz House: 2%
- Other: 6%
- No historic site/building comes to mind: 35%
- Don’t know: 16%

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

Others 1% or less not shown
HISTORICAL BUILDING/SITE VISITED IN LAST 12

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

Yes 20%

No 80%

Visited an historic building in last year

The 20% who visited went to:

- Sligo Abbey 9%
- The Model 5%
- The Yeats Building 5%
- Other Building/Site 1%

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

- Never: 28%
- Less often: 38%
- Once a month: 7%
- 2/3 times a month: 4%
- Once a week: 8%
- 2/3 times a week: 8%
- Daily: 7%
- Don't know: 0%

Net monthly: 34%
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.
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.

<table>
<thead>
<tr>
<th>Event Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concerts/music</td>
<td>15%</td>
</tr>
<tr>
<td>Festivals</td>
<td>11%</td>
</tr>
<tr>
<td>Markets/Christmas market</td>
<td>10%</td>
</tr>
<tr>
<td>Family events/fun day</td>
<td>7%</td>
</tr>
<tr>
<td>Food fairs/stalls</td>
<td>5%</td>
</tr>
<tr>
<td>Fleadh</td>
<td>4%</td>
</tr>
<tr>
<td>Irish/traditional music</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
</tr>
<tr>
<td>None/nothing</td>
<td>7%</td>
</tr>
<tr>
<td>Don't know</td>
<td>9%</td>
</tr>
</tbody>
</table>

Suggestions accounting for 3% or less not shown.

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
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%.

<table>
<thead>
<tr>
<th>Favourite Area</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Along the river/The Garavogue</td>
<td>24%</td>
</tr>
<tr>
<td>O’Connell Street</td>
<td>19%</td>
</tr>
<tr>
<td>Johnston Court</td>
<td>7%</td>
</tr>
<tr>
<td>Rockwood Parade</td>
<td>6%</td>
</tr>
<tr>
<td>Wine Street</td>
<td>5%</td>
</tr>
<tr>
<td>Quayside</td>
<td>4%</td>
</tr>
<tr>
<td>Tobergal Lane</td>
<td>4%</td>
</tr>
<tr>
<td>The shops/shopping centres</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
<tr>
<td>None/Nothing</td>
<td>10%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>1%</td>
</tr>
</tbody>
</table>

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

- “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”

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.

<table>
<thead>
<tr>
<th>Improvement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better variety/selection of shops</td>
<td>14%</td>
</tr>
<tr>
<td>Better parking/improve parking</td>
<td>13%</td>
</tr>
<tr>
<td>Better traffic management/flow</td>
<td>11%</td>
</tr>
<tr>
<td>A tidy up/makeover/modernising of town</td>
<td>11%</td>
</tr>
<tr>
<td>Reopen shops/businesses that have been closed</td>
<td>6%</td>
</tr>
<tr>
<td>Clean/paint/upgrade buildings</td>
<td>5%</td>
</tr>
<tr>
<td>More recreational facilities</td>
<td>4%</td>
</tr>
<tr>
<td>Investment/advertising</td>
<td>3%</td>
</tr>
<tr>
<td>Pedestrianise the streets</td>
<td>3%</td>
</tr>
<tr>
<td>More public toilets</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
</tr>
<tr>
<td>None/nothing</td>
<td>4%</td>
</tr>
<tr>
<td>Don't know</td>
<td>5%</td>
</tr>
</tbody>
</table>

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

Key improvements accounting for 2% or less not shown.

“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”
EXTENDED SHOPPING HOURS

For those who would avail of extended shopping hours, 10am-7pm Monday to Friday ranked highest.
### SLIGO TOWN CENTRE RATINGS – I

Café/restaurant choice and quality rank very highly for respondents at 97% and 96% positive respectively

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Very Good</th>
<th>Good</th>
<th>Neither</th>
<th>Poor</th>
<th>Very poor</th>
<th>Don’t Know</th>
<th>NET</th>
<th>Good Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Café/restaurant choice in the town centre</td>
<td>47</td>
<td>47</td>
<td>49</td>
<td>11</td>
<td>12</td>
<td></td>
<td>97</td>
<td></td>
</tr>
<tr>
<td>Café/restaurant quality in the town centre</td>
<td>47</td>
<td>47</td>
<td>48</td>
<td>12</td>
<td></td>
<td></td>
<td>96</td>
<td></td>
</tr>
<tr>
<td>Standard of service in shops in the town centre</td>
<td>20</td>
<td>67</td>
<td>4</td>
<td>6</td>
<td>2</td>
<td></td>
<td>87</td>
<td></td>
</tr>
<tr>
<td>Feeling of safety and security during the day in town centre</td>
<td>20</td>
<td>57</td>
<td>8</td>
<td>7</td>
<td>3</td>
<td>5</td>
<td>77</td>
<td></td>
</tr>
<tr>
<td>Variety of goods available in shops in the town centre</td>
<td>12</td>
<td>61</td>
<td>8</td>
<td>14</td>
<td>4</td>
<td>1</td>
<td>73</td>
<td></td>
</tr>
<tr>
<td>Value for money of shops in the town centre</td>
<td>9</td>
<td>54</td>
<td>18</td>
<td>16</td>
<td>2</td>
<td></td>
<td>62</td>
<td></td>
</tr>
<tr>
<td>General attractiveness of the town centre</td>
<td>8</td>
<td>53</td>
<td>11</td>
<td>20</td>
<td>7</td>
<td></td>
<td>61</td>
<td></td>
</tr>
<tr>
<td>Pavement cleanliness</td>
<td>7</td>
<td>55</td>
<td>12</td>
<td>22</td>
<td>5</td>
<td></td>
<td>61</td>
<td></td>
</tr>
<tr>
<td>Variety/range of shops in the town centre</td>
<td>10</td>
<td>49</td>
<td>9</td>
<td>23</td>
<td>9</td>
<td></td>
<td>59</td>
<td></td>
</tr>
<tr>
<td>General feeling of vibrancy in Sligo town centre</td>
<td>9</td>
<td>42</td>
<td>18</td>
<td>21</td>
<td>7</td>
<td>3</td>
<td>50</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Very Good</th>
<th>Good</th>
<th>Neither</th>
<th>Poor</th>
<th>Very poor</th>
<th>Don’t Know</th>
<th>NET Good Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling of safety and security at night in the town centre</td>
<td>10</td>
<td>36</td>
<td>13</td>
<td>10</td>
<td>18</td>
<td>14</td>
<td>46</td>
</tr>
<tr>
<td>Attractions in the town centre other than shopping</td>
<td>6</td>
<td>38</td>
<td>16</td>
<td>27</td>
<td>9</td>
<td>4</td>
<td>44</td>
</tr>
<tr>
<td>Range of events in Sligo town centre</td>
<td>3</td>
<td>40</td>
<td>19</td>
<td>22</td>
<td>4</td>
<td>12</td>
<td>44</td>
</tr>
<tr>
<td>General ease of getting around Sligo town centre</td>
<td>5</td>
<td>34</td>
<td>10</td>
<td>29</td>
<td>22</td>
<td>1</td>
<td>39</td>
</tr>
<tr>
<td>Seating and areas to congregate</td>
<td>3</td>
<td>27</td>
<td>15</td>
<td>40</td>
<td>13</td>
<td>3</td>
<td>30</td>
</tr>
<tr>
<td>Traffic flow in the town centre</td>
<td>1</td>
<td>10</td>
<td>9</td>
<td>30</td>
<td>48</td>
<td>2</td>
<td>11</td>
</tr>
<tr>
<td>Parking in the town centre</td>
<td>1</td>
<td>9</td>
<td>8</td>
<td>26</td>
<td>50</td>
<td>6</td>
<td>10</td>
</tr>
</tbody>
</table>

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.

Sligo's unique natural setting and environment makes a positive contribution to my experience of the town centre

- Strongly Agree: 28
- Slightly Agree: 44
- Neither: 14
- Slightly Disagree: 11
- Strongly Disagree: 4

Net agree 72%

The existing signposting and maps in the town centre make it easier to navigate Sligo town

- Strongly Agree: 15
- Slightly Agree: 44
- Neither: 17
- Slightly Disagree: 18
- Strongly Disagree: 5

Net agree 60%

Q.38 To what extent do you agree or disagree with the following two statements?

Base: All Respondents: 407
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.

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

Encourage Visit/ Spend More Time

- Yes: 57%
- Maybe/Somewhat: 29%
- Not Really: 8%
- Not at All: 5%

Highest amongst:
- Those who live 4-15km away (67%)
- Those aged 35-49 (64%)
- Those aged 18-25 (64%)
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 YOU

Ipsos MRBI

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