



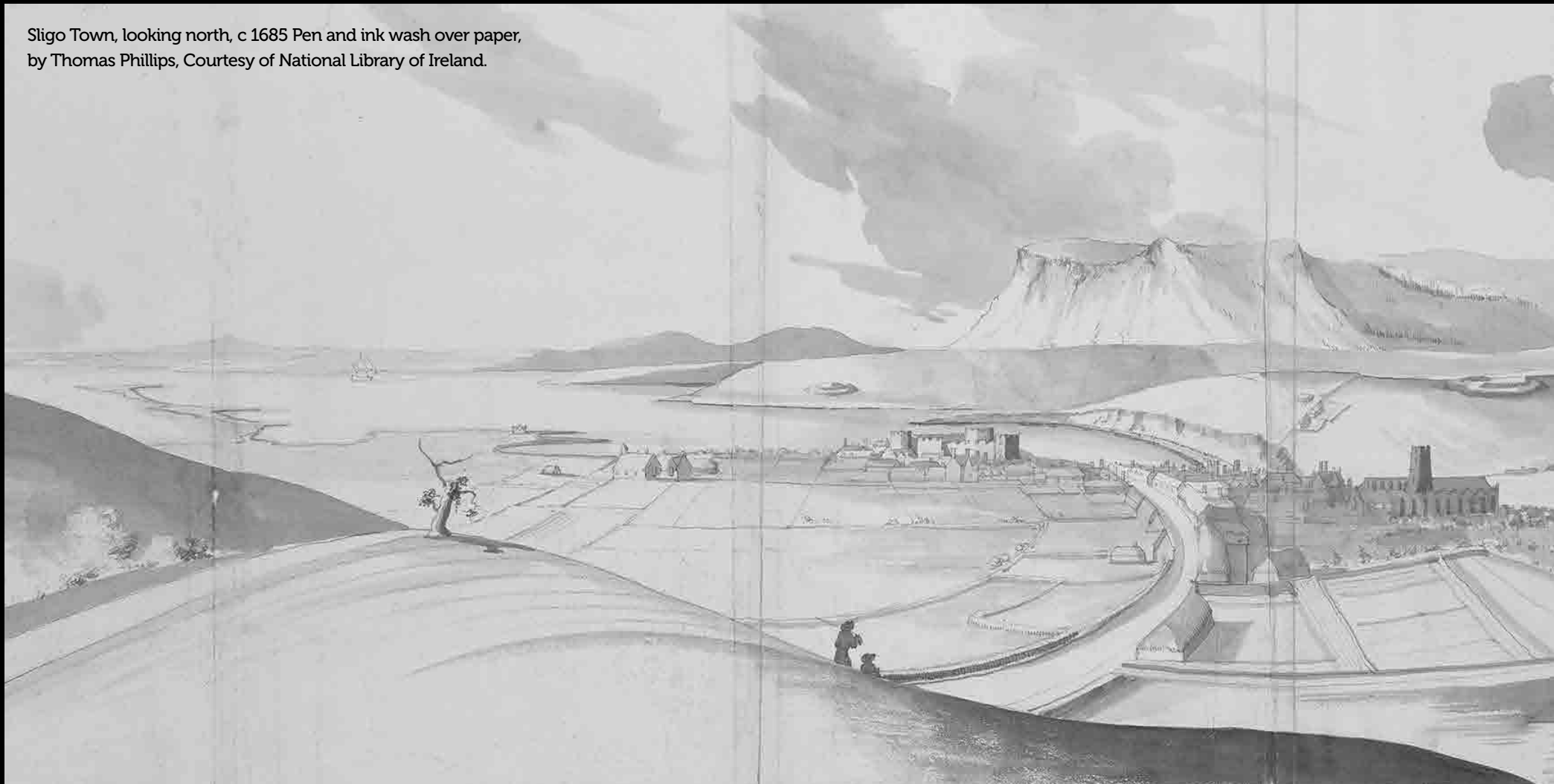
# SLIGO

## COLLABORATIVE TOWN CENTRE HEALTH CHECK

2020



Sligo Town, looking north, c 1685 Pen and ink wash over paper,  
by Thomas Phillips, Courtesy of National Library of Ireland.





## Introduction

Sligo (*Sligeach* = *shells abounding*) is a historic county town in the West of Ireland, with a population of 19,199 people (2016 CSO). The coastal town is nestled between the majestic Benbulbin Mountain to the north, ancient Knocknarea Mountain and the Atlantic Ocean to the west, beautiful Lough Gill to the east, and the rugged Ox Mountains to the south. The Norman influence is highly visible and includes the 1252 Dominican Friary founded by Maurice Fitzpatrick along with the layout of Sligo's historic streets and laneways. Sligo is one of the most picturesque settlements along the Wild Atlantic Way.

From the myths and legends of ancient Ireland, to the poetry of Nobel Laureate W.B. Yeats and the music of Coleman, Westlife and Dervish, Sligo's rich cultural and literary heritage is world famous and actively celebrated, as demonstrated by the hosting of the largest gathering of traditional musicians, singers and dancers, Fleadh Cheoil na hÉireann. Sligo also attracts significant inward investment and new employment has been created through partnership with the IDA and the relocation of tech start-ups to the North West.

The historic town has also secured significant funding through the URDF, Fáilte Ireland and the Heritage Council of Ireland. New residents are attracted by the quality of life and work/life balance the coastal town has to offer. The healthy lifestyle offered by Sligo Town, and its historic hinterland, is even more attractive given the worldwide Covid-19 pandemic.

## Aim of the CTCHC Report

This report summarises the key findings from the 15-step Collaborative Town Centre Health Check (CTCHC) Programme methodology, developed by the Heritage Council and its partners. The key findings from Sligo's first-ever CTCHC and baseline data will inform plans and strategies in relation to the following:

- **Arts, Cultural Tourism, e.g. music, food, etc.**
- **Climate change adaptation**
- **Commerce / E Commerce and Enterprise**
- **Heritage-led Regeneration**
- **Living in the Town Centre**
- **Public Realm, e.g. historic streetscapes, parks and public spaces**
- **Renewable Energy / Energy Harvesting**
- **Strategic Planning and Place-making Survey Methodology**



Photography by Eddie Lee

## The CTCHC research focuses on a number of key areas:

- Land use in the historic town centre
- Consumers' opinions and attitudes
- Business owners' attitude toward the town centre
- Footfall in the historic town centre
- Movement and accessibility

Representatives from Sligo Business Improvement District (BID), Sligo County Council, IT Sligo, Sligo Chamber, with ongoing support provided by the Heritage Council's CTCHC Co-ordinator, formed the Sligo CTCHC Steering Group and engaged in a collaborative process to achieve the goals set out by the Collaborative Town Centre Health Check 15-Step assessment process.



## Survey Methodology

Changing demographics, lifestyles, travel to work patterns and consumer preferences are all impacting on the vitality and viability of our historic town centres. In addition, the available information about our historic town centres is limited in scope.

This summary report presents up-to-date research that will help inform our response to these challenges through existing and future operational programmes that support heritage-led urban and rural regeneration.

Sligo's CTCHC research was undertaken during 2019 and 2020, following the recommended 15-Step Methodology set out by the CTCHC Programme.





## Land Use & Footfall Surveys

IT Sligo students under the supervision of lecturers of the Yeats Academy of Arts, Design and Architecture collected survey data on the vitality and vibrancy of the historic town centre and worked with local businesses in creating data for a land-use survey, which examined the use of ground floor space in the core town centre area. This core area covered Teeling Street, Castle Street, Grattan Street, O'Connell Street, Wine Street, Stephen Street, Bridge Street, Thomas Street, Market Street, High Street, John Street, Adelaide Street, and included approx 1,150 units, both occupied and vacant. The survey was conducted in March 2020 and uses were classified, using the GOAD Classification of Land Use and mapped using the CTCHC GIS colour coding system. The land use findings were peer reviewed in March 2020. A footfall survey was conducted by Sligo BID over 2 days in December 2019 to determine the areas of high and low footfall in Sligo Town Centre.

## Consumer & Business Surveys

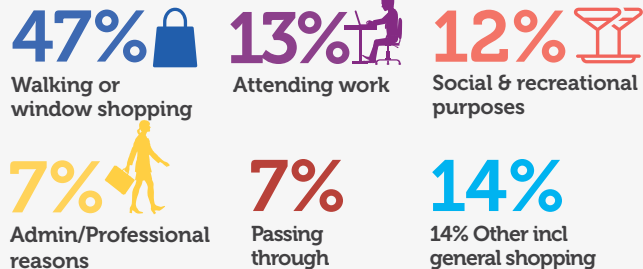
IPSOS was commissioned to undertake consumer surveys in the town centre. The survey questionnaire was based on previous CTCHC research in Ireland, provided under the CTCHC Programme. IPSOS used non-probability quota sampling to administer over 400 questionnaires to consumers in Sligo Town Centre. Quotas were based on age, gender and social class, as per CSO data.

In addition 80 randomly selected business owners were invited by Sligo BID January 2020 to participate in a commercial survey and a total of 32 responded. A further business survey on the impact of the COVID-19 pandemic was conducted by Sligo BID in May 2020, highlighting the difficulties and potential solutions for Sligo Town Centre to adapt to this new trading environment.



# Consumers' Opinions of Sligo Town Centre

## REASON FOR BEING IN SLIGO TOWN CENTRE



- Of the shoppers surveyed 33% shopped in the town centre out of habit and 30% because they find it easy to get to or handy.
- the highest average spend was €185, spent in mobile phone outlets (although only 4% of respondents had visited these outlets on the day of the survey)

## ONLINE SHOPPING IN SLIGO

**34%** of respondents shopped online at least once a month and spent on average **€77**

### THE TOP ONLINE STORES ARE:



## SUGGESTED IMPROVEMENTS TO TOWN CENTRE



- 53% thought that Brexit will have a negative impact on Sligo town centre and 32% do not know.

### SUGGESTED IMPROVEMENTS:

|   |     |
|---|-----|
| Better variety/selection of shops             | 14% |
| Better parking/improve parking                | 13% |
| Better traffic management/flow                | 11% |
| A tidy up/makeover/modernising of town        | 11% |
| Reopen shops/businesses that have been closed | 6%  |
| Clean/paint/upgrade buildings                 | 5%  |
| More recreational spaces                      | 4%  |

Under 4% not included in the results

## TOP % SHOPS VISTED



**€60**   
the average spend in a clothes shop.



- 63% of online shoppers DO NOT SHOP from Sligo based online shops.

- 53% of young consumers shop online the most.

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



## TOP 3 DISLIKES ABOUT SHOPPING IN SLIGO TOWN CENTRE



Throughout this section of the report, the answers to a number of questions asked in the IPSOS survey may add to more than 100%. This is because these were multi-code questions, meaning respondents were able to select more than one answer.

# Consumers' Opinions of Sligo Town Centre

## PREFERRED EXTENDED OPENING HOURS

**OPEN**

- 68% of shoppers would avail of an expansion of opening hours as follows

|                             |     |
|-----------------------------|-----|
| Monday to Friday 10am - 7pm | 28% |
| Friday 6pm - 9pm            | 16% |
| Thursday 6pm - 9 pm         | 12% |
| Sunday 2pm - 6pm            | 12% |
| None of these               | 32% |

## TOP 3 SUGGESTED EVENTS IN SLIGO TOWN CENTRE

- 34% visited the Sligo Town Centre at least once a month for public events
- Consumers were keen to see more events in Sligo Town Centre:



**97%**

of respondents thought that the choice of cafés/restaurants in the town centre was good or very good.

**97%**

thought the same of the quality of cafe and restaurants

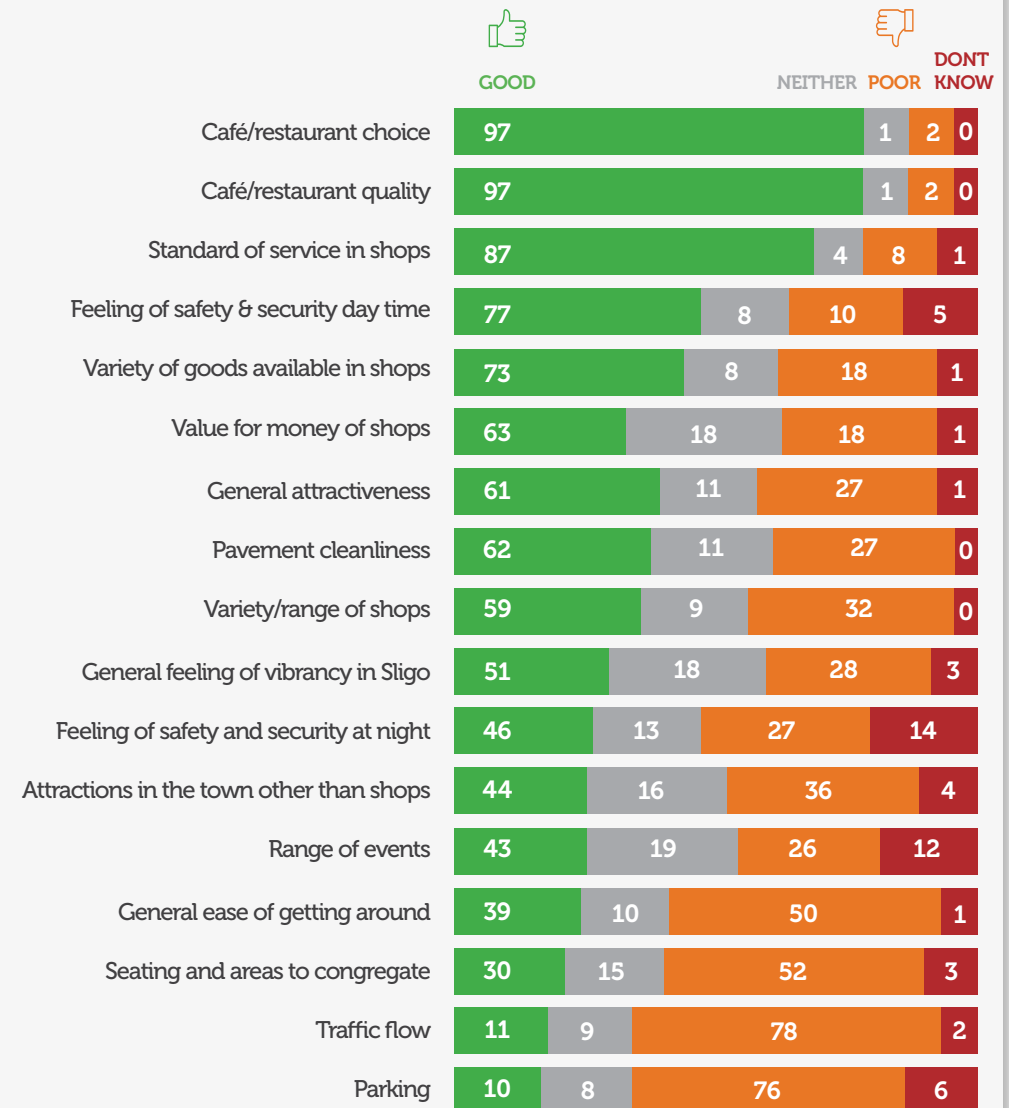
**80%**

of consumers had not visited any historic attraction in the last 12 months.



O'Crean Tomb Sligo Friary

Sligo Consumer Survey also invited respondents to rate key aspects of the historic town centre. The most positive rating was achieved by the town's cafés and restaurants and the standard of service in the shops.



# Business Owners' Opinion of Sligo Town Centre

## First thoughts about Sligo Town Centre?



'Too many empty properties'

Congested'

'Small, quiet, peaceful town'

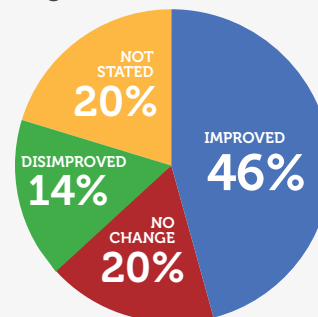
'Compact. Pretty. Busy.'

'Community, adventure, great food offering'

More events in the town centre

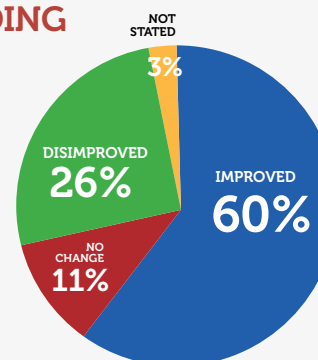
- 90% of business owners think that the café/restaurant choice and quality is good or very good.
- 44% still think that the quality and variety of shops is the main thing which attracts customers to Sligo Town Centre.
- 63% of business owners think that seating and areas to congregate are poor or very poor.
- In January 2020, less than half of the businesses had seen improving trading conditions over the last 2 years

### TRADING CONDITIONS OVER THE LAST 2 YEARS



- Pre COVID-19 pandemic, most business owners were optimistic about the trading conditions for the next 2 years.

### EXPECTED TRADING CONDITIONS OVER THE NEXT 2 YEARS



- 68% attributed change in trading conditions to Brexit. (Sentiment Pre COVID 19)
- 50% split between businesses that rent their premises versus own their premises
- 30% of business owners would further investment their premises in Sligo Town Centre.
- There is no prominent competition town for Sligo. The perceived share of competition from Northern Irish towns is low.

CASTLEBAR 26%

GALWAY 19%

CARRICK ON SHANNON 22%

OTHER

ENNISKILLEN 21%

## DO YOU SELL ONLINE?

70% of respondents stated that online sales accounted for 20% or less of their turnover.



86%  
have a  
Facebook  
account



77%  
have a  
business  
website



77%  
have an  
Instagram  
presence



# Business Owners' Opinion of Sligo Town Centre

## COVID-19 Business Survey

The majority of business owners in Sligo would improve access to the town centre.

**33%** would like to see improvement to traffic flow and parking

**33%** would make improvements to pedestrian access and public areas.

### BUILDING UPGRADE AND IMPROVEMENT:

**68%** of businesses made an investment within the last five years

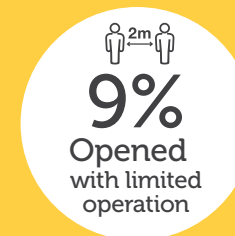
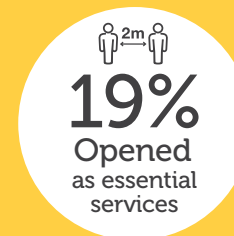
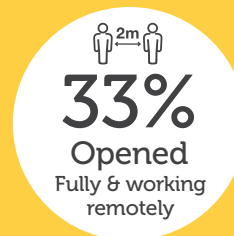
**58%** of businesses have future investment plans for their building



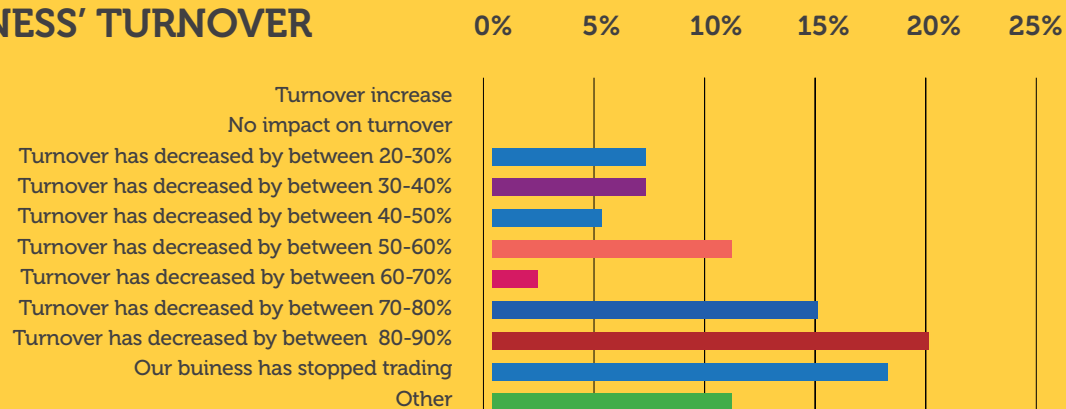
**63%** of businesses own a space on the upper floor, of which 50% is vacant.

**65%** wished there were more music and arts events.

In May 2020, Sligo BID surveyed over 80 businesses to evaluate the impact of COVID-19 on the town centre. More than a third of businesses were still closed in Sligo town centre, due to the COVID-19 lockdown and a third were opened but working from home.



### IMPACT OF COVID ON BUSINESS' TURNOVER



**37%**

would like to try pedestrianisation on a trial basis

**27%**

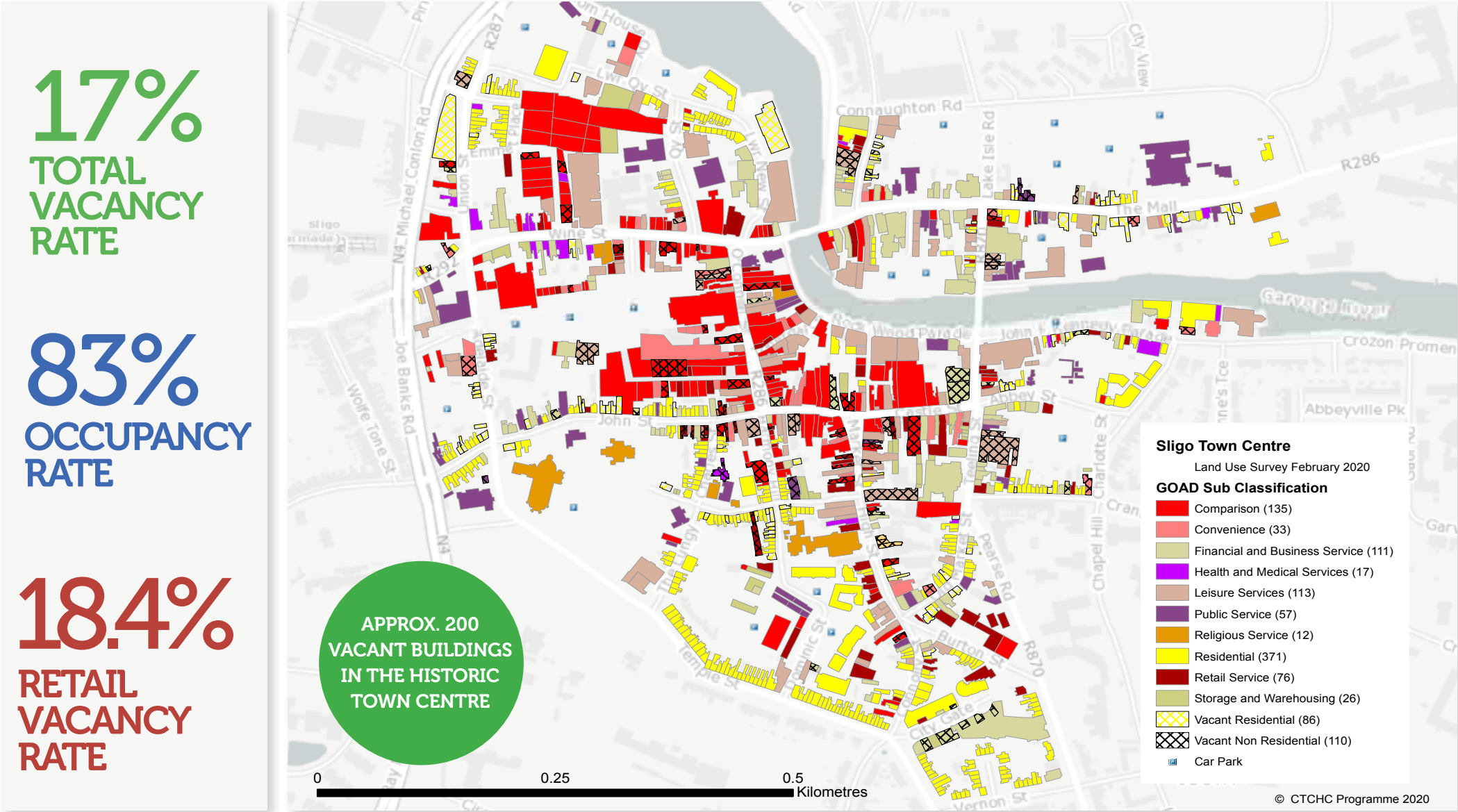
In favour of the pedestrianisation of smaller streets only

**41%**

In favour of leaving the streets as they are.



# Sligo Land Use Survey



|             |     |                         |     |                  |     |                    |    |                   |    |
|-------------|-----|-------------------------|-----|------------------|-----|--------------------|----|-------------------|----|
| Residential | 32% | Vacancy (total landuse) | 17% | Leisure services | 10% | Health and medical | 2% | Religious service | 1% |
| Retail      | 21% | Financial and business  | 10% | Public service   | 5%  | Storage            | 2% |                   |    |



# Footfall Survey of Sligo Town Centre

A footfall survey was undertaken at different locations across Sligo Town Centre, on Friday 20th and Saturday 21st December 2019. Three time slots were recorded for each location.

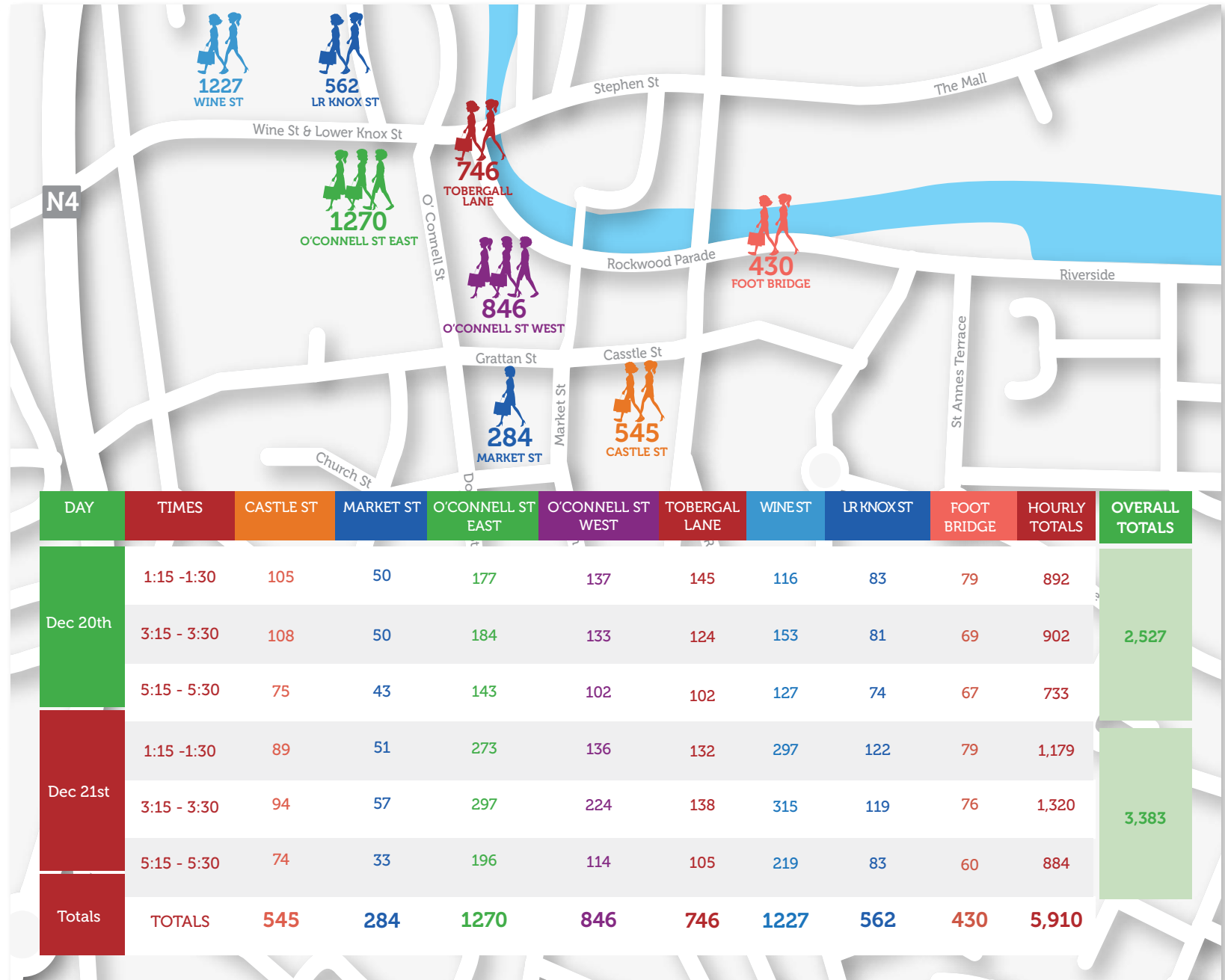
O'Connell Street is the busiest Street with an average pedestrian movement of 1,400 per hour.

Saturday is 34% busier in footfall than Friday and footfall falls by 33% after 5pm.

This might also be reflective of the early night fall at that period of the year.

**34%**  
busier on Saturday  
than on Friday

**33%**  
less busy after 5.00pm



# Key Considerations and Opportunities for Sligo

## Ireland's Programme for Government and the CTCHC Programme

The Heritage Council and Partners' CTCHC Programme has been included as one of the cornerstones of the Programme for Government: Our Shared Future, published in June 2020. Under the mission of a Better Quality of Life for All, a planned Town Centre First Policy will utilise the CTCHC Programme as a framework to gather and lead actions throughout the country. This new policy framework presents significant opportunities and benefits for Sligo and its historic town centre.

## Regional Development

Sligo Town is designated as one of three Regional Growth Centres, (along with Athlone and Letterkenny), in the Regional Spatial and Economic Strategy (RSES) adopted by the Northern and Western Regional Assembly in January 2020. NWRA's RSES acknowledges the challenges facing town centres in the North-West Region due to higher than average vacancy rates.

Sligo Town's strategic location at the crossroads of the CTCHC Programme's Atlantic Economic Corridor Network (AECN) and the Border Towns Network (BTN) makes the town a key player in the overall development of the NW Region. This strategic framework for regional growth and development is significant in acting as leverage for future investment in Sligo Town Centre.

## Regeneration, Heritage and Tourism Funding

Sligo Town Centre will also benefit from projects funded under the Urban Regeneration Development Fund (URDF) and the WDC Investment Fund. The new Eastern Garavogue Bridge and approach roads will help improve traffic management within the town centre. The enhancement of O'Connell Street and the

transformation of Stephen St car park to a cultural plaza, plus the upgrade of public spaces and buildings in the town centre with support from the Heritage Council's Historic Towns Initiative (HTI) will help achieve the Regional Policy Objective of upgrading Sligo Town Centre through focused intervention (RSES RPO 3.7.48). In addition, the Strandhill Surf Centre of Excellence and investment in a Yeats Trail will further strengthen the rich cultural asset base of Sligo as a tourist town with a rich and attractive quality of life.

## UN SDGs and Brexit

Sligo faces significant challenges as a result of the exit by the UK from the European Union and also in relation to meeting the UN's Sustainability Development Goals (SDGs). It is anticipated under the PfG that the CTCHC Programme's Border Towns Network will assist in enabling Ireland's Border Towns to survive and thrive for the benefit of existing and future generations - with ongoing support from the Irish Government and the EU.

## eCommerce – Need to 'Clawback'

The CTCHC surveys for Sligo Town have clearly revealed that there is a significant leakage from the town to [non-indigenous] online shopping. This business potential, i.e. 'claw back', could be better harvested by enhancing the overall consumer experience in order to capitalise on dwell time and total spend in Sligo's Town Centre. Any future eCommerce investment should combine with 'bricks and clicks' initiatives and other innovative programmes to promote commercial SMEs.

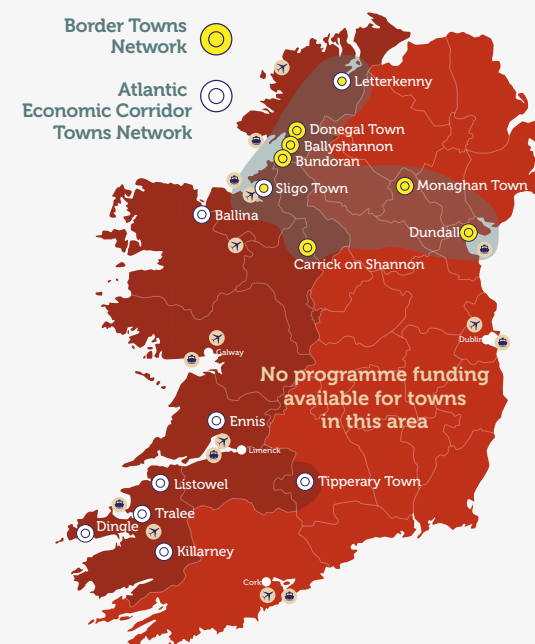
## COVID-19

Ongoing impacts of the Covid-19 pandemic are difficult to forecast but the short-term effects appear to be negative for most businesses in Sligo. The CTCHC Programme Partners will have a key role to play in designing and implementing adaptive responses to the new trading conditions through a coordinated and collaborative approach to town centre management.

## Heritage Assets – Built, Cultural and Natural

Heritage Assets – tangible and intangible – are a significant yet under-utilised feature of Sligo Town, which dates back to the prehistoric era. Reasserting the overall value and importance of Sligo's unique 'time-depth' and heritage's potential to contribute to Sligo's image and growth are key. Heritage-led regeneration represents a significant opportunity to transform the historic town centre and connect to important heritage sites within Sligo's wider historic landscape and seascape.

## Ireland's Collaborative Town Centre Health Check Programme





# Stakeholders and Project Team

## Stakeholders and CTCHC Project Team

The Sligo CTCHC Project is a partnership between the Heritage Council and local stakeholders. If you would like to get involved in the renewal of Sligo Town Centre, please contact:

**Sligo Business  
Improvement District**



**Gail McGibbon,**  
CEO, Sligo BID

**e-mail:** [info@sligobid.ie](mailto:info@sligobid.ie) **Tel:** +353 85 758 4434

**Institute of  
Technology Sligo**



**Dr Chris O'Malley,**  
Vice President, Research, Innovation & Engagement  
**e-mail:** [omalley.chris@itsligo.ie](mailto:omalley.chris@itsligo.ie)

**Sligo County  
Council**



**e-mail:** [ctchc@sligococo.ie](mailto:ctchc@sligococo.ie) **Tel:** +353 71 9111 111

**For information on the Collaborative Town Centre Health Check (CTCHC) Programme, please contact:**

## The Heritage Council

**Ali Harvey**  
CTCHC Programme Founder & Coordinator

**e-mail:** [aharvey@heritagecouncil.ie](mailto:aharvey@heritagecouncil.ie) **Tel:** +353 87 419 3458

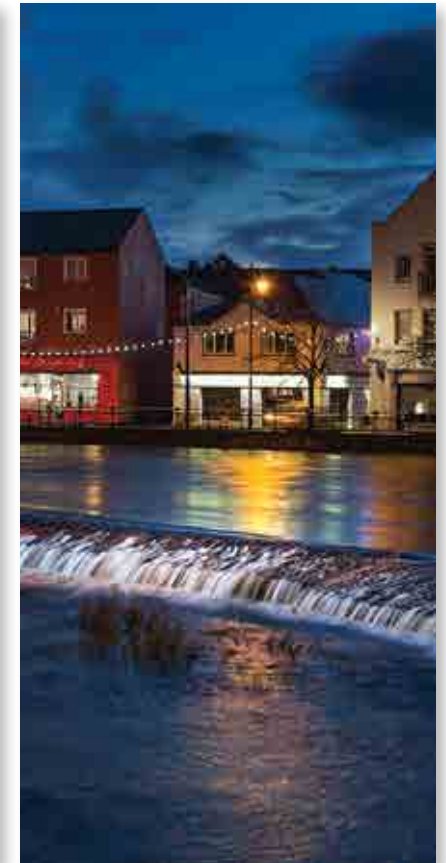
An Chomhairle Oidhreacht  
The Heritage Council



A significant number of stakeholders came together to form the Sligo CTCHC Project Team. Their names and organisations are as follows in alphabetical order:

|                    |                  |                    |                           |                |                      |
|--------------------|------------------|--------------------|---------------------------|----------------|----------------------|
| Bernadette Donohoe | IT Sligo         | Trevor McDaid      | Sligo Chamber of Commerce | Siobhan Ryan   | Sligo County Council |
| Finbarr Filan      | Sligo Tidy Towns | Mary McDonagh      | Sligo County Council      | Stephen Walshe | Sligo LEO            |
| Deirdre Greaney    | IT Sligo         | Gail McGibbon      | Sligo BID                 | Stephen Ward   | Sligo County Council |
| Ali Harvey         | Heritage Council | Dr. Chris O'Malley | IT Sligo                  |                |                      |
| Dr. Carol Moran    | IT Sligo         | Michael Roulston   | IT Sligo                  |                |                      |

Thank you to IT Sligo students of Year 4 BA(Hons) Architectural design RIBA part 1 for undertaking the Sligo Land Use Survey and Dr Luke Kelleher who peer reviewed the survey in March 2020.



Notes:

A large, light gray rectangular area with horizontal white lines, resembling a notepad or a space for writing notes. The lines are evenly spaced and extend across the width of the gray area.









An Chomhairle Oidhreachta  
The Heritage Council



tel | 056 777 0777

The Heritage Council, Church Lane, Kilkenny, Ireland

web | [www.heritagecouncil.ie](http://www.heritagecouncil.ie)

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