Sligo County Council & Sligo Borough Council

SLIGO CITY AND COUNTY JOINT RETAIL PLANNING STRATEGY 2010-2017

ROGER TYM & PARTNERS
Planners and Development Economists

Millward Brown IMS

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ROGER TYM & PARTNERS

19 Woodside Crescent
Glasgow G3 7UL

t 0141 332 6464
f 0141 332 3304
e scotland@tymconsult.com
w www.tymconsult.com

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1 INTRODUCTION

1.1 Roger Tym & Partners was commissioned in May 2008 by Sligo County Council and Sligo Borough Council to prepare a Joint Retail Planning Strategy for Sligo City and County as part of the preparation of the Sligo and Environs Development Plan 2010-2016.

1.2 As the Joint Retail Planning Strategy will be part of the Sligo and Environs Development Plan 2010-2016 (SEDP), it will also assist in the consideration of forthcoming planning applications, as well as in developing revised city centre and retail policies.

1.3 Retailing dynamics continue to evolve and affect County Sligo. It is anticipated that Sligo as the County's main focal point in retailing terms will experience an increase in levels of interest in retail (and leisure) development. The future development of the Green Fort Project, which includes retail and residential elements alongside a new museum and an extended Model Arts and Niland Gallery, is likely to have further catalytic effects. In addition, there is pressure for development related to growth in expenditure and enhanced accessibility brought about by the upgrading of the National Primary road network, with improvements to the N17/N16/N15 providing greater accessibility to and between centres of population in the West of Ireland, and N4 improvements offering better access to Dublin. Sligo's 'mono-nodal' nature also brings various policy issues with it, balancing demand with the needs of individual settlements.

1.4 The strategy also takes account of the effects of development and retail policy in neighbouring counties, some of which offer a competing product, while others may be seen as complementing County Sligo's broader strategic retail needs.

1.5 The anticipated pattern of population growth in Sligo City and County has been established by the settlement strategy in the County Development Plan, 2005. This responds to Sligo's designation as Gateway City and growth area in the National Spatial Strategy. Across the County, the population growth target is established at 50,000 - 80,000 people over the next 20 to 30 years. The settlement strategy aims adopts a centre hierarchy, based on expanded support settlements, to absorb anticipated growth sustainably. The hierarchy comprises:

- Sligo Gateway City - a nationally significant urban centre where a critical mass of population would sustain economic growth;
- Sligo Sub - region - including settlements within commuting distance of Sligo City such as the satellite villages of Collooney, Ballysadare, Strandhill, Grange and Rosses Point; and
- Key Support Towns serving different rural areas of the County - the towns of Ballymote (south), Tobercurry (south-west) and Enniscrone (west).

1.6 In the period to be covered by the SEDP, Sligo (and to a lesser extent the County's other main centres - Ballymote, Tobercurry, Enniscrone, Grange and Collooney[1] will develop further, bringing pressures for additional residential, commercial and retail development.

1.7 The role of these centres and their relationship with the type of potential floorspace which may be brought forward has been considered. The Retail Strategy considers these developing relationships, their likely extension, the appeal of competing centres outside the County, and the potential implications for Sligo and the wider County.

[1] for the purpose of the Retail Strategy, Ballysadare is considered as part of Sligo's wider urban outskirts

1.8 The **Retail Strategy** assesses:

- The extent to which these trends affect current policy and strategy;
- Whether demographic and economic changes since the last review necessitate a shift in planning and retail policy; and
- The impact of changes and development pressure in key settlements and their implications for strategic planning policy.

1.9 In preparing this Report, detailed analysis has been undertaken in Sligo and the surrounding area. This has included:

- an analysis of population and expenditure trends across Sligo and the wider County area;
- examination of the policy environment in which the retail strategy will operate, including a review of the submissions informing the First Manager's Report[2];
- health check assessments of Sligo City Centre, other retail nodes in the City, as well as town and village centres in other parts of the County;
- a City Centre shoppers survey;
- a survey of household expenditure patterns in the wide Sligo catchment area;
- analysis of retail floorspace and planning permissions in Sligo City centre and other retail focal points across the County (including a physical survey of all retail outlets in the area); and
- detailed discussions with key stakeholders in the City itself and in the retail industry generally.

1.10 The Shoppers and Household Surveys were undertaken by Millward Brown IMS. .

1.11 The Strategy aims to addresses the key challenges facing the retail sector, highlighting future opportunities for growth, and identifying actions that will further develop the City's role as the primary retail centre for Sligo and the surrounding area as it develops its Gateway function.

1.12 Following this introduction, the report has the following sections:

- Section 2 – Policy Review;
- Section 3 - Centre Appraisals;
- Section 4 - The Study Area, including the findings of the Shoppers and Household Surveys;
- Section 5 - Projected Requirements; and
- Section 6 - Conclusions;

[2] First Manager's Report on pre-draft submissions and observations in relation to the SEDP, Sligo County Council, Development Planning Unit, 18 June 2008

2 POLICY REVIEW

2.1 The various national, regional and local policies provide a consistent framework supporting further retail development in Sligo as part of its Gateway status. Despite its relatively small size, Sligo's importance as the key retail centre for a hinterland extending across the County and beyond is recognised.

Retail Planning Guidelines

2.2 As a result of increasing pressure for retail development, Retail Planning Guidelines were issued in December 2000 and amended in February 2005. The guidelines define the national retail hierarchy supporting it with five key policy objectives:

1. Facilitating a competitive and healthy environment for the retail industry;

2. Supporting the continuing retail vitality and viability of town and district centres, with established centres being the preferred location for new development (as well as the focus of social, business and community activity);

3. Promoting development which is easily accessible by different modes of transport;

4. A presumption against large-scale retail centres adjacent or in close proximity to existing, new or planned national roads and motorways; and

5. Ensuring that all development plans have clear retail policies and proposals.

2.3 In addition, specific policy guidance is provided for retail development of differing scales, with floorspace caps employed to encourage local competition:

- Regional shopping centres - outside Greater Dublin, there is no justification for new large scale regional shopping centres;
- District centres - development plans will identify any need for new district centres, of up to 10,000 sq.m in the main towns and 20,000 sq.m in Dublin;
- Large foodstores - a floorspace cap of 3,500 sq.m net is applied in Greater Dublin, reducing to 3,000 sq.m net elsewhere;
- Discount foodstores - the potential role of stores of up to 1,500 sq.m gross floorspace in extending retailing choice is acknowledged;
- Retail parks - the guidance notes that while development between 8,000 sq.m and 15,000 sq.m (gross) is not likely to have a material impact on the more important centres in the retail hierarchy, there could be adverse impacts for smaller centres. It strongly advises restrictions on the range of goods sold to bulky household goods only i.e. carpets, furniture, white electrical goods and DIY items;
- Retail warehousing units - a threshold cap of 6,000 sq.m gross floorspace is applied to single large retail warehouse units.; and
- Retail in petrol filling stations - up to 100 sq.m net retail sales area may be allowed.

2.4 Retail Planning Guidance stipulates that a sequential approach to the location of retail development should be followed in considering the preferred location for new retail development (both when preparing policy and in considering specific applications). Clear preference is given to town centre sites, followed by edge-of-centre sites (defined as within an easy and convenient walking distance from the primary shopping core[3]). Only when these options have been exhausted should alternative out-of-centre locations be considered.

2.5 Sligo is identified as a third tier retail centre[4] according to the guidance's retail hierarchy. The guidance states a third tier retail centre cannot be precisely defined however their overall value is significant - '*The combined population of third tier centres amounts to six per cent of the State total and they account between them for a further 18 per cent of comparison turnover.*'

National Spatial Strategy 2002-2020, "People, Place and Potential"

2.6 The National Spatial Strategy aims to achieve an improved balance of social, economic, physical development and population growth between the Irish regions. NSS identifies gateways and hubs that have the capacity to support a strong urban-rural structure to contribute to more balanced regional development.

2.7 Sligo is identified as a 'national level gateway' to the region with a central role in developing the North West region '*Critical mass in the West and North West can be strengthened by developing Sligo as a gateway to capitalise on its strategic location and energise its associated hinterland.*

2.8 Sligo was selected as a 'national level gateway' due of its strategic location in the North West, its physical and infrastructural capacity and its stock of critical factors such as water services, education and healthcare, necessary to support Gateway functions.

2.9 Sligo is well positioned spatially to provide support to parts of Mayo, Leitrim, Donegal and Sligo County itself as well as capitalising on emerging crossborder co-operation and being part of a broader corridor of cities from Cork to Derry.

The National Development Plan 2007-2013

2.10 The National Development Plan describes the nine Gateways identified in the NSS, current development issues and characteristics and a general outline of the overall investment priorities within each Gateway.

2.11 The Plan identifies Sligo's scenic setting and hinterland, recent completion of the inner relief road; various upgrades to the M/N4 road; the Sligo Institute of Technology; access to regional airports and strong private investment activity - particularly in the retail and leisure areas as Sligo's key strengths.

2.12 Development challenges principally include implementing measures to bring about increased private housing development and rapid population growth within the Gateway. Key development issues and investment requirements over the period of the Plan include:

Urban Renewal

- Continued development of the emerging cultural and entertainment quarter;
- Development of regional sports and recreation facilities;
- Targeted urban renewal including urban enhancement, pedestrianisation and urban redevelopment of the port area;

Housing

- Accelerated development of new private housing areas;

[3] 300 metres - 400 metres
[4] First tier: Dublin; Second tier; Four major cities of Cork; Limerick; Galway and Waterford.

- New eastern and western urban distributor routes to open up strategic land banks for accelerated development of new housing areas;

Access

- The development of the Atlantic Road Corridor with consequential enhancement of road links to other Gateways;
- Completion of the remaining sections of the N4 requiring upgrades;
- Introduction of enhanced railway services on the Sligo-Dublin route.

2.13 In its pre-draft submission, DOEHLG noted that “Sligo needs to maintain and consolidate commercial and employment-related development, with particular regard to the city’s promotion as a major centre for retailing, services, tourism and culture in the North-West, as recognised in the City’s Gateway designation by the Government under the National Spatial Strategy (NSS)”

2.14 It further noted that the pattern of dispersed development across the County-high growth outside the city combined with decline in the Borough - is unsustainable and that the next development plan and supporting strategies should aim to reverse this and stimulate Sligo’s growth. The Department’s observations also place a heavy emphasis on the comprehensive redevelopment of key sites including the Docklands and Racecourse area. Overall, a compact, sustainable pattern of development should be promoted.

Sligo County Development Plan 2005-2011

2.15 The Sligo County Development Plan omits the Sligo and Environs area, which is covered by the Sligo and Environs Development Plan 2004-2010.

Population Trends

2.16 Population forecasts are a central component of retail capacity studies. Key issues that emerged from a review of population trends in 2003 included:

- The population of the County, including Sligo town, was growing, but at a rate that would have to be accelerated to achieve the critical mass for Sligo City outlined in the NSS;
- The process of population decline was stabilising and reversing in many central and northern parts of the County, with substantial rates of increase recorded in some areas adjacent to Sligo town;
- western parts of County Sligo exhibited more persistent patterns of population stability or decline, apart from the areas associated with particular towns, but the areas of most significant decline were generally the more mountainous and remote parts of the County.

2.17 Sligo’s lower than forecast population growth has significant implications for achieving critical mass and fulfilling the regional obligations of a national level Gateway.

Strategic Aims

2.18 Taking account of national policies and important development trends, the strategic aims of the Development Plan are:

- To develop the full potential of each part of County Sligo to contribute to the optimal performance of the County as a whole - economically, socially and environmentally;
- To drive forward the development of Sligo towards a target population of between 75,000 and 80,000 by 2011, structured in a balanced manner between:

  - o The Gateway City of Sligo (35,000-40,000). Strategic 20-30-year population: 50,000- 80,000.
  - o the wider area of County Sligo (40,000), encompassing the targeted development of Key Support Towns and priority settlements, and the maintenance of viable rural communities in the rural hinterlands of these towns and villages.
- to support the implementation of the Gateway status for the City of Sligo by ensuring the structured and orderly development of Sligo as a compact and sustainable city;
- to sustain the vitality of rural communities throughout the County in a way that will complement the vibrancy of urban settlements and reinforce the identity of Sligo;
- to ensure that the nationally - and internationally - renowned natural and cultural heritage of Sligo is wisely conserved and enhanced;
- build up the regional-level linkages between County Sligo and other parts of the Border Region and adjoining regions, such as the Western Region and Northern Ireland.

Strategy

2.19 The overall settlement strategy for County Sligo is based on the following principal requirements:

- The promotion and development of Sligo as a Gateway City;
- Careful growth management in the Sligo Sub-Region[5];
- The development of Key Support Towns to serve rural areas:
  - o Enniscrone to serve the west of the County;
  - o Tobercurry to serve the south-west of the County;
  - o Ballymote to serve the south/south-east of the County.

Development

2.20 The Plan recommends that most new retail floorspace should be provided within Sligo City and Environs as it can be supported by a rapidly expanding population (especially within the first years of Plan period). The Plan recognises the limited prospects of growth and expansion in the rural parts of the County where the key thrust of Development Plan policy is to maintain and enhance the existing retail environment to serve and benefit local communities.

Objectives

- Support and encourage the key role of retailing within the towns and villages;
- Encourage the retention of retail/service outlets;
- Encourage uses that support local retail and service outlets;
- Ensure that retail and service outlets will generally be located within the central area of a town or village, where they can best serve the surrounding population.
- Discourage inappropriate out-of-town shopping facilities that detract from the vitality, viability and/or character of existing town and village centres.
- Generally discourage any retail outlet in excess of 500 square metres retail floor space;
- Give favourable treatment to proposed changes of use to retail;
- Promote the reuse of existing vacant retail outlets in towns and villages;

[5] The commuter belt of the greater Sligo City area

- Promote initiatives or programmes to enhance the character and urban design quality of Tobercurry, Ballymote, Enniscrone, Collooney and Grange, to ensure that they remain attractive for investment in commerce and retailing;
- Ensure that all new retail and commercial development proposals respect the scale and character of the streetscape within which they are proposed;
- Encourage the retention of traditional shopfronts and pub fronts of character and design quality.

Sligo and Environs Development Plan 2004-2010

2.21 The Sligo and Environs Development Plan 2004-2010 has a number of retail objectives and policies to facilitate retail expansion in Sligo. Retail objectives include:

- Promotion of the Centreblock and the Buttermarket as the priority areas for provision of new medium and large-scale retail development in Sligo;
- The identification of a network of neighbourhood centres to meet the needs of existing and new communities;
- The identification of two areas for concentrating retail warehousing activity - one at Shannon Eighter in the north, the other at Pearse Road (Carrowroe) in the south;
- A focus on Sligo Centre as the preferred location for retail development, including the assessment of new retail applications against the provisions of the sequential test ; and supported by strategies for the further development of the City's cultural offer, and the strengthening of its niche and tourism-related markets.

2.22 The Plan's retail policies can be divided into two categories:

Strategic Policies

- Cement Sligo's role as regional shopping centre and 'gateway' city;
- Assist the city in making the transition from a third tier to a second tier shopping centre on the national retail hierarchy;
- Encourage a range of shopping facilities within the City Centre;
- Facilitate a competitive and healthy retail environment in Sligo;
- Reinforce existing retail areas;
- Designate specific neighbourhood centres;
- Encourage the development of 'e-tailing' as a shopping option in Sligo;
- Provide overall retail space in line with projected requirements;
- Ensure that the amount of convenience floorspace to be provided in the city centre should be assessed relative to achievements of population growth targets; and
- Site retail development in locations that encourage multi-purpose shopping, business and leisure trips on the same journey.

Development Control Policies

- Restriction of retail warehouse developments solely to the sale of 'bulky' comparison goods, and ensure they are of appropriate scale.

- Generally discourage permission for change of use from retail or service to non-retail or non-service at ground-floor level[6]
- Discourage certain types of commercial and retail development at ground floor level
- Ensure that retail development is accessible by both public transport and private car
- Encourage national-chain retail branches and retail department stores to locate within the city centre;
- Seek to preserve and enhance existing traditional shop-fronts of high quality;
- Encourage modern shop fronts which respect context, where existing shop fronts are not worthy of preservation.

Summary

2.23 The broad policy context, at national, regional and local levels, supports the City Centre's ongoing development as the main regional centre. However, retail development is also promoted in other centres in the retail hierarchy. The County's mono-nodal structure has produced a heavy concentration of retail facilities in Sligo itself. Further development is reliant upon site identification and assembly, which is more problematic in the established urban core.

2.24 Increasingly, retailers have been focussing on sites and locations where these constraints are minimised, effectively promoting out of centre locations. With such locations providing a focus of modern retailing floorspace and growing in size, there will be increasing pressure for development of mainstream comparison floorspace (of the type traditionally seen in city centres) in other centres and other locations.

2.25 National, regional and local planning policy promote the Sligo Gateway, and supporting policies seek to stem leakage of expenditure from the County while also attracting increased levels of spending from outside. While retail development outside Sligo City Centre may assist in serving the County's population and promoting a more sustainable pattern of shopping trips, the policy direction also serves to underline the need for ongoing improvements in Sligo's retail offer if it is to maintain and enhance its regional retail function.

2.26 Policies to further strengthen the retailing role and focus of the City Centre need to be brought forward, including identification of potential areas for development and potential expansion and the continuing improvement of the City Centre environment.

[6] Within the following areas - O'Connell Street, Gratton Street, Castle Street, Market Street, High Street, Rockwood Parade, Tobergal Lane, Abbey Street and Stephen Street.

3 CENTRE APPRAISALS

3.1 The Retail Planning Guidelines 2005 indicate a variety of factors which contribute to city centre vitality and vibrancy. Encouraging centre vitality and viability requires a balance to be struck between these factors. The guidance lists four broad categories of the 'qualities' which need to be balanced:

- *Attractions* - these underpin a town and comprise the range and diversity of shopping and other activities which draw in customers and visitors.
- *Accessibility* - successful centres need both to be accessible to the surrounding catchment area via a good road network and public transport facilities, and to encompass good local linkages between car parks, public transport stops and the various attractions within the centre.
- *Amenity* – A healthy city centre should be a pleasant place to be in, and should be attractive in terms of its environmental quality and urban design, safe and it should have a distinct identify and image.
- *Action* - to function effectively as a viable commercial centre, things need to happen. Development and improvement projects should be implemented efficiently; there should be regular and effective cleaning and maintenance and there should be a coordinated city centre management initiative to promote the continued improvement of the respective centre."

Retail Planning; Guidelines for Local Authorities

3.2 This chapter contains summary health checks for Sligo; Ballymote; Tobercurry; Enniscrone; Grange and Collooney[7]

Sligo

Context

3.3 Sligo is regarded as the capital of the North West and a third tier retail centre[8] in the national retail hierarchy. Sligo town is situated on the Garavogue River and accounts for approximately one-third of the population of Sligo County (c. 20,000 residents). However its daily population expands to over 42,000[9] due to its regional economic significance as retail, commercial, tourist and administrative centre.

Retail Rankings

3.4 Recent retail rankings[10] place Sligo as the 21st most prominent retail centre in the island of Ireland in terms of annual comparison expenditure, and the most significant retail centre in the Border Region. According to Experian, Sligo is expected to maintain this position to 2018 while also improving its relative significance nationally by moving up one ranking position (21st to 20th).

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[7] The Sligo County Development Plan 2005-2011 identifies: Ballymote; Tobercurry; Enniscrone; Grange and Collooney as the five centres that are pivotal to Sligo County's retail economy. The Development Plan also identifies Rosses Point; Strandhill and Ballysadare as being important settlements in terms of population. However, they are not considered in detail in the Development Plan due to their close proximity to Sligo City. (Para. 5.5.1 P49)

[8] First tier: Dublin; Second tier: four major cities of Cork, Limerick, Galway and Waterford.

[9] Source: http://www.sligochamber.com/sligo.asp#retail

[10] Experian Retail Centre Rankings 2008

Table 3-1: Retail Rankings (2008)

Rank	Centre Name	Region	Comparison Spend (€m)
Top 10 - IRL & NI			
1	Dublin (IRL)	Dublin	€2,345M
2	Belfast (NI)	Northern Ireland	€1,164M
3	Cork (IRL)	South-West	€757M
4	Dundrum City centre (IRL)	Dublin	€676M
5	Limerick (IRL)	Mid-West	€607M
6	Lisburn (NI)	Northern Ireland	€582M
7	Liffey Valley Shopping Centre (IRL)	Dublin	€538M
8	Newtownabbey - Abbey Centre (NI)	Northern Ireland	€503M
9	Londonderry (NI)	Northern Ireland	€502M
10	Galway (IRL)	West	€475M
21	Sligo (IRL)	Border	€266M
Top 10 - Border Region			
1	Sligo (IRL)	Border	€266M
2	Dundalk (IRL)	Border	€238M
3	Drogheda (IRL)	Border	€233M
4	Letterkenny (IRL)	Border	€228M
5	Cavan (IRL)	Border	€208M
6	Monaghan (IRL)	Border	€190M
7	The Marshes Shopping Centre, Dundalk (IRL)	Border	€77M
8	Dungloe	Border	€68M
9	Ballyshannon	Border	€45M
10	Carrick-on-Shannon	Border	€39M

Source: Experian Retail Rankings 2008

Attractions

3.5 Sligo has experienced considerable retail expansion in recent years and serves an urban core and an extensive rural hinterland. The city has three main shopping centres and two retail parks.

Quayside Shopping Centre

3.6 The Quayside Shopping Centre is Sligo's largest shopping centre (6,200sq.m net) and has the city centre's highest concentration of national multiples (including: Next; TK Maxx; River Island; Oasis; Monsoon and Warehouse). Opened in 2005, the Quayside also benefits from a multi-storey car park (c.375 spaces).

3.7 A proposed extension of the Quayside (Phase 2) is presently being considered by An Bord Pleanala. This would add a further 2,000 sq.m of supporting uses rather than retail floorspace to the scheme. The application proposes a combination of office space, restaurant and café as well as related car parking. A decision is anticipated in October 2008.

Johnston Court

3.8 Johnston Court is Sligo's newest and second largest shopping centre (3,600 sq.m net) and accommodates a wide range of general comparison goods retailers. The centre provides a mix of mainly national multiples with some retail services (cafes and juice bars).

Centre Block

3.9 Wine Street and the Wine Street Car Park was one of the main focal points of retail policy in the previous Retail Strategy. The Centreblock development has proceeded in part with the construction and opening of Johnston Court. However, other parts of the site have still to be developed.

3.10 Dunnes Stores has received planning permission for the redevelopment of its store at Wine Street. This will comprise some 9,400sq.m (gross) including retail, café/restaurant and supporting ancillary uses. A multi-storey car park with capacity for 456 cars forms part of the development.

3.11 Treasury Holdings has an application for some 5,950 sq.m of comparison shopping in 14 units, and 2,500 sq.m of office space around a new civic square. A 350[11] -space car park and 42 apartments are also included in the proposal. At the time of writing An Bord Pleanala was considering the application.

Sligo Retail Park

3.12 Sligo Retail Park was opened in October 2004. The 18 unit complex was Sligo's first major out of town shopping development and offers 18,000 sq.m of net retail floorspace and c.500 car parking spaces.

3.13 The Park offers mainly bulky comparison retailing (Homebase; Halfords; Harry Corry; Land of Leather; Reids; Carpet Rite),some comparison shopping (Toy City) and some retail services (KFC, Pizza Hut, McDonald's).

3.14 Tesco has purchased land to the south-west of the retail park at Carrowroe. The park itself and the surrounding lands have been the subject of increasing interest from retail developers and operators. A number of related submissions have been made in advance of preparation of the first draft of the SEDP. The First Manager's Report notes interest from Tesco, Argos and others in developing in out of town locations

3.15 Previous applications to extend the range of retailing in Sligo Retail Park to include convenience outlets and supermarkets have been refused[12].

3.16 The relative merits of retail development in this and other locations needs to be considered in the context of future requirements i.e. the distribution of the Gateway population as it grows and the extent to which proposed development is appropriate to the needs of the surrounding area.

Cleveragh Retail Park

3.17 The recently completed Cleveragh Retail Park offers a range of outlets including Smyth Toys and two bulky comparison outlets (kitchen and windows stores). The Park has three vacancies although the prospective occupancy of one of them by Argos should increase the Park's retail appeal and vibrancy.

3.18 In addition, the park contains a significant volume of office space including the Motor Taxation offices, which boosts footfall.

Leisure and recreation

3.19 Sligo also has a relatively modern 12-screen multiplex cinema in Wine Street and a number of quality restaurants and bars particularly on O'Connell Street and along the Rockwood Parade.

3.20 Sligo has a number of places of historical interest including an Abbey (commissioned in 1253); a Gothic style courthouse; Sligo County museum and a contemporary art gallery.

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[11] It will combine with Dunnes redevelopment.
[12] Application no. PL06/628, Sligo County Council

3.21 The future development of the Green Fort Project includes retail and residential elements alongside a new €14 million museum and an extended Model Arts and Niland Gallery (€7 million). The site occupies an elevated position on the entry to Sligo city centre and ground preparation works are in hand. A second phase is anticipated to cost some €100 million. This will provide a new civic space, retail and residential components along with supporting car parking (some 800 spaces are planned). The pedestrian and other linkages to the City Centre will be critical in ensuring that the benefits of the footfall generated by the development are extended to the City Centre.

3.22 The scale and nature of the retail and leisure element will be important, both in helping to generate revenue in the area and in adding to the appeal of the City centre as a regional shopping destination. In this context, care should be taken to ensure that the retail element offers something additional to the existing profile, while also reflecting the range of goods which users and visitors to the Green Fort Project are likely to be interested in.

3.23 Figures are not yet available indicating the volume of visitor usage anticipated in the revamped museum and art gallery. However, the site itself is adjacent to regional health and education facilities and it is estimated that the combination of workforce, students, patients and visitors amounts to between 6,500 and 9,000. The retail element therefore has the potential to tap into both direct and indirect markets.

3.24 The quality of the proposed civic square and related public realm improvements will influence the type of retailer attracted to the area. While it is not possible to indicate a suitable scale of development, it is likely that this requirement will be limited in scale.

3.25 A number of small, well-designed units reflecting the approach taken to the civic space and institutions would be appropriate. While the bulk of provision should be for specialist comparison uses, some small scale supporting convenience provision such as a small[13] grocery/newsagents may also be appropriate.

Convenience and Comparison Shopping

3.26 Food retailing in the city centre is provided by Tesco (at Wine Street car park); Dunnes and Lidl (both Cranmore Road). The city centre also has a number of small scale local convenience outlets including: Spar; Centre; Mace; Londis; Lituanica (Lithuanian convenience store) and a small number of independent butchers and greengrocers.

3.27 Since 2002, while the number of convenience stores in Sligo has remained constant, convenience floorspace has increased by 21%. Major retail developments such as the Quayside shopping centre; Johnston Court; and the Sligo Retail Park have been notable general and bulky comparison floorspace additions.[14]

3.28 Overall, convenience and comparison stores in Sligo now occupy a less significant proportion of all retail units owing to an increase in the number of retail service[15] outlets. The city now has a slightly higher proportion of retail vacancies compared to 2002.

[13] No more than 150-200 sq.m
[14] 2002 comparison floorspace figures includes car and motor cycle showrooms which were not included in the 2008 survey
[15] Retail services include: restaurants/cafes; hairdressing/ beauty/health shops; laundrettes and dry cleaners; travel agents; banks and financial services; building societies; and estate agents

Table 3-2: Sligo retail floorspace 2008 & 2002 (sq.m net)

	Sligo 2008			Sligo 2002*		
	Sqm	No.	No. as %	Sqm	No.	No. as %
Convenience	8,631	52	9.2%	6,638	51	11.8%
All Comparison:	48,874	217	38.3%	37,377	203	46.9%
Mainstream Comparison	25,010	178	31.4%	-	-	-
Bulky Comparison	23,864	39	6.9%	-	-	-
Retail Services	13,502	219	38.7%	16,994	125	28.9%
Vacant	10,959	78	13.8%	8,329	54	12.5%
TOTAL	81,966	566	100.0%	69,338	433	100.0%

Source: RTP Retail Floorspace Survey 2008 *Sligo City Centre Retail Strategy (2004-2010)

Shopping Initiatives

3.29 The 'Sligo Shopping Spree' is an annual shopping initiative organised by Sligo Chamber of Commerce. The event runs over a two week period in October (taking in three weekends). Every shopping outlet is invited to take part with around 60 participating stores in recent years. Stores display posters advertising their involvement with the 'spree' and offer individual discounts. The event is advertised on radio and local and regional newspapers.

Accessibility

3.30 While accepting its remoteness relative to the main centres of population, Sligo is well-connected to the strategic transport network. The area is well served by a number of national primary routes including the N17 to Galway (85 miles) and the N4 to Dublin (135 miles). Other primary and secondary roads connect Sligo with Athlone, Belfast, Derry and Limerick. A bus station is situated in the city centre and provides regular services to all centres nationwide. Local buses service the city centre and neighboring towns. Further access is provided by Sligo airport[16] and by rail[17].

Table 3-3: Distance from Sligo to other major cities

	Km	Miles
Dublin	212	135
Galway	138	86
Cork	330	207
Belfast	208	125
Derry	137	85
Limerick	238	146

Source: Sligo Chamber of Commerce

Car Parking

3.31 Despite the availability of several large car parks, car parking is considered to be a significant problem as indicated by the Household Survey, Shoppers Survey and anecdotal evidence during site visits.

[16] regular flights to Dublin and Manchester
[17] Stations: Dublin-Connolly, Maynooth, Mullingar, Edgeworthstown, Longford, Dromod, Carrick-on-Shannon, Boyle, Ballymote, Collooney, Sligo

Table 3-4: Car Parking Availability in Sligo City

Area	Spaces
Hourly	
Wine Street	340
Stephen Street	70
Glasshouse	60
Abbey Street/ St Annes	80
Quayside	375
Dunnes Adelaide St	250
Daily	
Market Yard	80
Connaughton Road	220
Cathedral	115

Source: RTP site visits July/ August 2008

3.32 The strategic importance of future parking provision is a key consideration for retail planning. The current Sligo and Environs Development Plan (SEDP) 2004 - 2010 outlines a car parking strategy for Sligo favouring multi-storey car parks (rather than surface car parking). It restricts car parking facilities to strategic locations on the immediate edge of the city centre.

3.33 The SEDP 2010-2016 will include an overall mobility and parking strategy indicating circulation patterns, mobility management objectives and the location, type and capacity (where possible) of future parking areas/structures within and around the city centre and the wider SEDP area.

3.34 Traffic congestion and a one way traffic management system further reduces pedestrian accessibility in shopping areas such as: Castle Street; Grattan Street; John Street and to some extent Wine Street.

Amenity

3.35 A summary of the quality of the shopping environment and attractiveness of Sligo's key shopping areas is provided below:

Table 3-5: Sligo Centre - Shopping Amenity

Shopping centre/Street	Quality of Shop fronts	Open spaces & Landscaping	General Quality of Shopping Environment
The Quayside	Attractive frontages consistent with similar modern indoor shopping developments elsewhere in Ireland and the UK	Bright, pedestrianised indoor and outdoor shopping area	Modern bright shopping complex
Johnston Court	Attractive frontages consistent with similar modern indoor shopping developments elsewhere in Ireland and the UK	Bright, covered, pedestrianised shopping area	Modern bright shopping complex with modern atmospheric blue spotlighting
O'Connell Street	Mixed standard. Includes high quality 19th Century fascia as well as poor quality frontages requiring renewal	On-street tree plants enhance environmental quality Absence of litter and graffiti	Pedestrianised. However previous road markings and poor quality pavements detract from the overall visual appeal and accessibility
Grattan Street	Generally well maintained	Busy one way narrow	Narrow pavements and

Shopping centre/Street	Quality of Shop fronts	Open spaces & Landscaping	General Quality of Shopping Environment
	independent shop frontages	road and pavement creates a congested appearance Absence of litter and graffiti	lack of traffic management impedes pedestrian accessibility
Market Street	Reasonable standard although shop fronts noticeably deteriorate southwards away from the main retail core	On-street tree plants enhance environmental quality Opportunity for seating area and civic area next to statue at bottom of street	Undistinguished Hanging baskets or dedicated street lighting would enhance streetscape
Wine Street	Mixed. Some good quality well maintained historic frontages.. Historic blocks screen and reduce the visibility of the main retail core of the City Centre	Traffic impairs visual appearance. Lack of graffiti and litter	Road traffic and narrow pavements disrupt pedestrian movement
Sligo Retail Park	Modern uniform frontages	Well proportioned car parking; lighting and landscaping	High quality shopping environment
Cleveragh Retail Park	Modern frontages and recently improved landscape setting. Redevelopment of former derelict site.	Car parking appropriate to the scale of the facility. Improved landscape quality	While presence of neighbouring industrial uses affects attractiveness, this is balanced by recently-opened recreational facilities..

Source: RTP site visits July/ August 2008

3.36 With the recent development of Johnston Court and the Quayside Shopping Centre, the city centre's primary retail area is now focused in a core area in the north-west of the city centre. This area includes O'Connell Street.and is where the majority of High Street retailers are located. The planned expansion of the Quayside Shopping Centre, and the redevelopment and Dunnes and development adjacent of 14 additional retail units as part of the Centreblock development will further reinforce this focus. with potential risks to the future sustainability of the traditional retail areas to the south and south-east of the city centre.

3.37 The findings of the health check assessment suggest that areas such as Market Street, Grattan Street and Castle Street have been affected by this strengthened focus in other areas, the main indicators being relatively low levels of footfall, limited recent investment in shop fronts and the changing nature of shopping in the area generally.

Action

3.38 Sligo's visual appearance and retail performance may benefit from more co-ordinated traffic management. From assessments on site and from anecdotal observations from retailers, traffic congestion and restrictions on car parking significantly reduce pedestrian movement and the visual appeal of the city centre. While acknowledging that the proposals for the remaining parts of the Centreblock (assuming their approval) should considerably improve facilities, careful consideration should be given to future car parking provision to promote easy access to both core and fringe areas within the City Centre.

3.39 Improvements to traffic management and the pedestrian environment in Market Street; Castle Street and Grattan Street could also assist in improving circulation and footfall to and from the core retail area. The encouragement of cafés, restaurants and other leisure facilities in this area may also help to extend dwell time.

3.40 Public realm improvements can also help Sligo cater for 'event shoppers' who desire attractive and safe shopping environments with good pedestrian links. This is essential given Sligo's strategic role and the journey times many shoppers will experience travelling to Sligo.

3.41 The city centre's strengthening retail core has important consequences for the future of the city's peripheral shopping areas. Specific initiatives may need to be considered to help facilitate appropriate and sustainable retail development in peripheral areas that is complementary to the offer in the retail core. This could include:

- identification of redevelopment opportunities to provide floorplates of the size and flexibility sought by today's High Street retailers. The redevelopment of Castle Street and the attraction of Heatons to the unit offers an example;
- encouragement of an environment conducive to the development of niche retailers;
- provision of leisure facilities which encourage shoppers and visitors to stay in the City Centre for longer periods and add to the experience of visiting the city centre.

Collooney

3.42 Collooney is approximately 13km south of Sligo City Centre and is a Key Satellite Village in the County Sligo Settlement Hierarchy. The Regional Settlement Structure outlined in the Border Regional Planning Guidance identifies Collooney as a Small Town for Urban Strengthening.

3.43 Convenience food retailing in the town is limited in scale and operators include Centra; Mace; Spar and local butchers. The limited comparison shopping offer reflects the area's population and its close proximity to Sligo. The village also contains a range of retail services (laundry; solicitors; café; takeaway shops; pubs; and hairdressers) distributed throughout and a number of other comparison outlets (Epichome - Homeware; McKims Hardware and a small Garden Centre). A range of large scale bulky comparison outlets and vacant premises also border the perimeter of Collooney at the Rathrippin roundabout on the N4.

3.44 The recent development of warehousing units at the edge of Collooney could potentially increase comparison floorspace in the area (although the majority were originally permitted as non-retail warehouses). Take up of these premises has been slow. Six large units are currently available.

Table 3-6: Collooney retail floorspace 2008 & 2003 (sq.m net)

	Collooney 2008			Collooney 2003*		
	Sqm	No.	No. as %	Sqm	No.	No. as %
Convenience	743	6	17.1%	642	6	18.2%
All Comparison:	4,091	7	20.0%	241	10	30.3%
Mainstream Comparison	94	1	2.9%	-	-	-
Bulky Comparison	3,997	6	17.1%	-	-	-
Retail Services	506	14	40.0%	n/a	11	33.3%
Vacant	4,775	8	22.9%	369	6	18.2%
TOTAL	10,116	35	100.0%	1,252	33	100.0%

Source: RTP Retail Floorspace Survey 2008 *Sligo County Development Plan Table 5.D

Accessibility

3.45 Collooney has good access to the N4 (Dublin to Sligo) and N17 (Sligo to Galway) and is also located on the Dublin to Sligo railway route and served by a two-hourly train service on weekdays.

3.46 Free on-street car parking is available throughout the village which appears to be sufficient given the small scale local nature of the shopping offer and likely dwell time of shoppers. Narrow footpaths pavements along with the frequent occurrence of cars parking on the pavements hinders pedestrian accessibility in places.

Amenity

3.47 Shop frontages and building facades are generally well maintained throughout the village however, the public realm while benefiting from a lack of graffiti and litter is somewhat featureless.

3.48 A bland slabbed/ red stoned paved garden area opposite Collooney Methodist Church is arguably the centre's only civic focal point and has the potential to be more visually attractive and offer greater value to the community.

Action

3.49 Collooney's visual appearance and appeal would greatly benefit from a public realm improvement programme to address the centre's streetscape and visual appeal. Pavements are also in need of improvement in some areas of the village (generally peripheral areas). Appropriate landscaping; street furniture and the development of a specific civic space may also enhance the areas attractiveness. There should be a restriction on further retail warehousing development in the area to focus investment and development in the central area.

Ballymote

3.50 Ballymote is some 20 km to the south of Sligo. The Sligo County Development Plan identifies Ballymote as a Key Support Town to serve the south and south-east of the County.

3.51 The shopping area in Ballymote is concentrated along Teeling St; O'Connell St and Wolfe Tone St. Convenience food shopping is provided by a small to medium sized Supervalu (1,000 sq.m net) and two small local stores (Spar and Cryans).

3.52 Ballymote has a limited range of comparison and bulky comparison shopping which reflects the town's size and function.

3.53 Historical attractions include Ballymote Castle (dating from c.1300) and a September 11 memorial (presented by the Mayor of New York presented in 2006 to commemorate the birth place of Michael Corcoran (1872)) [18]. Despite the lack of available data, anecdotal evidence suggests this is a popular tourist attraction.

3.54 The volume of convenience floorspace in the town has increased since 2003 despite a reduction in the number of outlets. The number of comparison outlets and floorspace has however slightly increased along with an increase in number of retail service outlets. Vacancy levels have also fallen slightly.

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[18] Michael Corcoran was an Irish/ American general in Union Army during the American Civil war and a close confident of President Abraham Lincoln

Table 3-7: Ballymote retail floorspace 2008 & 2003 (sq.m net)

	Ballymote 2008			Ballymote 2003*		
	Sqm	No.	No. as %	Sqm	No.	No. as %
Convenience	1,436	4	6.9%	1,226	8	13.1%
All Comparison:	2,444	17	29.3%	1,937	16	26.2%
Mainstream Comparison	1,001	11	19.0%	-	-	-
Bulky Comparison	1,443	6	10.3%	-	-	-
Retail Services	959	28	48.3%	n/a	26	42.6%
Vacant	381	9	15.5%	410	11	18.0%
TOTAL	5,220	58	100.0%	3,573	61	100.0%

Source: RTP Retail Floorspace Survey 2008 * Sligo County Development Plan Table 5.D

Accessibility

3.55 Ballymote is accessible by road and rail. The town lies at the junction of the R293, R294, and R295. Ballymote's railway station is on the main Dublin-Sligo line (3 trains daily each way). The town is also served by the Bus Eireann 476 bus route[19] and the 460[20] on Saturdays. Free on-street car parking is available throughout the town. Supervalu also offers a number of spaces for customers (c. 60 spaces).

3.56 While pedestrian accessibility throughout the town's main streets is enhanced by wide pavements, a number of areas require investment. Anecdotal evidence from shopkeepers at the western entrance to the town (next to the Esso garage) also highlighted the hazardous nature of the street paving in bad weather.

Amenity

3.57 Ballymote has a pleasant shopping environment. The public realm benefits from a small civic square with benches. Hanging baskets are also prevalent outside some shops. Litter was mainly concentrated in peripheral areas.

3.58 While shop fronts are generally in good condition, encouragement of further investment may be appropriate in some areas such as Wolfe Tone Street. A number of derelict buildings further affect the visual amenity of this area.

Action

3.59 A dedicated car park would help control traffic flows and improve pedestrian accessibility within the town centre. Anecdotal evidence suggests that current parking arrangements (which are restricted to on street car parking) can lead to traffic congestion during busy periods, with impacts on pedestrian safety and accessibility. Pedestrian safety and accessibility would be further enhanced by investment in street pavements and a pedestrian crossing.

3.60 Peripheral areas of the city centre would also benefit from shop front improvement which would greatly improve the city centre visually.

Tobercurry

Attractions

3.2 Situated c. 30 km from Sligo, Tobercurry is a Key Support Town (as indicated in the Sligo County Development Plan) serving the south and south-west of County Sligo. The town had a population of 1,421 in 2006.

3.61 Tobercurry has a range of convenience outlets (Spar; Mace; The Crescent; Supervalu; Viva Health Food) and a local butchers and newsagents. The town also

[19] Stopping at: Killavil-Culfadda-Keash-Ballymote-Cloonkeevy-Bunnanadden-Tobercurry
[20] Sligo-Ballysadare-Collooney-Ballymote-Tobercurry-Gurteen-Ballaghaderreen-Loughlynn-Castlerea

has a range of comparison outlets (including a building supplies unit, garden centre and bulky furniture warehouse). Tobercurry has a similar population and retail mix to Ballymote.

Table 3-8: Tobercurry retail floorspace 2008 & 2003 (sq.m net)

	Tobercurry 2008			Tobercurry 2003*		
	Sqm	No.	No. as %	Sqm	No.	No. as %
Convenience	1,137	10	16.9%	1,835	13	17.3%
All Comparison:	2,665	14	23.7%	2,103	19	25.3%
Mainstream Comparison	385	9	15.3%	-	-	-
Bulky Comparison	2,280	5	8.5%	-	-	-
Retail Services	1,038	29	49.2%	n/a	35	46.7%
Vacant	1,402	6	10.2%	602	8	10.7%
TOTAL	6,241	59	100.0%	4,540	75	100.0%

Source: RTP Retail Floorspace Survey 2008 * Sligo County Development Plan Table 5.D

Accessibility

3.62 Located at the junction of the N17 and the R294, (c. 30 km from Sligo and 32 km from Ballina), Tobercurry is accessible by private car and served by the Bus Eireann 476 route. Tobercurry also has a number of mini-bus and taxi services and is located less than 15 km from Ballymote Railway Station.

3.63 Narrow footpaths and roads restrict vehicle and pedestrian accessibility, particularly at busy times and when deliveries are being made. Although narrow, footpaths are in fairly good condition. Pedestrian access is enhanced by a pedestrian crossing.

3.64 Parking spaces are available in Wolf Tone Square (c. 40 spaces) and the Supervalu car park (c. 50 spaces), which has pedestrian access onto Teeling Street.

Amenity

3.65 The town centre’s overall streetscape is of a good standard although some shop fronts may require investment. There is little litter and graffiti. Every second Tuesday, during the summer months, the Tidy Towns Committee organises the ‘Litter Action Event’. This gives members of the public the opportunity to help clean the town. The public realm is also enhanced by the civic space at Wolfe Tone Square. Benches and large flower pots create a pleasant environment and a relaxed atmosphere.

Action

3.66 A shop front initiative would enhance the overall shopping environment. Reoccupation of vacancies in prime areas at Wolfe Tone Square leading onto Humbert St would help improve the town centre’s vitality and viability.

Grange

3.67 Grange is 19 km north of Sligo and a Key Satellite Village in the County Sligo Settlement Hierarchy. The Regional Settlement Structure outlined in the Regional Planning Guidance for the Border Region includes Grange in the category of Smaller Towns and Villages.

3.68 The village had a population of 383 in 2006. Accordingly, Grange’s shopping offer is limited to local services with no shoe or clothing outlets. Convenience shopping is available at Centra, Londis (in the nearby Texaco) and a local newsagent. A 1,246 sq.m. (gross) Supervalu is currently under construction at the edge of Grange. The village also has a pharmacy, restaurant, two pubs and a community office.

3.69 Grange is an access point for the 'North West Trail' a 326-km circular cycle route through counties Donegal, Tyrone, Fermanagh, Leitrim; and Sligo. While facilities have been provided to encourage visitors to stop in the village, it has not been possible to obtain figures relating to their usage or the effects of visitors on trade in the area.

3.70 Recent development at the edge of Grange has almost doubled retail floorspace in the area. A furniture store has recently begun trading from the unit (632 sq.m. net).

Table 3-9: Grange retail floorspace 2008 & 2003 (sq.m. net)

	Grange 2008			Grange 2003*		
	Sqm	No.	No. as %	Sqm	No.	No. as %
Convenience	411	4	23.5%	452	3	16.7%
All Comparison:	815	4	23.5%	622	6	33.3%
Mainstream Comparison	39	2	11.8%	-	-	-
Bulky Comparison	777	2	11.8%	-	-	-
Retail Services	252	7	41.2%	n/a	8	44.4%
Vacant	227	2	11.8%	18	1	5.6%
TOTAL	1,705	17	100.0%	1,092	18	100.0%

Source: RTP Retail Floorspace Survey 2008 * Sligo County Development Plan Table 5.D

Accessibility

3.71 Grange is located on the N15 and benefits from a high degree of road accessibility. As well as being close to Sligo, Grange is well served by a regular bus service to Donegal, Letterkenny and Derry, and a once-daily bus service to Enniskillen.

3.72 An off-street parking area is situated just off the N15 (c.15 spaces). Dedicated off-street car parking is also provided at Centra (c. 30 spaces) and the access point to the North West Trail (c. 50 spaces)

3.73 Pedestrian accessibility benefits from well maintained street paving and pedestrian crossing points.

Amenity

3.74 Grange has a relatively attractive streetscape with street furniture, hanging baskets and little or no graffiti or litter. Shop fronts are generally attractive and building façades appear to be well maintained.

Action

3.75 Grange has a relatively attractive shopping environment and appears to be successfully fulfilling its local retail function. Shopping initiatives and promotions linked to the North West Trail could help local shops capitalise on their strategic location by capturing associated leisure and tourism spend.

Enniscrone

3.76 Enniscrone is a small seaside town approximately 42 km west of Sligo, with a population of 829. It has developed as a traditional coastal tourist town and remains a popular family holiday resort. The recent completion of a large number of residential/ holiday homes has increased the resident summer-time population.

3.77 Convenience food retailing is provided by a small scale Gala, Londis, Centra and a local butcher. The town has one bulky comparison retailer (Halmec Hardware) and limited general comparison shopping (a jewellery and gift shop, surf shop, pharmacy). While retail services are distributed throughout the town, the number of cafes, restaurants and other leisure outlets appears to be limited for a popular tourist destination.

3.78 Other leisure attractions include a golf club, amusement park, supervised playground and an indoor aqua centre (Waterpoint).

3.79 The number of convenience and comparison outlets and floorspace has increased slightly since 2003. However, the number of retail services has fallen slightly.

Table 3-10: Enniscrone retail floorspace 2008 & 2003 (sq.m net)

	Enniscrone 2008			Enniscrone 2003*		
	Sqm	Number	No. as %	Sqm	No.	No. as %
Convenience	249	5	20.0%	242	4	19.0%
All Comparison:	252	8	32.0%	211	3	14.3%
Mainstream Comparison	170	7	28.0%	-	-	-
Bulky Comparison	81	1	4.0%	-	-	-
Retail Services	678	11	44.0%	n/a	13	61.9%
Vacant	101	1	4.0%	20	1	4.8%
TOTAL	1,279	25	100.0%	473	21	100.0%

Source: RTP Retail Floorspace Survey 2008 * Sligo County Development Plan Table 5.D

Accessibility

3.80 Enniscrone is accessible by the R297 off the N59 (Ballina to Sligo Road). The R297 is the town's main commercial route. There are a further four local roads leading north and south of the R297 which serve local residents. On-street car parking is illegal along the town's main road, although several shops have dedicated off-street car parking outside their outlets.

3.81 Enniscrone is well served by a frequent daily bus service to Sligo and Ballina. There are six Ballina-Dublin buses daily.

3.82 Pedestrian access in the centre is disrupted by poor-quality street pavements, café and restaurant furniture and car parking directly outside shops, all of which impede pedestrian flow.

Amenity

3.83 Enniscrone's role as a tourist destination with appropriate recreation and leisure attractions could be reinforced through improvements to the city centre's streetscape and environmental quality. While shop fronts and building facades are generally of a reasonable standard, a number look tired and require investment. The centre also lacks a civic focal point.

Action

3.84 Street paving and shop front improvements would improve the shopping environment and enhance the overall visual appearance and streetscape. The possibility of creating a civic focal point with seating and landscaping should also be investigated.

3.85 A summary schedule of floorspace across County Sligo is provided in the following tables. This is accompanied by a schedule showing the scale of extant permissions across the County (i.e. proposed retail development with planning approval but not yet implemented)

Floorspace

Table 3-11: County Sligo floorspace 2008 (sq.m net)

AREA	sq.m	No.of units	% No.	% floorspace
COUNTY SLIGO				
Convenience	12,607	81	10.7%	11.8%
All Comparison:	59,141	267	35.1%	55.5%
Mainstream Comparison	26,699	208	27.4%	25.1%
Bulky Comparison	32,442	59	7.8%	30.5%
Retail Warehousing (included in Bulky)	*18,831*	*17*	*2.2%*	*17.7%*
Retail Services	16,935	308	40.5%	15.9%
Vacant	17,845	104	13.7%	16.8%
TOTAL	106,527	760	100.0%	100.0%

Table 3-12: Sligo floorspace 2008 (sq.m net)

AREA	sq.m	No.of units	% No.	% floorspace
SLIGO				
Convenience	8,631	52	9.2%	10.5%
All Comparison:	48,874	217	38.3%	59.6%
Mainstream Comparison	25,010	*178*	*31.4%*	30.5%
Bulky Comparison	23,864	*39*	*6.9%*	29.1%
Retail Services	13,502	*219*	38.7%	16.5%
Vacant	10,959	*78*	13.8%	13.4%
TOTAL	81,966	566	100.0%	100.0%
SLIGO - CITY CENTRE				
Convenience	3,234	32	7.3%	8.1%
All Comparison:	21,109	170	38.7%	53.2%
Mainstream Comparison	19,942	*165*	*37.6%*	*50.2%*
Bulky Comparison	1,166	*5*	*1.1%*	*2.9%*
Retail Services	9,842	175	39.9%	24.8%
Vacant	5,512	62	14.1%	13.9%
TOTAL	39,697	439	100.0%	100.0%
SLIGO - OTHER[21]				
Convenience	5,397	20	15.7%	12.8%
All Comparison:	27,765	47	37.0%	65.7%
Mainstream Comparison	*5,068*	*13*	*10.2%*	*12.0%*
Bulky Comparison	*22,697*	*34*	*26.8%*	*53.7%*
Retail Services	3,660	44	34.6%	8.7%
Vacant	5,447	16	12.6%	12.9%
TOTAL	42,269	127	100.0%	100.0%

[21] Includes Ballysadare

Table 3-13: Ex- Sligo floorspace 2008 (sq.m net)

AREA	sq.m	No.of units	% No.	% floorspace
GRANGE				
Convenience	411	4	23.5%	24.1%
All Comparison:	815	4	23.5%	47.8%
Mainstream Comparison	39	2	11.8%	2.3%
Bulky Comparison	777	2	11.8%	45.6%
Retail Services	252	7	41.2%	14.8%
Vacant	227	2	11.8%	13.3%
TOTAL	1,705	17	100.0%	100.0%
ENNISCRONE				
Convenience	249	5	20.0%	19.5%
All Comparison:	252	8	32.0%	19.7%
Mainstream Comparison	170	7	28.0%	13.3%
Bulky Comparison	81	1	4.0%	6.4%
Retail Services	678	11	44.0%	53.0%
Vacant	101	1	4.0%	7.9%
TOTAL	1,279	25	100.0%	100.0%
TOBERCURRY				
Convenience	1,137	10	16.9%	18.2%
All Comparison:	2,665	14	23.7%	42.7%
Mainstream Comparison	385	9	15.3%	6.2%
Bulky Comparison	2,280	5	8.5%	36.5%
Retail Services	1,038	29	49.2%	16.6%
Vacant	1,402	6	10.2%	22.5%
TOTAL	6,241	59	100.0%	100.0%
BALLYMOTE				
Convenience	1,436	4	6.9%	27.5%
All Comparison:	2,444	17	29.3%	46.8%
Mainstream Comparison	1,001	11	19.0%	19.2%
Bulky Comparison	1,443	6	10.3%	27.6%
Retail Services	959	28	48.3%	18.4%
Vacant	381	9	15.5%	7.3%
TOTAL	5,220	58	100.0%	100.0%
COLLOONEY				
Convenience	743	6	17.1%	7.3%
All Comparison:	4,091	7	20.0%	40.4%
Mainstream Comparison	94	1	2.9%	0.9%
Bulky Comparison	3,997	6	17.1%	39.5%
Retail Services	506	14	40.0%	5.0%
Vacant	4,775	8	22.9%	47.2%
TOTAL	10,116	35	100.0%	100.0%

Extant retail permissions

Table 3-14: Extant permissions- Sligo Borough (aggregate sq.m.)

	Total (05-08)	2008	2007	2006	2005
Convenience	2,977	0	2,558	419	0
Mainstream Comparison	14,012	7,657	5,655	547	152
Bulky Comparison	3,515	-56	3,546	25	0

Table 3-15 Extant permissions - Sligo Environs (aggregate sq.m.)

	Total (05-08)	2008	2007	2006	2005
Convenience	-	-	-	-	-
Mainstream Comparison	3,360	3,360	-	-	-
Bulky Comparison	-	-	-	-	-

Table 3-16: Extant permissions - Sligo County (aggregate sq.m.)

	Total (05-08)	2008	2007	2006	2005
Convenience	1,553	132	12	1,131	279
Mainstream Comparison	2,048	430	1,181	72	365
Bulky Comparison	5,737	263	3,701	0	1,774

Table 3-17: Extant permissions - Sligo County by Area (aggregate sq.m.)

Area	Total (05-08)	2008	2007	2006	2005
Convenience					
Ballisodare	132	132	-	-	-
Ballymote	279	-	-	-	279
Collooney	32	-	-	32	-
Coolaney	343	-	-	343	-
Dromore West	0	-	-	-	-
Enniscrone	220	-	-	220	-
Mullaghmore	12	-	12	-	-
Strandhill	0	-	-	-	-
Tobbercurry	0	-	-	-	-
Grange	536	-	-	536	-
Mainstream Comparison					
Ballisodare	125	-	-		125
Ballymote	122	-	122	-	-
Collooney	429	-	173	16	240
Coolaney	266	125	86	56	-
Dromore West	0	-	-	-	-
Enniscrone	550	289	261	-	-
Mullaghmore	0	-	-	-	-
Strandhill	540	-	540	-	-
Tobbercurry	16	16	-	-	-
Grange	0	-	-	-	-
Bulky Comparison					
Ballisodare	0	-	-	-	-
Ballymote	35	35	-	-	-
Collooney	5702	228	3701	-	1774
Coolaney	0	-	-	-	-
Dromore West	0	-	-	-	-
Enniscrone	0	-	-	-	-
Mullaghmore	0	-	-	-	-
Strandhill	0	-	-	-	-
Tobbercurry	0	-	-	-	-
Grange	0	-	-	-	-

Source: Sligo County Council (2008)

4 STUDY AREA

4.1 Two surveys were undertaken to inform the Retail Strategy:

- a survey of 300 shoppers in Sligo City centre;
- and a telephone survey of 800 households in the area shown in **Figure 4-1**.

4.2 This area is also used in the Shoppers Survey and forms the basis for the retail capacity analysis. It covers the whole of County Sligo plus most of County Leitrim and a small part of northern County Roscommon. It is referred to as 'the Study Area' throughout this report. In many Retail Strategy Studies the Survey/ Study Area has simply followed the boundaries of the County in question. For Sligo, it was estimated that the area of influence of Sligo Centre for comparison shopping would extend well into County Leitrim. For similar reasons, the salient area formed by the northern part of Roscommon is included. The results of the Shoppers Survey confirmed the appropriateness of this area, an analysis reinforced by discussions with Sligo County Council officers.

Figure 4-1 Retail Study Area

Map from Microsoft Encarta Atlas

The Shoppers Survey

4.3 The Shoppers Survey was carried out in July 2008 - on Friday 4th, Saturday 5th and Monday the 7th. Interview points were located at either end of O'Connell Street and in the Wine Street car park. A total of 308 interviews were obtained. The results were coded and analysed using the Mercator Survey Analysis program.

Non-resident shoppers

4.4 One of the prime purposes of the survey was to identify the level of trade captured by Sligo Centre from beyond the Study Area. As a first step, respondents were asked where they normally lived. Table 3.1 indicates that while the City draws trade from a mainly local area (77% from within County Sligo), some 7% lived in other parts of the study area, while a further 17% were from outside the study area catchment area, i.e. from locations elsewhere in the Republic, in Northern Ireland, Britain or elsewhere.

Table 4-1 Shoppers Survey - Where respondents lived

Base	308
No reply	0.0%
Sligo Town	44.8%
Elsewhere Co. Sligo	31.8%
North Leitrim	6.5%
North Roscommon	0.3%
Elsewhere Ireland	8.8%
Northern Ireland/ UK	5.5%
Other Country	2.3%

4.5 Those surveyed were also asked whether they were in Sligo Centre as regular shoppers, as business visitors or as tourists. For the great majority of those surveyed, shopping (as part of a regular trip) was the main reason for their visit. The next table shows how the results related to place of residence. While the figures have not been converted to percentages (due to the low values in the 'business visitor' and 'tourist' categories) the profile suggests that most of Sligo's retail trade originates from within the study area.

Table 4-2 Place of residence and status of visit

	Status of visit		
Residence	regular shopper	business visitor	tourist
Base	249	11	36
	84%	*4%*	*12%*
No reply	0	0	0
Sligo Town	128	3	0
Elsewhere Co. Sligo	93	1	0
North Leitrim	17	1	2
North Roscommon	0	0	1
Elsewhere Ireland	7	4	15
Northern Ireland/ UK	4	2	11
Other Country	0	0	7

4.6 Most of those resident in the study area described themselves as regular shoppers although a few, mostly from North Leitrim and Roscommon, said they were business visitors or tourists. While a few resident outside the study area said they were regular shoppers in Sligo Centre, most described themselves as tourists with only a minority making business-related trips.

4.7 Although the survey was confined to people who said they were shopping in Sligo City Centre, this did not have to be the main reason for their visit. As it happened, about a fifth of those responding provided main reasons other than shopping. (see Table 4-3)

Table 4-3 Place of residence and main purpose of visit

Purpose of visit	Total	Place of residence Study area	Ex-study area
	308	257	51
	%	%	%
supermarket shopping	31.2	35.8	7.8
shopping for food/groceries elsewhere	10.1	10.9	5.9
shopping for clothes/shoes	25.3	22.6	39.2
other forms of shopping	13.3	12.1	19.6
	79.9	*81.4*	*72.5*
visiting bars/cafes/restaurants	0.3	0.4	0.0
bank, building society, finance	2.3	2.7	0.0
leisure/recreation	12.3	9.7	25.5
Place of work	5.2	5.8	2.0
	20.1	*18.6*	*27.5*

4.8 Food shopping, and mainly supermarket shopping, was the main factor in the trip for nearly half of those resident in the study area. A further 35% were there to buy clothes or shoes or other goods. While leisure uses accounted for most of the remainder, a minority either worked in the area or were visiting banks, building societies or other financial services.

4.9 Sligo is also an important shopping destination for those respondents living outside the study area, although the emphasis of the shopping trip is noticeably different. While fewer than 14% were in Sligo to buy food or groceries, nearly 60% were shopping for clothes, shoes or other goods. Over a quarter had made their trip for leisure or recreation reasons.

4.10 For the capacity analysis it is necessary to make estimates of the amount of trade that Sligo Centre gains from outside the study area. As shown in Table 4-3 above, 51 out of 308 Shoppers Survey respondents (17%) lived outside the study area. However, given that ex-study area residents had a distinctly different shopping profile, their expenditure on convenience and comparison goods also needs to be taken into account.

4.11 The Shoppers Survey included questions regarding respondents' spending during the shopping trip, i.e. what had been spent already as well as anticipated expenditure in the remainder of their trip. The survey distinguished between spending on:

- shopping at supermarkets
- for food/ groceries at other shops
- at the market
- for clothes and shoes and
- for other forms of shopping

4.12 The first three elements fall into the convenience shopping category; the last two are considered as comparison shopping

4.13 From the responses provided, a shopper's mean expenditure per trip on convenience goods is estimated at €49 for study area residents and €18 for those resident outside the study area. When applied to the shopping profile shown above, it is estimated that non-residents account for 7% of Sligo City Centre's convenience goods turnover.

4.14 For comparison goods, the mean expenditure figures are €33 for residents and €129 for non-residents. This suggests that non-residents account for 44% of the Centre's comparison goods turnover.

4.15 However, these are coarse estimates. The numbers of non residents are low and it is possible that the survey chanced across those who were spending more than is typical. In addition the survey was held at the height of the tourist season when the number of non -residents was near the maximum. For these reasons the capacity analysis includes adjustments to the percentages above.

4.16 Shoppers were also asked which other centres they used for their clothes and shoes shopping. Their responses are provided in Table 4-4.

Table 4-4 Place of residence - other centres used for clothes & shoes shopping

		Place of residence	
Other centres	Total	Study area	Ex-study area
	308	257	51
	%	%	%
No reply	0.6	0.0	3.9
Sligo only	45.1	53.3	3.9
Galway	14.6	15.6	9.8
Letterkenny	1.6	0.8	5.9
Derry	3.2	1.9	9.8
Liffey Valley	1.6	0.8	5.9
Dublin City Centre	22.1	19.8	33.3
Enniskillen	17.5	17.9	15.7
Carrick-on-Shannon	4.9	5.8	0.0
Belfast	3.2	1.9	9.8
Outside Ireland	6.8	2.7	27.5
Castlebar	1.0	0.8	2.0
Elsewhere Ireland	5.5	4.7	9.8
Other, unspecified	0.3	0.4	0.0

4.17 In this table, the percentages sum to more than 100% because more than one centre can be stated by respondents. More than half those resident in the study area said Sligo was the only centre they used for clothes and shoes. The most commonly mentioned other centres were Dublin City Centre, Enniskillen and Galway. The attractions of Dublin and Galway are clear, though both are some distance away. Enniskillen is closer, with the town's Asda as a significant attraction.

4.18 Few non-residents said Sligo was the only centre they used for this type of shopping. The places quoted reflected where they lived, with Dublin City Centre most commonly mentioned, followed by centres outside Ireland, Enniskillen, Derry and Galway. Respondents were then asked which of these centres was their main centre for clothes and shoes.

Table 4-5 Place of residence - main centre used for clothes & shoes shopping

Other centres	Total	Place of residence: Study area	Place of residence: Ex-study area
	308	257	51
	%	%	%
No reply	1.3	0.8	3.9
Sligo	75.6	88.3	11.8
Galway	1.9	1.6	3.9
Letterkenny	0.6	0.0	3.9
Derry	0.3	0.0	2.0
Liffey Valley	0.0	0.0	0.0
Dublin City Centre	5.5	2.3	21.6
Enniskillen	4.5	3.1	11.8
Carrick-on-Shannon	0.6	0.8	0.0
Belfast	1.0	0.4	3.9
Outside Ireland	5.8	1.6	27.5
Castlebar	0.3	0.0	2.0
Elsewhere Ireland	1.9	0.8	7.8
Other, unspecified	0.3	0.4	0.0

4.19 The great majority of residents use Sligo as their main centre, with none of the other centres attracting more than a few percent. Again, non-residents responses reflected where they lived. About 12% - those living just over the boundary - do view Sligo as their main centre, but most others mentioned Dublin City Centre, Centres outside Ireland and Enniskillen in response to this question.

Accessing Sligo City Centre

4.20 The survey also sought information on how shoppers access the City Centre. The responses have been grouped according to the purpose of the trip (as shown in Table 4-3) i.e. convenience shopping, comparison shopping and other (visiting bank, leisure, etc). These categories are used in the following tables.

Table 4-6 Main mode of transport

Mode of transport		Type of trip: Convenience	Type of trip: Comparison	Type of trip: Other
All	308	127	119	62
	%	%	%	%
No reply	1.0	1.6	0.8	0.0
Own car	55.8	57.5	57.1	50.0
Other car	13.0	11.8	10.1	21.0
Taxi	2.3	5.5	0.0	0.0
Bus	6.8	5.5	9.2	4.8
Train	1.3	0.8	1.7	1.6
Walk/cycle	19.8	17.3	21.0	22.6
Other	0.0	0.0	0.0	0.0

4.21 Overall, around 70% of those surveyed used cars. Another 20% walked or cycled, which would include those non-residents who were staying at nearby hotels. Only 10%

used public transport or taxis. In many surveys it is found that convenience shopping trips are more often car-based than comparison trips. .

Table 4-7 Travel time to centre

		Type of trip		
	All	Convenience	Comparison	Other
All	308	127	119	62
		%		
No reply	0.6	0.8	0.8	0.0
0 to 10 mins	39.0	37.0	38.7	43.5
10 to 20 mins	27.6	30.7	22.7	30.6
20 to 30 mins	12.3	10.2	15.1	11.3
30 to 45 mins	11.4	13.4	11.8	6.5

4.22 Two-thirds of those surveyed had taken 20 minutes or less to reach the City Centre and 9% more than 45 minutes. Comparison shoppers had rather longer journeys. The position is complicated by non-residents; 35% of them had taken 45 minutes or more - presumably having started their current trip from home - but others had stayed overnight in Sligo and had short journeys to the centre.

Table 4-8 Frequency of shopping

		Type of trip		
		Convenience	Comparison	Other
All	308	127	119	62
		%		
No reply	0.6	1.6	0.0	0.0
Once a week or more	73.1	83.5	65.5	66.1
Once every 2 or 3 weeks	8.4	11.8	6.7	4.8
Monthly	4.5	1.6	8.4	3.2
Less than once a month	3.2	0.0	5.0	6.5
Not regularly/ first time	10.1	1.6	14.3	19.4

4.23 Over 80% of convenience shoppers said they shopped in the centre once a week or more often. The figure was lower for comparison shoppers and others, partly because of the prominence of non-residents in these categories.

Evaluation of the centre

4.24 Three questions were asked to assess respondents' evaluation of the centre:

- Why do you shop in Sligo Centre?
- Is there anything you particularly dislike about the centre?
- Do you have any suggestions for improving the centre?

4.25 Table 4-9 gives the answers to the first of these[22].

[22] Percentages sum to > 100 as respondents could provide more than one answer

Table 4-9 Why do you shop in Sligo City Centre?

Base	308
	%
No reply	4.5
Close to home	72.4
Close to work	23.1
Easy to get to	33.4
Good public transport	0.3
Sufficient car parking	1.0
Reasonably priced/free parking	0.0
Good selection/quality of shops	12.3
Good mix of shopping & leisure	5.5
Specific shop or shops	3.2
Pleasant shopping environment	1.6
Good standard of cleanliness	0.3
Like the market	0.0
Safe shopping environment	1.9
Other	4.5

4.26 In surveys of this kind respondents frequently cite the accessibility of the centre - *close to home or work, easy to get to*, but such responses are often augmented by more positive appraisals. Here, supporting positive sentiments are relatively infrequent; few people praised the range and quality of the shops and fewer still had favourable comments on the environment (rather, such aspects were frequently criticised)

Table 4-10 Is there anything you particularly dislike about the centre?

Base	308
	%
No reply	8.4
Nothing	30.5
Inconvenient to get to	0.3
Poor public transport	4.5
Inadequate car parking	39.3
Expensive car parking	31.5
Poor quality shops	9.4
Lack of particular type of shop	17.5
Lack of leisure facilities	2.6
Unpleasant shopping environment	3.6
Poor standard of cleanliness	7.8
Unsafe/ threatening environment	2.6
Traffic related comments	0

4.27 Complaints about the range and quality of shops, and about the environment, far outweighed the positive responses noted in Table 4-9 . There were also numerous complaints about parking, both its availability and charging levels. The percentage saying they had no criticism is low for surveys of this type.

Table 4-11 Suggested City Centre Improvements

Base	308
	%
No reply	28.9
Provide park & ride	37.7
Make the centre easier to get to	31.2
Provide more parking	5.5
More shops	5.5
Better range of shops	15.9
Provide specific shop	17.2
Provide particular leisure facil	0.6
Improve traffic conditions	0.0
Improve street cleanliness	7.1
Pedestrianise particular Street	3.9
Improve pedestrian environment	13.3

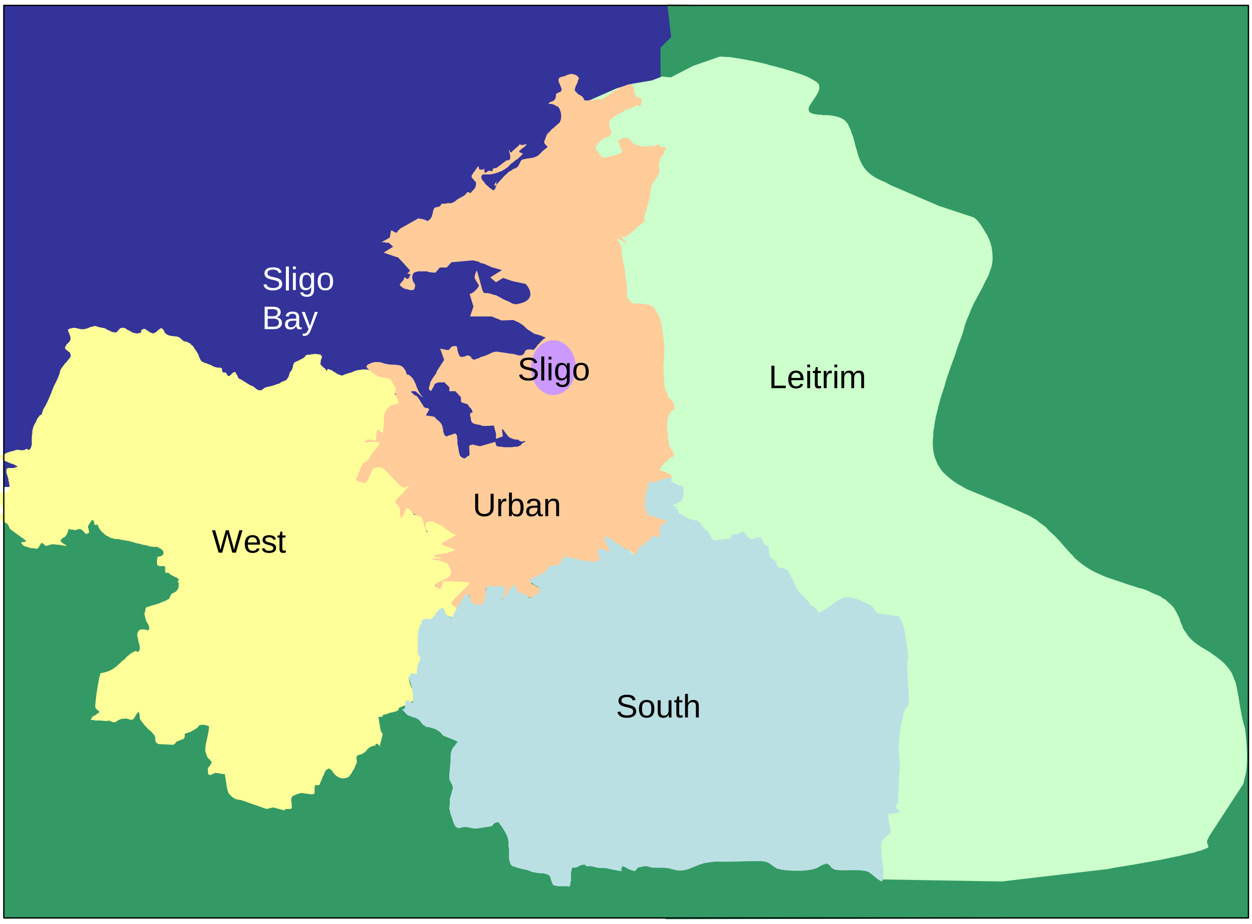
4.28 As might be anticipated, suggestions for improvement generally mirrored these criticisms. Many respondents thought that a park and ride system was the best way of addressing the parking problem and improving access to the centre. Other suggestions related to improving the range of shops. Where particular shops were mentioned by far the most common was Argos, followed by M&S, Heatons and Top Shop.

The Household Survey

4.29 The Household Survey was carried out in July and August 2008, with a sample drawn from the Study Area shown in **Figure 4-1**. The central aim was to establish resident's shopping patterns for different types of retailing.

4.30 The fieldwork was carried out by Millward Brown, Ireland, using a questionnaire designed by Roger Tym & Partners (see Appendix A). The survey was conducted by telephone, using Eircom listings together with quota controls, yielding 752 useable interviews. The results were disaggregated into five zones, the boundaries of which are shown in Figure 4-2.

Figure 4-2 Household Survey Zones



Comparison Shopping

4.31 The survey distinguished between patterns of purchasing for 'mainstream' comparison goods as found on the High Street or in shopping malls - and purchases from retail warehouse units. Market shares for 'mainstream' comparison spending were established, taking patterns of spending on clothes and shoes as a proxy. Respondents were asked to indicate the main and alternative centres they use for this type of shopping[23]. The results were combined into market shares using weighting factors derived for previous surveys of this type in Ireland and the UK..

Table 4-12 Mainstream comparison goods - Market Shares(%)

	Survey zone					
Location	South	Leitrim	Sligo Town	Urban outskirts	West	Study Area
Sligo Town Centre	45.2	36.1	72.2	71.1	33.1	54.5
Carrick on Shannon	21.4	29.7	1.9	0.2	0.0	11.1
Dublin City Centre	9.3	10.7	11.3	7.3	6.8	9.4
Ballina	0.0	0.0	0.1	0.0	47.3	5.4
Enniskillen	1.3	7.3	3.1	3.5	0.8	3.6
Boyle	15.4	2.2	0.4	0.2	0.0	3.2
Galway	0.9	0.8	2.8	3.2	2.7	2.1
Elsewhere Republic	0.9	2.8	0.4	1.4	1.4	1.4
Elsewhere County Longford	2.2	4.2	0.0	0.0	0.0	1.4
Liffey Valley SC	0.0	1.2	0.8	1.2	0.6	0.8
Other Country	0.4	0.9	1.0	0.5	0.3	0.7
Ballyshannon	0.0	0.0	0.1	2.6	0.0	0.7
Donegal	0.0	0.4	1.7	0.7	0.0	0.7
Letterkenny	0.0	0.4	0.1	2.1	0.0	0.6
Belfast	0.0	0.0	1.3	1.0	0.6	0.6
Britain, England	0.9	0.0	0.3	1.2	0.6	0.6
Castlebar	0.0	0.0	0.4	0.2	3.6	0.6
Elsewhere Dublin Region	0.0	1.3	0.4	0.0	0.3	0.4
Derry	0.0	0.0	0.3	1.3	0.0	0.4
Elsewhere County Roscommon	2.1	0.0	0.1	0.0	0.0	0.4
Elsewhere County Leitrim	0.0	1.3	0.1	0.0	0.0	0.3
Cranmore	0.0	0.0	0.6	0.5	0.0	0.3
Elsewhere Sligo	0.0	0.0	0.0	0.9	0.0	0.2
Elsewhere County Mayo	0.0	0.0	0.0	0.0	1.2	0.1
Collooney	0.0	0.0	0.0	0.5	0.0	0.1
Ballinamore	0.0	0.4	0.0	0.0	0.0	0.1
Longford Town	0.0	0.4	0.0	0.0	0.0	0.1
Tobercurry	0.0	0.0	0.0	0.0	0.6	0.1
Athlone	0.0	0.0	0.3	0.0	0.0	0.1
Bundoran	0.0	0.0	0.0	0.2	0.0	0.1
Elsewhere Northern Ireland	0.0	0.0	0.0	0.0	0.3	0.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

4.32 Sligo City centre achieves market shares of over 70% in Sligo Town and the surrounding urban outskirts. In the other three zones its market share is much lower - well below 50% - mainly due to strong competition from three centres on the fringes of the study area: Ballina, Carrick-on- Shannon and Boyle. All three of these are outside County Sligo, though the last two are both inside the Study Area.

4.33 Retail strategies often maintain that exports of this kind offend the principle of sustainability and should therefore be reduced. However, it is difficult to see how this could apply in this instance given the geography of the study area, the zones within it and their relationship to the three centres mentioned above. For those living in parts of the zones outside the urban area, the three centres offer short journey times in what is

[23] The limited duration of a telephone survey tends to preclude detailed discussion of spending on individual goods categories.

a sparsely populated area. For example, Corballa in western Sligo is 47 minutes driving time from Sligo City centre, but only 8 minutes from Ballina. Ballinafad, in southern Sligo, is 31 minutes from Sligo but only 6 minutes from Boyle. Leitrim Village is 49 minutes from Sligo but 6 minutes from Carrick-on Shannon. In County Sligo there is no significant mainstream comparison goods centre apart from Sligo City centre.

4.34 Consumption of energy is of more concern with long distance trips to places like Dublin, which is more than 200 km (and 3 hours) away from Sligo. Dublin City Centre had a market share of around 11% in two zones and 9% across the study area as a whole. There was a small amount of movement to other parts of the Dublin Region, principally to the shopping centres at Liffey Valley and Blanchardstown. Other distant destinations included Galway, Enniskillen, other parts of the Republic and overseas. Altogether, places outside the study area accounted for 32% of residents' expenditure. Such a situation is not unusual - there are many other counties that have no major centre and export much of their expenditure to centres in Tiers 1 and 2 of the national retail hierarchy such as Dublin and Cork (the Retail Guidelines note that Tier 1 and 2 centres combined account for nearly 60% of all comparison goods turnover).

Retail Warehousing

4.35 The definition of 'bulky goods' is not necessarily an accurate reflection of the type of shopping purchases made at retail warehouse outlets. Many do not sell bulky goods. Where they do, it is frequently the case that purchases are not particularly bulky e.g. computer software from PC World or hand tools from B&Q.

4.36 UK-based research has questioned the belief that consumers choose to shop at retail warehouses to drive bulky goods away in their cars. Other factors are now thought to be more significant - such as low prices and the ability to view a wide range of certain types of goods which are not traditionally displayed in the High Street. Ease of access and car parking are also critical considerations.

4.37 The retail warehousing sector is also highly fragmented, consumers often making significant purchases for DIY goods, furniture and carpets and white durables in different locations. This is a marked differentiation from mainstream comparison shopping, where the consumer will carry out most of their expenditure in a single centre (or shopping mall).

4.38 Reflecting these factors, specific questions were framed to capture patterns of spending at retail warehouses. The concept of retail warehousing was first explained and respondents were then asked which retail warehouses they had used in the last year, indicating the names and locations of up to three outlets. Some 17% said they had not been to a retail warehouse in the past year. The responses of the remainder show the following pattern.

Table 4-13 Retail Warehouses / locations used in the last year

Retailers	%
Argos	18.6
B&Q	3.6
Curry's	16.0
Homebase	37.8
PC World	12.2
Woodies	11.1
Other	0.5
TOTAL	100.0

Location	%
Sligo Town	58.9
Elsewhere Study Area	9.2
Enniskillen	4.7
Carrowroe	4.2
Castlebar	5.1
Elsewhere	17.9
TOTAL	100.0

4.39 Over half of the retail warehouse brands mentioned were DIY based outlets, led by Homebase, followed by Woodies and B&Q. The most important non-DIY outlet was Argos with the remainder mainly electrical-based retailers. Just under 60% of the outlets were located in the town of Sligo although most of the remainder are outside the study area. As with mainstream comparison shopping, high levels of expenditure leakage from the County are experienced for goods sold from retail warehouses.

Convenience and Supermarket Shopping

4.40 Capturing information on the full range of convenience shopping presents a number of issues in household surveys. While, people can normally provide clear information on the supermarkets which they use regularly, patterns of shopping at butchers, bakers, off-licence and other specialist convenience outlets tend to be more variable. Supermarkets account for the large majority of household spending on convenience retail goods. Their location is also at the heart of retail planning and policy debate. The Household Survey therefore focused on supermarket shopping.

4.41 Respondents were asked to indicate where their main supermarket shopping was carried out and whether they made use of any other supermarket. Questions were asked about average weekly expenditure in each location.

4.42 The results were combined to establish market shares, using the expenditure figures as weighting factors. It should be noted that the market shares refer to places, and are not restricted to central areas. For example, Sligo's market share includes city centre stores (such as Dunnes and Tesco) as well as supermarkets in edge of centre and out of centre locations.

4.43 Sligo dominates its own zone and the urban outskirts, but elsewhere it faces strong competition from Ballina, Boyle and Carrrick-on-Shannon, as with mainstream comparison shopping. In the South zone, Boyle and Carrick-on-Shannon together account for 80% of the trade, and after other centres have taken their share, Sligo City is left with only 9%. In West Sligo, Ballina takes two thirds and in Leitrim,Carrick-on-Shannon accounts for almost one half. Other centres include Enniscrone in the west, Ballinamore and Drumshanbo in Leitrim, with Bundoran also pulling from Donegal. Enniskillen takes a share from all five zones, due to a combination of exchange rate differentials and the attractions of the town's Asda.

Table 4-14 Supermarket shopping - Market Shares (%)

	Survey zone					
Location	South	Leitrim	Sligo City	Urban outskirts	West	Study Area
Sligo City	9.0	13.8	88.8	87.7	20.2	48.8
Carrick-On-Shannon	33.1	48.5	0.5	0.0	0.0	17.4
Boyle	46.8	0.0	0.0	0.4	0.0	8.0
Ballina	0.0	0.0	0.0	0.0	66.5	7.9
Elsewhere	7.5	13.8	2.0	0.6	5.9	5.9
Elsewhere Study Area	0.0	0.4	6.8	5.6	1.3	3.2
Enniskillen	1.6	5.8	1.6	2.6	0.8	2.8
Ballinamore	0.8	8.0	0.3	0.0	0.0	2.1
Drumshanbo	1.2	7.5	0.0	0.0	0.0	2.0
Bundoran	0.0	2.1	0.0	3.0	0.0	1.2
Inniscrone	0.0	0.0	0.0	0.0	5.2	0.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

4.44 Over the whole Study Area, external centres take 18% of residents' expenditure, though almost half of this goes to Ballina. It is possible that these exports are balanced by imports clawed in by Sligo City, Boyle and Carrick-on-Shannon.

Views of Local Shopping

4.45 Finally, the questionnaire also asked what people liked about Sligo City Centre and what they would like to see by way of improvements to the centre. While these questions were similar to those posed in the Shoppers Survey, there is no reason why the responses should be the same. Most respondents to the Shoppers Survey were regular visitors to Sligo Centre whereas many of the Household Survey sample did not use it as a main centre, or visited it infrequently.

4.46 As respondents could provide more than one answer, the percentages in the next two tables therefore sum to more than 100. The first table profiles Sligo City Centre's perceived advantages.

Table 4-15 What do you like most about Sligo City centre?

Feature	Survey zone					
	South	Leitrim	Sligo City	Urban outskirts	West	Study Area
			%			
Good selection, range, variety of shops	31.8	25.0	16.2	11.4	29.7	21.8
Compact, easy to get round	20.5	23.2	14.7	15.8	11.9	17.6
New shops, shopping centres	6.8	10.7	8.7	12.7	16.8	10.9
Near home, convenient, easy to get to	9.1	1.8	11.7	11.4	3.0	7.6
Pedestrianisation of O Connell Street	4.5	5.4	5.7	5.1	5.0	5.1
Quality of shops	6.8	3.6	3.4	6.3	5.9	5.1
Pedestrianisation generally	4.5	5.4	3.4	5.1	7.9	5.1
River, riverside walks	2.3	5.4	4.5	3.2	3.0	3.8
Other	2.3	1.8	2.6	6.3	1.0	3.1
Particular shops/ type of shop	2.3	5.4	1.5	1.3	3.0	2.7
Restaurants, cafes, pubs	0.0	1.8	4.9	3.2	1.0	2.3
General character, atmosphere	0.0	0.0	3.8	3.2	5.0	2.2
Familiarity, used to it, born here	2.3	0.0	4.9	3.2	0.0	2.2
Parking is OK	4.5	1.8	1.5	0.0	3.0	1.9
Friendly, good service	0.0	0.0	3.4	2.5	1.0	1.4
Competitive prices	2.3	0.0	0.8	0.0	1.0	0.7
Spacious, never too crowded	0.0	0.0	0.8	1.3	1.0	0.6
Good for meeting people	0.0	0.0	0.0	1.3	0.0	0.3
Good public transport	0.0	0.0	0.4	0.0	0.0	0.1
Nothing, not much, nothing going for it	13.6	10.7	24.9	21.5	14.9	17.3
Don t know, vague answer	9.1	14.3	4.2	5.1	10.9	8.6
No reply	0.0	0.0	0.4	0.6	0.0	0.2
TOTAL NUMBER	44	56	265	158	101	624

4.47 There were quite a lot of negative replies such as *not much, nothing going for it,* these being more common with those living in the town or its outskirts who were more of a captive clientele. A variety of the positive comments related to the layout or appearance of the centre, including its compactness, the new shopping centres, pedestrianisation and the riverside walks. Approval of the range and quality of shops was again more common with those from the remoter zones than those living in the town or its outskirts.

Table 4-16 What improvements would you like to see in Sligo City centre?

Feature	Survey zone South	Leitrim	Sligo City	Urban outskirts	West	Study Area
				%		
More parking	43.2	50.0	44.9	46.2	43.6	45.9
More shops, wider variety	22.7	8.9	8.7	12.0	8.9	12.1
Sort out traffic, road access	9.1	1.8	18.5	15.2	9.9	10.8
Specific shop or type of shop	13.6	8.9	9.1	10.8	10.9	10.5
other	4.5	5.4	9.8	12.0	7.9	8.1
Pave, improve, finish O' Connell St	2.3	0.0	16.2	8.2	3.0	6.1
Cheaper parking	0.0	5.4	5.7	8.9	2.0	4.9
Needs flowers, beautification	4.5	0.0	8.3	7.6	2.0	4.6
Re-open O Connell St to traffic	2.3	3.6	8.7	4.4	0.0	4.1
Need other facilities	2.3	1.8	3.4	4.4	0.0	2.6
Need public toilets	0.0	1.8	3.0	4.4	3.0	2.5
Better quality shops, more up-market	2.3	0.0	2.6	1.3	2.0	1.5
Need to cater for middle-aged, elderly	2.3	0.0	2.3	1.9	1.0	1.5
Improve public transport	0.0	1.8	0.8	1.9	0.0	1.0
Nothing, already OK, wouldn't change it	9.1	8.9	3.4	3.2	14.9	7.2
Don t know	2.3	8.9	4.2	1.9	7.9	4.9
No reply	0.0	1.8	0.0	0.6	2.0	0.9
TOTAL NUMBER	44	56	265	158	101	624

4.48 The range of suggested improvements is dominated by parking, mentioned by around half of the respondents in each zone. The next most common suggestion was to improve the range of shops or to provide a particular shop, M&S and Argos being particular favourites. Action to improve traffic was another common suggestion, with almost as many wanting O'Connell Street reopened to traffic as those who applauded its closure in the previous question.

5 PROJECTED REQUIREMENTS

5.1 This chapter estimates retail expenditure growth and future floorspace requirements in the Study Area from 2008 to 2020. A profile of expenditure is developed for the base year - 2008 - and from this estimates of the turnover of convenience and comparison retail floorspace in Sligo City centre are derived. Expenditure is then projected forward to 2015 and 2020 in line with population growth forecasts and projected increases in per-capita expenditure.

Population in 2008 and future change

5.2 Population estimates for Sligo and its catchment have been developed from the latest projections prepared for the National Spatial Strategy. Existing and projected population estimates have been developed for each of the zones in the Study Area. From a present level of 93,446, the population of Sligo's catchment area is projected to rise some 14% to 2015 and a further 9% to 2020. (The approach to estimating population is common to that adopted for the Sligo Housing Strategy and is detailed at Appendix B. It is consistent with the rates of growth in the Revised Regional Population Projections 2007).

Table 5-1 Study Area Population- 2008, 2015, 2020

			Area			
Year	South	Leitrim	Sligo City	Urban outskirts	West	**Study Area**
2008	15,847	22,463	20,764	22,725	11,647	93,446
2015	16,467	26,519	27,390	25,417	11,103	106,897
2020	17,237	29,332	30,527	27,287	11,270	115,653

5.3 Over the next 12 years, it is forecast that an increasing proportion of residents will live in the Sligo area (Sligo City and Urban Outskirts). This proportion is anticipated to rise from 47% of the Study Area's population at present, to 49% in 2015 and 50% in 2020.

Expenditure on comparison goods & future floorspace requirements

Expenditure

5.4 National per-capita sales of comparison and convenience goods are developed from the Roger Tym & Partners retail model (see Appendix C). These are converted to area level using local expenditure indices based on analysis of local socio-economic characteristics.

Table 5-2 Per capita annual comparison goods expenditure by area - 2008 - 2020 (€)

			Area			
Year	South	Leitrim	Sligo City	Urban outskirts	West	**National**
Index	0.996	1.011	1.112	1.026	0.924	1
2008	€2,937	€2,980	€3,278	€3,026	€2,726	€2,949
2015	€3,755	€3,811	€4,192	€3,870	€3,486	€3,771
2020	€4,609	€4,677	€5,145	€4,749	€4,278	€4,629

5.5 Anticipated expenditure growth rates are based on ESRI data. Following some short term fluctuation where annual growth is expected to vary between 1.6% and 5.2% between 2009 and 2015, annual increments are assumed to be more steady thereafter at 4.2% per annum.

5.6 The corresponding levels of available expenditure on comparison goods in each area are shown below.

Table 5-3 Annual comparison goods expenditure by area- 2008 -2020 (€m)

	Area					
Year	South	Leitrim	Sligo City	Urban outskirts	West	Study Area
2008	€46.5	€66.9	€68.1	€68.8	€31.8	€282.1
2015	€61.8	€101.1	€114.8	€98.4	€38.7	€414.8
2020	€79.4	€137.2	€157.1	€129.6	€48.2	€551.5

5.7 Total resident expenditure on comparison goods in 2008 is €282.1 million. Adjustments then need to be made for special forms of trading to translate residents' expenditure into expenditure actually carried out in catchment area shops

Adjustments to comparison expenditure

5.8 Allowances have been made for special forms of trading (SFT) which covers expenditure through the internet, in market stalls, mail order and other non-store locations. Following analyses by Experian, a reduction of 11% is assumed in 2008 rising to 14% in 2015 and 16% in 2020, reflecting the increasing use of internet trading and the increasing prominence of goods such as consumer electronics where internet purchases are very high.

5.9 After applying these adjustments, household expenditure[24] in comparison outlets in the Study Area in 2008 is estimated to be €250.2 million. This is shown in the table below alongside an assessment of the quantitative performance of Sligo's comparison goods sector based on the market shares revealed by the survey.

Table 5-4 Annual comparison goods summary 2008 (€m)

	Area							
	South	Leitrim	Sligo City	Urban outskirts	West	Study Area	Inflow	
Expenditure	€46.5	€66.9	€68.1	€68.8	€31.8	€282.1		
Less SFT	€41.3	€59.4	€60.4	€61.0	€28.2	€250.2		
Less RWH	€35.1	€50.5	€51.3	€51.8	€23.9	€212.7		
Market Shares								
Sligo Centre	45.2%	36.1%	72.2%	71.1%	33.1%	54.5%		
*3 towns**	36.8%	31.9%	2.4%	0.4%	47.3%	19.7%		
Other	18.0%	32.0%	25.4%	28.5%	19.6%	25.8%		
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%		
turnover (€ m)	€15.9	€18.2	€37.1	€36.9	€7.9	€116.0	€38.7	€154.6
			Net floorspace in Sligo Centre (sq m)					25,847
					Sales density (€ per sq m)			€5,982

* Ballina, Boyle and Carrick-on-Shannon

[24] We say *household expenditure* because these estimates - and others in this report - do not include retail expenditure by businesses, on items like food, drink or stationery. Neither do they include retail expenditure by communal households, such as nursing homes, hospitals or boarding schools. Our research has indicated that these forms of expenditure are considerable but they are not covered by conventional retail expenditure estimates.

5.10 The market shares are for mainstream comparison expenditure so it is necessary to make a further adjustment to exclude expenditure at retail warehouses (RWH). Based on the amount of existing retail warehousing in the County and the estimate of exported expenditure, this element is assumed to be approximately 15% of all comparison sales - similar to the proportion found in other Irish Counties and in the UK. This is deducted from the expenditure of each zone, leaving some €212.7 million for the entire Study Area. Application of the market shares of Sligo Centre then gives a turnover for the Centre of €116 million.

5.11 This is the turnover derived from residents of the Study Area, We then add a further allowance for imports from outside, calculated as 25% of the final turnover of the Centre - a rather lower figure than that shown by the shoppers survey to take account of reduced off-season sales. (It should be noted that exports from the Study Area are built into the market shares.) This gives a total turnover of €154.6 million for the Centre. Dividing by the volume of net comparison floorspace, gives an average sales density of €7,325 per sq.m, higher than the general average for centres of this type (around €5,000 per sq m).[25]

5.12 There are a number of reasons why certain stores may out-perform relative to national averages, including location, age of store, level of investment, focus of the product range, lack of competition in the area etc. Nevertheless, this suggests that a number of stores are trading at above average levels and highlights a requirement for further mainstream comparison retail floorspace development in the City Centre.

Projected floorspace requirements

5.13 Table 5-4 forms a base from which future comparison retail floorspace requirements can be assessed. Projections of the area's future population and levels of per capita expenditure are presented in Tables 5-1 to 5-3. These tables cover total comparson expenditure since it is a matter of policy as to how much of the total comparison "pot" should be allocated to retail warehousing.

5.14 Existing retail floorspace will continue to absorb expenditure and an increase in floorspace efficiency of 2.2 % per annum has been incorporated to reflect retailers efforts to improve the operation of their stores.

5.15 In addition there are a number of extant planning permissions for retail development which have not yet been developed. In Sligo, a net total of 17,527 sq.m (net) of potential comparison goods floorspace is in this category (14,012 sq.m mainstream comparison, 3,515 sq.m bulky goods). As it will absorb part of the available sum of retail expenditure - some €89.4million [26] - this combination of improved floorspace efficiency and 'pipeline' retail development has been taken into account in the analysis of future floorspace requirements.

5.16 Comparison floorspace requirements in 2015 and 2020 have been established using sales densities of €5,800 per sq m and €6,450 per sq m respectively

5.17 Furthermore, it cannot be assumed that Sligo's market share (or that of the other centres) will remain static over the plan period. As discussed above and in previous chapters, with the development of Johnston Court and the Quayside Centre, Sligo has seen some improvement in its retail offer in recent years. In addition, a substantial volume of potential new comparison retail floorspace has already been approved. To 2015, as Sligo moves towards Gateway status, the development of this floorspace, along with the continuing improvement of the City Centre as a cultural focus and the retailing environment, and improvements in car parking and accessibility, should act to increase the City Centre's market share. This effect is likely to be most clearly felt in the central parts of Sligo's catchment (Sligo City and the Urban Outskirts) although the

[25] The Cork Retail Strategy adopted averages of €5,000 per sq.m for mainstream comparison and €2,500 for retail warehousing floorspace.
[26] As above, assuming an annual efficiency increase of 2.2%.

City will also exert an increasing influence more widely, attracting expenditure which is presently attracted to other competing centres beyond the Study Area. This is reflected in the following tables. 2020 market shares are kept constant at 2015 levels.

Table 5-5 Comparison goods expenditure & requirements 2015

	Area							
	South	Leitrim	Sligo City	Urban outskirts	West	**Study Area**	**Inflow**	
Expenditure (€m)	€61.8	€101.1	€114.8	€98.4	€38.7	€414.8		
SFT@14% (€m)	€53.2	€86.9	€98.8	€84.6	€33.3	€356.7		
Increase 2008-2015	*€11.9*	*€27.5*	*€38.4*	*€23.6*	*€5.1*	*€106.5*		
Market Shares								
Sligo Centre	50.0%	44.0%	78.0%	76.7%	39.0%			
3 towns	35.0%	30.0%	2.0%	0.3%	45.0%			
Other	15.0%	26.0%	20.0%	23.0%	16.0%			
Total	100.0%	100.0%	100.0%	100.0%	100.0%			
Sligo Centre 2015 turnover (€ m)	€26.6	€38.2	€77.0	€64.9	€13.0	€219.7	€73.2	€293.0
				Less turnover of				
				▪ 2008 floorspace				€180.1
				▪ Extant permissions				€89.4
				Residual expenditure				€23.5
							sales density	€5,800
				Floorspace requirement (sq.m net)				**4,047**

Table 5-6 Comparison goods expenditure & requirements 2020

	Area							
	South	Leitrim	Sligo City	Urban outskirts	West	**Study Area**	**Inflow**	
Expenditure (€m)	€79.4	€137.2	€157.1	€129.6	€48.2	€551.5		
SFT@16% (€m)	€66.8	€115.4	€132.1	€109.0	€40.6	€463.8		
Increase 2008-2020	€25.5	€56.0	€71.7	€48.0	€12.4	€213.6		
Market Shares								
Sligo Centre	50.0%	44.0%	78.0%	76.7%	39.0%			
3 towns	35.0%	30.0%	2.0%	0.3%	45.0%			
Other	15.0%	26.0%	20.0%	23.0%	16.0%			
Total	100.0%	100.0%	100.0%	100.0%	100.0%			
Sligo Centre 2020 turnover (€ m)	€33.4	€50.8	€103.0	€83.6	€15.8	€286.6	€95.5	€382.2
				Less turnover of				
				▪ 2008 floorspace				€200.8
				▪ Extant permissions				€99.7
				Residual expenditure(€ m)				€81.7
							sales density	€6,450
				Floorspace requirement (sq.m				**12,668**

5.18 With population growth in the Gateway area, and as extant permissions are implemented over the Plan period there will be an additional requirement for some 4,050 sq.m net mainstream comparison floorspace. Between 2015 and 2020, the requirement will increase by a further 8,620 sq.m net.

5.19 This is a minimum requirement and would be sufficient to enable Sligo City Centre to progress to Gateway status without greatly reducing the market shares of Ballina, Boyle and Carrick (which perform an important function for the wider County area). It is envisaged that Sligo would become a western focus for higher-order comparison-goods shopping, enabling a proportion of the spend currently attracted to Dublin, Enniskillen and other centres to be recaptured.

Expenditure on Convenience goods & future floorspace requirements

Expenditure

5.20 As with expenditure on comparison goods, national per-capita sales of convenience goods are translated to area level using local expenditure indices based on analysis of local socio-economic characteristics.

Table 5-7 Per capita annual convenience goods expenditure by area - 2008 -2020 (€)

	Area					
Year	South	Leitrim	Sligo City	Urban outskirts	West	National
Index	1.034	1.044	1.117	0.989	0.988	1
2008	€2,480.6	€2,504.4	€2,680.0	€2,373.2	€2,369.6	€2,399.0
2015	€2,573.3	€2,598.0	€2,780.2	€2,461.9	€2,458.2	€2,488.6
2020	€2,699.4	€2,725.3	€2,916.4	€2,582.5	€2,578.6	€2,610.6

5.21 Future growth (based on ESRI data) moves between 0% and 0.5% per annum to 2012 before increasing to 1% per annum to 2020. The resulting levels of available convenience goods expenditure are shown below for each area.

Table 5-8 Annual convenience goods expenditure by area - 2008 -2020 (€m)

	Area					
Year	South	Leitrim	Sligo City	Urban outskirts	West	Study Area
2008	€39.3	€56.3	€55.6	€53.9	€27.6	€232.7
2015	€42.4	€68.9	€76.2	€62.6	€27.3	€277.3
2020	€46.5	€79.9	€89.0	€70.5	€29.1	€315.0

5.22 Total resident expenditure on convenience goods in 2008 is €232.7 million.

Adjustments to convenience expenditure

5.23 It is assumed that special forms of trading account for 2.6% of convenience spending in 2007, rising to 3.65% in 2016 and thereafter. (The effects of internet trading are not so great as with comparison goods because most internet orders are despatched from individual stores and count towards the turnover of those stores)

5.24 Given the localised nature of convenience shopping, exports tend to be balanced by imported spending. It is therefore assumed that expenditure in Study Area outlets is equivalent to residents' expenditure less SFT - that is, €226.7 million.

5.25 The table below shows the effect of this adjustment and factors in the performance of convenience goods outlets in Sligo from the market shares identified in the Household Survey.

Table 5-9 Annual convenience goods summary 2008 (€m)

	Area						
	South	Leitrim	Sligo City	Urban outskirts	West	**Study Area**	
Expenditure	€39.3	€56.3	€55.6	€53.9	€27.6	€232.7	
Less SFT @2.6%	€38.3	€54.8	€54.2	€52.5	€26.9	€226.7	
Market Shares							
Sligo	9%	14%	89%	88%	20%	48.8%	
3 towns	80%	48%	0%	0%	67%	33.3%	
Other	11%	38%	11%	12%	13%	17.9%	
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Expenditure							
Sligo	€3.5	€7.6	€48.1	€46.0	€5.4	€110.7	
3 towns	€30.6	€26.6	€0.3	€0.2	€17.9	€75.6	
Other	€4.2	€20.7	€5.8	€6.3	€3.6	€40.5	
Total	€38.3	€54.8	€54.2	€52.5	€26.9	€226.7	
				Net floorspace in Sligo (sq m)			8,631
				Sales density (€ per sq m)			€12,820

5.26 From a planning perspective, the figures show two clear issues: one affecting Sligo, the other affecting the wider County area.

Sligo

5.27 The sales density figure of €12,820 is particularly high, capturing as it does trading in stores of different formats, ages and sizes. For areas such as Sligo, an average of some €8,000 - €9,000 might be expected. This apparent 'overtrading' reflects the concentration of trade in Sligo's City Centre stores and the lack of alternative provision, whether in the City Centre itself, or in other defined centres.

5.28 An additional 3,700 sq.m[27] net would be required to bring estimated turnover to a more average level, and indeed developments such as that proposed by Dunnes go part of the way to meeting this.

County

5.29 As can be seen in Table 5-9 convenience shopping facilities in Sligo itself exert a relatively low level of influence in those areas outside the Gateway area. Centres outside County Sligo - Ballina, Carrick on Shannon and Boyle - are particularly significant to residents in other parts of the County and in neighbouring areas. Paragraphs 4.33 and 4.34 highlight the comparison retail attraction of the three centres . However, large parts of County Sligo also lack ready access to supermarket facilities. The expenditure pattern indicated by the survey also shows high levels of convenience expenditure leakage to these centres.

5.30 In this context, the development of intermediate convenience facilities may be appropriate. This would encourage a more sustainable pattern of convenience goods shopping while also reducing related expenditure leakage from the County.

[27] Based on €9,000 per sq.m

Projected floorspace requirements

5.31 In assessing future floorspace requirements, a process similar to that used for analysing future comparison floorspace requirements has been adopted.

5.32 Floorspace efficiency improvements of 0.6% per annum have been adopted (consistent with experience in other parts of Ireland and in the UK).

5.33 In Sligo, there is planning permission for some 2,977 sq.m net convenience retail floorspace which has yet to be developed. Once trading, it is estimated that this could account for a further €30.2 million[28] of resident's expenditure. In the wider County, some 1,553 sq.m has been granted permission but is not yet developed. Convenience floorspace requirements in 2015 and 2020 have been established using sales densities of €9,250 per sq m and €9,500 per sq m respectively for floorspace in Sligo and €8,000 per sq m and €8,250 per sq m respectively for floorspace in the County.

5.34 In examining future requirements, it has been assumed that market shares would change to reflect potential new convenience floorspace provision in intermediate centres in the wider County and reductions in the market shares presently enjoyed by Sligo, Ballina, Carrick-on-Shannon and Boyle in those areas outside the Gateway have been incorporated accordingly. An adjustment has also been made to reflect the likely attraction of new provision in the wider area to some residents in the Urban Outskirts.

Table 5-10 Convenience goods expenditure & requirements 2015

			Area			
	South	Leitrim	Sligo City	Urban outskirts	West	**Study Area**
Expenditure	€42.4	€68.9	€76.2	€62.6	€27.3	€277.3
Less SFT @3.7%	€40.8	€66.4	€73.4	€60.3	€26.3	€267.2
Market Shares						
Sligo	3%	7%	89%	80%	10%	3%
3 towns	77%	46%	0%	0%	65%	77%
Other	10.0%	34.0%	10.0%	11.0%	13.0%	10.0%
*Intermediate centre**	10.0%	13.0%	1.2%	9.0%	12.0%	10.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Expenditure						
Sligo	€1.2	€4.6	€65.2	€48.2	€2.6	€121.9
3 towns	€31.4	€30.5	€0.0	€0.0	€17.1	€79.1
*Intermediate centre**	€4.1	€8.6	€0.9	€5.4	€3.2	€22.2
Other	€4.1	€22.6	€7.3	€6.6	€3.4	€44.0
Total	€40.8	€66.4	€73.4	€60.3	€26.3	€267.2
Potential expenditure in intermediate centres						€22.2
Less commitments						€12.4
Residual spend						€9.7
Sales density (€ per sq m)						€8,000
Floorspace requirements (sq m						**1,216**
Potential expenditure in Sligo City						€121.9
Less commitments						€30.2
Residual spend						€91.7
Sales density (€ per sq m)						€9,250
Floorspace requirements (sq m)						**1,280**

* potential

[28] @ €10,150 per sq.m

Table 5-11 Convenience goods expenditure & requirements 2020

	Area					
	South	Leitrim	Sligo Town	Urban outskirts	West	**Study Area**
Expenditure	€46.5	€79.9	€89.0	€70.5	€29.1	€315.0
Less SFT @3.7%	€44.8	€77.0	€85.8	€67.9	€28.0	€303.5
Market Shares						
Sligo	1%	5%	89%	75%	9%	
3 towns	70%	44%	0%	0%	61%	
Other	10%	34%	10%	11%	13%	
Intermediate centre *	19%	17%	1%	14%	17%	
Total	100.0%	100.0%	100.0%	100.0%	100.0%	
Expenditure						
Sligo	€0.4	€3.9	€76.2	€50.9	€2.5	€133.9
3 towns	€31.4	€33.9	€0.0	€0.0	€17.1	€82.4
*Intermediate centre**	€8.5	€13.1	€1.0	€9.5	€4.8	€36.9
Other	€4.5	€26.2	€8.6	€7.5	€3.6	€50.4
Total	€44.8	€77.0	€85.8	€67.9	€28.0	€303.5
Potential expenditure in intermediate centres						€36.9
Less commitments						€12.8
Residual spend						€24.1
Sales density (€ per sq m)						€8,250
Floorspace requirements (sq m						**4,470**
Potential expenditure in Sligo Town						€133.9
Less commitments						€31.1
Residual spend						€102.8
Sales density (€ per sq m)						€9,500
Floorspace requirements (sq m)						**4,187**

* potential

5.35 As the Gateway population expands and extant permissions are developed out, further limited requirements for additional convenience floorspace will emerge, both in Sligo and in the wider County. In Sligo, there will be an additional requirement for an estimated 1,280 sq.m net convenience floorspace rising to 4,190 sq.m net in 2020. Outside the Gateway, the requirement is estimated to be 1,220 sq.m net in 202 rising to 4,470 sq.m net by 2020. In both instances, were discount retailers to enter the market, there could be scope for slightly higher levels of floorspace.

5.36 From this analysis, and examination of extant permission for retail floorspace, it is clear that a substantial part of the future requirement for convenience and comparison floorspace has already been granted planning permission. In this context, careful monitoring of implementation is needed to ensure that the City and County can continue to provide an appropriate scale and quality of retail floorspace sufficient to meet the needs of its future population and their future strategic role.

6 THE SLIGO CITY CENTRE AND RETAIL STRATEGY 2004-2010

6.1 Retail and related policies in the Sligo and Environs Development Plan were heavily informed by the findings of the Sligo City Centre and Retail Strategy 2004-2010. This chapter examines the extent to which the strategy has been implemented and draws comparisons based on the fieldwork and analysis which has been completed in 2008.

City Centre Health Check

6.2 The previous strategy promoted the retail development of two key central areas in helping to maintain and enhance the City Centre's retail function. As discussed earlier, while considerable progress has been made in strategy implementation with the development of the Johnston Court and Quayside schemes (both of which are now trading), the development of the main Centreblock area (Wine Street/Adelaide Street) has lagged behind. The Dunnes redevelopment has recently been approved, while Treasury Holdings proposed redevelopment is the subject of a review by An Bord Pleanala.

6.3 While the development of the Sligo Retail Park at Carrowroe has also taken place since the last strategy, the observation that '"Sligo's retail facilities are concentrated in the centre with very little suburban retailing present"[29] remains valid.

6.4 The previous strategy was informed by a Pedestrian Survey. Over 80% of pedestrians had positive views of the Centre relative to competing locations, particularly the City centre's compactness and the central environment (particularly in the vicinity of the river). At the same time, it highlighted concerns over traffic congestion in the central area and the impact this had on the shopping experience. Pedestrianisation was mentioned by nearly one fifth of those interviewed as the single biggest potential improvement. The survey also identified a significant minority who felt that the selection of shops in the area could be improved.

6.5 More detailed analysis has been undertaken in 2008 through a more extensive survey exercise including both a Shoppers Survey and a Household Survey within Sligo's comparison goods catchment. The inclusion of a Household Survey allows a more accurate analysis of expenditure patterns, particularly, the extent to which retail expenditure in Sligo's catchment area is drawn to competing centres (by definition, Shoppers and Pedestrian Surveys are more likely to capture details of those who use the centre more frequently as opposed to those who make more use of competing offers elsewhere).

6.6 With the floorspace additions noted above and the partial pedestrianisation of O'Connell Street, the retail environment has undoubtedly improved since the strategy was formulated. Nonetheless, as the survey analysis in previous chapters demonstrates, much of the analysis and observations made 5 years ago remain pertinent. Traffic congestion and car parking remain major issues, although the prospective developments by Dunnes and Treasury Holdings would add to capacity in the central area.

Quantitative Assessment

6.7 The 2004 Strategy notes Sligo's central position (in retailing terms) in an area that includes the whole of County Sligo and parts of neighbouring Counties. It is the largest settlement in the County and this position has not altered despite population growth in other settlements. In the interim, however, national and regional planning policy has encouraged further concentration to promote Sligo's transition to gateway status.

[29] P 7, Sligo City Centre and Retail Strategy 2004-2010

Population

6.8 Of the catchment area scenarios modelled in the previous review, Scenario B - which reflects 'fair' population growth as the City achieved Gateway Status - is closest to the assumptions used in this report. By 2021, the City's comparison goods catchment is estimated to have grown to 116,989. This compares with a catchment population estimate of 115,653 used in this report (and consistent with the assumptions employed in the Revised Regional Population Projections 2007).

Expenditure

6.9 Projected retail spending is slightly different to that anticipated in the previous strategy. In 2008, it is estimated that per capita annual spending on convenience goods is €2,610 and €2,905 for comparison goods, compared with previous estimates of €2,664 and €2,480 respectively. Projected levels of expenditure to 2020 and 2021 are however, significantly different. In 2020, it is estimated that per capita annual spending on convenience goods will be €2,840 with €4,560 spent on comparison goods. This compares with previous estimates of €3,813 and €4,488 respectively, which partially explains the reduced convenience floorspace requirement relative to the previous strategy.

Strategy

6.10 As would be anticipated given that several of the core retailing issues remain, the key elements of the previous strategy addressed a number of the critical issues facing retail centres in and around Sligo today, namely:

- The need to encourage town centre retail development in support their continued health and vitality i.e. application of the Sequential Test;
- Bringing forward measures to enhance Sligo's appeal as a shopping destination for comparison goods; and
- Encouraging opportunities for City centre retail development (and redevelopment) to retain the compact nature of the centre - the Centre Block and Buttermarket are mentioned in this context - while recognising the need to bolster the traditional retail area in the south- east of the City centre.

6.11 The 2004 Retail Strategy also identified locations for specific types of retail development:

- to reduce piecemeal development of bulky goods outlets:
  - Pearse Road (Carrowroe) - identifying potential development of up to 19,000 sq.m (gross) but reinforcing bulky goods restrictions. This has been substantially developed since;
  - Promotion of an additional retail warehouse park (a maximum of 5,000 sq.m (gross) at Shannon Eighter, which to date has not come forward.
- To meet neighbourhood requirements:
  - Identification of a network of neighbourhood centres with a significant retail element (the SEDP 2004-2010 identifies 11 areas, to address recent and anticipated growth in the neighbouring areas).
  - Neighbourhood centre size thresholds were adopted with a maximum unit size of 250 sq.m (gross) and a maximum centre size of 1,500 sq.m (net)

6.12 The 2008 retail analysis shows that the concentration of convenience expenditure in the centre of Sligo has if anything increased over the last 5 years. The quantitative assessment indicates that the turnover of the main stores is considerably in excess of company averages. In this context and in view of the anticipated growth of the City, it may be appropriate to identify an additional category of centre in the urban retail hierarchy to enable a balanced provision of convenience retail facilities across the City.

6.13 In the long term i.e. beyond the Strategy period and after completion of the Centre Block and Buttermarket areas, it also advocated consideration of potential options for City Centre expansion should this become necessary. The potential of sites in the the Docklands area (to the west of Hughes Bridge) was mentioned in this context.

7 CONCLUSIONS

7.1 The Retail Planning Guidelines (paragraph 36) provide guidance on retail development issues which need to be addressed in the development plan. Guidelines for scale of floorspace to be provided, the relative split between uses: convenience, comparison and bulky household, and the location of future development are critical considerations for Sligo.

7.2 The Strategy provides:

- Confirmation and update of the County retail hierarchy;
- Identification of the extent of the retail catchment areas;
- Broad assessment of the additional quantitative retail floorspace requirements (capacity and need) for the County; and
- Recommendations on key policy approaches for assessing retail proposals.

7.3 There are two aspects to the policy recommendations:

- A broad description of the overall strategy over the period of the Sligo and Environs Development Plan 2010-2016; and
- Policy requirements for the range of locations in the County retail hierarchy with appropriate policy advice and guidance.

Future requirements

7.4 The scope for carefully planned major retail development to 2015 is demonstrated in Chapter 5. This reflects the relatively high levels of comparison floorspace development witnessed in the last five years and the volume of floorspace in the retail development pipeline.

7.5 In quantitative terms, between 2008 and 2015 there is scope for further mainstream comparison retail development of some 4,050 sq.m (net), and it is anticipated that this will increase substantially, by a further 8,620 sq.m net to 2020. It is emphasised that this requirement is in addition to the various permissions for the Centre Block and surrounding area which have yet to be implemented.

7.6 Comparison retail development in the plan period should also seek to address qualitative deficiencies. The Shoppers Survey identified gaps in Sligo's existing provision and it is vital that these are filled if the City is to further develop its regional role as a Gateway. Several concerns were raised over the quality of the retail environment and existing provision in Sligo, including the range and quality of shops. As the main focus of retail activity in the County, there is additional scope for comparison retail development where it would extend the quality and range of the existing offer.

7.7 The analysis also demonstrates scope for additional convenience floorspace in Sligo -- both in the City Centre, in other neighbourhood centres and in the County generally. Over the period of the Plan, these requirements are however considered to be modest in scale after planning permissions relating to such development are taken into account. In Sligo, there will be an additional requirement for an estimated 1,280 sq.m net convenience floorspace rising to 4,190 sq.m net in 2020. Outside the Gateway, the requirement is estimated to be 1,220 sq.m net in 2015 rising to 4,470 sq.m net by 2020. In both instances, were discount retailers to enter the market, there could be scope for slightly higher levels of floorspace.

Location of New Floorspace

7.8 Retail Planning: Guidelines for Local Authorities (paragraphs 28 & 29) details the importance of retailing in town centres: in meeting the retail requirements of residents and others who use or visit town centres: in contributing to levels of activity and town centre viability and health; and in supporting their general improvement. The guidance notes the considerable investment that has been directed to central areas and the vital role of planning policy in sustaining and enhancing their role.

7.9 A centre-based approach is therefore adopted consistent with national and regional planning policy.

7.10 The Retail Strategy encourages the provision of retail floorspace in the County's centres at a level appropriate to the size and projected roles of its various settlements as outlined in the County Development Plan and the Border Regional Planning Guidelines.

Comparison Retailing

7.11 Given the larger distances that people are prepared to travel for comparison shopping (and particularly higher order goods) the existing hierarchy is satisfactory. Sligo is in the process of building its role as a Gateway Centre. Additional floorspace should be concentrated in Sligo City Centre to further develop this role, enabling longer-distance exports to be reduced (although there will always an expenditure flow to Dublin and other higher-order centres given the quality and range of retailing as well as other supporting attractions in these centres)

7.12 For comparison goods shopping, the strategy therefore supports the further development of higher-order shopping facilities in Sligo, consistent with its Gateway designation. This will assist in the town's ongoing strengthening and consolidation, simultaneously enhancing its overall status and competitiveness as the County's main shopping centre and destination.

7.13 This process could be compromised were intermediate centres to be developed. Sligo City Centre presently provides medium level facilities for the central part of the County while Ballina, Boyle and Carrick provide lower level but accessible facilities to outlying areas in the south and east of the County. While the anticipated improvement in Sligo's comparison retailing offer will affect the market shares of these centres, this should not be of such a scale as to affect their ability to continue to serve the areas around them, both in County Sligo and elsewhere.

7.14 Subject to sequential approach provisions, the Council will encourage development which seeks to reduce the level of expenditure exported to centres outside the County.

7.15 It is noted that a substantial proportion of the quantitative requirement to 2015 may have already been met through a combination of built and committed development. Nevertheless, Sligo, as a Gateway, needs to retain the capacity to cater for major retail development and such development should be directed to the City Centre in the first instance. The Centre's role can be strengthened through securing major retail development, which will in turn benefit the county area and the wider region. For this to happen, it may be necessary to identify development sites within the City Centre or to consider its extension.

7.16 The capacity analysis indicates a limited capacity for further comparison floorspace (which includes goods sold from retail warehouses) in the plan period. While the clear preference is for this requirement to be met in City Centre sites, it is acknowledged that part of the requirement may be met in retail warehousing formats in other locations. However, the quantitative case for further allocations of retail warehousing over and above existing allocations is not supported by the capacity analysis. While the zonings at Carrowroe and Lisnalurg (relocated from Shannon Eighter) should be retained, their floorspace thresholds should not be exceeded. The existing restrictions to the sale of bulky goods only, or goods generally sold in bulk should stay in place.

7.17 Assuming the development of the Centre Block, further development opportunities in the City Centre are limited. Efforts to ensure that the City Centre can attract higher-order comparison-goods retailers, through identification and enabling appropriate development sites, should therefore be a priority action. This should include:

- Encouraging site assembly and redevelopment in the established City Centre to provide new blocks and floorplates appropriate to the needs of modern retailing (while also respecting the City's heritage (as witnessed recently on Castle Street). Particular attention should be given to potential opportunities in the Market Street/Castle Street area ;
- Potential extension of the City Centre to include the area west of Hughes Bridge. Provision of mainstream comparison floorspace in this location should be considered only where it can be demonstrated that alternative opportunities in the established City Centre have been exhausted (and only after completion of the Centre Block). In the medium term, it may be appropriate to consider development of convenience retail floorspace in this area to facilitate a qualitative improvement in the City Centre's convenience retail offer while also releasing space for additional comparison retail development in the established City Centre.
- Any extension of the City Centre across the N4 should ensure effective pedestrian and vehicular transport linkages to and from the established area. In the medium-term, a masterplan should be prepared to show how this area can form an effective extension to the City Centre,
- Improvements in City Centre accessibility.

Convenience retailing

7.18 While the analysis indicates limited scope for additional convenience floorspace development, there is a need to address the balance of retail provision across both the City and the County.

Sligo

7.19 As shown in Chapter 5, convenience retail floorspace in Sligo is heavily concentrated in Sligo City Centre. Central stores presently meet most of the convenience shopping needs of the population in the Gateway area.

7.20 While the convenience shopping function of the City Centre is important to its ongoing vitality, it is also necessary to ensure that convenience retail facilities are accessible and convenient across the City as a whole. In the plan period, two neighbourhood centres will therefore be enabled to develop as larger neighbourhood centres for convenience retailing purposes in order to facilitate the City's balanced growth. While these should reflect commitments already made in the current Plan (i.e.Carrowroe and Lisnalurg), the potential for centres to serve existing and growing communities at Ballinode and Pearse Road-Cleveragh should be considered.

7.21 Provision in these locations is designed to meet the needs of existing residents, while also reflecting recent growth in Sligo. Both are also located close to regeneration areas in the City (Hazelwood and Cranmore).

7.22 Neighbourhood centres are presently restricted - the centre as a whole should be no more than 1,500 sq.m (net) and individual units should not exceed 250 sq.m(net). In the larger neighbourhood centres, the threshold on development will be relaxed to enable convenience retail development of up to 1,750 sq.m net (with a maximum unit size of 1,500 sq.m net). This aims to encourage the development of small scale supermarket provision. While the 250 sq.m restriction will continue to apply to comparison retail units, the overall scale of the centres will be limited to 2,750 sq.m(net) across the centre.

7.23 While the remaining neighbourhood centres will continue to be restricted as at present, there may be scope for development towards larger neighbourhood centre status beyond the Plan period and consistent with pattern of population growth in the City.

Sligo County

7.24 The absence of any secondary convenience goods centre in County Sligo is a serious issue. Many parts of the county are around 30 minutes drive or further from their nearest sizable supermarket - whether that is in Sligo Town or in the surrounding centres of Ballina, Boyle or Carrick. A distance of 30 minutes is about twice that which most people in Ireland are used to traveling for supermarket shopping, so there is a strong case for building up intermediate centres, particularly where this reinforces recent and forecast settlement growth.

7.25 Additional provision should only be encouraged in settlements identified as Key Support towns in the County Development Plan. In the Plan period, the scope for further development is limited to one small to medium -sized supermarket (1,000 - 1,300 sq.m net). Sites should be identified to bolster convenience retailing in Ballymote up to an additional 1,500 sq.m net. This provision should serve the eastern part of the County, offering a sustainable location convenient to residents in the south of the County.

7.26 Beyond the plan period, there is likely to be scope for a further addition of a similar scale elsewhere in the County, subject to the emerging pattern of population growth.

Criteria for Assessment

7.27 The hierarchical structure of City Centre - Larger Neighbourhood Centres - Neighbourhood Centres in Sligo is designed to encourage the improvement of all of the centres in Sligo. A set of policy criteria for assessing retail developments is provided in support.

7.28 The provisions of paragraphs 55 to 65 of the Retail Planning Guidelines outline the main principles for assessing new retail proposals. These should inform site selection, scale and form of development, access and servicing arrangements, linkages and support for creation of a competitive retail sector across Sligo.

7.29 The preferred location for retail development is within existing centres. In the instances where proposed retail development cannot be accommodated in defined centres then edge-of-centre locations will require to be identified. The distance to and from a defined core shopping area varies according to the local circumstances of each centre. Nonetheless this should be no more than 300-400m from the edge of the defined central area. Only when these options have been exhausted should alternative out-of-centre locations be considered.

Large Foodstores

7.30 Where practicable, new medium to large convenience developments should be located within or on the edge of a town centre or rather within a designated Larger Neighbourhood Centre (if appropriate) serving a large residential area and community. The level of accessibility by all modes of transport is vital - more so for pedestrians and those using public transport - in choosing the location of new foodstores.

7.31 As large foodstores tend to attract high volumes of shoppers undertaking less frequent but larger weekly grocery trips, the availability of convenient and easily accessible car parking is also a pre-requisite. Thus, in the future, large scale foodstores in town centre or edge-of-centre locations are more likely to require the provision of decked car parking given the potential constraints on site availability.

Retail Warehousing

The Retail Planning Guidelines recognise that retail warehousing is not easily accommodated within town centres, mainly due to its physical requirements, the need for large parking areas, and issues with site assembly.

7.32 In assessing the suitability of any retail warehousing it will be important to consider: the range of goods to be sold; the quantitative and qualitative need for development; potential impacts on centre vitality and viability; the scale, design and character of development; and vehicular access and movement arrangements.

7.33 The Retail Planning Guidelines indicate that individual retail warehouses should be no smaller than 700 sq.m gross floorspace (with no permission to sub-divide), and no larger than 6,000 sq.m. In NSS Gateway areas such as Sligo this cap is relaxed subject to satisfactory traffic assessments and centre impact assessments. Increasingly, retail warehouse parks have been allowed which sell toys and sports goods.

7.34 There will be a presumption that the range of goods sold be strictly limited to that recommended in the Retail Planning Guidelines. Operations for retail warehouse units will therefore be restricted to the sale of bulky household[30] goods through the use of planning conditions and enforcement powers.

District and Neighbourhood Centres

District Centres

7.35 There are no formally designated District Centres in Sligo. The Retail Planning Guidelines (paragraph 71, and in Annex 1) indicate that a purpose built District Centre can be within the built up area or a suburban location on the edge of an urban area and would usually contain at least one food supermarket or superstore together with non-retail services. District Centres serve the local community within a 15-20 minute drive time and typically comprise up to 10,000 sq.m gross floorspace.

7.36 As the majority of projected convenience and comparison goods requirements in Sligo are directed to City Centre and other centres in Sligo, the strategy does not designate any District Centres.

Neighbourhood Centres

7.37 Local or neighbourhood centres are defined as: small groups of shops, typically comprising a newsagent, small supermarket/general grocery store, sub-post office and other small shops of a local nature serving a small, localised catchment population. National Retail Planning Guidance provides no specific quantitative criteria for a Neighbourhood Centre.

7.38 While neighbourhood centres should be convenient to a localised catchment, there needs to be a reasonable quantum of floorspace to provide a good local range and provide a viable focus of shopping and service outlets.

Discount Foodstores

7.39 Discount convenience retailing is a niche market sector and one that is increasingly dominated by European retailers such as Aldi and Lidl. These discount formats complement supermarkets and larger superstores providing additional variety and competition in the retail market.

7.40 Discount foodstores will typically comprise about 1,500 sq.m gross, served by a surface car park with up to 100 spaces. The preferred location for a discount foodstore would be in the town centre or edge-of-centre, or in a Neighbourhood Centre. The

[30] DIY and garden materials, carpets, furniture and white electrical goods.

potential for a discount foodstore to act as the anchor for a small centre is acknowledged in the Retail Planning Guidelines.

7.41 The main criteria to be adopted in assessing the suitability of discount foodstore proposals includes: its impact on centre vitality and viability; the likely impact on the urban design, character and amenity of the town or area; and its level of accessibility by different modes of transport.

Other Retailing Formats

Factory Outlet Centres

7.42 Factory outlet centres are not currently part of the retail hierarchy in Sligo. Factory outlet centres are deemed to be inappropriate development if sited in close proximity to higher order comparison centres. This is due to the direct competition offered through the provision of fashion related retail outlets and products.

7.43 Factory outlet centres offer a niche format of retailing which may be accommodated in unique or special circumstances, perhaps in or close to a smaller town within the retail hierarchy, that may benefit significantly from being an established destination for tourism-led trading, and only where there may be potential for the creation of stronger linkages with the nearby town centre.

7.44 The success of factory outlet centres will normally depend on its attraction across a wide catchment area, including tourists. There may therefore be implications for existing tourist facilities and established town centres, even those some distance from the proposals.

7.45 Criteria for assessing this form of development should primarily focus on whether the development is located in a truly strategic location with the capability to capture sufficient tourism based expenditure. In sustainability terms, the preferred location should be close to or in an existing town centre.

Traditional Markets

7.46 Markets are a popular form of traditional retailing which meets local shopping needs, often with a range of other specialist and tourism related shopping. Markets are sometimes perceived as creating adverse environmental effects such as noise, litter, and traffic congestion. Effective management and regulation can improve their operation while also minimising adverse impacts.

Petrol Filling Station and Forecourt Convenience

7.47 Convenience retail floorspace associated with petrol filling station forecourts is a growing sector. Petrol filling station shops have a part to play in serving the needs of many of the more isolated and rural communities in across County Sligo.

7.48 The development of facilities of this nature will also be subject to the sequential approach recognising that in certain circumstances, their development in out-of-town locations may have detrimental impacts on the performance of an established centre, and particularly small convenience shopping outlets. The maximum retail floorspace at petrol filling stations is restricted to 100 sq.m. In order to ensure an adequate provision of local retailing in villages, there may be circumstances where this figure can be exceeded

Local and Village Shops

7.49 Local and village shops have an important role serving the convenience shopping requirements of local communities throughout Sligo and the wider County. It is essential that local shops be easily accessible to all sections of the local community, in particular the elderly or less mobile, and those people with disabilities. Where possible, the development of small-scale retail facilities should be located in existing village or neighbourhood centres.

7.50 There will be a presumption in favour of new small-scale retail development in villages and small settlements, having regard to the following:

- there is no significant adverse impact on the vitality and viability of existing centres; and
- the proposal is of an appropriate scale and is acceptable in terms of design, impact on any residential amenity, servicing and parking arrangements.

Isolated and Rural Small Shops

7.51 It is a generalised policy within most Counties, including County Sligo that all retail development should be directed to existing settlements (as per the hierarchy) and that development in the countryside should only be considered where appropriate to the needs of the local population.