

1 Introduction

1.1 Aims of the City Centre Strategy

The aim of this Strategy is to form a realistic vision for Sligo City Centre. The Strategy is divided into four sections, beginning with an introductory section that examines the context of national planning guidance and Sligo's position in relation to national policy. Section two contains a comprehensive health-check of Sligo City Centre, including survey analysis. Section Three forecasts future requirements for retail floorspace in Sligo based on population, expenditure and floorspace turnover projections. Finally, Section Four consists of a comprehensive and area-specific strategy based upon the findings of the previous three sections.

This document supports the Sligo and Environs Development Plan and also sits within the context of the Sligo Sub-Regional Strategy. The former document plans for the time period up to 2010, whereas the latter incorporates a vision, including forecasts and projections, to 2021. As a consequence, it is appropriate for this strategy to make projections with both timescales taken into consideration.

In accordance with national guidance, the strategy aims to provide strategic guidance on the location and scale of retail development. The need for additional development is based upon a realistic appraisal of both expenditure change and market requirements. In addition the strategy proposes policies and action initiatives to encourage the improvement of city centres, and aims to create an attractive and safe city centre for pedestrians.

1.2 Sligo as a 'Gateway' City and Regional Centre for the North-West

With a population of over 18,000, Sligo is the largest urban centre in the Republic of Ireland north of Galway and west of Athlone. It is a centre that provides an urban anchor for an area of low population density. As such, it is of particular importance to the rural economy, since it serves a large rural hinterland.

Rapid growth and change is a likely probability for Sligo. In line with the National Spatial Strategy and given its regional prominence in the north-west, Sligo has aspirations to evolve into a national gateway for Ireland. Sligo already has many attributes that characterise a gateway centre. The challenge is to cement its role as the administrative and cultural centre for the north-west region. To a large extent the city already fulfils this role, several insurance companies and banks choose to locate their regional headquarters in the city and one of six national High Court Houses is on Teeling Street. In addition, Sligo is home to regional cultural venues such as theatres, galleries and art centres.

1.3 History of City Centre

Sligo's early growth (Pre-1640) centred on Thomas Street and the river crossing now known as New Bridge. Grattan Street, Castle Street and High Street developed later on in the latter half of the 17th century and O'Connell Street, John Street and Wine Street grew in importance during the 18th century.

The city grew prosperous in the 19th century and this was a significant period of growth. Many of the buildings on the commercial streets date from this period and feature 3-4 storeys with a variety of traditional, grand and modern shop fronts. Several significant buildings are prominent elements of Sligo's built environment which distinguish it from other areas, these include the 1878 gothic revival style Court House (Teeling Street) and the 1865 French renaissance style City Hall (Quay Street).

1.4 Existing Urban Form

Nowadays, the city centre in Sligo has a square configuration, which contrasts with many Irish towns and cities that feature a single main street. The centre consists of two main square networks with the commercial core of the city within them. These square networks consist of Adelaide Street, John Street, O'Connell Street, Wine Street, Stephen Street, Bridge Street, Thomas Street, and Castle Street. The square pattern of roads is maintained across the River Garvogue by Hyde Bridge, which provides a link from Wine Street to Stephen Street and also by the New Bridge that provides a connection from Bridge Street to Thomas Street.

The building pattern in Sligo City Centre reflects the different periods of growth. Castle Street, Market Street, High Street, and Grattan Street all feature buildings with narrow plot widths and the blocks of development associated with these streets are densely developed; this area is where much of the original commercial development took place. Much of O'Connell Street and Quay Street show much wider plot widths and reflect the later expansion of Sligo in the 19th century.

Although the city centre straddles the Garvogue river, the built form of Sligo has historically not addressed the waterfront. However, in recent years the area has been redeveloped, increasing linkages with Castle Street and O'Connell Street. Shops, restaurants and pubs now front onto the river creating a new focus and vibrancy, particularly around Rockwood Parade, which is linked by a footbridge to the north bank of the river.

1.5 National Policy Objectives

The Department of the Environment and Local Government in December 2000 issued Retail Planning Guidelines for Planning Authorities. Under the Planning and Development Act 2000, Planning Authorities and An Bord Pleanála are obliged to have regard to these guidelines in the performance of their planning functions.

National policy identifies five key objectives to guide retail development, all of which are intended to carry equal weight. They are as follows;

1. All development plans should incorporate clear policies and proposals for retail development.
2. The planning system should facilitate a competitive and healthy environment for the retail industry. It is not the purpose of the planning system to inhibit competition, preserve existing commercial interests or prevent innovation.
3. Retail development should be easily accessible, particularly by public transport, in a location which encourages multi-purpose shopping, business and leisure trips on the same journey.
4. The continuing role of city, town and district centres should be supported. These established centres should be the preferred locations for developments that attract many trips. In order to achieve this objective, national guidance stipulates that the preferred location for retail development, should be within town and city centres, consistent with the requirement to achieve good access especially by public transport. If there are no development sites available within a town or city centre then the next preference should be a location on the edge of the centre. Only where there are no sites, or potential sites, within a centre or on its edge, or satisfactory transport accessibility (including park and ride) realistically cannot be ensured within a reasonable period of time, should out of centre development be contemplated. This policy also supports the role of centres of social and business interaction in the community.
5. There is a presumption against large retail centres located adjacent or close to existing, new or planned national roads / motorways since it leads to an inefficient use of costly and valuable infrastructure.

In June 1998 the Minister for the Environment and Local Government made a Policy directive and Regulations under the Planning Acts to limit the size of a supermarket development to 3,000 sq. metres outside Dublin and to 3,500 sq. metres in the Greater Dublin Area.

1.6 Sligo within the National Retail Hierarchy

Sligo is a strong shopping centre that is attractive to shoppers and has many positive aspects on which to build in the future. In the national context, the government guidelines identify a 'Retail Hierarchy' consisting of four tiers, which are as follows;

- First tier: City of Dublin
- Second Tier: Four major cities of Cork, Limerick, Galway, Waterford.
- Third Tier: Thirty-three towns and cities mentioned, including Sligo.
- Fourth Tier: Large number of small towns in 1,500 to 5,000 population category.

Thus, only five centres nationally are deemed to be above Sligo in the national hierarchy and together these five primary urban centres account for seventy-eight per cent of Ireland's comparison goods turnover. The third tier group of centres cannot be precisely defined, but the more vibrant examples have seen significant growth in comparison goods turnover in the last fifteen years or so.

The greatest concentration of third-tier settlements lie in the areas of the country where there is greatest population density. As a result, third tier centres are most numerous in the East and South-East but are less common towards the West and the North. Thus, Sligo is of particular importance in a less densely populated area of the state where it acts as an anchor for a rural economy that is undergoing rapid change. As such, it is well placed to capture future growth in retail spend.

Sligo still needs to strengthen its position within the national hierarchy and become more attractive to long-distance shoppers if it is to achieve its aspiration to become a 'gateway city' for Ireland and the regional capital of the North-West. The aim for Sligo is to make the transition from the third to second tier on the national retail hierarchy.

1.7 Pressure for Retail Development on a National Scale

Nationally, there has been much pressure for retail development since 1987. This has been characterised by a demand for larger stores and the gradual entry of European retailers into the Irish market. The resultant increasing difficulty of accessing prime retail pitches has meant moves to decentralise large-scale retail provision to out-of-centre locations.

The underlying reason for these pressures has been the continuing success of the Irish economy that has in turn led to increases in consumer spending. Ireland continues to represent an opportunity to many European retailers because it has a comparatively young population who often have high levels of disposable income. Drivers of output and consumption also include high numbers of new workforce entrants, an increase in single person households, high levels of inward migration and an increase in female participation rates in the workforce.

Retailers have been among the main beneficiaries of economic growth in the country. Retail sales grew at almost 8% through most of the nineties, which was twice the UK rate. A continuation of this economic success will generate a requirement for additional retail floor-space, particularly for comparison goods. However, growth is hampered by inadequately developed transport infrastructure and the five centres that make up the top two tiers of the retail hierarchy have become increasingly congested and competitive. Pressures for expansion will almost certainly be felt in centres such as Sligo and will be further exacerbated by the projected increase in population and the aspiration to achieve 'gateway city' status.

1.8 Implications of National Policy for Sligo

Sligo now faces the challenge of ensuring that additional retail development is provided in a way that is efficient, equitable and sustainable. It is the role of the planning system to guide development via the development plan and national guidance indicates that such developments should be accessible by both private and public transport. New retail development should be accessible to all sections of society and be of an appropriate scale that does not harm the traditional centre and existing retailers. As stipulated in government guidance, in deciding development, financial benefits to the council are not a material consideration.

1.9 The Role of City Centres

It is the expectation that urban centres such as Sligo should provide a broad range of both commercial and community facilities and act as a focus for the region. The challenge for Sligo is to cement its role as the administrative centre for the North-West region. Whilst retailing is a core function, a city centre is more than just a shopping centre and should also have a high level of accessibility to employment, services, and facilities for all the community. It should include a combination of natural features: historic buildings, cultural, civic and government buildings as well as public spaces.

It is necessary for planning authorities to promote the vitality and viability of the centre. This is dependent on the range and quality of activities in a centre, its mix of uses, its accessibility to people living and working in the area and its general amenity, appearance and safety. A number of indicators can be used to measure the 'health' of a city centre. Section Two examines the health of Sligo City centre in detail.

1.10 The Sequential Approach

The Irish government, in common with other EU governments, has stipulated in policy that established centres should be the preferred locations for retail developments. Having assessed the size, availability, accessibility, and feasibility of developing both sites and premises, firstly within a town or city centre and secondly on the edge of a town centre, alternative out of centre sites should be considered only where it can be demonstrated that there are no centre or edge of centre sites which are suitable. This is referred to as the sequential approach to the location of retail development.

The experience of European neighbours has demonstrated that excessive out-of-town retail development has the affect of drawing investment from, and having detrimental consequences upon the town centres which are often less healthy as a result. Negative consequences have included higher levels of vacancies in the centre as well as higher prices and less choice. Knock-on affects have included higher rates of crime within declining town centres and less tourism as a result. The car dependent nature of out-of-town development has often served to exacerbate social exclusion, as the elderly or young and those without access to a private car have less choice and are obliged to pay higher prices.

Research by Hillier Parker examined the impact of locating large food stores on edge-of-centre or out-of-centre sites of market towns and district centres in the UK. The motivation for this research was the level of genuine concern about their future viability, in particular there was widespread concern about the effects of large food stores, particularly in non-central locations, on the economic health of market towns. There was concern that the historic role of such towns as social and trading focal points combined with their legacy of ancient streets and buildings was being gradually eroded. The centres examined were of an essentially similar nature to the City of Sligo so the findings are of much relevance to this development plan.

The research indicated significant impacts on market share of between 13% - 50% on the principal food retailers in market towns as a result of allowing large food stores to locate outside the

centre. These levels of impact on market share directly and indirectly led to the closure of some town centre retailers, increases in vacancy levels; and a general decline in the quality of the environment in the centre. Contrary to the widely held perception, the research indicated that impact is not confined solely to other supermarkets. Edge-of-centre and out-of-centre large food stores sell an increasingly wide range of convenience and comparison goods, and often include other services such as a post office, pharmacy, dry cleaner and cash point. Thus, the impact of a large food store locating outside the town/city centre is not confined to town/city centre convenience retailing, but can also affect comparison and service uses in the centre as well.

It was acknowledged that market towns and district centres generally have limited catchments for convenience goods which will only support a limited number of large food stores. Therefore the development of an out-of-centre food store represents a loss of potential investment in the town centre. New town centre food stores can act as a catalyst for future investment in town centres. Shoppers who use town or city centre food stores are also more likely to undertake linked trips in the centre than shoppers in out-of-centre or edge-of-centre stores.

2 City Centre Health-Check

2.1 Purpose of a Health-Check

A city-centre health-check, or 'vitality and viability assessment', as it is also known, indicates areas of weakness and opportunity. The surveys undertaken are necessary to formulate a comprehensive response which makes better use of a centre's resources and potential to address major deficiencies.

Vitality is defined as the level of activity and how buoyant a city is, whereas viability is the commercial well-being of the city. Many factors will affect the health, or the vitality and viability of a city centre. These factors include;

- The range and quality of activities in the centre.
- Mix of uses.
- Accessibility to people living and working in the area.
- Appearance and safety.

Key positive indicators of vitality include size of the centre by floorspace, the number of major multiples, comparison and quality independent retailers. Negative factors include the amount of vacant floorspace, or retailers vulnerable to supermarket competition.

2.2 Definition of Sligo City Centre

The area of most intense development and activity defines the city centre. This area features narrow plot widths on some streets, higher density development (in terms of land take up) and a high percentage of commercial and office type of land uses. The prime retail street in Sligo is currently O'Connell Street. Other main commercial areas include Grattan Street, Castle Street and along Market Street, High Street, Wine Street and Stephen Street. The centre of activity in the city is regarded as where O'Connell Street meets Tobergal Lane.

The retailing core of the city has slowly migrated westwards in recent times. It was previously centred on the Market Cross area and has since moved towards the Wine Street Car park. In the past, the perceived centre of the city was more towards the south-east at Market Street and High Street. Although these streets primarily feature commercial development, the general impression of the area is of neglect and obsolescence, due to the proliferation of vacancies and widespread dereliction. Market Street, the High Street, Connolly Street and Old Market Street are all sited on narrow plot widths giving the street an interesting character.

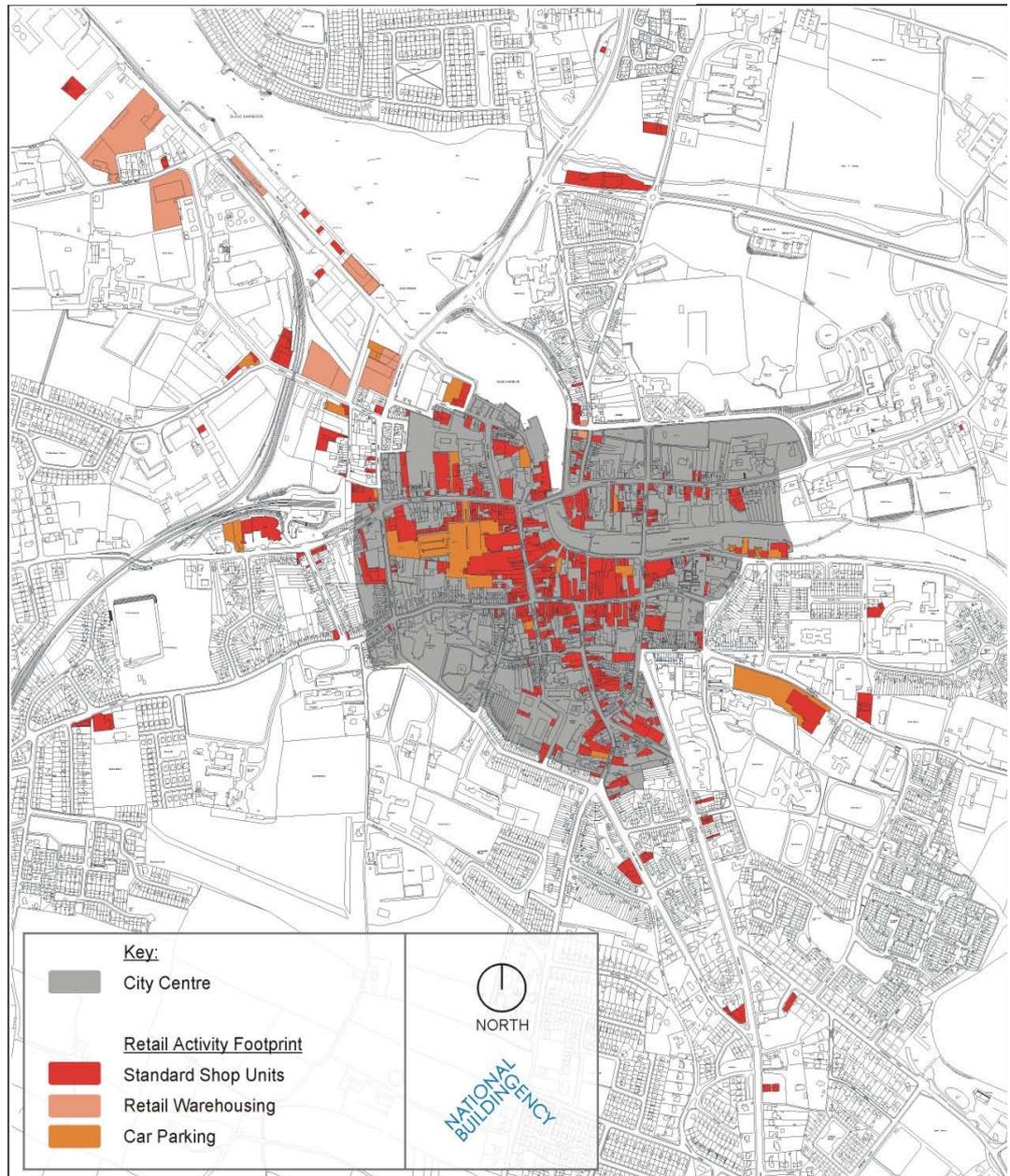
Sligo's office development focuses on the western end of Wine Street and along Stephen Street. The latter in particular is where most of the high street banks have located. The Mall that continues on eastwards from Stephen Street features public institutional uses such as the library, museum and art gallery.

Sligo features a large centrally located block of land that has become known as the Wine Street Centre Block. The Centre Block is enclosed within Wine Street, Adelaide Street and John Street. It was subject of a previous masterplan by the National Building Agency and of an Integrated Area Plan bid for urban renewal in 1998. As a result it will be the focus of a major redevelopment in conjunction with developers Treasury Holdings.

The city centre also has a northern block, which features a mixture of commercial, office, residential (on its periphery) and public institutional activity; this block is enclosed within Wine Street, Quay Street, Lower Quay Street and Union Street. The predominant feature of this area is the large area of brownfield land currently in the backlands of the block due to an incomplete development. This site is commonly referred to as the Buttermarket.

Figure 1 defines the current city centre for the purpose of this plan. It also illustrates (in red) the current retail footprint.

Figure 1: City Centre Boundary and Current Retail Activity Footprint



2.3 Suburban and Neighbourhood Centres

There are several smaller individual outlets and neighbourhood centres in the suburbs of Sligo that operate with mixed degrees of success. Some of the more notable are outlined below;

Church Hill / Maugherboy Road

Small retail outlets are dispersed for some distance along this route on the west of Sligo. The main focus is the area opposite Sligo Rovers Soccer Ground, which includes local shops and a pub, as well as a small park, youth community centre, play-school and recycling facilities and also a post office further to the west. A secondary area featuring a large convenience store is located over the railway bridge on Maugherboy Road.

Cranmore Road

The Dunnes store on Cranmore Road serves a local market of the surrounding housing estates and also attracts shoppers from a much wider area. A smaller area of local shops

further east down Cranmore Road operates less successfully.

Cartron

Cartron Village Shopping Centre is a small neighbourhood shopping centre aimed at a local market. The centre is anchored by a Mace store and also includes a butcher, a public house and a Baptist Church in the centre. Unfortunately, it has included six vacant units for a number of years and the centre appears to be failing. Pedestrian linkages within Cartron are extremely poor which has not helped to make the centre a viable proposition.

Crozon Park

Crozon Park is another example of a local centre that has failed. Four out of four of the purpose-built retail outlets lie vacant. As in the case of Cartron Village, the unsuccessful centre has suffered from the poor pedestrian linkages to the surrounding residential areas.

The three latter examples demonstrate the importance of locating neighbourhood centres in accessible locations, preferably on main streets in the centre of a neighbourhood with strong pedestrian linkages to allow residents to easily reach the centre.

2.4 Customer Views

A Pedestrian Survey was carried out on Friday 23rd May 2002. Members of the public were questioned for their views around the city centre, including Castle Street, JFK Parade, Lower Knox Street, Market Street, O'Connell Street (North & South end), Quay Street, Rockwood Parade, and Wine Street Car Park. Over 200 respondents were questioned with regard to the purpose of their visit, their shopping habits, means of transport, perceptions of Sligo, the evening economy and crime and safety.

The full survey form and results can be viewed in the Appendix, and implications of the findings are periodically referred to throughout this Strategy. The survey was conducted randomly and indicated that 81% of respondents were from County Sligo, and 51% were residents of Sligo City. 5% were tourists. The overall shopping experience of Sligo compared favourably to other towns and cities. Almost three-quarters thought the city was 'fair' or 'good' compared to other towns/cities and a further 8% thought it was 'Very Good.' Just 19% felt Sligo was 'Poor' or 'Very Poor' compared to other towns and cities.

People viewed Sligo's compact size as a particular bonus, as was the environment, particularly around the riverside. By far the biggest perceived negative was the traffic congestion and related problems. Without any prompting from the interviewers, almost one-third mentioned this as something they dislike about Sligo. Considering this, it is perhaps not surprising that 'Pedestrianisation' ranked as the most popular suggested improvement. Without prompting, it was put forward by 17% of respondents. There was also a significant element who thought Sligo had a limited selection of shops.

In addition to the Pedestrian Survey, a valuable exercise in public consultation took place in May 2002 in the form of two public forums to which all residents and otherwise interested parties were invited to participate. Many interesting points were raised and some of them have been developed further in the development plan process. The main findings from this consultation exercise were published in the June 2002 Manager's Report.

2.5 Analysis of Retail and Commercial Activity

In order to gain full insight into the current retail climate in Sligo a survey of retail floor space was undertaken in February 2002. Figures 2-4 give a summary breakdown of the findings divided by the city centre and outer area. The outer area consists of the suburban fringes of Sligo that lie beyond the city centre. As the tables indicate, Sligo's retail facilities are concentrated in the centre with very little suburban retailing present.

An overall vacancy level of 12.5% is on the high side, and indicates the retail market of Sligo has room for improvement. The vacancy rate of the outer area is extremely high (23.7%) due to the failure of a number of poorly sited local centres. In the city centre, it is notable that vacancies are concentrated in the edge streets that are contracting to the south east. This is indicative of the fact that the city centre has been steadily shifting to the north and west over time.

Figure 5 gives a more detailed breakdown by more specific classes of retail outlets, and Figure 6 provides some background information on service units. The significance of employment within the retail sector is clear when it is considered the borough's population is just 18,429 (Census 2002, C.S.O. Preliminary Figures).

The majority of upper floors are not in separate retail use in Sligo, and often many of the upper floors are not even used for ancillary retail purposes such as storage. One of the few exceptions is the Wine Street Car Park where a number of upper floors are in separate

Figure 2: All Sligo Retail / Service Outlet Summary

| | Number | Percentage (%) |
|--------------|------------|----------------|
| Convenience | 51 | 11.8 |
| Comparison | 203 | 46.9 |
| Service | 125 | 28.9 |
| Vacant | 54 | 12.5 |
| Total | 433 | 100 |

Figure 3: Sligo Inner Area Retail / Service Outlet Summary

| | Number | Percentage (%) |
|--------------|------------|----------------|
| Convenience | 36 | 9.6 |
| Comparison | 180 | 48.1 |
| Service | 118 | 31.6 |
| Vacant | 40 | 10.7 |
| Total | 374 | 100 |

Figure 4: Sligo Outer Area Retail / Service Outlet Summary

| | Number | Percentage (%) |
|--------------|-----------|----------------|
| Convenience | 15 | 25.4 |
| Comparison | 23 | 39.0 |
| Service | 7 | 11.9 |
| Vacant | 14 | 23.7 |
| Total | 59 | 100 |

Figure 5: Sligo City Retail Survey 2002 – Detailed Breakdown (City Centre and Outer Area)

| | Number of units | Net Retail Footprint (Ground Floor sq.metres - excluding attached storage) | Total Retail Floorspace (All floors sq.metres - excluding attached storage) | Gross Retail Floorspace (entire premises - all floors including attached storage sq.m) | Employees Full Time | Employees Part Time |
|---|-----------------|--|---|--|---------------------|---------------------|
| BAKERS | 5 | 167 | 167 | 173 | 20 | 7 |
| BUTCHERS | 11 | 436 | 436 | 107 | 32 | 10 |
| CTN & CONVENIENCE | 25 | 1,966 | 2,117 | 2,229 | 107 | 93 |
| GREENGROCERS & FISHMONGERS | 3 | 120 | 120 | 128 | 5 | 0 |
| OFF LICENCES & HOME BREW | 2 | 313 | 313 | 313 | 6 | 5 |
| SUPERMARKET, FOOD STORE | 5 | 3,637 | 3,637 | 4,793 | 146 | 228 |
| TOTAL CONVENIENCE | 51 | 6,638 | 6,790 | 7,743 | 316 | 343 |
| ANTIQUES, FURNITURE, CARPETS & TEXTILES | 13 | 5,196 | 5,307 | 5,367 | 25 | 18 |
| BOOKS, ARTS/CRAFTS, STATIONERS & COPY | 21 | 1,507 | 1,552 | 1,844 | 63 | 30 |
| CARS, MOTOR CYCLES & ACCESSORIES | 14 | 7,465 | 7,465 | 7,724 | 68 | 7 |
| CHEMISTS, TOILETRIES & OPTICIANS | 11 | 728 | 728 | 827 | 61 | 20 |
| CLOTHES | 43 | 6,244 | 8,031 | 9,362 | 170 | 226 |
| DIY, HARDWARE, OFFICE & HOUSEHOLD GOOI | 20 | 3,719 | 4,087 | 10,752 | 87 | 19 |
| ELECTRICAL, HOME ENTERTAINMENT, OFFICE | 22 | 6,491 | 6,586 | 8,134 | 154 | 32 |
| FLORISTS & GARDEN CENTRES | 7 | 575 | 575 | 1,111 | 16 | 6 |
| FOOTWEAR | 6 | 461 | 461 | 583 | 24 | 11 |
| GIFTS, CHINA, GLASS & LEATHER GOODS | 8 | 743 | 833 | 901 | 22 | 15 |
| JEWELLERS | 6 | 182 | 182 | 309 | 13 | 8 |
| MOBILE PHONES | 5 | 146 | 146 | 182 | 11 | 1 |
| PHOTOGRAPHY, PICTURE FRAMES | 6 | 405 | 420 | 449 | 12 | 18 |
| SPORTS, TOYS, CYCLES & HOBBIES | 10 | 1,197 | 1,408 | 1,456 | 34 | 12 |
| MISCELLANEOUS, CHARITY, PETS & OTHER | | | | | | |
| COMPARISON GOODS | 11 | 2,317 | 2,495 | 2,896 | 21 | 17 |
| TOTAL COMPARISON | 203 | 37,377 | 40,275 | 51,896 | 781 | 440 |
| VACANCIES | 54 | 8,329 | 8,662 | 8,662 | n/a | n/a |
| TOTAL SLIGO RETAIL FLOORSPACE | 308 | 52,344 | 55,727 | 68,301 | 1,097 | 783 |

Figure 6: Retail Survey 2002 – Breakdown of Service Outlets

| | Number of units | Net Footprint (Ground Floor sq.metres - excluding attached storage) | Total Floorspace (All floors sq.metres - excluding attached storage) | Gross Floorspace (entire premises - all floors including attached storage sq.m) | Employees Full Time | Employees Part Time |
|--------------------------------|-----------------|---|--|---|------------------------|------------------------|
| BOOKMAKERS | 2 | 66 | 66 | 66 | 5 | 0 |
| HAIR, HEALTH & BEAUTY | 34 | 1,555 | 2,033 | 2,037 | 126 | 41 |
| LAUNDRETTE & DRY CLEANERS | 8 | 156 | 156 | 277 | 17 | 7 |
| PUBS, BARS, NIGHTCLUBS | 47 | 11,372 | 15,657 | 15,841 | 185 | 264 |
| RESTAURANTS, CAFES & FAST FOOD | 34 | 3,845 | 4,520 | 4,998 | 202 | 301 |
| TOTAL SERVICE | 125 | 16,994 | 22,432 | 23,219 | 535 | 613 |

retail use. Some of the retail outlets use their upper floors for retail space, where as on other streets many of the upper floors are given over to office use.

2.6 Multiple Retailers and Key Attractors

The lack of city centre multiples is a key factor inhibiting Sligo's growth. In comparison to other cities of similar population size, Sligo has few anchor stores or 'key attractors' (those that attract customers from a considerable distance). The main three present are Tescos, Dunnes Stores and Pennys. In terms of women's fashion multiple retailers there are Wallis, Benetton and Dorothy Perkins, however Galway has three times as many similar stores. This lacking in Sligo's retail offer is partially due to the lack of a modern shopping centre and comparatively little modern shopping space. As a result, there have not been many opportunities for new retailers to enter the Sligo market.

However, a positive consequence of this has been the development of an interesting variety of local independent stores contributing to the city's unique retail sector. Sligo has retained a number of specialist local shops that survived the internationalisation of the 1980's to provide elements with a unique retail offer different to other towns and cities. Research shows high quality indigenous local shops for browsing are crucial in maximising a centre's overall appeal to the shopper. The independent, specialist retailers have the affect of acting as a backup to the big name multiples as well as adding to the diversity of urban life.

The NBA Pedestrian Survey indicated that 17% of respondents said they felt the city had a limited selection of shops and 5% felt the city lacked big-name multiple retailers. This confirms the findings of previous surveys, such as that by Parker in 1998, which indicated there was an unsatisfied demand for fashionable clothes shops and a considerable demand for another big name department store. Indeed, there is only one stand-alone large mixed store in Sligo, the Dunnes store on Cranmore Road, which sells clothes, household and grocery items. It is clear that Sligo needs to provide sites for the mid-sized 'name-brand retailers' whilst the city continues to provide an environment where specialist, independent retailers can flourish.

2.7 City Centre Retail and Commercial Rents

The areas of highest ground-floor retail rents are O'Connell Street and the associated arcades into the centre-block where rents are typically in the range €35-€50 per square foot. Extending further from the perceived city centre of O'Connell Street into the Wine Street car park, typical rental values are still among the city's highest. An approximate hierarchy of ground floor rents following these areas would place Grattan Street in the next bracket, followed by Castle Street, Stephen Street, Market Street and finally High Street, where the more affordable retail frontages are located at about €15 per square foot on average. Retail rents are on a par with other comparable urban areas, but have risen due to scarcity of retail space in the city centre.

The core business and office area of the city can be identified as the area around Thomas Street and Bridge Street, extending more recently along Rockwood Parade, It is in this area that first floor rents are highest (€16-€22 per square foot) and are also assisted by urban renewal reliefs. Secondary business areas, with slightly lower first floor rents (€13-€18 per sq.ft), extend down Castle Street, Grattan Street, Stephen Street and Wine Street.

2.8 Shopfronts

Sligo is fortunate to contain some very attractive shopfronts dating from the nineteenth century, particularly on O'Connell Street, Grattan Street and Lower Knox Street. These add a pleasing aesthetic to the streetscape and are a major contributory factor in creating the city centre's uniqueness and historical appeal. Some of the better examples can be seen in Figures 7 and 8. However, the overall standard within the city is let down by some very unattractive shop fronts, including some on main retail streets that require attention. The issue of shop-front fascia is one that requires careful attention in development control decisions, if Sligo's character is to be maintained. Replacement or alteration of historical fascia should be prevented, whilst new additions should contribute positively to the existing streetscape.

Figures 7 & 8:
Attractive historical shopfronts on O'Connell Street



2.9 Accessibility

Traffic is an issue that affects all aspects of retailing. Congestion and parking concerns urgently need to be addressed to assist the retail sector in Sligo. Congestion is a serious problem, as the findings of the NBA Pedestrian Survey indicated. It is particularly bad on Adelaide Street, Bridge Street, O'Connell Street, Grattan Street and Castle Street

The pedestrian survey indicated the following;

- 65% of respondents live in households with access to a car - but less than half (46%) arrived in the city centre by car.
- 37% arrived in the city centre on foot, and 17% arrived by public transport.

The questions of access to the city centre and of shopping locations are major interlinked issues in the planning of Sligo. Whilst resolution of vehicular traffic access remains unconfirmed, investment will continue to be postponed in Sligo. Furthermore, uncertainty over access and transport options makes planning city centre shopping extremely difficult.

Encouraging people to use public transport is a key aim, since it would assist in reducing congestion in the city centre. This would have multiple benefits such as enhancing the commercial viability of city centre businesses, as well as offering a more pleasant, safer and less polluted shopping environment that would appeal to long distance event and family shoppers.

There is much scope for improvement in this respect, since just 16% of all respondents to the pedestrian survey had arrived in Sligo City Centre by public transport (bus, coach or train). However, the potential levels of patronage is underlined by the fact that 20% of respondents cited one or more potential improvements that would encourage them to use public transport more often to visit Sligo. It is important to note this was an un-prompted response. It is also important to consider that the survey includes large numbers of respondents who already live in the city centre so would be unlikely to use public transport to travel a comparatively short distance. With these due considerations it is clear that improvements to the public transport services would result in higher levels of patronage and thus less overall traffic congestion in Sligo.

Of those respondents who did arrive by public transport, 67% rated the condition and comfort as 'good' and this was the aspect of service with which there was most satisfaction. There was much dissatisfaction with the punctuality of the service, 35% thought it was poor in this respect. Full results are in the Appendix.

2.10 Car Parking

Sligo's catchment area covers an area of diffused, rural residential distribution, which means that many visitors are both car-borne and travel relatively long-distances. Other issues may also affect car ownership and usage. Because of the relatively high levels of income in Sligo and surrounding area, the number of families owning two or more cars is higher. Also, the cost of accommodation in Sligo and it's environs means there has been a developing trend of living in cheaper accommodation further from the place of work or education. The resultant savings are used to purchase a car.

As a result of these factors, access systems and car-parking are under pressure. Evidence suggests that length of stay in car parks increases in line with distance commuted. Furthermore, as distance between residence and destination increases, the acceptability of parking some distance from the actual destination also increases. This may be significant in the case of Sligo where large numbers of visitors travel in from relatively long distances. Lessons from elsewhere indicate that visitors such as these will probably be more conducive to the idea of pedestrianising relatively large areas of the centre.

At present there are 14 off-street car parks (excluding smaller car parks associated with the city's smaller businesses) in or adjoining the city centre accommodating 1,452 cars serving Sligo. Of these approximately 37% of spaces are privately owned and managed, with the remainder in public management. The largest facility is Wine Street Car Park. Surveys undertaken in the 1995 Sligo Traffic & Transportation Study indicated that throughout the whole city there was actually a surplus of car parking spaces, but the more peripheral car parking spaces are not fully utilised by people shopping.

Inadequate parking is one of the main drawbacks of the central area of most towns and cities, and has often been cited as a problem with Sligo City Centre. However, the pedestrian survey undertaken by the NBA in May 2002 indicated that just 44% of car borne visitors stated that they had suffered some difficulty in finding a car parking space, but 56% stated that they had encountered *No* difficulty at all in finding a parking place. A significant

minority of car arrivals (28%) parked in more than one place during their visit to the city centre, with the most extreme examples moving parking spaces four or five times.

A more detailed Car Parking Strategy can be found in the Transport Section of the Development Plan. In the interests of using the city centre's lands more efficiently and effectively, there is a preference for multi-storey car parks rather than surface car parking and a recognition that such facilities should be in strategic locations on the immediate edge of the city centre. In light of current and proposed developments, four locations for strategic multi-storey car parks have been identified for each of the quadrants of the city centre. These are Abbey Street Car Park, Connaughton Road, the Buttermarket and the Wine Street Block. The net increase in spaces is expected to be in the region of almost 800 spaces, though a portion of these are likely to be reserved for employee use.

2.11 Pedestrian Flows

Pedestrian activity is high in Sligo, particularly on the main shopping streets. Pedestrian flow surveys were undertaken on Friday 10/05/02, between the hours of 11.30am and 18.30pm. The results are indicated in Figure 9. Not surprisingly the surveys indicate that O'Connell Street, followed by Castle/Grattan Street are the areas of most intense pedestrian activity in Sligo.

The pedestrian survey indicated that most respondents walked up to one mile in the course of their visit, and 30% walked one mile or more. 10% of respondents walked more than 3 miles. Full results can be viewed in the Appendix. Previous studies have indicated that the maximum comfortable distance the average person is willing to walk is 400 metres. Assuming that a person is willing to walk up to one mile in a round trip (from car-park to shops, etc) implies a catchment area of approximately 800 metres, or half a mile.

However, whilst these figures suggest a larger city centre could be effectively accommodated by pedestrians, it is worth noting that when asked "What things do you most like about Sligo?", 22% replied that they liked the city's compact size and the fact that most key attractions were within walking distance. The strength of feeling is underlined by the fact that this was by far the most popular answer to the question.

2.12 Crime & Safety

Sligo is a relatively prosperous city with low levels of social exclusion. Despite this, there is are notable levels of concern regarding crime and public order issues in the city. It is an issue that needs to be addressed urgently or perceptions of Sligo as a pleasant place to live or visit will begin to suffer. Evidence from public consultation indicates that over half of respondents to the Sligo Pedestrian Survey described Sligo as either 'Unsafe' or 'Very Unsafe' in the evening and at night.

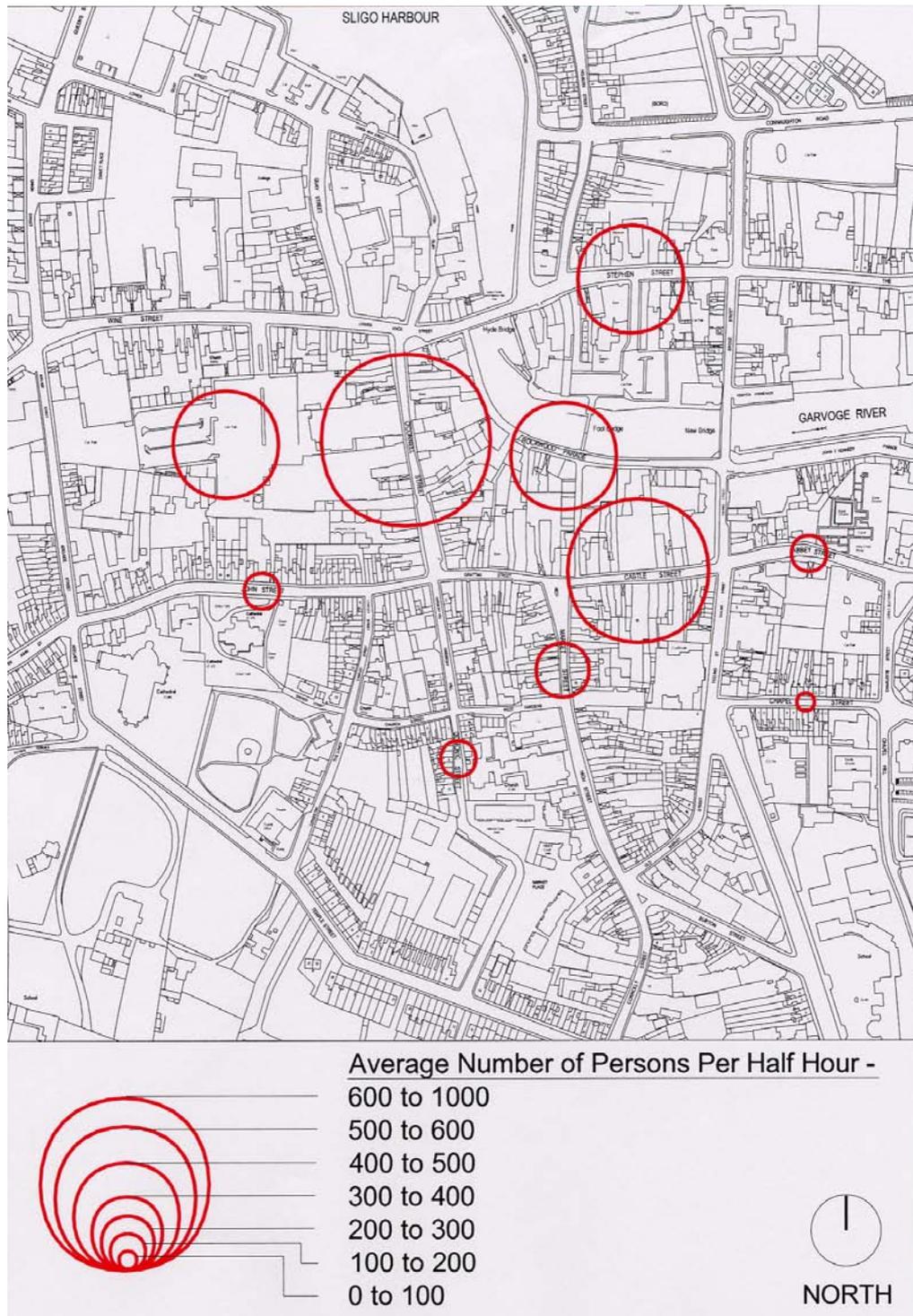
Despite the differing phrases and terminology used by survey respondents, it is clear that many cite drunkenness and public disorder as a major problem in Sligo, and there is a commonly held fear of violent assaults in the evening and at night. It appears the primary source of the problem stems from groups of often drunken young people congregating in Grattan Street and O'Connell Street after the clubs and pubs shut. This frequently results in antisocial behaviour, public disorder and sometimes more serious assaults. Late night fast-food outlets provide a particular focus for this unwelcome activity.

Problem areas to a lesser degree include Johnson's Court as an example of a poorly lit and narrow through route exacerbating the threat of muggings or assaults. There have also been serious incidences of crime recently such as stabbings and rapes that have received national press attention. A massive 49% of respondents to the NBA Pedestrian Survey cited the need for a more visible presence of Garda on the streets as the solution, and another 10% called for more effective policing. There were also significant numbers who wanted more CCTV and better street lighting. It is imperative to ensure that areas are well lit to provide a safe environment for pedestrians, particularly women on their own at night. New walkways, particularly within the Wine Street Block and along the river-front will have to be carefully designed so as to avoid the problems encountered by the design of Johnson's Court.

Encouraging people to live within the city centre, via initiatives to make flats above shops available for living space will assist in creating a more vibrant and safer environment. The sort of crime and anti-social behaviour that has been described often thrives in areas that are not occupied at night by residents. Neighbourhoods that have a residential element are, by their very nature, more community focused and protected.

There is a need to avoid youth dissatisfaction with a renewed focus on evening economy and enhanced leisure facilities. Encouragement of late night shopping initiatives is also

Figure 9: Pedestrian Flow Chart



Source: NBA Survey Work, May 2002.

important. The provision of more outdoor entertainment events on late-night shopping evenings would increase vibrancy and create a pleasant environment for people to enjoy. A benefit may be to encourage a higher number of the smaller independent retailers to open on these nights as a result.

3 Quantitative Assessment of Retail Capacity

Retail Planning Guidelines issued by the Department of the Environment and Local Government stipulate that Planning Authorities should make an assessment of demand and of the need for additional development. The purpose of addressing these factors is to enable the plan preparation process to be informed about the level of retail development that the market is likely to bring forward. This section contains the relevant analysis for Sligo. The starting point is by defining the existing catchment area of the city, followed by current and future population projections for that catchment area. An estimate of the expenditure available within the catchment has been made as well as an estimated turnover of existing commercial retail premises. By subtracting estimated total turnover from estimated total expenditure an approximation of the potential available spend within the catchment area can be arrived at. This figure can then be converted into a floorspace capacity. This is a summary of the process, but also a simplification. As this section outlines, there are many variables to consider at each stage of the process.

3.1 Catchment Population

Primary & Secondary Catchment Areas

All towns and cities have a 'primary shopping catchment area', the population of which will make up the centres core customers. Within the defined catchment area, the majority of shoppers will choose to shop in the centre in question. By convention, the area from which 70% of shoppers originate is defined as the primary catchment population.

There are two different types of primary catchment area according to different classes of retail goods. The catchment area for convenience goods (primarily foodstuffs) is generally smaller than the catchment areas for comparison goods (i.e. clothes and household durables). Theoretically, this is as a result of the shopper being prepared to travel further for comparison goods than for convenience goods. This is mainly due to the fact that convenience goods are required on a more regular basis, and as a result of this, convenience food stores are located within every village or town of any significance, meaning customers do not usually have to travel far to obtain them. Another reason for this is the nature of foodstuffs, particularly if they are frozen, which means shoppers will not be prepared to travel as far to transport them home. Nonetheless, larger urban centres are usually able to attract customers from further distances to do their convenience shopping than smaller centres. This is because larger centres are generally (but not always) associated with more retail outlets which usually equates to both more choice and lower prices.

Sligo has a potentially large primary catchment area for a number of reasons. There are no other large towns in County Sligo, the largest two, Ballymote and Tubbercurry, have approximately 1,000 persons each. There are no other large urban areas for some substantial distance, with Ballina (population approximately 8,800) being the closest at a distance of 36 miles.

It is also possible to define 'Secondary Catchment Areas' which include less frequent visitors from further a field. A proportion of shoppers will travel to a centre from within this secondary area, but the attraction of rival locations will generally surpass the core centre in question.

Survey Results

The extent of Sligo's catchment population is defined from a number of different sources, but primarily the Pedestrian Survey and Origin/Destination Survey carried out by the NBA in 2002. Previous work by Parker in UCD in 1998 and F.O'Rourke, in 1997 has also been taken into consideration. In addition simple gravity modelling has incorporated an appreciation of the affects of rival towns by their respective population and quantity and quality of shopping facilities. The quality of transport infrastructure, particularly the road network, has also been considered.

Over half (56%) the respondents to the pedestrian survey were in Sligo City Centre for the purpose of shopping. As expected, survey work indicated that shoppers for comparison goods originate from a larger area and a higher proportion travel from beyond the county boundary than they do for convenience goods (see Figs 10 & 11).

The Origin & Destination of Vehicles Survey is the second field survey carried out by the NBA that is of particular relevance. It was undertaken in April 2002 and results indicated that the passengers of 9.3% of all vehicles entering Sligo on the N4, N15 and N16 did so for the purpose of shopping, 3.9% intended to use services and the passengers of 7.8% of vehicles were intending to use leisure and recreation facilities. The latter category included a sizeable element of tourists¹. The Origin & Destination Survey found that approximately three-quarters of vehicles entering Sligo to shop or use services had an origin from else-

Figure 10: Origin of Convenience Custom in Sligo

| County | Percentage |
|-------------------|------------|
| Co.Sligo | 84.3% |
| Co.Leitrim | 10.0% |
| Co.Mayo | 2.9% |
| Co.Donegal | 1.4% |
| Others / Tourists | 1.4% |
| Total | 100% |

Source: NBA Pedestrian Survey 2002

Figure 11: Origin of Comparison Goods Custom in Sligo

| County | Percentage |
|-------------------|------------|
| Co.Sligo | 74.5% |
| Co.Leitrim | 10.9% |
| Co.Donegal | 7.3% |
| Co.Galway | 1.8% |
| Co.Roscommon | 1.8% |
| Others / Tourists | 3.6% |
| Total | 100% |

Source: NBA Pedestrian Survey 2002

where within Sligo County. The very similar results obtained from both the Pedestrian Survey and the Origin & Destination Survey, serve to confirm the accuracy of the findings regarding the source of Sligo's market for retailing.

Conclusions from the Survey Work Regarding Sligo's Primary Catchment Area

Both surveys carried out by the NBA replicate the conclusions of earlier work by Parker at UCD (1998) and O'Rourke (1997). Namely, it appears that the majority (about three quarters) of shoppers visiting Sligo city, live within County Sligo. As such, the NBA survey findings confirmed Parker's previous research from 1998 by indicating that the primary convenience catchment of Sligo actually only covers the immediate surrounding area and also

Figure 12: Origin of all Vehicles Visiting Sligo to Shop

| County | Percentage |
|--------------|------------|
| Co.Sligo | 74.0% |
| Co.Leitrim | 12.0% |
| Co.Fermanagh | 4.7% |
| Co.Roscommon | 4.0% |
| Co.Mayo | 3.3% |
| Co.Donegal | 2.0% |
| Total | 100% |

Source: NBA Origin & Destination Survey 2002

Fig 13: Origin of all Vehicles Visiting Sligo to use the Shops and/or Services

| County | Percentage |
|--------------|------------|
| Co.Sligo | 75.4% |
| Co.Leitrim | 11.3% |
| Co.Roscommon | 4.4% |
| Co.Fermanagh | 3.4% |
| Co.Donegal | 2.5% |
| Co.Mayo | 2.5% |
| Co.Cavan | 0.5% |
| Total | 100% |

Source: NBA Origin & Destination Survey 2002

¹ Respondents could specify more than one purpose, and their journey did not necessarily have Sligo as a final destination.

parts of northern Co. Leitrim. Towns such as Grange, Collooney and Ballysadare fall within the primary convenience catchment, whereas Ballymote is a watershed point, where the attraction of rival shopping locations matches the attraction of Sligo.

As a result, it is estimated that the catchment area presently extends out about 13-14 miles from the city for convenience goods and approximately 24-25 miles for comparison goods. The catchment population for convenience goods extends across two counties, Sligo and Leitrim, and numbers 46,272². The catchment population for comparison goods extends across six counties (Sligo, Leitrim, Donegal, Roscommon, Mayo and Fermanagh) and numbers 79,195². These catchment population estimates are based on electoral ward boundaries and populations.

The extent of the current catchment areas is illustrated in Figure 17 and greater detail on population estimates and projections can be found in section 3.2. Sligo has a reasonably large catchment area for food, indeed, previous research by Parker (1998) indicates it is actually larger than the food catchment area of Galway, although Sligo's comparison catchment is much smaller.

NBA survey work indicates that even within Sligo's primary catchment areas, there is a high level of leakage occurring. A significant number of people resident within Sligo's primary catchment area choose to shop in rival locations. Existing neighbourhood centres in the Sligo urban area act as major attractors for incidental shopping (milk, newspaper, cigarettes) but less so for main food shopping. Smaller centres in the county attract a significant number of convenience shoppers who are resident within County Sligo. These competing centres for convenience goods include Ballymote, Tubbercurry, Riverstown, Grange and Strandhill. Ballymote, in particular, caters to a proportion of residents from South County Sligo, for a wide range of items as an alternative to shopping in Sligo City itself.

Likewise, leakage occurs from Sligo's primary catchment area for comparison goods. However, the nature of the competing centre for this class of shopping is somewhat different. Two cities in particular, Dublin and Galway, appear to attract significant numbers of shoppers from Sligo's natural catchment area. Much of this leakage is event-related since a day-out shopping in a large urban centre is often a family event. Shoppers were particularly inclined to shop elsewhere for clothes and shoes, and to a lesser extent for other leisure items such as books, CDs, videos, DVDs and crafts/gifts. Dublin and Galway act as the major attractors for these types of shopping. Indeed, such is the attraction of Galway (and Dublin) for clothes, shoes and similar items that even some residents of Sligo City itself would choose to do this sort of shopping in Galway rather than in their home city. Indeed it is notable that a significant minority of Sligo City residents choose to shop elsewhere for a wide range of items and at a wide range of competing centres. Clearly for these people at least, Sligo is failing to provide either the range of goods or the shopping environment they require.

Another finding from survey work is that Sligo is not particularly successful in attracting county residents as a place to dine in the evening. Smaller centres such as Rosses Point, Carrick-on-Shannon, Drumcliff and Bundoran are the favoured destinations for eating out for a significant minority of county residents. To what extent this is due to some of the problems of crime and safety after dark, noted in section 2.14, is debatable. It does appear though, that Sligo's evening economy is losing some potential custom.

Conclusions from the Survey Work Regarding Sligo's Secondary Catchment Area

The Pedestrian Survey indicated that the maximum extent of Sligo's *secondary* catchment area is potentially very large, since the furthest distance that any respondent had travelled to shop in Sligo was from Letterkenny, County Donegal in the north, and from Glenamaddy, County Galway in the south. Likewise, the Origin and Destination Survey indicated that the furthest extent of travel was Donegal town in the North, Enniskillen in the North-East, Ballinamore and Carrick-on-Shannon to the South-East and Castlebar and Ballina to the West.

Application of the Defined Catchment Areas

The findings of this strategy hinge upon the size of the defined primary catchment area, and an assessment of the potential expenditure available within it. It is acknowledged that this can never be an exact tool, since Sligo will draw significant expenditure from its secondary catchment area that may extend further into Donegal, Mayo and other surrounding counties. However this is balanced by the fact that elements of the population within the defined catchment area will continue to undertake their shopping elsewhere, particularly for convenience goods. To a large extent it is assumed that these two trends will balance one another out, so the adopted method of applying all expenditure from the primary catchment area to Sligo itself remains the most accurate assessment of available expendi-

² 2002 Census of Republic of Ireland and 2000 Census estimates for Northern Ireland.

ture.

Furthermore, shoppers travelling longer distances will tend to do so for the more bulky, expensive goods that are not catered for unplanned retail warehouse parks. Thus it is assumed that the planned increase in retail warehousing will to a large extent cater for an increase in shoppers from beyond the primary catchment area.

3.2 Population Projections

In recent times, Sligo's population has not risen at the same rate as other North-West centres such as Letterkenny, Castlebar, Athlone, and Tralee. However, it can be expected that achievement of national gateway status would result in a rapid and large-scale increase in Sligo's population.

Although the Sligo & Environs Development Plan will be implemented over a period of six years from its adoption (i.e. to 2010), it is set within long-term strategic perspective for the next twenty years in line with the Sligo Sub-Regional Strategy 2001-2021. Therefore, it is necessary to project future population forecasts to both 2010 and 2021 and make assessments of the requirements for retail floorspace accordingly. Future forecasts of population are perhaps particularly significant in the case of Sligo in comparison to other towns and cities because of the extent of projected expansions in population.

However, because of the uncertainty regarding population projections it is necessary to examine differing scenarios for population growth. In all three scenarios, consideration has been made of the likely effects on the two previously defined catchment areas (i.e. for convenience goods and for comparison goods). In other words, Scenarios B & C envisage a progressively larger geographical catchment becoming incorporated as Sligo grows in regional stature and influence. It is considered that Scenario B is the most likely pattern of future growth. All three scenarios are outlined below.

Scenario A – Status Quo.

Current rate of population increase continues

Population continues to rise at a rate comparable to the present rate of increase (i.e. the rate of population growth between 1996 and 2002). This scenario does not allow for the implications of Sligo moving towards 'national gateway' status and as such there is no fundamental policy shift that influences population growth. As a result both urban and rural areas within the catchment boundaries continue the established pattern of low-level population growth, which is 0.44% per annum within the comparison goods catchment area and 0.95% per annum within the convenience goods catchment. In Scenario A the population of Sligo's convenience catchment rises to nearly 50,000 by 2010 and nearly 55,000 by 2021, whilst the comparison goods catchment rises to nearly 89,000 by 2010 and nearly 94,000 by 2021. Such a scenario would become relevant as a result of a change of national governmental policy leading to an abandonment of the policy of designating national gateways. The scenario may also be relevant in the event of Sligo failing to capitalise on the potential of elevated regional status.

Fig 14: Scenario A Population Projections

| | 1996 Census | 2002 Census | 2004 Projection | 2006 Projection | 2008 Projection | 2010 Projection (end of plan period) | 2021 Projection |
|---|-------------|-------------|-----------------|-----------------|-----------------|--------------------------------------|-----------------|
| Sligo City | 17,786 | 18,429 | 18,643 | 18,858 | 19,072 | 19,286 | 20,465 |
| Sligo Convenience Goods Catchment Area | 43,770 | 46,272 | 47,158 | 48,061 | 48,981 | 49,919 | 54,884 |
| Sligo Comparison Goods Catchment Area | 76,524 | 79,195 | 80,119 | 81,053 | 81,999 | 82,955 | 87,908 |

Sources: 2002 Census.

**Scenario B – Sligo Achieves ‘Gateway’ Status.
Fair Population growth.**

Sligo City (2010 Population = 26,565, 2021 Population = 37,761)
Sligo Sub-Regional Area (2021 Population = 53,761
(Including Sligo, Ballysadare, Collooney, Strandhill, Rosses Point, Grange, Rathcormack, Ransborough, Ballincar, Drumcliff, Carney)

This scenario is referred to in the Sub-Regional Strategy as the most likely forecast of the future pattern of population growth. It envisages large-scale increases in population as a consequence of Sligo achieving gateway status. As a result the population of Sligo would increase from 18,429 (2002 census) to 26,565 by the end of the plan period in 2010 and further to 37,761 by 2021. The population of the Sligo Sub-Region (as defined in Sligo Sub-Regional Strategy) would increase from 34,254 (2002 census) to 42,470 by the end of the plan period (2010) and to 53,761 by 2021.

Due to the urban focus of the national gateway initiative, the real impact of population growth would affect Sligo urban area and to a lesser extent the satellite villages selected in the Sub-Regional Strategy (see above). As Sligo’s regional status would be elevated in the scenario, we can postulate that the city’s catchment area, particularly for comparison goods, would expand exponentially as more shoppers are attracted from greater distances to Sligo’s improved retail offer. These inter-related factors would lead to a comparison goods catchment population of nearly 106,000 by 2010 and nearly 117,000 by 2021. Such forecasts recognise that other centres will also grow in future years, particularly those that also aspire to gateway status such as Athlone and Galway, and the estimation of Sligo’s catchment area under Scenario B has taken such considerations into account.

However, outside of Sligo and its immediate satellite villages, the remaining (largely rural) areas within the catchment area do not experience any acceleration in *rate* of population growth in this scenario. Indeed, policy restrictions on ribbon development and the constraints of environmental designations combined with falling household sizes would probably mean that the rate of population growth would slow in such areas. The rate of growth in these areas stood at 0.8% in the census period 1996-2002, which was a period that saw much ribbon development and one-off rural housing. With this in mind, Scenario B envisages a slower growth rate of 0.2% up until 2021 for the rural hinterland, which incidentally also reflects the longer term trend from 1981 to 2002 for North-West Ireland.

Fig 15: Scenario B Population Projections

| | 1996 Census | 2002 Census | 2004 Projection | 2006 Projection | 2008 Projection | 2010 Projection (end of plan period) | 2021 Projection |
|---|-------------|-------------|-----------------|-----------------|-----------------|--------------------------------------|-----------------|
| Sligo City | 17,786 | 18,429 | 20,463 | 22,497 | 24,531 | 26,565 | 37,761 |
| Sligo Convenience Goods Catchment Area | 43,770 | 46,272 | 48,709 | 51,169 | 53,631 | 56,092 | 69,626 |
| Sligo Comparison Goods Catchment Area | 76,524 | 79,195 | 83,171 | 87,147 | 91,125 | 95,103 | 116,989 |

Sources: 2002 Census & Sligo Sub-Regional Strategy.

**Scenario C - Sligo Achieves 'Gateway' Status.
Massive Population Growth.**

Sligo 2021 Population = 85,233
Sligo Sub-Regional Area 2021 Population = 105,733
(Including Sligo, Ballysadare, Collooney, Strandhill, Rosses Point, Grange, Rathcormack, Ransborough, Ballincar, Drumcliff, Carney)

In this scenario, there would be a rapid expansion in population as Sligo capitalises very rapidly and successfully on national gateway status.

In Scenario C, we can assume Sligo's catchment area will extend still further than that modelled in Scenario B. However, as in Scenario B, it is anticipated that population growth will centre on Sligo and its immediate satellite villages rather than the more rural hinterlands (which it is supposed would grow at a constant rate of 0.2% per annum as in Scenario B). The size of the catchment area in Scenario C would expand exponentially to an even greater extent than in Scenario B.

If Sligo was to achieve the level of expansion Scenario C envisages, it would be fair to presume that the gateway concept had been a success nationally. As such, consideration has been made of the fact that Galway and Athlone could also be expected to witness large scale population growth and expanding retail catchment areas as a result.

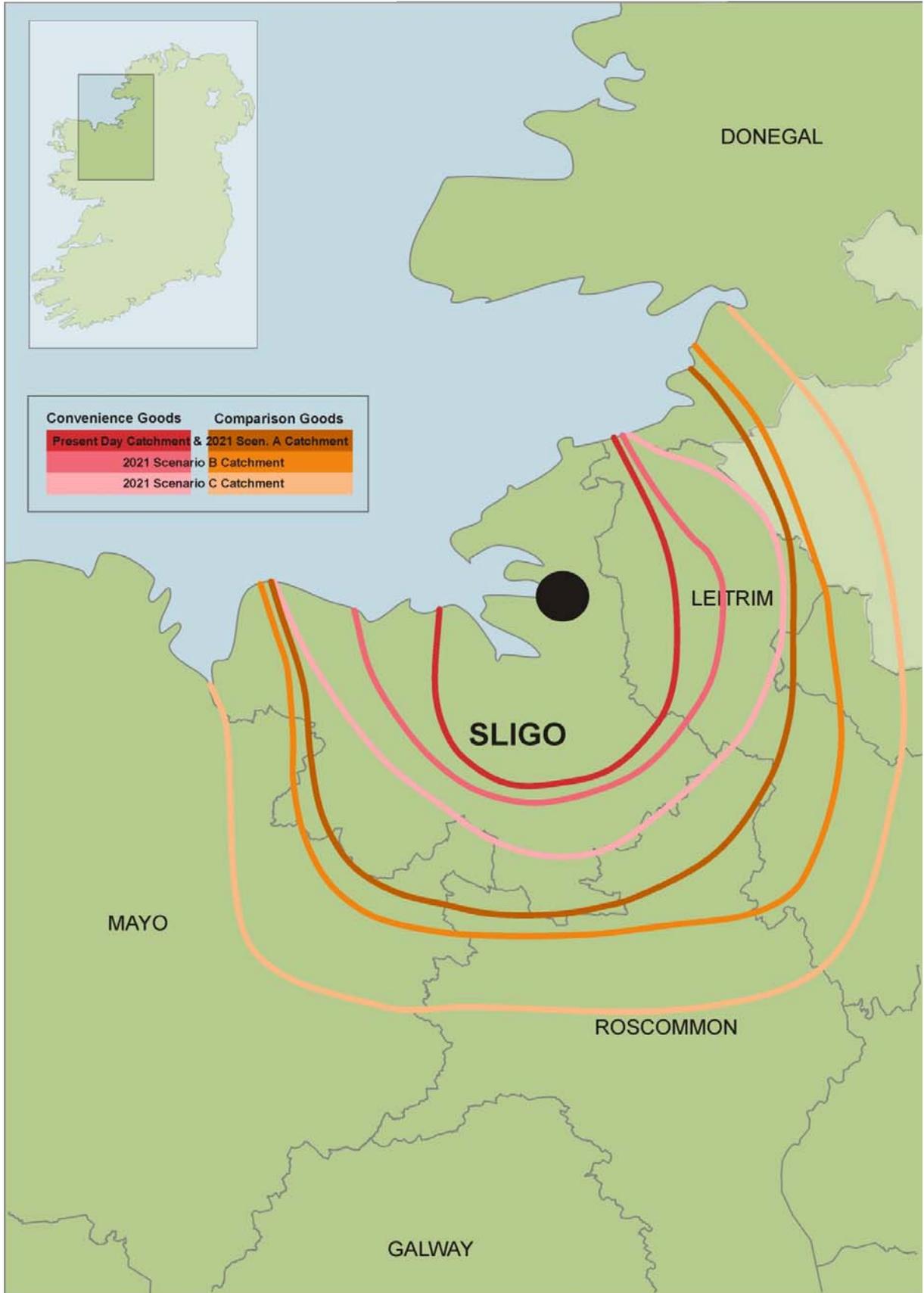
Fig 16: Scenario C Population Projections

| | 1996 Census | 2002 Census | 2004 Projection | 2006 Projection | 2008 Projection | 2010 Projection (end of plan period) | 2021 Projection |
|---|-------------|-------------|--------------------|--------------------|--------------------|---|--------------------|
| Sligo City | 17,786 | 18,429 | 25,461 | 32,493 | 39,525 | 46,557 | 85,233 |
| Sligo Convenience Goods Catchment Area | 43,770 | 46,272 | 54,947 | 63,646 | 72,345 | 81,045 | 128,897 |
| Sligo Comparison Goods Catchment Area | 76,524 | 79,195 | 87,776 | 98,890 | 110,004 | 121,119 | 182,266 |

Sources: 2002 Census & Sligo Sub-Regional Strategy.

An enlarged Sligo, both in terms of population and retailing facilities, would witness an expanding catchment area and clawback of some of the expenditure leakage that is occurring at present. However it is unlikely that some of the larger urban centres that are 30-50 miles away will ever fully be incorporated into Sligo's catchment. Such places would include Castlebar, Donegal, Ballina, Longford and Enniskillen. Although increasing numbers of shoppers would visit Sligo from towns such as these, to be fully considered within Sligo's primary catchment the majority of the population of a town has to consider Sligo as their primary shopping destination, and this is unlikely considering the respective size of the settlements concerned.

Figure 17 Sligo Retail Catchment Projections



3.3 Estimating Individual & Household Goods Expenditure

The average household expenditure per week on shopping has been estimated using the 1999/2000 Household Budget Survey published by the Central Statistics Office (C.S.O). The rate of increase in household and individual expenditure has been monitored with reference to previous Household Budget Surveys in 1987 and 1994/95. Based on observed trends during this period, projections for expenditure have been made for the plan period and to 2021. It is important to note that these projections have been calculated so that they indicate actual real quantitative (i.e. volume) increase in consumption based upon 2000 prices, and do not represent inflationary increase.

The 1996 census indicated that the average household size in Sligo Borough was 2.9, and in the County of Sligo it was 3.0. The trend in recent years has been for a fall in the average household size. This is due to factors such as lower birth rates and preference for smaller family sizes as well as young people moving out of the family home earlier as well as increasing levels of divorce and separation. These social and demographic trends can be expected to continue so that Ireland moves towards the European average of 2.6 persons per household. Thus, for the purpose of this study, individual expenditure in the catchment areas has been forecasted using the figure of 2.8 persons per household to 2010, and 2.7 persons per household for 2021. These figures are more accommodating of the trend of declining household size.

Based on projections of average household expenditure and assumptions of typical household size, we can estimate an average expenditure for the individual. Figure 18 highlights the yearly expenditure of an average person living in Ireland. These figures calculate the average expenditure for *all* individuals, including children.

Figure 18: Average Annual Expenditure (Individual)

| | 1999/2000 Actual (€) | 2002 Projection (€) | 2004 Projection (€) | 2006 Projection (€) | 2008 Projection (€) | 2010 Projection (€) | 2021 Projection (€) |
|------------------------------|-------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|------------------------|
| Total Convenience Foodstuffs | 2,110 | 2,296 | 2,413 | 2,536 | 2,664 | 2,800 | 3,813 |
| Total Comparison Goods | 1,720 | 1,933 | 2,100 | 2,281 | 2,480 | 2,697 | 4,488 |
| Total All Goods | 3,830 | 4,230 | 4,513 | 4,817 | 5,144 | 5,497 | 8,302 |

Source: Household Budget Survey 1999/2000

The convenience category of goods includes all food (except meals out). The three main categories of comparison goods that together make up the total figure for comparison goods are 'Durable Household Goods' (including furniture, domestic appliances, television, stereos, etc) 'Household Non-Durables' (including items such as cleaning materials, toiletries and cosmetics) and an 'Other Goods' category (including reading materials, stationary, toys, flowers, etc).

As Figure 18 demonstrates, expenditure on comparison goods has been increasing at a higher rate than expenditure on foodstuffs since 1987 and this pattern is predicted to continue. This is due to higher disposable incomes available for spending on luxury items beyond the requirement to buy limited foodstuffs.

3.4 Total Available Expenditure in the Catchment Populations

On the basis of the defined catchment areas, it is possible to forecast the total available expenditure for the plan period by multiplying the forecasts for individual average annual expenditure by the three scenario forecasts for population of the convenience and comparison catchment area.

As noted in the three scenario population projections, Sligo and its environs are expected to grow in population. Furthermore, Scenarios B & C envisage a catchment area that expands exponentially as Sligo expands in population. Therefore, year on year, it is assumed that the catchment population will be drawn from an area that grows steadily larger in size.

As a result of these factors, projected available expenditure grows significantly. The three possible scenarios of available expenditure are outlined in the table below. It is important to note that these figures are based on 2002 prices and no inflationary increase is taken into consideration.

³ 2002 Average household sizes not yet published.

Figure 19: Scenario A - Total Available Expenditure in the Catchment Population

| | 2002 | 2004 | 2006 | 2008 | 2010 | 2021 |
|------------------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Convenience Goods | €106,252,916 | €113,789,129 | €118,877,242 | €130,503,041 | €139,759,250 | €209,284,206 |
| All Comparison Goods | €153,122,465 | €168,214,950 | €184,898,211 | €203,350,561 | €223,771,348 | €394,567,426 |
| Total Available Expenditure | €259,375,381 | €282,004,079 | €303,775,452 | €333,853,601 | €363,530,598 | €603,851,632 |

Sources:1999/2000 Household Budget Survey, 2002 Census for Ireland.

Figure 20: Scenario B - Total Available Expenditure in the Catchment Population

| | 2002 | 2004 | 2006 | 2008 | 2010 | 2021 |
|------------------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| Convenience Goods | €106,252,916 | €117,531,048 | €123,468,903 | €142,891,519 | €157,042,559 | €265,500,801 |
| All Comparison Goods | €153,122,465 | €174,622,878 | €198,799,731 | €225,981,672 | €256,538,321 | €525,093,019 |
| Total Available Expenditure | €259,375,381 | €292,153,925 | €322,268,634 | €368,873,191 | €413,580,881 | €790,593,820 |

Sources:1999/2000 Household Budget Survey, 2002 Census for Ireland, 2000 Census for Northern Ireland.

Figure 21: Scenario C - Total Available Expenditure in the Catchment Population

| | 2002 | 2004 | 2006 | 2008 | 2010 | 2021 |
|------------------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|-----------------------|
| Convenience Goods | €106,252,916 | €132,583,702 | €161,377,231 | €192,754,962 | €226,905,195 | €491,515,120 |
| All Comparison Goods | €153,122,465 | €184,292,265 | €225,586,713 | €272,801,609 | €326,717,975 | €818,080,439 |
| Total Available Expenditure | €259,375,381 | €316,875,966 | €386,963,944 | €465,556,571 | €553,623,171 | €1,309,595,560 |

Sources:1999/2000 Household Budget Survey, 2002 Census for Ireland, 2000 Census for Northern Ireland.

3.5 Estimated Turnover of Retail Premises

Baseline Data

The average turnover of existing retail premises has been estimated using data updated from the 1988 Census of Services published by the Central Statistics Office (CSO). This data has been updated using average yearly price increases from the Consumer Price Index for specific retail categories. An additional small percentage increase has been incorporated based on likely increases in sales space efficiency, as retailers typically increase their turnover per square metre. The presumed figure is 1% per annum increase for convenience floorspace and 2% per annum increase for comparison floorspace. These percentage increases are based on data from Roger Tym & partners and from Forfas. As a result the estimated turnover per square metre in Sligo 2002 is €4,624 for convenience goods and €2,436 for comparison goods.

Turnover Estimates

Evidence from the Institute of Grocery Distribution in the UK (1996) indicates that turnover per annum for major supermarkets ranges from €10,538 per sq.m. to €14,025 per sq.m. There is limited comparable data available regarding revenue per square metre in Ireland. Forfas have utilised the published estimates on the major multiples turnover, coupled with estimates of average store sizes to estimate that the turnover for the very best Irish multiple retailers is between €7,513 per square metre per annum, and €9,569 per square metre per annum. It is likely that the lower turnover in Ireland is due to population densities generally being lower.

As such, the estimates for Sligo are reasonable when considering the following;

1. The Forfas estimates are for the best Irish multiple retailers
2. The hinterland of Sligo is less densely populated than Ireland as a whole, a fact which usually results in lower turnovers.
3. Evidence from the 1988 Census of Services indicated that on average, turnover per square metre was lower in Sligo city than for the national average.

Projected Increases in Turnover

Roger Tym & Partners made the following assumptions in their April 1999 study submitted to the Department of the Environment and Local Government;

- Convenience Goods - existing floorspace will increase in efficiency by 1% per annum to 2003 and by 0.5% per annum thereafter to 2011
- Comparison Goods – 2% to 2003 and 1.5% thereafter to 2011.
- New convenience floorspace will have a turnover per square metre of €10,930 (£8,608) per annum in 1998 prices, to which there will be no subsequent efficiency change.
- New comparison floorspace will have a turnover per square metre of €5,465 (£4,304) per annum in 1998 prices, to which there will be no subsequent efficiency change.

For the purposes of the study the figure of 1% growth per annum in sales per square metre for convenience goods and 2% for comparison goods will be applied to Scenario A for the period 2002 to 2021. These were the same increases in sales density that were applied for the period 1988 – 2002.

However, because of the rapid population growth envisaged in Sligo and surrounding area in Scenarios B & C for the period 2002 – 2021, it is more appropriate to assume higher growth in sales densities for these scenarios. Forfas data for individual retailers indicates that annual growth rates in sales per square metre can increase by as much as 8% per annum. Thus, in Scenario B, it is assumed that convenience sales density of current retail floorspace will grow by 2% and comparison by 3%. In Scenario C, the figures will be 3% and 4.5% respectively.

It is assumed that new retail floorspace added in the plan period and to 2021 will not be subject to increases in efficiency, and sales density will remain constant, in accordance with the guidance provided to central government by Roger Tym & Partners.

The estimated annual turnover of all retail outlets in Sligo at present is €129,511,463 and the greater proportion of this is revenue gleaned from expenditure on comparison goods.

Figure 22: Scenario A - Total Estimated Turnover Forecasts of Existing Floor-Space

| | 2002 | 2004 | 2006 | 2008 | 2010 | 2021 |
|-------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| Convenience Goods | € 31,393,178 | € 32,024,181 | € 32,667,867 | € 33,324,491 | € 33,994,313 | € 37,926,379 |
| Comparison Goods | € 98,118,285 | € 102,082,263 | € 106,206,387 | € 110,497,125 | € 114,961,209 | € 142,939,814 |
| Total | € 129,511,463 | € 134,106,444 | € 138,874,254 | € 143,821,616 | € 148,955,522 | € 180,866,193 |

Figure 23: Scenario B - Total Estimated Turnover Forecasts of Existing Floor-Space

| | 2002 | 2004 | 2006 | 2008 | 2010 | 2021 |
|-------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| Convenience Goods | € 31,393,178 | € 32,661,462 | € 33,980,986 | € 35,353,817 | € 36,782,112 | € 45,733,933 |
| Comparison Goods | € 98,118,285 | € 104,093,688 | € 110,432,994 | € 117,158,363 | € 124,293,308 | € 172,051,006 |
| Total | € 129,511,463 | € 136,755,151 | € 144,413,979 | € 152,512,181 | € 161,075,419 | € 217,784,939 |

Figure 24: Scenario C - Total Estimated Turnover Forecasts of Existing Floor-Space

| | 2002 | 2004 | 2006 | 2008 | 2010 | 2021 |
|-------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| Convenience Goods | € 31,393,178 | € 33,305,023 | € 35,333,298 | € 37,485,096 | € 39,767,939 | € 55,048,128 |
| Comparison Goods | € 98,118,285 | € 107,147,620 | € 117,007,880 | € 127,775,530 | € 139,534,073 | € 226,443,295 |
| Total | € 129,511,463 | € 140,452,643 | € 152,341,178 | € 165,260,626 | € 179,302,012 | € 281,491,423 |

Figure 25: Scenario A - Floorspace Required to 2010 and 2021

Floorspace Requirements (Sq.m)

| | 2002 | 2004 | 2006 | 2008 | 2010 | 2021 |
|-------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Convenience Goods | 5,970 | 6,521 | 6,875 | 7,750 | 8,434 | 13,665 |
| Comparison Goods | 8,773 | 10,548 | 12,551 | 14,810 | 17,355 | 40,133 |
| Total | 14,743 | 17,068 | 19,426 | 22,559 | 25,789 | 53,799 |

Figure 26: Scenario B - Floorspace Required to 2010 and 2021

Floorspace Requirements (Sq.m)

| | 2002 | 2004 | 2006 | 2008 | 2010 | 2021 |
|-------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Convenience Goods | 5,970 | 6,768 | 7,136 | 8,576 | 9,590 | 17,526 |
| Comparison Goods | 8,773 | 11,249 | 14,094 | 17,357 | 21,092 | 56,308 |
| Total | 14,743 | 18,017 | 21,230 | 25,933 | 30,683 | 73,834 |

Figure 27: Scenario C - Floorspace Required to 2010 and 2021

Floorspace Requirements (Sq.m)

| | 2002 | 2004 | 2006 | 2008 | 2010 | 2021 |
|-------------------|---------------|---------------|---------------|---------------|---------------|----------------|
| Convenience Goods | 5,970 | 7,917 | 10,052 | 12,382 | 14,924 | 34,807 |
| Comparison Goods | 8,773 | 12,304 | 17,318 | 23,131 | 29,855 | 94,363 |
| Total | 14,743 | 20,221 | 27,369 | 35,513 | 44,779 | 129,170 |

3.6 Assessment of Additional Retail Floorspace Requirements

Following on from the work of Roger Tym & Partners in their 1999 study for the Department of the Environment and Local Government, we can estimate the turnover of new floorspace. As outlined, the study indicated that new convenience floorspace averages a turnover of €10,930 per square metre per annum and new comparison floorspace has a turnover of €5,465 per square metre per annum. These figures are higher than turnover for existing floorspace, but that is typically due to the higher levels of profitability in more modern retail developments.

These figures use 1998 prices. For the purposes of this study, the figures have been updated to 2002 prices by the levels of retail price inflation for the period. This results in 2002 floorspace value of €12,983 per square metre per annum for convenience goods floorspace and €6,720 per square metre per annum for comparison goods floorspace.

By applying these values for new floorspace figures to the financial capacity tables above we can calculate an approximate floorspace requirement for Sligo. Scenario B is still considered the most realistic forecast of Sligo's requirements, and figure 27 indicates that at least 30,000 square metres of retail floorspace will be required by the end of the plan period in 2010 to serve the projected catchment area.

Figure 28: Standard Shop Units Floorspace Pending or Under Construction.

| Site | Number of New Units | Proposed Retail Floorspace (sq.m) | Proposed Convenience Floorspace (sq.m) | Proposed Comparison Floorspace (sq.m) | Proposed Service Floorspace (sq.m) | Proposed Car-Parking |
|--------------------------|---------------------|---|--|---------------------------------------|------------------------------------|--|
| Centre Block Development | 26 | 17,300# (7,700 committed to expansion of Dunnes / Pennys) | 3,500* | 9,500* | 4,300* | 1,200 (including redevelopment of existing car park) |
| Buttermarket Development | 35 | 11,287 (Note Original permission for 13,000 sq.m, but 1,713 sq.m given permission to change use to cinema from retail in April 2002.) | 4,000* | 6,000* | 1,287* | 700 |
| Lidl, Cranmore Lane | 1 | 1,500 | 1,500 | 0 | 0 | 132 |
| TOTAL | 62 | 30,087 | 9,000 | 16,000 | 5,587 | 2,032 |

#Proposed scheme net retail area, less existing retail to be replaced.

*Estimated split of convenience / comparison floorspace

Figure 29: Retail Warehouse Floorspace Pending or Under Construction

| Site | Number of New Units | Proposed Retail Floorspace (sq.m) | Proposed Convenience Floorspace (sq.m) | Proposed Comparison Floorspace (sq.m) | Proposed Service Floorspace (sq.m) | Proposed Car-Parking |
|---|---------------------|---|--|---------------------------------------|------------------------------------|----------------------|
| Pearse Road | 13 | 19,045 | 0 | 19,045 | 0 | 1,590 |
| Clifford Electrical, Carrowroe Roundabout | 1 | Approx 500sq.m retail sales space included within 1,967sq.m buildings which include offices and stores. | 0 | 500 | 0 | 71 |
| TOTAL | 14 | 19,545 | - | 19,545 | - | 1,661 |

3.7 Floorspace Pending or Under Construction

There is a substantial amount of new retail floorspace planned, or in some cases actually under construction in Sligo. It is beneficial to compare the area of this 'pending floorspace' that pipeline to the requirements identified in the previous section. It is important to note that none of the floorspace identified in figures 29 and 30 has yet been constructed so all of it will potentially contribute to the identified requirements in figures 26-28, as and when it comes forward. For the benefit of analysis, developments have been split according to standard retail development (Figure 29) and retail warehousing (Figure 30).

Certain assumptions or estimates regarding the breakdown of convenience, comparison or service space have been made in relation to some of these pending developments. For example, the future occupancy of the Centre Block and the Buttermarket is not yet fully confirmed, so it is not possible to clarify a breakdown of the type of retail goods that will eventually be sold there. Similar developments around the country generally concentrate on comparison goods, together with some convenience shopping. Typically, there may also be an element of service provision such as restaurants, cafes, hairdressers, beauty salons, health shops, dry cleaners, travel agents, estate agents and auctioneers. However, some service elements such as banks and financial services tend to locate on more traditional street frontages, although this is by no means an imperative. Based on what is typical and also based on knowledge of some of the retailers that have already indicated an intention of locating in the future developments, the floorspace breakdowns for the Centre Block and the Buttermarket have been estimated in Figure 29.

It is assumed all proposals for retail warehousing, such as at Pearse Road, will be restricted to comparison goods that are bulky in nature, in line with government guidelines. As such the total for Figure 30 is solely comprised of comparison goods.

In addition to the pending floorspace described in figures 29 and 30 there are currently some forty vacant units within the city centre or edge of centre, that amounts to 7,389 sq.m. of floorspace that is currently unused. The vacancy rate in the city centre is 10.7%, and 12.5% in Sligo as a whole (see figures 2-4). Some of this currently vacant space will cater for the increased requirements, and there are grounds for optimism that much of it will be suitable for

increasing demands for services such as restaurants, cafes, estate agents, travel agents, hairdressers, dry cleaners, etc; or outlets to serve increasing levels of tourism. However, it also has to be recognised that all town or city centres will have a residual level of vacant space at any given time due to the natural turnover of commercial businesses. The aim of a vital and viable city centre is to maintain the vacancy rate at a more acceptable level of not more than approximately 4%.

The analysis indicates that the planned retail floorspace that has already been identified in the Buttermarket and the Wine Street Centre Block will provide the bulk of the floorspace requirements to serve Sligo's primary catchment area for the plan period to 2010. As such, it is imperative to ensure that these identified sites come forward for retail use to ensure a cohesive and viable city centre.

There is clearly no lack of city centre land suitable for retail development to serve the requirements to 2010. The challenge is to ensure their successful development as suitable locations for major retailers. There is an urgent need to attract anchor stores to the city centre and develop shopping facilities on the identified sites in order to arrest the expenditure leakage and encourage people to shop more often in Sligo. The compact city centre is one of Sligo's biggest strengths, thus the development and enhancement of central sites will build upon this advantage. If this vision is not achieved, or if out-of-town sites are allowed to retail goods that could easily be sold from within the city centre, there is a real risk that Sligo will evolve into a car-dependent edge-city, exacerbating traffic congestion as a result.

It is pertinent to consider retail warehousing separately since it is a substantially different class of outlet. The retail warehousing that is pending or under construction (fig 30) provides further floorspace, which together with the standard retail floorspace in the pipeline (fig 29), means the total retail floorspace in the pipeline is in excess of the most likely floorspace requirements identified to 2010 (fig 27). However, this excess of provision need not reduce the city centre developments chances of success, provided the retail warehousing is restricted to truly bulky goods that are not easily sold from within city centres.

Furthermore an excess of retail warehousing floorspace provision is acceptable in planning terms for an important reason. All of the analysis contained in this section forecasts retail spending based on household budget data available from the Central Statistics Office. Although this is reliable data, it is necessary to consider the peculiar circumstances that are relevant to Sligo City in the forthcoming years. Whilst the available data is relevant in the circumstances for the types of goods sold in standard city centre stores such as foodstuffs, clothing, footwear, and pharmaceutical goods, it is necessary to consider other factors with regarding the type of goods sold in retail warehousing such as DIY items, furniture, carpets and household appliances. The scale of housing development to cope with Sligo's projected expansion will be very significant, bringing in a large influx of new residents to Sligo, the majority of whom will be setting up new homes in the city. Inevitably there will be much demand for the sort of bulky household items described. As such it is necessary to zone additional large areas of retail warehousing to cope with this demand since it is imperative that the specific needs of the newcomers are provided for and Sligo is allowed to grow smoothly and efficiently.

4 City Centre Strategy and Potential Development Opportunities

4.1 Key Principles of the Strategy

4.1.1 Aims of a City Centre Strategy

In 1997, Felim O'Rourke noted that Sligo has not been successful in attracting shoppers for Comparison Shopping and Shopping as an Experience. Sligo was not seen as an attractive place to go for a days shopping compared with Galway or Derry. This meant that Sligo did not attract shoppers from towns and villages which are equi-distant from Sligo and Galway and Sligo and Derry. It was noted that Sligo did not have;

- A sufficiently wide range of retail outlets.
- Multiple chain stores.
- Adequate parking.
- A major shopping centre.
- An attractive shopping environment

The City Centre health check as outlined in section two confirms that the situation remains much the same today and that arguably none of the above problems have been fully resolved. This Strategy aims to outline the ways in which all five issues can be addressed and rectified. Section 4.2 examines potential opportunities to enlarge the retail footprint of Sligo, whilst sections 4.4 and 4.5 focus on the need to reinforce existing retail areas.

4.1.2 Application of the Sequential Approach

Section 1.10 outlined why the city centre is the most suitable location for large food stores and most types of comparison shopping with reference to the most reliable and up-to-date research, whilst section 3.7 indicated that the capacity of retail floorspace planned or under construction was sufficient to provide for the plan period.

In such a situation where there is no capacity for additional retailing, the opening of an edge-of-centre or out-of-centre superstore is likely to lead to 'disinvestment' in the city centre (i.e. failure to reinvest in store refurbishments, etc). This has implications for the future viability of the individual retailer, and investment in the city centre as a whole.

The debate can become complicated in urban centres where there is a clear shortage of sites available within the city centre. However, Sligo does not have this problem. The quantitative assessment of retail capacity in section 3.7 demonstrated the availability of suitable sites within the existing centre in the form of the Wine Street Centre Block and the Buttermarket. There is a danger that irreparable damage will be done to the vitality and viability of the city centre if this fact is ignored and Sligo capitulates to pressure for large, out-of city retail areas selling goods that could otherwise readily be sold from within the city centre.

4.1.3 Appealing to the Long-Distance Shopper

Whilst a city the size of Sligo will have a consistently reliable source of custom for convenience goods, it is the comparison goods on offer that will attract shoppers from further a field. Furthermore, as Figures 20-22 demonstrated, comparison good shopping will continue to grow in importance so long as the national economy remains buoyant, since individuals will have more spending power.

In order to appeal to the shopper, particularly those that are further out on the fringes of Sligo's catchment area, it is important to understand what factors influence them in choosing a shopping destination. This will enable Sligo to become better placed to provide a shopping environment that will cater for, and appeal to potential customers.

The factors that lead customers to travel long-distance to do their shopping will relate to the size of the centre, as an approximate indicator of the goods likely to be available. In this respect, Sligo is well placed, being the largest centre for some considerable distance. However there are other factors that encourage people to visit a particular centre to do their shopping. They need to feel confident that the destination will have the goods they want and they are further encouraged if they know the city has the presence of a national-multiple outlet, especially if it has been advertised nationally. Ease of access to the city centre and car parking, or indeed its absence, will have an influence on where people shop. The quality of indigenous local shops which act as a back-up for browsing will also be important to the long-distance 'event shopper'. The term 'event shopper' is important and requires some further explanation.

Shoppers for comparison goods, particularly for clothes, increasingly view their trip as an 'event.' Theoretically, as income rises, so does the value of time, since time is the only resource that cannot be purchased. The shopping centre with one-stop facilities thus becomes attractive. However, wealth

increases education, and the discerning shopper moves on to require greater variety of shopping choice. A stimulating shopping environment is one in which heritage and fringe range become as important as access, price or time efficiency. There is much evidence for this trend. In Europe it has been borne out to the extent that many first-generation out-of-town centres have failed and lie empty despite initial success in the early days. Further evidence comes in the form of the recent trend by department stores to seek city centre sites which capitalise on the unique attraction of specific places, as more educated shoppers react against sterile and standardised shopping environments.

On this basis, Sligo has several advantages that will enable the city to compete successfully and appeal to long-distance event shoppers in the future. Sligo's strengths lie in its compact nature which is undiluted by out-of-city competition. Sligo also has a number of specialist local shops that have survived the internationalisation of the 1980s to offer a unique retail experience. In addition it is beautifully situated upon the Garvogue River, adjacent to Sligo Bay and with a striking outline of the mountains to the north and south. It has all the amenities and services needed by the visitor; art galleries, theatres, cinema, museums, excellent shops, restaurants and pubs, great traditional music and many historic links with the poet W.B. Yeats and his brother Jack B Yeats. In short, Sligo is the commercial, cultural and educational centre of the North West, and equally importantly, it is a pleasant and interesting place to visit. It is imperative that the city builds on these strengths and uses them to its advantage.

4.2 Potential Opportunities for Expansion of the Retail Footprint

As noted by previous commentators and the findings of current survey work, the compact nature of the city at present is one of its positive attributes. It is important that the city maintains its compact nature, as this is critical in ensuring that shoppers do not make several trips in their vehicles to reach shops that are considered beyond walking distance. Therefore, expansion should focus on existing derelict or underused lands that are within 400m of O'Connell Street.

Sligo has seen relatively little new retail space in recent years, with the only medium to large sized shopping centre in the city being constructed in the early 1970s. Sligo is not dissimilar to other city and town centres where the older commercial centre has been partially enclosed by older residential areas which, in more recent times, both restrict and influence the future expansion of the city centre, particularly to the southeast. As a result, the north-west of the city centre offers the most suitable areas for retail expansion.

4.2.1 Wine Street Centre Block

The Centre Block is the large area that is enclosed within Wine Street, Adelaide Street and John Street, much of which is currently taken up by car parking. Following Sligo's submission of the Integrated Area Plan for Sligo, Wine Street Car-Park has been designated for urban renewal by the Department of the Environment and Local Government and will be subject to a major redevelopment in conjunction with developers Treasury Holdings.

The format of the Centre Block redevelopment is dependent partially on the Inner Relief Road (W5) route. Therefore the Centre Block as proposed cannot go ahead without a firm W5 commitment. In the event of the Inner Relief Road not being constructed it would be necessary to consider an alternative layout in order to facilitate development.

The current proposals indicate a total gross retail area of approximately 23,790 square metres (21,340 sq.m net) with provision of 1,200 car parking spaces in two phases. Current stores Tesco, Dunnes and Pennys will all remain within the block, albeit on new premises, which in the case of the latter two at least, will be considerably larger than their current stores. The development will further include the provision of three large new anchor units (1,951 sq.m, 1,310 sq.m. and 1,078 sq.m.), six large retail units (279 – 929 sq.m.), 26 medium size units (average size 200 sq.m.) and 14 smaller units (average size 98 sq.m.). The Centre Block development is an excellent opportunity to create a quality shopping mall and attract the big-name multiples that the city centre urgently requires to improve its retail offer. As such, the successful redevelopment of the Centre Block is crucial to the success of the city as a whole.

Modern design methods mean that multi-storey car parks can be converted to retail use if future circumstances demand it. However, for this to be feasible the building has to allow adequate floor to ceiling height within each floor and there may be financial implications to such a design. Therefore, if in the longer term, the future retail footprint were to expand to such an extent that it is no longer appropriate to utilise the Centre Block for car parking then this would potentially be resolvable, were the right design considerations incorporated at design stage.

4.2.2 Buttermarket Block

The expansion of the core shopping area to the north and west of the city can be expected to continue, particularly as that area gains in attraction as a result of developments in the Wine Street Centre Block. After the Centre Block, it seems likely that the area north of Wine Street and west of Quay

Street, otherwise known as the Butter Market Block, will be the most likely area subject to retail development pressure.

The permission granted for the Buttermarket site relates to a three-level shopping centre that as proposed will amount to approximately 13,000 square metres of retail space with a 700-space car park. Discussions have indicated the intention is that this will include two anchor stores, a supermarket of 3,700 square metres and a department store of 5,000 square metres. In April 2002, 1,713 sq.m. of space on level four that was previously included in the retail allocation was given permission to change use from retail to serve as an extension to the Gaiety Cinema.

Strong and effective linkages to the national road network and the proposed Inner Relief Road will be critical to the developments eventual success. The Buttermarket Block must be readily accessible to both north and south-bound vehicles via the Inner Relief Road. Access from the north will be from Queen's Store Road via Lower Quay Street or possibly Emmett Place. Effective signposting and advertising of the centre will be essential across Hughes Bridge. It will be necessary to reserve land on the eastern edge of Queen's Store Road and on the north edge of Lower Quay Street to provide access to the multi-storey car park. This access should be designed in such a way that it is equally viable to vehicles travelling from the south as from the north. As such a west-east access will be necessary from the N4 Inner Relief Road directly connecting to the entrance of the Buttermarket block. The form of this access is dependent on the layout of the junction between the Inner Relief Road and Queens Store Road. It is vitally important that the design of this junction does not harm the future commercial prospects of the Butter Market block by hindering vehicular access.

It may be necessary to strengthen pedestrian links across Wine Street to avoid severance of two key retail areas in the city centre. Given the volume of traffic that utilises Wine Street, a footbridge should be considered, as this would not hinder the flow of traffic. A footbridge would have to be sensitively and carefully designed so as to encourage pedestrian traffic between the two city centre developments.

Effective pedestrian linkages need to be established from the Buttermarket to O'Connell Street and the traditional city centre across Lower Knox Street and up Quay Street. The removal of the existing taxi rank on Quay Street and the provision of replacement taxi facilities in the central square will make Quay Street a more pedestrian friendly environment. This link will also need to be signposted effectively.

The provision of a multi-storey car park in the Buttermarket block will allow the replacement of the existing car park on the riverfront at Quay Street with public open space. As a result, it will also be essential that any future layout of the block encourages strong pedestrian linkage to the public open space that is proposed in the Quay Street Car Park.

4.2.3 The Traditional Retail Area to the South-East

The slow migration of retail activity to the north and west has resulted in a shadow effect being felt in the south-eastern area. Market Street and High Street feature primarily commercial development and also narrow plot widths giving the street an interesting character, but retail vacancies are more apparent in these edge streets than in any other part of the city centre. High Street was part of the old south road out of Sligo, once containing many inns and hotels, but nowadays the general impression is of run down buildings and dereliction. Other nearby streets such as Old Market Street, Connolly Street and Burton Street are characterised by urban decline and are in need of renewal.

Although the retail presence in this area is contracting, total reduction in retail space is not occurring across the city as a whole. Thus, the predicted continued growth in retailing provides an opportunity to reinforce these declining areas of Sligo's core. The whole central footprint of the retail area will need to expand to serve the projected population increases for the city and also to cement Sligo's role as a 'gateway city'. Therefore, areas that are currently in decline will still have the potential for urban renewal as the core shopping area expands. Although the perceived 'centre' of the city has undoubtedly shifted north-west, Sligo's growth in both population and regional importance should ensure urban renewal for these areas and a reassertion of their commercial viability.

The declining south east has much potential to build upon the area's traditional charm and create an attractive area for craft, gift and other specialist and independent shops, including restaurants. Provision of these types of outlets will assist in attracting event shoppers and tourists and will act as a back-up for browsing to the larger retailers. The focus should be on regenerating the streetscape with the aim of revitalising the retail frontages and re-opening vacant units. This area is particularly suitable for indigenous local retailers as it offers smaller premises and cheaper rents. Local retailers see opportunities to create niche type retail, restaurant and business services in a built fabric that allows for low cost commercial ventures. This should be encouraged and would complement the retail strategy for the wider city as a whole, providing the event shopper with an attractive browsing area. The planning regime should be sufficiently flexible to incorporate cultural uses. Some very successful examples of this type of retailing exist in the United Kingdom, such as Brighton Lanes, a network of narrow streets consisting solely of small-scale indigenous retailers, cafes, and restaurants contained in

an attractive streetscape. The Lanes area has become so renowned for its unique charm and quality retail offer, that it now attracts event shoppers and tourists from vast distances and has played a pivotal role in the successful regeneration of the whole city. The provision of large-scale modern shopping malls in the neighbouring vicinity has served to benefit both types of retailing, due to the increase in linked trips.

Eventual pedestrianisation or traffic-calming measures of certain shopping streets will help revitalise the southeast area. The provision of multi-storeys on the edge of the city centre at sites such as Abbey Street will allow shoppers who arrive by car to reach the area and make them more conducive to walking further distances within the city centre itself. However, these factors alone will not be sufficient to make the area attractive for pedestrians. Careful attention will have to be paid to urban design with street furniture and planting, whether the area is pedestrianised or not. The example of Rockwood Parade serves as a useful guideline and the same high standards should be applied to this area. Furthermore, the traffic island at the north end of Connolly Street provides an under-utilised setting for some form of public art or monument, or at the very least some planting to increase the attractiveness of the streetscape.

The tourist potential of the area is perhaps under-recognised. The courthouse built in 1878 is a fine building and a major landmark in the area. Some of the gothic features were modelled on Law Courts in London. But it is the less tangible historical aspects that are perhaps most interesting about the area. In 1846, an advert placed in Old Market Street advertised the departure of a ship from Sligo Port bound for America. This marked the start of the great exodus from Ireland's shores. By the following year, over 13,000 people sailed from the port of Sligo. This corner of Sligo could legitimately be marketed as the birthplace of the Irish-American experience.

Certain City Centre management Initiatives may be required to maintain this area's attractiveness and encourage new commercial activity here. The area should continue to be included as a future Integrated Area 'Framework Plan'. Current framework plans in the area focus on the interior of two existing urban blocks either side of Market Street. Provision of the existing framework plan for the block between Harmony Hill and Market Street will provide a pedestrian walkway suited to smaller, more specialist retail units. This Integrated Area Plan contains additional proposals for 'the courtyard block' that contains the courthouse and is bounded by Teeling Street on the eastern edge and Market/High Street to the West. If this proposal were to come to fruition it would further revitalise frontages along High Street, Old Market Street and Castle Street. Whilst the development of these two blocks would be advantageous, particularly the block abutting Harmony Hill, the renewal of the existing streetscape from Market Street down through the High Street and Connolly Street must remain a priority.

4.2.4 Pearse Road

A retail warehouse area of significant size (19,000 sq.m retail floorspace) is planned along Pearse Road (N4). Due to its location well outside the city centre this area should be restricted only to units selling truly bulky household goods or goods generally sold in bulk so as not to have an adverse impact on Sligo City Centre. In order that this development is accessible to non-car owners, it is important to ensure that there are effective public transport links with the city centre from this site.

4.2.5 Shannon Eighter

An additional retail warehouse park capable of accommodating not more than 5,000 sq.m. of retail floor space will be permissible at Shannon Eighter adjacent to the N15 as indicated on the Sligo and Environs Development Plan Zoning Map. This will facilitate a healthy and competitive retail climate in Sligo and encourage linked trips by agglomerating retail warehousing on a single site with good access to the national road network. The provision of these two suitable sites for retail warehousing will reduce piecemeal development of retail warehousing scattered around Sligo, particularly in the Harbour area, thereby assisting in a more comprehensive development of other Port lands.

4.2.6 Longer-Term Options to the North-West

Considering the rapid pattern of development envisaged for Sligo in Section 3 of this plan and previously within the Sligo Sub-Regional Strategy, there is a need to give passing consideration to patterns of development beyond the lifespan of this plan. It is imperative that patterns of development that are relevant for the present and near future are not made irrelevant and obsolete by rapid pace of change.

At present, Union Street and Adelaide Street act as a barrier and edge on the western side of the existing city centre due to heavy traffic flows. The impact of the proposed W5 route may well be to shift this boundary slightly to the west and open up the western side of Adelaide Street as a potential shopping location.

The timescale envisaged is probably beyond the lifespan of this development plan period, but in the event of all available city centre sites becoming occupied in the future, lands to the north extending to

Hughes Bridge, and to the west of the Inner Relief Road will offer the most suitable edge-of-centre locations for retailing expansion since they are accessible by public and private transport, adjacent to the centre and, currently at least, contain under-utilised sites. Although an 'edge-of-centre' has not been specifically defined in this Strategy, generally it is considered that locations within easy walking distance (up to 300-400 metres) from the retail core fall within this definition, although the distance can vary according to the level of pedestrian accessibility.

It is crucial to emphasise, that this is a long-term proposition. In no circumstance should land outside the defined city centre be considered for retail development prior to the successful completion of the large retail schemes in the city centre in the form of the Centre Block and the Butter Market. If this were allowed it would almost certainly have adverse consequences for the function of Sligo City Centre and would compromise the viability of these key city centre developments and lead to a fractured and dispersed pattern of development. Consequences for the city centre would go beyond negative impacts upon existing commercial interests. Indirect effects of a loss of city-centre vitality would potentially include a loss of tourism revenue and increased crime and social problems within the inner core.

4.3 Other Types of Retail Development

4.3.1 Local and Neighbourhood Shopping Centres

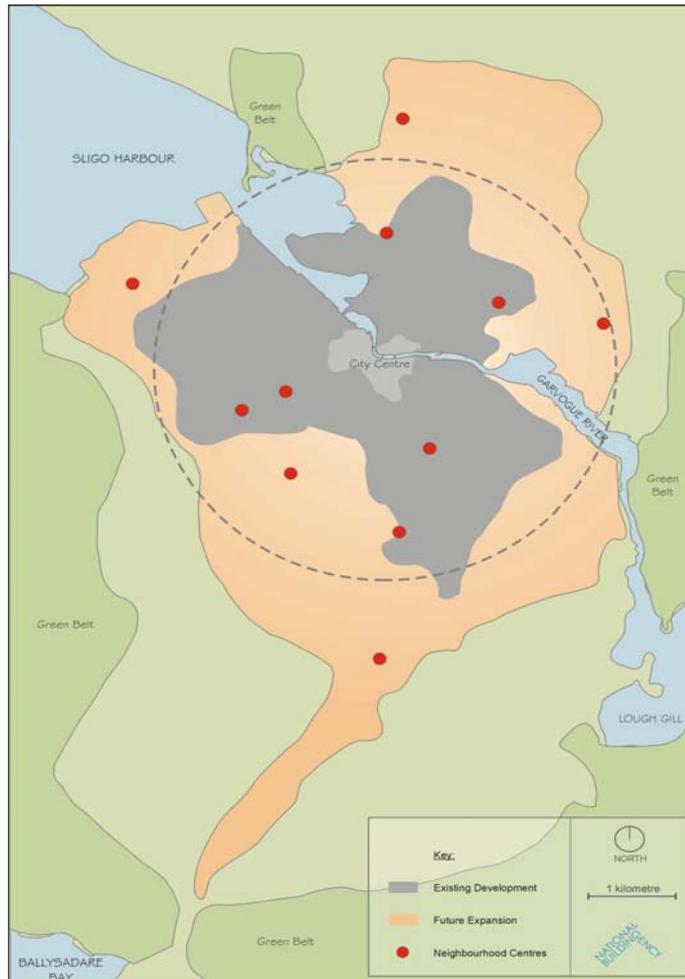
In order to serve the present and future residents of Sligo it is necessary to zone a network of effective neighbourhood centres which include a significant retail element. The location of neighbourhood centres seeks to ensure that all future residential areas are adequately serviced by local facilities and services, including commercial and community centres. Neighbourhood centres provide a valued service and cater for the daily needs of nearby residents, particularly the elderly, the less mobile, families with children and those without access to a car. The centres aim to install a strong local focus to their areas, thereby generating a sense of place and community. In Sligo, designated neighbourhood centres will reinforce some existing areas that display emerging or existing neighbourhood characteristics (i.e., Ballinode) or will be created to serve existing or future residential areas (i.e., at Caltragh).

A full schedule of neighbourhood centres is identified in Figure 30 and can be seen in more detail on the Sligo & Environs Development Plan Zoning Map. These centres will be safeguarded for retail, service and community uses. Typically they are located so that all residential development is within reasonable walking distance of the facilities and have good through-road access. The strategy ensures that most, if not all, future residential areas are within approximately 5-8 minutes walk from a neighbourhood centre (400-600 metre catchments). As not all neighbourhood centres will provide a full and total range of services, strong linkages are envisaged between adjoining centres so that they facilitate ease of movement between centres.

Neighbourhood centres are to be located along or just off key distributor routes. For a neighbourhood centre to be successful it needs to be strongly linked to surrounding residential developments, with good access for pedestrian and cyclists. It also requires a prominent location with good road frontage and access. Opportunities for passing trade also reinforce their role. Two neighbourhood centres in Sligo have failed in the past to provide some of these essential elements - Cartron Village and Crozon. Therefore, there is a presumption against the location of neighbourhood centres that have restricted access to the surrounding streetscape, for example on cul-de-sac routes. In order to address some of the difficulties Cartron and Crozon are experiencing, small-scale business and enterprise units, or starter units, will be encouraged to locate at these centres and the local authority will take a flexible view towards the redevelopment of vacant units to other uses.

As well as General food stores and newsagents, local neighbourhood centres commonly encompass important retail outlets like pharmacies, bakers, post offices, restaurants, take away, video/DVD rental, laundry facilities, hairdresser and public houses. In some instances more specialist units may be appropriate according to particular circumstances. In order to preserve the local nature of the designated neighbourhood centres, a size threshold of 250 square metres should normally be applied to individual retail units, and 1,500 square metres to the whole centre. Beyond this limit, shops are likely to serve beyond a purely local market and thus would be more suitably located within the city centre, or on the edge of the city centre if no central sites are available. In certain circumstances it may be appropriate that the number of units within the centres is restricted to ensure that they serve local needs.

Fig 30 – Neighbourhood Centres



It is very important to ensure neighbourhood centres provide a concentration of community facilities and services. Other service uses that would be suitable for neighbourhood centres would be a dental and medical surgery, place of worship, credit union, community centre, crèche and childcare facilities. It would be beneficial if they were located adjacent to schools and small parks. In addition, they should be adequately served by public transport. This maximises the potential of combined trips whereby an individual can take the children to school, undertake some incidental shopping and perhaps walk the dog in a single trip. This goal of 'Complete Neighbourhoods' is also invaluable in creating a sense of place and community, with the immeasurable benefit to quality of life that this in turn provides. However it is important to recognise that a designated neighbourhood centre need not necessarily contain all the retail outlets, services and facilities mentioned. For example it is unlikely that each and every neighbourhood centre will have a post office and a pharmacy. Therefore, even at the 500 metre catchment radius, it is envisaged that there will be an overlap in their respective catchment areas with perhaps one centre providing a post office and the other a pharmacy.

In order to act as a focal point in a residential area, a high standard of urban design will be sought in neighbourhood centres. Buildings comprising the neighbourhood centre or in the immediate vicinity will generally be permitted to increase their heights to three or four storeys to reflect their prominence. A mix of uses will be encouraged at the centres, with residential and office uses promoted above first floor levels. This is also seen as an incentive towards their construction and development.

Future applications for retail or service outlets in Sligo's suburbs will not normally be considered unless they are within identified neighbourhood centres. However, a residential area may emerge over the plan period which has relatively poor accessibility to one of the identified neighbourhood centres. This would constitute exceptional circumstances, but if such a situation clearly arises, it may be appropriate to allow development of a single convenience outlet to serve such an area. Conditions should ensure the outlet is restricted only to daily convenience items and is no larger than 100 sq.m. Sligo currently contains a significant amount of single local shops scattered within suburban residential developments. It is anticipated that as the identified neighbourhood centres gain in popularity, the commercial benefits of locating within them will be recognised. As a result, retail and service uses will gravitate towards locating within the designated areas.

It is considered that the primary function of all neighbourhood centres, will be to provide convenience goods and community services to a local population. Therefore, their development should not precede the surrounding residential development they are intended to serve.

As Sligo expands, the City Centre may reach a certain threshold, beyond which it cannot expand without ceasing to function as a single, compact centre. Usually this point is beyond the distance most people are prepared to walk in a shopping trip. Realistically this is unlikely to occur during the lifetime of this development plan, but given the aspirations for gateway status and the potential for rapid and large-scale population increase it is nonetheless appropriate at this stage to plan for such an eventuality. Once Sligo City Centre reaches this threshold, then further and larger-scale neighbourhood centres may be appropriate, in addition to those designated in Figure 30. Furthermore the 400 square metre floorspace cap on retail units in neighbourhood centres may need to be raised in scale with a hypothetically enlarged Sligo of the future.

4.3.2 Discount Food Stores

National guidance indicates that smaller discount food stores of no bigger than 1,500 sq.m. can be valuable in introducing a more competitive price element into the retail hierarchy, particularly for certain sectors of the community. This element of retail provision has been addressed in the context of Sligo and a Lidl store is under construction at Cranmore.

Discount food stores can act as effective anchors to small neighbourhood centres, but proposals need to be considered in relation to other principles for assessing new development. Namely, they should not cause an adverse impact on the city centre or cause an increase in the long-term vacancies in the primary retail area. Given the pressing need to develop vacant city-centre sites in Sligo, it is considered that the sequential test should be applied to this type of development in the same manner as to any other class of retail outlet.

Likewise, the prescribed guidelines regarding scale in neighbourhood centres should also apply to discount food stores. Discount stores should not be of excessive scale and allowed to have significant impact on the viability of smaller centres. They should be accessible by all sections of society and should have a high standard of access by public transport, foot and private car.

4.3.3 Retail Warehousing

Retail warehousing is characterised by large single level stores specialising in the sale of 'bulky' items such as furniture and DIY items. This type of activity in Sligo is currently dispersed as individual or small clusters at the Port, Cleveragh and Ash Lane, whilst a major retail warehouse park is planned on Pearse Road, with a retail capacity of 19,000 square metres (as discussed in sections 3.7 and 4.2.4). An additional retail warehouse park of not more than 5,000 sq.m. is zoned at Shannon Eighter, as discussed in section 4.2.5.

As a class of retail outlet, retail warehousing is most prevalent in the household durables sector. The principle purpose of retail warehousing is to provide for retail activity in large floorspace outlets with a high level of self-service and low labour costs. As such, there is often an economic case for providing retail warehousing to help reduce unemployment.

In section 3.7 it was explained that retail warehousing is a class of retail outlet that warrants separate consideration from standard shop units. Due to their size and parking requirements, retail warehouses do not generally fit within a city centre and as such need to be considered separately from standard retailing. Retail warehousing depends heavily on good access to the national road network, and also benefits from being agglomerated together on single sites so as to minimise the number of trips by car. It can have a positive role to make in the retail hierarchy, and provided they are of appropriate scale and are restricted to bulky comparison goods need not necessarily have a material adverse impact on an existing city centre. Individual units should also accord to the relevant policies concerning scale and design requirements.

Existing designations more than cater for the need within the plan period. The primary emphasis of retail policy should be to rejuvenate city centre areas such as the Centre Block and the Butter market. Retail warehousing has the potential to have an adverse impact on a city centre the size of Sligo if introduced on too large a scale, or if allowed to sell the wrong class of goods. It is imperative that such developments be restricted only to units selling truly bulky household goods or goods generally sold in bulk (as opposed to foodstuffs or clothing and footwear) so as not to have adverse impact on Sligo City Centre. Out-of-centre retail developments can change their composition over time. Planning conditions should be used to ensure that a development does not substantially change its character unacceptably in ways that would create a development that the planning authority would have refused on the grounds of impact on vitality and viability of an existing centre. Provision of such facilities should also be conditional on the developer facilitating effective public transport links to the city centre.

4.3.4 Industry with Workshop / Showroom

Small-scale retail workshops/showrooms will be permissible in the zoned area of Cleveragh which is indicated on the Sligo & Environs Development Plan Zoning Map. Cleveragh is unique amongst the areas zoned as BILT (Business, Industry & Technology Parks) in the Development Plan, since this is the only area of the city where such a use is permissible. Such outlets should be ancillary to an adjacent industrial or business unit and will be restricted to selling goods that are both bulky in nature and related to the business on site. Regarding the definition of bulky goods, the same set of guidelines is relevant as is applied to retail warehousing.

4.3.5 Factory Outlet Centres

Factory outlet centres are groups of shops, usually in out-of-centre locations, specialising in selling seconds and end-of-line goods at discounted prices. Given Sligo's most pressing challenge is to develop the large city centre sites at the Centre Block and the Buttermarket for retail use, it is not considered appropriate to give consideration to this type of development in Sligo at this time.

National guidance indicates that factory outlet centres 'can lead to the diversion of expenditure on comparison shopping, particularly fashion and specialist goods which forms a key component of city centre turnover.' Therefore factory outlet centres should not be considered in Sligo until sites within the city centre are no longer available, in accordance with the sequential test. Realistically this is very unlikely to occur within the time frame of the development plan.

4.3.6 Petrol Filling Stations

Shops that are ancillary to filling stations can often provide a wide range of retail goods. The positive aspect of these outlets is that they can offer all the benefits of a local shop combined with the security of 24-hour opening. Often the retail element can be in an ancillary building to the main filling station. An example is the Christies Supermarket at the junction of Mail Coach Road and Pearse Road, which due to its size effectively now acts as a neighbourhood centre. Whilst the important role of these outlets provide is recognised, it is generally considered that the retail element should remain secondary to the petrol filling station usage. The rationale behind this national policy is that larger stores can encourage additional car-borne traffic which will primarily visit the site for general shopping rather than for petrol. This in turn can create disruption and congestion for those who simply wish to use the petrol pumps. Thus the preferred location for retail outlets is within established city centres or neighbourhood centres in line with the sequential test. Generally it is appropriate to allow a shop of up to 80 sq.m. of net sales area in association with a filling station. Further details on this are to be found in section 4.6 General Principles for Assessing New Development.

4.3.7 Technology

Tele-shopping and retailing on the Internet are forecast to be one of the most significant growth areas in retailing in the future. It was estimated in March 2000 that there were 592,000 adults using the internet in Ireland (Nua Survey). The internet has the potential to cause a major power-shift in the retailing industry, and to change the power flow away from the retailer towards the consumer. The success of new technology is notoriously hard to predict, and the internet has had its ups and downs as a commercial medium. However, the impact of Tesco Direct in the UK suggests the service has a future. Furthermore, e-business will soon become m-business, where 'm' stands for mobile. Shoppers will soon be able to do all their shopping, banking and holiday bookings over the phone thanks to Wireless Application Procedure (WAP) technology.

Shopping on-line is cheaper because the retailers have fewer overheads and it is more convenient for the customer. It seems highly likely that this will have an impact on all retail markets in the world and there is no reason to believe that Ireland will be an exception. In fact, Ireland has much future potential for on-line grocery retailing or 'e-tailing'. This is due to a combination of factors such as the potentially long-term restrictions on superstore developments, increasingly congested road networks and an increasingly technologically aware population. In a sparsely populated region of high environmental value like the north-west, the benefits for the environment will be that fewer private vehicles will congest the road system on shopping trips. Instead bulk delivery vehicles can serve many customers on a single trip.

It is likely that opportunities will also arise for retailers of high-value, non-perishable goods and Irish-themed products that can be cost-effectively delivered by post. Ireland has already gained a leadership position in the remote selling of computers and a number of Irish retailers have a presence on the internet.

There are significant opportunities for employment and wealth creation in Ireland throughout the electronic retail value chain. These include multimedia content creation for advertising, web pages and virtual shopping malls, transaction processing, and the packaging, warehousing and distribution of physical goods. There is also the opportunity for Ireland to take an early leadership position as an international location/hub for internet-based shopping activities in the non-perishables area, provided

Ireland can develop the required broadband telecommunications infrastructure and international logistics services for competitive parcel delivery.

A significant proportion of consumers are still sceptical about online shopping and the future success of the industry is dependent on change in the mindset of both consumers and retailers. The end of traditional shops is still far off, but nonetheless it is important that the local planning authority recognises the positive aspects of e-business and facilitates its development where possible, by ensuring that potential land uses, such as centralised distribution centres for e-tailing, are encouraged. These do not have to be located within town centres and are not subject to the normal demands of the sequential test, provided they are purely for storage and delivery and no goods are actually purchased on site. Appropriate conditions to any permission should ensure they are not an excuse for inappropriate out-of-town development. The nature of this type of development means it would be most suitably located on industrial estates with good access to the road network.

4.4 City Centre General Strategies

4.4.1 City Centre Management

Modern town and city centres combine a wide range of uses in a manageable and confined area, including living, working, shopping, entertainment, education, public services, health and leisure. The growing need for sustainability and the more effective use of resources will increasingly affirm the need to maximise these uses in a safe, accessible and effective way. The concept of city centre management aims to bring together a partnership of key stakeholders, sharing aspirations, expertise and resources to take forward a joined up and holistic plan to meet local needs and strengthen regional resources.

Local city or town centre management initiatives range from ad hoc partnerships to companies limited by guarantee. Usually a core management group called a Management Board or a Steering Group clarifies the roles and responsibilities of all partners. Normally a city centre manager is appointed to oversee the vision for the city centre. Ideally participation should not be confined to local government and retailers, but should include restaurateurs, leisure operators, head office operators, transport providers, investors and land owners, voluntary community groups, as well as such service providers as solicitors, accountants, financial services, the police, education and health.

In the UK, similar schemes have been funded by public sector and private business, but a cocktail of funds has been preferred to a single source and EU allocations may also be appropriate. Supporters can provide resources in a variety of ways, including money or core funding, goods or services in kind, staff secondment, sponsorship of events or use of influence.

Informal groupings of retailers and interested parties do exist in Sligo, but the city would really benefit from the creation of a formal, structured City Centre Management Group. This will be particularly vital in a period which is likely to witness rapid and large-scale change and development. The local authority should play a pivotal role in instigating the process, in consultation with the user groups mentioned. To facilitate this, a full-time professional city centre manager should be appointed for Sligo City Centre.

4.4.2 Pedestrianisation and Pedestrian Linkages

The city centre of Sligo is characterised by vehicular-pedestrian conflict which does not at present provide a pleasant shopping environment. The conflict is most severe, and pedestrian movement is most impeded, on the main shopping streets of O'Connell Street, Grattan Street and Castle Street.

As discussed in section 2.9, evidence from the pedestrian survey indicated a high level of dissatisfaction with the current situation and a groundswell of opinion that the problem needs resolving. The problem is contributing to negative associations for the city as a shopping destination, and it seems likely that Sligo's commercial viability is being affected as a result.

If action is not taken to rectify this problem, the situation will only get worse as Sligo's population increases and levels of car ownership rise. The sheer volume of traffic in Sligo City Centre has now reached such a state as to be detrimental to the environment, amenity and the aesthetic appeal of the city. The car parking survey indicated a consistently high level of illegal parking in the centre, often in potentially dangerous locations which is serving to exacerbate the problem.

The pedestrian / vehicle balance has not altered significantly since publication of the 1995 Sligo traffic and Transportation Study, which suggested that the vehicular domain is relatively generous compared to the pedestrian domain. The study identified some main pedestrian circulation difficulties. Narrow footways in combination with large numbers of pedestrians at O'Connell Street, Grattan Street, Castle Street and Market Street cause problems, in particular for shoppers with prams or wheelchair users. Furthermore, the study noted that high levels of user conflict between vehicles and pedestrians at O'Connell Street, Grattan Street and Castle Street.

Furthermore it is important to recognise the importance of other factors to the potential visitor to the city centre, in addition to any parking and traffic problems. Other balancing factors to take into account include the relative ease of accessibility by public transport of a typical city centre when compared to suburban, neighbourhood or out-of-town shopping locations. City centres also offer greater choice of competitive goods often with lower prices. Furthermore, there are opportunities to do many types of errands on one trip, particularly in the case of an important regional centre like Sligo.

The provision of a series of multi-storey car parks to serve Sligo City Centre in conjunction with controls on street parking on key access roads will have the effect of providing visitors to the city centre with safe, convenient parking whilst increasing the city's accessibility. They will also replace the plethora of inner urban car parking spaces. These positive factors would be in addition to the obvious benefits to the shopping environment for the pedestrian. There would be more public space within a safer, less polluted and more attractive shopping area. Measures to take traffic out of the city centre thus have several advantages.

The removal of parking spaces from the city's core will allow for the pedestrianisation of certain key areas. Pedestrianisation of O'Connell Street will create a more attractive shopping environment and make the area more appealing to potential investors. A pedestrianised O'Connell Street will also relate to pedestrianised character of the Centre Block via arcades system for browsers. Grattan Street, Castle Street and Market Street would also benefit from pedestrianisation, although these should be phased to a later date and only after a thorough examination of the implications on traffic movement within the city. In the intervening period, on-street parking must be restricted on Castle Street & Grattan Street.

The eventual pedestrianisation of the City Centre streets, combined with the new public squares on Stephen Street and Quay Street, could be accompanied by a city centre street festival in the Summer months to celebrate the revitalisation of Sligo City centre. Ideally such an event would attract big-name entertainers as well as local artists and act as the City's statement of intent to act a regional cultural capital for the North-West. There would be considerable benefits in resulting national media coverage that would assist in promoting Sligo in its augmented and enhanced national role. In addition, competitions could be commissioned for the provision of public art on the newly pedestrianised streets.

4.4.3 The Evening Economy

In order to achieve gateway status, Sligo will undergo large-scale, and comparatively rapid, increases in population. Sligo therefore will need to appeal to the mobile workforce that will most likely make up the bulk of in-migrants to the city. Dublin has successfully attracted large-scale immigration and as a



Figure 31: Outdoor Utilisation of the Street Scene by the Garvogue River

result been the engine behind the growth of the 'Celtic Tiger'. However, with the capital showing signs of overheating it is the objective of national guidance that gateway cities such as Sligo which are strategically located are in a position to absorb a degree of overspill. Therefore, as in the case of Dublin, the demographics of likely in-migrants will be such that a very high proportion of these individuals will be young, as well as comparatively skilled and educated. For Sligo to both function as a regional capital, and to attract this future influx, it is absolutely critical that the city hosts a vibrant evening economy. This will require the local authority to encourage a diversity of uses in the city centre throughout the day and evening.

In addition to the effects of Sligo's projected growth in regional status and population, there are other driving factors behind the need for a renewed focus on this area. The expansion of the evening economy can also be expected to continue in line with trends such as that of higher disposable incomes and young people starting families later. Furthermore, an attractive evening economy will boost the tourist economy by encouraging visitors to spend more time in the city. These connected factors will have the affect of revitalising commercial interests in the city centre.

To support this, evidence from the Pedestrian Survey suggests there is an unsatisfied demand for a greater variety of entertainment in Sligo, something different from the standard pubs and restaurants. A high proportion of respondents said more music concerts and nightclubs would encourage them to visit Sligo more in the evening. Other views gleaned from public consultation exercises suggest the city would benefit from more promotion of late night shopping, perhaps with the added attraction of more outdoor events, music and street entertainments. Certain major retailers do currently open until 9pm on Thursdays and Fridays. However, many of the smaller retailers do not. As a result, the nights of evening shopping lack the vibrancy and bustle they potentially might have. Newly pedestrianised areas would facilitate the addition of music and street entertainers to the street-scene, particularly in the Summer months. This may well assist in attracting the 'event' shopper to visit Sligo in the evening, or encourage workers to spend more time in the Sligo at the end of the working day.

An attractive and historic city centre like Sligo that is popular with tourists would also benefit from importation of elements of the continental drinking and café culture. The regeneration of areas along the riverfront such as Rockwood Parade provide a suitable setting for outdoor cafes, as would other areas that are subject to pedestrianisation in the future. The Irish weather has historically limited utilisation of outside space for leisure purposes, but street cafes can increasingly work in colder climates nowadays due to the latest technology of outdoor street heaters. The area around the riverfront has begun to evolve in this way during the Summer months, and this trend can be expected to continue, particularly to cater for visitors to the 'Cultural Quarter' that can be expected to develop in the Connaughton Road area. Dependent on the success of this quarter, the riverfront activity may well spread eastwards along JFK Parade and the emerging pedestrian linkage along the north bank (see further details in section 5.5.5 for details of this).

There are clear commercial and economic benefits to these initiatives, but a less quantifiable benefit is that it would encourage sections of the surrounding population to visit the city centre at a time they wouldn't normally be inclined to do so. As noted in section 2.12, over half of respondents (55%) classed the city centre as either 'Unsafe' or 'Very Unsafe' after 7pm. The promotion of a vibrant environment late into the evening primarily for shopping, but also simply as a pleasant place to be, may well help to alter perceptions of the city centre as an unsafe place.

Public consultation exercises also indicated consistent views suggesting the city centre lacks a leisure use, and a bowling alley was a frequent suggestion. Such a use may well assist in providing youth entertainment facilities that would take young people off the streets and have a knock on affect on levels of public disorder and antisocial behaviour in the evenings. At weekends and in the day it could provide a much needed entertainment facility for younger families. It would also have commercial benefits for neighbouring uses and boost the evening economy.

A modern urban centre is multi-functional and acts as a place to work, shop, play and live. It is recognised however, these uses are not always mutually complementary to one another and the local authority will need to manage conflicts of interest. It is imperative that the concept of living within the centre of Sligo is not soured by the problems discussed in the previous section on crime and safety.

Whilst considering proposals for initiatives to enliven the evening economy, it is recognised that the primary leisure requirement in the evening will remain for more traditional pubs, bars and clubs, and this demand can only be expected to continue for many of the same reasons outlined above. Therefore, issues of capacity and saturation will need to be tackled to avoid an over-concentration of pubs, bars (including megabars) and clubs and to steer investment towards places that will benefit from more eating and drinking establishments. The local planning authority should ensure that new food and drink uses are well located, ensure the quality design of the buildings that accommodate them, and secure special management arrangements and public infrastructure through planning conditions and obligations.

The development plan needs to contain robust policies to secure a good mix of uses and to avoid saturation. Therefore, if areas of stress where capacity has been reached become apparent, further

introductions of food & drink use should be restricted. The area around Grattan Street and O'Connell Street should be subject to such restrictions for the course of the plan period. Applications for fast food outlets, pubs, bars and nightclubs should be encouraged to locate elsewhere in the city centre in order to diffuse the situation. It is also important not to breach a certain threshold for non-retail uses within primary shopping frontages and where possible, businesses that thrive on the evening economy should also be encouraged to be open during the day so as to avoid lifeless street frontages in the centre.

Suitable areas for future bars / clubs would be the area around Stephen Street which is essentially a business and office district. As such it is would benefit from a degree of evening activity. Another area that would benefit from the location of bars /pubs and nightclubs may be the area north of Wine Street and Lower Knox Street to the river which is also lacking vitality after dark.

It is imperative that public transport and taxi services facilitate the swift and safe departure of visitors after they have enjoyed an evening in the centre. This would help resolve issues of noise and help prevent public order problems occurring. Proposals for a new square/transport hub adjacent to Sligo Station are discussed in the following section. In view of the proposed new taxi rank that will be included within this development, at least one new taxi rank is required on the eastern side of city to cater for custom late at night as the pubs and nightclubs shut. The exact location will be dependent on the resolution of the pedestrianisation issue, but High Street or West Gardens may be suitable areas.

4.5 City Centre Area Enhancement Strategies

4.5.1 The Central Square

The railway station and bus station are located on the edge of the city centre on Lord Edward Street and this area is the significant transport node in Sligo. Connections between the core and the transport node on Lord Edward Street are therefore very important. As the railway and public transport in general increases in use, more people will see this area first on arrival in Sligo, it is therefore important to provide good quality modern facilities in this area and also ensure the streets are paved to a high standard and buildings are maintained well.

Fig 32: Footprint of Proposed Sligo Square



A central shopping area that is more closely related to the railway and bus stations will be a beneficial factor in making Sligo a sustainable location for the event shopper and encouraging people to use public transport. The proposed route of the Inner Relief Road will effectively sever the city centre from the Railway and the Bus Station, so an overpass that is attractively designed to a high standard would be beneficial, so as not to deter visitors to the city centre who arrive by sustainable means of transport.

It will also be extremely important that pedestrians arriving from the west are encouraged to enter the city centre via the Centre Block. Research has shown that current pedestrians arriving from Lord Edward Street, which is the direction of the bus and train stations, have a strong 'cross-block desire line'. That is to say that they are far more inclined to head for the city centre through the current Centre Block than they are to walk down Wine Street. Policies should ensure that the linkage between the stations and O'Connell Street is maintained and enhanced and pedestrians are encouraged to continue using the Centre Block as a through fare.

Proposals are under discussion for a new 60 sq.m. square between the train station and the west end of Wine Street. The Square would be situated adjacent to the Inner Relief Road on the east side. It would be a key focal entry-point into Sligo City Centre and would provide the necessary connection between the city centre and the proposed multi-modal transport interchange focused at the railway station, following completion of the Inner Relief Road. The square would act as a 'Transport Hub', a dropping-off point for buses and taxis. The existing taxi rank in Quay Street may be moved to this new location, although a second taxi rank may well be necessary on the eastern side of city to serve the evening uses.

The new square proposal involves the relocation of the existing bus maintenance depot at the top end of Adelaide Street and land will also be donated to the new square scheme on the northern side. This will mean that the northern edge of the square will be a listed building that currently only fronts onto Union Street. This building will be elevated in status as a key site on both the square and the Inner Relief Road. The final footprint of the site is illustrated in figure 32.

The square proposal will consist of an area of bus and taxi pick-ups and an area of public space that can be utilised for cafes or other service uses. A new building to the south of the proposed square on the site of part of the bus maintenance depot has potential for a prestige office block, with a more active street level frontage.

The site would also provide an extremely suitable location for the relocation of North-West Tourism offices from their existing site on Temple Street. This would enable advice and guidance to be issued to tourists at their point of entry into Sligo. It would also be beneficial to construct ticketing offices for Iarnród Éireann and Bus Éireann on the square. This would partially resolve the problem of severance of the bus and train stations from the main city centre by the Inner Relief Road.

Although the layout within the square is not yet fixed, it is an objective of this development plan to create a new civic square. It is proposed therefore to designate the site as an Action Area Plan would strengthen its potential as an objective in the Development Plan.

Lower down on the west side of Adelaide Street the land will be suitable for larger retail units selling electronic goods. It will possibly be necessary to have an objective for pavement widening on Adelaide Street to encourage pedestrian linkage to the entrance of the Centre Block.

4.5.2 Quay Street Car Park and Harbour South Bank

Sligo's street structure is such that it makes contact with the river and sea at various locations in spaces of varied character. One such point is Quay Street Car Park, which has historically acted as a harbour. Although the harbour usage is no more, the site remains a spatial experience of some quality. The proposed provision of large areas of multi-storey car-parking in the Centre Block and more particularly in the adjacent Buttermarket site, will allow the removal of the existing surface level car park at Quay Street to create a public open space.

The proposal is dependent on the future provision of replacement car-parking in the Buttermarket, which will allow the Quay Street Car Park to be redeveloped as a complementary use to provide a public area that would serve the increasing levels of pedestrian activity that will result in the northern part of the city centre. Therefore, for the redevelopment of the Quay Street Car Park to be a success and the public space utilised in the future, it will be imperative that there are strong pedestrian linkages primarily to the Butter Market Block and secondly to the Wine Street Centre Block. The new public open space will then serve as a resting point for both shoppers and those who work in the centre.

As part of the proposal a riverside walkway will be created. Part of the waterfront at Quay Street Car Park has been converted into an award-winning 'Wild Flower Project' by Sligo Grammar School. It would be preferable for this to be incorporated into any redevelopment of the area.



Figure 33: Quay Street Car Park – A Riverside Site of Significant Potential

4.5.3 The Cultural Quarter

North of the river, the Model Arts and Niland Gallery site is located in what can loosely be termed Sligo's cultural quarter. This area is the subject of a competition and a bid to North-West Tourism for further funding and development. Strong linkages between this area and the city centre should be maintained so as to encourage 'event' shoppers to make combined trips.

North-West Tourism has identified a need for concert-hall facilities in Sligo. This is the type of development that the city needs to promote itself as a regional capital and a location somewhere within the urban fabric of the cultural quarter would be suitable. Connaughton Road has also been identified as the most suitable site for a multi-storey car park to serve the city centre, and is an integral component of the proposed network of multi-storeys.

4.5.4 Stephen Street Car Park

Street markets can greatly add to the attractiveness and the vitality of a cosmopolitan city centre, as successful examples in Galway and in Temple Bar in Dublin serve to illustrate.

The area around Stephen Street Car Park in Sligo offers a suitable amenity area that is not used to its full potential at present. High quality urban design exists on the opposite bank at Rockwood Parade and also to some extent on the north riverbank towards Lower Hyde Knox Bridge. However, this scenic area is spoilt by the location of the existing Stephen Street Car Park, which acts as a barrier to any further improvements to the riverside setting. Furthermore, it does not currently act as an incentive for pedestrians, particularly event shoppers and tourists, to explore the north bank of the city. As a result the potential benefits of the footbridge will not be fully realised until Stephen Street Car Park is subject to improvement.

In the longer term, the possible provision of car parking at edge-of-centre sites such as Connaughton Road would allow the removal of the existing car park on the riverside to open up this key city centre location for public amenity. However, even within the context of the existing layout, there exists under-utilised incidental grassland adjacent to the car park on the east side, which would allow the provision of a market area with more immediate effect, albeit on an initially small scale.

At such a key location it may be necessary for the licensing authority to place restrictions on the range of goods sold. The market should provide a platform for local artists and craftspeople, and licensing should reflect this aim. The aim is a high quality urban amenity that will appeal to the tourist and event shopper alike. In addition to arts and crafts goods, antiques and specialist food stalls may also be appropriate.



Figure 34 - St. Nicholas Church Galway
The photos illustrate a successful example at St Nicholas church in Galway.
The market licences are issued by Galway Corporation and the impact on the vibrancy of the street scene contributes greatly to the image of Galway as a destination.

Figure 35





Figure 36: Public enjoyment of the riverfront at Stephen Street is stifled and constrained by car park-

he site also serves as a useful intermediate zone, strategically placed between the main retail area and the emerging cultural quarter to the north-west. An arts and crafts street market will fulfil the role of an intervening use that will complement both zones of the city and encourage a flow of pedestrians. Given the attractiveness of the location it is imperative that any new use both enhances the setting and encourages public enjoyment of the river views.

4.5.5 City Centre Riverfront

The river is an important feature and to take advantage of this natural asset buildings should address the river where possible. To utilise the full potential of the river as a natural asset, ways of opening up the river for pedestrians should be encouraged.

A Riverside Walkway

The area on the north bank of the river that extends west from Kempton Parade to the J.Fallon footbridge is actually a publicly defined Right of Way. However it currently consists of multiple-ownership backland development that is under-utilised and blocked to the public. It should remain an objective of the local authority to open up this route to public access as far eastwards as the J.Fallon footbridge, using CPO powers if necessary to secure the route. This will be advantageous for several reasons, in particular allowing greater public enjoyment of the river and creating commercial opportunities for bars and restaurants as a result. It would also open up a new, more scenic route that will improve interconnections between the cultural quarter and the city centre, via the proposed new uses on the site of Stephen Street Car Park.

Issues of safety will be of paramount importance to this amenity, particularly at night and after dark. The walkway must be well lit at all times and easily visible from the landward side to the north. The southern side of the walkway should be protected from the river by a barrier that does not prevent enjoyment of river views.

J.F.K. Parade

The high standards of urban design that have been established on Rockwood Parade should also be encouraged eastwards along J.F.K Parade. With developments that seek to address the river occurring on both banks of the river, further restaurants and bars would find a suitable and attractive location in ground-floor premises along J.F.K Parade. Whilst offices and/or apartments are appropriate for upper floors, only city centre uses which add to the vitality of the area, should be allowed on the ground floor of the parade. This would include a mix of smaller, specialist retailers complemented by cafes, restaurants, pubs or bars. In the longer term, the local authority may wish to examine ways of removing the on-street parking that exists, although this measure will be dependent on the future successful provision of replacement multi-storey car parking in the city centre and surrounds.

4.5.6 Abbey Street

Although Sligo City is a popular tourist destination, much of it is actually outdoor tourism destined for the surrounding countryside. As such, Sligo frequently serves as a stopping point and no more. Commercially this is a missed opportunity and the provision of a cultural quarter to the north rightfully aims to enhance the appeal of the city as a tourist destination in its own right. However, it is important to also recognise that the city contains other more traditional, tourist attractions that are perhaps not enhanced or advertised to their full potential.

Sligo City has just one recognised Heritage site in the national list of seventy-six sites drawn up by the Department of Arts, Heritage, Gaeltacht and the Islands. The one site in question is Sligo Abbey. As such this feature has much potential to be promoted as a more prominent feature and as a symbol of the city. The Abbey is in fact Sligo's only surviving medieval building, a Dominican Friary that was founded in 1252/3. Although sacked in 1642 and left as a ruin, the remaining structure is in good condition, with many of the tombs, monuments and features retaining much of their original splendour. It has the oldest high altar in any Irish monastic church, dating to the 15th century. The Abbey is under state care and managed through Duchas, the Heritage Service. The Department of Arts, Heritage, Gaeltacht and the Islands have in the past indicated that there may be archaeological issues on the south side of Abbey Street. The redevelopment of the area may afford some investigation of this possibility prior to redevelopment.

The area has already been identified as a result of the Integrated Area Framework Plans. The plan envisages the provision of a multi-storey car park to the south of Abbey Street, to replace the existing surface level car park. This will serve to remove incoming traffic to this edge-of-centre setting, which will be particularly crucial to the success of the pedestrian-friendly proposals in the main central core. However, it is important that the multi-storey is set back within the site as far from the Abbey as possible, and is not of too inappropriate a scale, and does not cast a shadow over this historical feature.

Pedestrian access from the multi-storey car park to the city centre should be facilitated along Abbey Street to give greater scope for re-enlivening the street-scene. There will be commercial opportunities from shoppers arriving and departing their vehicles as well as from tourists. In the longer term, Abbey Street would be a suitable candidate for pedestrianisation. Therefore for many reasons it is essential that the frontage opposite the Abbey is treated sensitively, and uses are installed that enhance this significant setting. A pedestrian crossing is required across Teeling Street/Thomas Bridge to facilitate pedestrian movement between the site and the city centre.

Abbey Street is a relatively lifeless street at present, and the surrounding setting does little to enhance the Abbey or encourage the inquisitive tourist to investigate. As a result the area has a fringe city centre feel, although it is actually within 400 metres of the perceived city centre of O'Connell Street. As such, Abbey Street represents an extremely suitable area for expansion for smaller specialist outlets that can both capitalise on, and enhance this important historical landmark. The area directly opposite the Abbey (where the car park is currently sited) and further down the street towards Castle Street is ideally suited to tourist, gift and craft items, that could possibly be related to the Abbey itself. In addition, once more people are attracted to the street, there is potential for a café to provide refreshment for visitors in a scenic setting which is slightly removed from the bustle of the core shopping streets down Castle and Grattan Street. Ideally these developments should be set back suitably far from the road to allow creation of public space and promote the visual aspect and amenity of the Abbey from the opposite side of the street. This will also allow utilisation of the space by outdoor cafes.

The Abbey site would also benefit if further attention were paid to the north boundary from the river-front side. The area between the Abbey and the river, currently sites single storey retail uses not suited to a city centre. It should be a longer-term objective to remove them and open up views between the Abbey across the river to the new pedestrian walkway on the north bank.

4.6 General Principles for Assessing New Development

4.6.1 General Principles

In assessing the retail planning applications, the planning authority will also be guided by recent Department of the Environment and Local Government's Retail Planning Guidelines, which identify the following elements:

- Adequacy of existing shopping outlets,
- Size and location of existing outlets,
- Quality and convenience of existing outlets,
- Effect on existing communities,
- Needs of the elderly, infirm or disabled or other persons who may be dependent on the availability of local shopping outlets,
- Need to counter urban decline and to promote urban renewal and to promote the utilisation of unused infrastructural facilities in urban areas.

A retail impact analysis may be required as part of a planning application for shopping centres, retail activity or large food/grocery chain stores, where the Planning Authority considers it necessary. Such developments will be assessed as to whether they:

- Support the City Centre
- Cause sufficient impact to undermine the quality of a centre
- Diminish the range of activities and services
- Increase the incident of vacancies.
- Ensure a high standard of access.
- Link effectively with the nearby city centre.
- Encourage multi-purpose trips.
- Act as a driver of regeneration, with the reuse of inner urban sites.

4.6.2 Permitted Locations for Shopping

As far as possible new retail development is to be sited within city centres or, if no sites are available, immediately on the edge of city centres with a presumption against development elsewhere, except where district or neighbourhood centres are being provided to meet neighbourhood needs. It is not appropriate for applications for out of centre sites to be pursued when the class of goods could quite clearly be sold from within the city centre.

New development should be accessible by a variety of transport modes, including public transport. In the development plan context, the demonstration of congestion arising from car usage should not be used as an argument against city centre development locations, where adequate public transport exists or could be provided, and since measures to alleviate congestion are to be provided (as outlined in the Car Parking Strategy).

4.6.3 Layout and Design

These guidelines will provide developers with a greater degree of certainty as to the way a particular scheme will be judged. Where an application for development complies with the policies and proposals of a development plan in all material respects it will not be necessary for the applicant to provide additional supporting background studies. However, the developer is expected to demonstrate that a proposal complies with the development plan.

The design of proposals for retail development should have proper regard to their relationship with their surroundings and should, if possible, develop and enhance local character. It is recognised that much new development will be of a larger scale than existing facilities, nonetheless new proposals should integrate as much as possible into the existing townscape of the centre.

Designs should avoid presenting blank frontages to city centres or being inward-looking. Designs which add interest and variety, and which reflect local context should be encouraged.

The frontage facing onto a street should consist of the actual retail selling space to facilitate ease of access for pedestrians. Service yards and car parking should be located at the rear of developments so as to avoid unsightly views. They should normally be placed away from the street frontage closest to the city centre, and should, wherever possible, maintain existing building lines. They should be well lit and incorporate hard or soft landscaping appropriate to their design and setting.

4.6.4 Shopfronts

The design of new shopfronts should relate to the architectural characteristics of the building in which it is situated. New shopfront designs must respect the scale and proportion of the streetscape by

maintaining the existing grain of development along the street and respecting the appropriate plot width.

Proposed alterations to existing frontages need to be given careful consideration. Traditional shop frontages of character and quality should be retained in normal circumstances. Where existing shop-fronts are of no special merit, total replacement is acceptable.

Modern multiple formats which have adopted a 'corporate image', will not necessarily be allowed to use their standardised shopfront design, corporate colours and materials. Such companies should be encouraged to ensure that their particular fascia takes account of the character of the local area. Compatibility with individual buildings and with the street scene will be considered more important than uniformity between the branches of one company. Nameplates and signage will be required to be constructed in proportion to the façade of the building. Excessive scales or proportions will not be permitted. Particular attention should be paid to shop-front fascia in Architectural Conservation Areas. New retail outlets may be required to tone down or alter their fascia design in these areas.

The repair, restoration and replacement of shopfronts must be sympathetically carried out to protect the architectural character of the city. When existing shops are being refurbished, they should, wherever possible, install level access, unless there are valid conservation reasons or the difference in level cannot reasonably be overcome.

The process of trading through an opening in a building facade without a shopfront will not be permitted. The use of loud music or other sound to attract attention to a shop front will also not be permitted.

4.6.5 Large Foodstores

Large foodstores generally serve the weekly convenience goods shopping requirements of families. They require large areas of floorspace with adjacent car parking. The majority of this type of bulk convenience shopping is undertaken by car, but a significant proportion of customers visit by other means. Therefore large foodstores should be well served by public transport. These stores should be located in accordance with the sequential test so that city centre sites are the most suitable location. Where applications include significant amounts of non-food items, the accompanying drawings should clearly indicate the area to be devoted to convenience goods. As previously indicated the national floorspace cap of 3,000 sq.m. applies.

4.6.6 Discount Food Stores

The sequential test, and the prescribed guidelines regarding scale in neighbourhood centres, should be applied to this type of development in the same manner as to any other class of retail outlet. Discount Food Stores should be accessible by all sections of society and should have a high standard of access by public transport, foot and private car.

4.6.7 Retail Warehousing

Retail Warehousing activity relates to the sale of non-food, non-clothing goods. Retail Warehousing includes the sale of large scale goods including furniture/carpets, bulky white electrical goods, gardening goods, DIY items and toys. The activity may include outdoor display areas and is likely to generate considerable car parking requirements.

In order to limit the impact on the vitality and viability of the city centre, retail warehousing must be restricted to selling truly bulky goods (furniture/carpets, bulky white electrical goods, gardening goods, DIY items). Where the range of goods sold from retail warehouse parks extends to the type of non-bulky durables which are retailed from town or city centres then there is potential for an adverse impact on the centre. Items which should be restricted from sale from retail warehousing include grocery and food items (including alcohol), footwear, clothing, books, magazines, mobile phones, music (i.e., compact discs, tapes, mini-discs etc.), toiletries, cosmetics, artists materials, jewellery, gifts, china and leather goods. Conditions will be attached to prevent the sale, by sub-division or change of content, of goods normally sold in town/city centre shops where they would thereby compete with the use of the town/city centre to seriously injure its viability. A limit on the range of goods sold will normally be imposed and individual units will be subject to an upper floor limit.

Retail warehouse units should ideally be agglomerated on planned retail parks in order to minimise the number of trips by car. It is also essential that they are limited in scale so as not to have an adverse impact on the city centre. Generally units of less than 700 sq.m. gross floorspace are more easily accommodated in city centres and, in any event, tend to sell a less bulky range of goods. Consequently it is appropriate to impose a minimum size condition preventing the construction or subdivision of units into stores less than 700sq.m. in out of centre locations. Individual units should be subject to an upper floor limit of 4,000 sq.m.

The design and layout of retail warehouse units should be such that they provide a compact development form, with continuous building lines that provide for integration in urban design terms with adjoining and subsequent developments. Where more than one retail warehouse activity is proposed, shared car parking will be expected or encouraged.

Parking should normally be provided to the rear of buildings so as to temper the view of expansive car parks or to assist in providing continuous development blocks and building lines expected within a new street form. There should not be more than one car parking space per thirty-five square metres of net retail space.

A landscaping scheme should be designed as an integral part of the development. A schedule of planting and maintenance should accompany any application. The Planning Authority will particularly ensure that areas of open car parking are adequately landscaped, both on its perimeter and within, with a combination of trees and shrubs of sufficient density to provide visual relief to car parking areas and make them more attractive.

4.6.8 Petrol Filling Stations and Ancillary Uses

When considering all applications of this nature, attention should be given to the safety aspects of circulation and parking within the station forecourt.

In particular they will have to satisfy the following minimum standards:-

- (i) A road frontage of not less than 31 metres (100 feet) which is clear of any structures, other than a low boundary wall, for a depth of not less than 7 metres (22 feet) from the road boundary.
- (ii) No petrol pump may be situated less than 7 metres (22 feet) from the road boundary.
- (iii) The station may not have more than two vehicle accesses, the width of which shall be not less than 6 metres (20 feet) and shall not exceed 9 metres and have a kerb radii not less than 10 metres (35 feet).
- (iv) The surface of the forecourt shall be graded, surfaced with bitumen macadem or other suitable material and drained to the satisfaction of the Planning Authority. A petrol/oil interceptor trap shall be fitted to the surface water drainage system. Provision shall be made for the storage and removal of refuse and waste material.
- (v) A sanitary convenience should be provided for public use.
- (vi) The minimum site distance from the entrance (access way) to the nearest road junction shall be 50 metres for major junctions and 25 metres to a minor road junction.

The primary purpose of petrol stations is to provide facilities for the sale of fuels for vehicles. However, permission will be granted for ancillary retail uses involving goods related to the motor trade. In addition, in areas not already served by convenience shops, permission may be granted for small shops retailing confectionery, groceries and newspapers. Applications may include ancillary shops of up to 80 sq.m. of net sales area, without being subject to the rigours of the sequential test. Applications in excess of 100sq.m. should be assessed as if they were independent retail units in line with the sequential test. The associated filling station is of no consequence in these circumstances, and such proposals should be assessed as if there were no petrol filling facilities present.

The common pairing of filling stations and foodstores on a single site should not be seen by developers as an excuse to evade the demands of the sequential test. It is not the case that all petrol stations need necessarily have an adjacent foodstore. Consequently, retailers should not seek to claim that they are unable to assemble sites within a city centre or on the edge of one, simply because they face difficulty in assembling a site capable of accommodating a large foodstore and a petrol filling station. This is an incorrect application of the sequential test, since it is perfectly reasonable to consider the two formats separately.

A car maintenance workshop can be permitted in circumstances where it would not adversely affect the local amenities, particularly with regard to proximity to dwellings and the availability of adequate off-street car parking space. The multiplication of petrol/service stations will not be permitted where these encroach on the amenities of residential areas and/or obstruct traffic flows.

4.6.9 Automatic Teller Machines

The planning authority will strictly control the location of Automatic Teller Machines (ATMs) having regard to the following:

The need to protect the character of the street, building or shopfront into which they are to be incorporated into (especially listed buildings). The design and location must be such that they are safe and easily accessible. Canopies, signs and logos shall be discreetly incorporated into the overall design.

The provision of ATMs at petrol stations will be encouraged to facilitate drivers wishing to use them. In general, ATMs will not be provided where customers queuing may cause disruption to pedestrians.

4.6.10 Advertising on Buildings and Advertising Hoardings

Details of regulations regarding advertisement standards are to be found in 'Planning and Development Regulations 2001, Part 2, Article 6'. Generally, advertising should be sympathetic in design and colouring, both to the buildings on which they will be displayed and their surroundings and should not obscure architectural features. The construction of nameplate fascias linking two or more buildings of different architectural design and character is generally unacceptable. The height of signs and advertising on a building will be strictly controlled and high level advertising will not be permitted. Projecting or swinging signs will be limited to one per building.

Advertising will be contained within the facade area of the building and will not be allowed above the eaves or parapet level of buildings. Signs mounted on buildings should be designed as an integral part of the building or shopfront (in the case of retail outlets).

In general, advertising hoardings, including three dimensional signs and tri-visions, will only be permitted within commercial areas of the city, but will not be permitted on or in the vicinity of listed buildings or structures or on the front facades of buildings. However, advertising hoardings may be permitted temporarily where they help screen building sites and derelict sites awaiting redevelopment and where they form an integral part of the boundary treatment of the site. Their size and placement shall be such that they are integrated into the existing streetscape and the planning authority will consider issues of noise (particularly in the case of tri-vision signs), illumination, scale and the visual quality of their setting.

4.6.11 Signage

Monument signs are to be preferred to freestanding signs. All elements of the sign must be incorporated into a single design and auxiliary projections or attachments not part of a single design will be prohibited.

Signs shall not exceed the height of the buildings in its vicinity nor shall they exceed 4 metres in height. Signs will not be permitted to extend onto public footpaths, roads or other public rights-of-way.

In general, only one freestanding or monument sign shall be permitted on a site, though exceptions may be permitted on corner sites, where a site is bounded by two or more public roads or where the road frontage is deemed by the planning authority to be excessively long and merits a second sign.

4.6.12 Canopies and Awnings

The erection of canopies constitutes a development requiring planning permission. The use of plastic canopies over windows will be discouraged. Where shading of a window display is required the traditional retractable awning is considered suitable. Scaffold Drops will require planning permission.

4.6.13 Security Screens

The use of metal security grills or shutters will be discouraged. Where it is suggested as essential to use such shutters, these should be open grilled, and should be affixed to the inside of the window, or preferably behind the display area. The installation of roller shutters is a development requiring the prior grant of planning permission. The use of the public footpath for security stanchions or roller shutter fixings is not acceptable.

4.6.14 Illumination and Spread of Light

If external illumination is proposed, documentation shall be provided that clearly shows that light or glare from such illumination will not adversely affect pedestrian and vehicular traffic or adjacent properties.

4.6.15 Taxi Stands and Hackney Bases

Should any taxi companies locate in the city the local authority will work with them in the identification of suitable locations for the provision of taxi ranks.

The establishment of a taxi rank or hackney base will not be permitted where it is likely to interfere with traffic flows or parking. Satisfactory off-street parking should be provided for hackneys when the vehicles are not in use. Planning assessments will address issues of location, pedestrian safety, traffic congestion, residential amenities and accessibility.

4.6.16 Telecommunication Antennae

Telecommunications antennae should be located so as to minimise any negative visual intrusion on

the surrounding area, especially on landscapes or streetscapes of a sensitive nature. The preferred location for telecommunication antennae is in industrial estates or areas zoned for industry or in areas already developed for utilities.

The use of tall buildings or other existing structures is always preferable to the construction of an independent antennae support structure. Support structures should be kept to the minimum height consistent with effective operation and should be monopole (or poles) rather than latticed or square structure, unless such structures have a clear and/or simple design or alternatively where it is judged by the Planning Authority to incorporate high sculptural design quality. Sharing of installations (antennae support structures) will be encouraged where it is deemed to lead to a reduction in the visual impact on the landscape or townscape. All applicants must satisfy the Local Authority that a reasonable effort to share the installations has been made. Where it is not possible to share a support structure the applicant should, where possible, share a site or site adjacent, so that antennae may be clustered.

As part of a planning application for antennae, operators are required to furnish a statement of compliance with the international Radiation Protection Association (IRPA) Guidelines or the equivalent European Pre-standard 50166-2 which has been conditioned by the licensing arrangements with the Department of Transport, Energy and Communications and to furnish evidence that an installation of the type proposed complies with the above guidelines. Such applications will also have regard to "Telecommunications Antennae and Support Structures – Guidelines for Local Authorities" Department of the Environment 1996.

4.6.17 Neighbourhood Centres

The most suitable locations for the provision of Neighbourhood Centres are identified on the objectives map. Neighbourhood Centres should be located along or just off key distributor routes, and readily accessible by a range of transport options including private car, public transport, walking and cycling. Neighbourhood Centres should not be located within areas that have restricted access to the surrounding streetscape, for example within cul-de-sac routes.

In principle, the appropriate uses at neighbourhood centres are as follows;

General stores, foodstores, newsagents, pharmacies, post offices, restaurants, take away, video/DVD rental, laundry facilities, hairdressers/barbers, public houses, dental / medical surgery, place of worship, credit union, crèche or childcare facilities. However it is important to have further consideration for issues relating to urban design and scale before such uses gain approval.

In order to preserve the local nature of the designated neighbourhood centres, a size threshold of 250 square metres should normally be applied to individual retail units in and a total of 1,500 square metres to the whole centre. Beyond this limit, shops are likely to serve beyond a purely local market and thus would be more suitably located within the city centre, or on the edge of the city centre if no central sites are available.

Future applications for retail or service outlets in Sligo's suburbs will generally not be considered unless they are within identified neighbourhood centres. However, a residential area may emerge over the plan period which has relatively poor accessibility to one of the identified Neighbourhood Centres. This would constitute exceptional circumstances, but if such a situation arises, it may be appropriate to allow development of a single convenience outlet to serve such an area. Conditions should ensure the outlet is restricted only to daily convenience items and is no larger than 100 sq.m. Sligo currently contains a significant amount of single local shops scattered within suburban residential developments. It is anticipated that as the identified neighbourhood centres gain in popularity, the commercial benefits of locating within them will be recognised. As a result, retail and service uses will gravitate towards locating within the designated areas.

An emphasis on quality urban design will be sought in neighbourhood centres. Buildings comprising the neighbourhood centre, or in the immediate vicinity, will generally be permitted to increase their heights to three or four storeys to reflect their prominence. A mix of uses will be encouraged at the centres, with residential and office uses promoted above first floor levels.

The development of neighbourhood centres should not precede the surrounding residential development they are intended to serve. They should be developed in accordance with the phasing sequence of development.

4.6.18 Use Mix

Where commercial developments are proposed, the planning authority may require appropriate mixes of use, in accordance with the uses of the surrounding area. In general, the planning authority will encourage a mix of uses on upper floors in shopping/neighbourhood centres.

4.6.19 The Evening Economy - Bars/Night-Clubs/Disco Bars/ Amusement Centres

In order to maintain an appropriate mix of uses and protect night-time amenities in Sligo, the local authority will, through the appropriate use of its development control powers, prevent an excessive concentration of pubs, bars, nightclubs and hot-food take-aways in a particular area and shall ensure that the intensity of any proposed use is in keeping with both the character of the area (i.e., residential, mixed use, etc.) and with adjoining businesses, when development proposals are being considered. The following issues shall be taken into account in the assessment of applications for the above uses.

- Noise at the boundaries will be carefully monitored and noise insulation measures will be required at the time of the submission of the planning application. Other effects of the development on the amenity of nearby residents must be assessed prior to the granting of planning permission, i.e. general disturbance, hours of operation, car parking, litter and fumes.
- New buildings must be designed to prevent noise escaping and with adequate provision for refuse disposal, storage and collection.
- The local authority should encourage a diversity of uses in the city centre throughout the day and evening.
- An important consideration for the local authority is the number and frequency of events in such facilities.
- The planning authority shall insist that proper litter control measures are in place prior to the opening of any premises.
- Facade design will be carefully controlled by the planning authority and in particular the type and degree of advertising signage and lighting. The design shall respect the character of the street and the buildings.

Locations for larger-scale night-time uses, such as mega-bars or nightclubs, should, wherever possible, have good access to public transport and taxis at closing time. An efficient and regular public transport service should be encouraged to serve the city centre late into the night and contributions to funding this can be sought from developers via appropriate conditions.

4.6.20 Fast Food Take-Aways

A proliferation of hot food take-aways will not be permitted in any particular area. Regard will be had to the impact of hot food take-aways on the amenities in the area, including noise, odour and litter. The Planning Authority may impose restrictions on opening hours of hot food take-aways as a condition of planning permission.

4.6.21 Open Air Concerts

In considering applications for open air concerts, the planning authority shall have due regard to the following: noise and general disturbance, hours of operation, traffic generation, traffic flow and car parking, accessibility, effect on residential amenities of the area, litter control, emergency access, ancillary uses such as fast food provisions and toilet facilities. The planning authority shall insist that proper provisions and arrangements in relation to these, and other relevant issues, have been made prior to the granting of permission.

In general, open air concerts will not be permitted within residential zones or in close proximity to religious institutions.

Applications that are generally in accordance with the stipulated requirements should be viewed in a positive light. The planning authority should weigh the above considerations against the commercial advantages of attracting greater numbers of visitors and tourists to Sligo, particularly in the evening. Less tangible benefits can be gained by such events in terms of popular perceptions of Sligo as a place to live, work or visit, particularly if such events gain regional or national media coverage.