REVIEW AND UPDATE OF THE SLIGO COUNTY RETAIL STRATEGY

SLIGO COUNTY RETAIL STRATEGY

2016 - 2023

PROJECT TEAM

FRANK MOYLAN
MIHAELA DAVIDESCU

McCutcheon Halley Walsh
CHARTERED PLANNING CONSULTANTS

HARRY WALSH
COLM MCLOUGHLIN
SERENA O'CONNOR
DAVID FREELAND

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EXECUTIVE SUMMARY

The *Sligo County Retail Strategy 2016-2023* has been prepared for Sligo County Council in accordance with the requirements of the *Retail Planning Guidelines 2012*. In compiling this Retail Strategy, due regard has been had to the most up-to-date information regarding population growth projections, the prevailing economic outlook and retail sales information.

The over-arching aim of the Retail Strategy for County Sligo is to ensure that future retail development in the County is accommodated in a manner that is efficient, equitable and sustainable.

Analysis of recent changes and forecasts for the retail sector points towards a gradual improvement in the markets over the lifetime of the Strategy and coupled with *Regional Planning Guidelines* population targets this suggests a more positive outlook for the retail sector in Sligo. However, this growth must be considered in the context of the extent of available floorspace and the need to focus new retail development into existing urban centres. The retail sector is one of the most dynamic sectors in the economy and is particularly susceptible to wider economic change and changing shopping habits.

This Strategy takes a fresh view of retail development within and impacting the County providing advice regarding the broad quantum, scale and type of retail development required in the County. A comprehensive review of retailing floorspace within the County has informed the Strategy. The opportunity to proactively resolve issues highlighted within the previous Retail Strategy has been severely constrained given the lack of activity in the construction sector and the scarcity of available funding.

This Strategy will be used to provide a firm basis on which to inform future retail planning policy with the aim of maintaining, enhancing and developing the retail offering of Sligo County.

1.0 INTRODUCTION

In October 2015 McCutcheon Halley Walsh Chartered Planning Consultants were commissioned by Sligo County Council to review and update the *Sligo City and County Joint Retail Strategy 2010-2016* and to prepare a new Retail Strategy for the City and County, as part of the preparation of the *Draft Sligo County Development Plan 2017-2023* and the future replacement of the *Sligo and Environs Development Plan 2010-2016* with a local area plan. It is envisaged that the new Retail Strategy will inform the policies of the Plans in respect of retail development and ensure that such policies are based on the most up-to-date information. Detailed assessment relating to Sligo City will be contained in a separate Strategy document, which will be made available during preparation of the new Local Area Plan for Sligo City and environs.

The *Retail Planning Guidelines for Planning Authorities* (2012), issued by the Department of the Environment, Community and Local Government (DoECLG), require Local Authorities to prepare retail strategies and retail policies for their areas and to incorporate these where appropriate into their respective statutory plans.

This Strategy takes a fresh view of retail development within and impacting the County providing advice regarding the broad quantum, scale and type of retail development required in both the County and in Sligo City. The Strategy involves both desk-top and fieldwork surveys including a review of existing published documents, studies, plans, retail legislation, government policy, local studies, analysis of current retail trends, both internationally and locally and a review of best practice in the sector, as applicable in both a national and local context. Field surveys comprising the availability and quality of retail floorspace and environments and the extent of shopping catchment areas were also undertaken.

This Strategy examines in detail the ‘key support towns’ in County Sligo, namely Ballymote, Tubbercurry and Enniscrone. Only high level assessment of Sligo City and environs is provided. Smaller towns and villages are also examined in order to provide an understanding of the role and function of such towns and villages and to provide a comprehensive view of retailing within the County.

Since the previous Retail Strategy was completed in November 2009, it is generally perceived that expansion of population and retailing will have remained unaltered for the most part and that there will have been further consolidation of retailing within the county. A number of projects envisaged for the City of Sligo within the 2009 Retail Strategy, including the Wine Street Car Park redevelopment and the Green Fort project have not been realised. These and other projects were hoped to provide a catalytic effect for retail development within the City and impacting beyond the County. Financial difficulties and obstacles in getting these projects up and running is reflective of the wider retailing situation experienced throughout the County and City since the previous Strategy in 2009. The County is particularly susceptible to fluctuations in currency values given its proximity to the border with Northern Ireland and improvements to national routes, including the N16. During the lifetime of the previous Strategy, currency values have reversed and Sligo now finds itself in a more positive position in attracting retail custom from the northern jurisdiction. While we await the publication of the new National Planning Framework replacing the National Spatial Strategy, we must continue to prepare this Strategy against the backdrop of Sligo remaining as the primary growth driver for the County and wider region.

The opportunity to proactively resolve issues highlighted within the previous Retail Strategy has been severely constrained given the lack of activity in the construction sector and the scarcity of available funding. Whilst this Retail Strategy is primarily focused on the formulation of policy to control the geographic characteristics of retail operations, the Strategy must consider this in light of altering shopping habits and modern shopping demands.

The strategy also takes account of the effects of development and retail policy in neighbouring counties, some of which offer a competing product, while others may be seen as complementing Sligo’s retail offer.
The anticipated pattern of population growth in Sligo City and County has been set in the *Border Regional Planning Guidelines 2010*. This responds to Sligo’s designation as Gateway City and growth area in the *National Spatial Strategy*. Across the County, the population growth target is established at 71,851 in 2016 and 77,350 in 2022. Despite release of *Regional Population Projections* by the Central Statistics Office (CSO) in December 2013[1] offering alternative population scenarios for the border and western regions, targets set within the *Regional Planning Guidelines* remain unchanged.

1 CSO (2013) *Regional Population Projections 2016-2031*. Accessible at http://www.cso.ie/en/releasesandpublications/er/rpp/regionalpopulationprojections2016-2031/

The settlement hierarchy for the County detailed in the *Sligo County Development Plan 2011-2017* and in the *Draft Sligo County Development Plan 2017-2023*, comprises: -

- Sligo Gateway City – growth driver in the County and wider region;
- Key Support Towns serving different rural areas of the County – the towns of Ballymote (south), Tubbercurry (south-west) and Enniscrone (west) and;
- Sligo Sub - region – including settlements within commuting distance of Sligo City such as the villages of Collooney, Ballysadare, Strandhill and Grange.

In light of the anticipated population targets, the new County Development Plan for Sligo will be expected to put in place policies to deal with pressures for additional residential, commercial and retail development.

The overarching aim of the Strategy is to ensure that future retail development in the County is accommodated in a manner that is efficient, equitable and sustainable. The primary purpose of the Retail Strategy is to implement the objectives of the *Retail Planning Guidelines 2012*.

1.1 RETAIL PLANNING CONTEXT

The retail sector is Ireland's largest employer, with over 250,000 people employed representing 14.5% of Ireland's total workforce according to Retail Ireland (2013)[2]. Consequently, planning policies regarding retailing have significant wider social and economic effects.

Sligo City Centre's ongoing development as the main regional centre for the northwest is supported in the policy context, at national, regional and local levels. To align with sustainable development policies, appropriate levels of retailing are also supported in a number of other key centres throughout the County, while the Retail Planning Guideline place Sligo on the second tier of the national retail hierarchy alongside Letterkenny and Ballina.

As identified within the previous 2009 Retail Strategy for Sligo, the primacy of Sligo City has produced a heavy concentration of retail facilities in the city itself with significant pressure to develop peripheral lands and reuse existing premises for non-bulky comparison retailing. Policy P-RP-5 of the County Development Plan 2011-2017 supports concentrating retailing and service outlets within the central area of a town or village, but this can often restrict the development of the retailing function of the centre, given the constraints in site size and assembly.

National, regional and local planning policy continue to promote Sligo Gateway City, with supporting policies seeking to stem the leakage of expenditure from the County while also attracting increased levels of spending from outside. Altering shopping habits play a major impact on the geography of retailing. Patterns suggest a consolidation of convenience retailing into larger stores designed to fulfil both the daily and weekly shopping requirements of the catchment. Local shops become less viable resulting in a growing reliance to use the private motor vehicle to visit the shop and a resultant traffic and parking increase. The main convenience retailers in Ireland have strategically identified gaps in the market and as a result the larger urban centres are no longer the sole centre for the 'weekly shop'. Smaller towns can now fulfil the convenience requirement once held only by the largest of our urban centres. This has largely resulted in a widening base and geographic spread of complementary retail services, while also reducing the need for customers to travel longer distances to undertake weekly or fortnightly shopping.

In contrast, there has been a growing willingness to undertake lengthier journeys to fulfil comparison shopping demands resulting in consolidation of comparison outlets into distinct centres. Impressive shopping environments attract the attention of national and international brands. Retailing remains the most popular reason for visiting an urban centre.

Policies to further strengthen the retailing role and focus of the City Centre need to be brought forward, including identifying whether the extent of retailing previously envisaged for the city centre is reasonable or warranted in light of changing retail patterns and demographics. While wider market dynamics may ultimately dictate the extent of retailing warranted for the City, an evidential approach of the current requirement must be undertaken to ensure this is based on the best available data.

The recovery of the Irish economy is gathering momentum, but a significant number of challenges remain. It will be vital that planning for a recovery is undertaken in a proactive and creative manner, in order to address issues that have manifested over the recessionary period and to ensure retail services are delivered in a timely and efficient manner and in the right places.

2 Retail Ireland (2013) *About Us: Introduction*. Accessible at http://www.retailireland.ie/Sectors/RI/RI.nsf/vPages/About_Retail_Ireland~introduction?OpenDocument

1.2 CONSULTATION

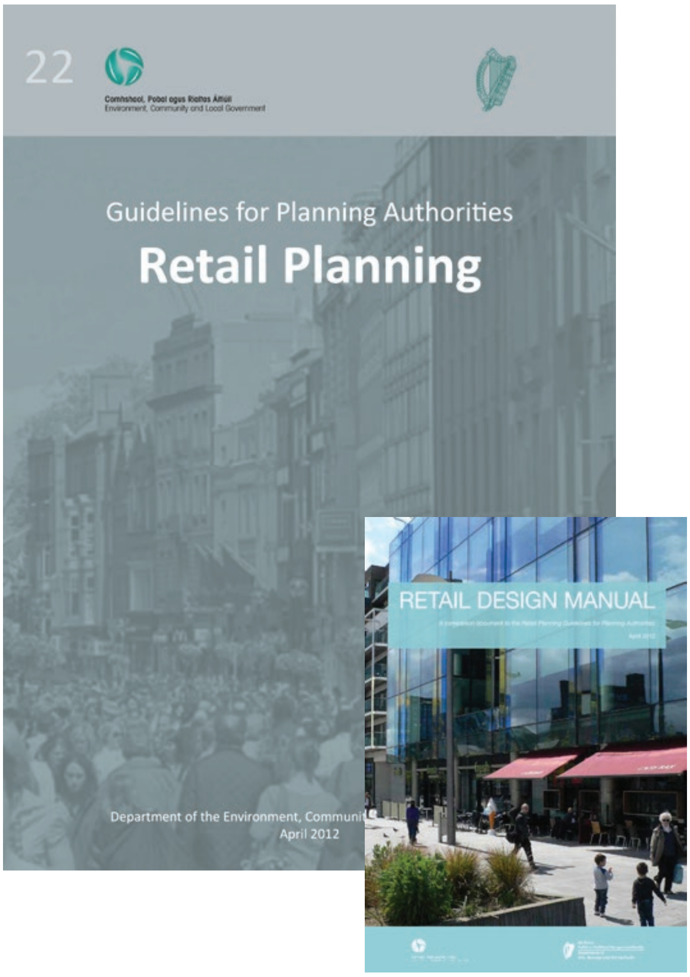
There is no legislative requirement for consultation to be carried out with stakeholders and the general public in preparing the Retail Strategy. Nevertheless, to enable a more comprehensive review of retailing in the County, and to understand broader issues effecting retailing in the County, a targeted group of interest groups were engaged as part of this project. Organisations such as Chambers of Commerce, neighbouring Local Authorities and local Community Development Associations were contacted by a mailshot offering a chance to input to the review and update of the Strategy. Responses were received from Local Authorities, Chambers of Commerce and Development Associations. All matters raised during consultation have been considered as part of the review and update of the Retail Strategy. All stakeholders will have an opportunity to engage in the future direction of retailing within the County during the public statutory consultation on the *Draft Sligo County Development Plan 2017-2023*.

2.0 POLICY REVIEW

2.1 RETAIL PLANNING GUIDELINES 2012

The *Retail Planning Guidelines* published by the Department of the Environment, Community and Local Government in April 2012, replace the previous *Retail Planning Guidelines* published in 2005. The purpose of the updated *Retail Planning Guidelines* is to promote sustainable retail planning, by assisting Planning Authorities in addressing retail development, in preparing Development Plans and in assessing applications for retail developments. They also guide retailers and developers in formulating development proposals.

The retail planning environment has and is changing nationally, having regard to the continued rollout of measures contained within the *Retail Planning Guidelines 2012*. The current 2012 Guidelines are less prescriptive than the previous Guidelines with more of a focus on the creation of sustainable centres, as opposed to retail destinations only and with the accompanying manual having more of a focus on urban design.



The 2012 Guidelines and accompanying *Retail Design Manual* have increased standards relating to design, access and mobility, signage, landscaping, the creation of place, and town centre integration, including the seeking of a mix of uses. The Guidelines emphasise that enhancing the vitality and viability of town centres in all their functions through sequential development is an overarching objective in retail planning. The Guidelines include a presumption against large out-of-town retail centres, in particular those adjacent to or close to existing, new or planned national roads / motorways.

The Guidelines have five key policy objectives, namely: -

1. Ensuring that retail development is plan-led;
2. Promoting city/town centre vitality through a sequential approach to development;
3. Securing competitiveness in the retail sector by actively enabling good-quality development proposals to come forward in suitable locations;
4. Facilitating a shift towards increased access to retailing by public transport, cycling and walking in accordance with the *Smarter Travel Strategy*; and
5. Delivering quality urban design outcomes.

The *Guidelines* emphasise that in order to ensure proper planning and sustainable development, retail development and activity must follow the settlement hierarchy of the State, including the various Gateway and Hub town locations identified in the *NSS 2002-2020*, the *Regional Planning Guidelines* and the Core Strategies of Development Plans. The Guidelines also provide specific guidance for the content and role of Development Plans. It is stated, *inter alia*, that: -

- Development Plans must set out clear evidence-based policies and objectives in relation to retailing in a discrete section of the Plan;
- Joint or multi-authority retail strategies, where required, will guide the preparation of retail policies and objectives in the relevant Development Plans;
- The need for any additional retail warehousing should be carefully assessed in view of the significant levels of recent provision and potential impacts on vitality and viability of city and town centres;
- At a minimum, Development Plans must: -
    - State the elements of their settlement hierarchy in line with the relevant regional planning guidelines and their core strategy;
    - Outline the level and form of retailing activity appropriate to the various components of the

settlement hierarchy in that core strategy;

- Define, by way of a map, the boundaries of the core shopping areas of city and town centres and also location of any district centres;
- Include a broad assessment (square metres) of the requirement for additional retail floorspace only for those plans in the areas covered by a joint or multi-authority retail strategy;
- Set out strategic guidance on the location and scale of retail development to support the settlement hierarchy, including where appropriate identifying opportunity sites which are suitable and available and which match the future retailing needs of the area;
- Identify sites which can accommodate the needs of modern retail formats in a way that maintains the essential character of the shopping area;
- Include objectives to support action initiatives in city and town centres, such as mobility management measures that both improve accessibility of retail areas, while aiming to develop a pedestrian- and cyclist-friendly urban environment and vibrant street life;
- Public realm interventions aimed at improving the retailing experience through high-quality civic design, provision of attractive street furnishing, lighting and effective street cleaning/ business improvement district type initiatives; and
- Identify relevant development management criteria for the assessment of retail developments in accordance with these guidelines.

Some other key guidance set out in the *Retail Planning Guidelines*, as relevant to Sligo County, includes the following: -

- The second tier of the Retail Hierarchy includes regional centres such as Sligo. The **Regional level** of retail provision focuses upon the tier of Gateways, Hub Towns and other large settlements and provides for high-level regional retailing functions in localities including Athlone, Tullamore and Mullingar, Ballina/Castlebar, Cavan, Tuam and Letterkenny[3];
- The fourth tier of the national retail hierarchy, 'Small Towns and Rural Areas' comprises 75 towns in the 1,500 to 5,000 population category, which would technically include Tubbercurry, Ballymote and Strandhill. Without naming specific towns, the Guidelines outline that the 75 towns in the fourth tier provide basic convenience shopping, either in small supermarkets or convenience shops and in some cases, also provide comparison shopping, for example small-scale hardware, retail pharmacies and clothes shops[4];
- 3,000 sq.m. net cap on convenience retail floorspace within a new unit or unit proposed to be extended;
- 6,000 sq.m. gross cap on a single retail warehouse floorspace. The need for any additional retail warehousing should be carefully assessed in view of the significant levels of recent provision and potential impacts on vitality and viability of city and town centres.

Whilst the Guidelines have been prepared with an onus on guiding retail development in complex urban environments, they do have pertinence for rural areas including small villages and local shops. The Guidelines support the inclusion of specific planning policy with regard to these lower tier shopping facilities.

Retail Design Manual (2012)

One of the key messages of the *Retail Planning Guidelines* is that a high level of design quality can make an important contribution to the future health of city and town centres. The Guidelines are therefore accompanied by a *Retail Design Manual,* which sets out the key principles of urban design, which should form the framework for policies to promote quality design in Development Plans and Local Area Plans. The Manual sets out key principles of urban design under a number of headings, for example, design, context and character, access and connectivity, density and mixed use and utilises case studies to demonstrate the application of the principles. The Manual has pertinence in creating attractive town centres, and will be particularly relevant in any upgrade works to Sligo's primary shopping parades

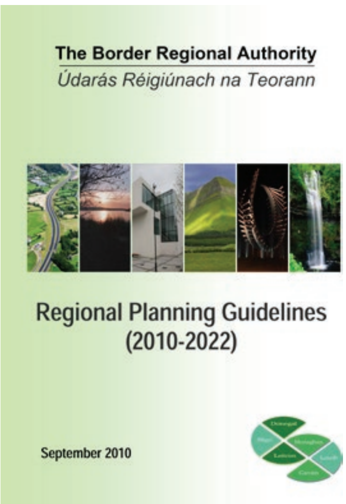
3 Under the previous Retail Planning Guidelines 2005, Sligo was on the third tier of the National Retail Hierarchy along with the neighbouring towns of Ballina, Castlebar and Letterkenny. Under the 2012 Strategy, Sligo remains on the same tier as these neighbouring urban centres and preparation of the Strategy has been undertaken considerate of this hierarchy.

4 Review of the CSO census data for 2011, reveals that 114 towns are within the 1,500 to 5,000 population bracket, so it unclear which towns are in fact within the fourth tier, as the Guidelines do not expand on this matter. Based on the survey undertaken in this Strategy, both Tubbercurry and Ballymote would comfortably fall into the fourth tier, while the retail base of Strandhill would suggest it does not fit.

2.2 NATIONAL SPATIAL STRATEGY 2002-2020

The *National Spatial Strategy* (NSS) is a twenty-year strategic planning framework, whose aim is to achieve more balanced social, economic and physical development and population growth between the regions. The NSS introduced the concepts of gateways and hubs, with Sligo City identified as a Gateway for the western Border Region. Tubbercurry and Collooney are identified as performing regionally strategic, residential, employment, administrative, commercial and service functions. Ballymote is noted as an Urban Centre (with population of circa 1,000 persons). It is expected that a *National Planning Framework* (NPF) will replace the *National Spatial Strategy* in 2016[5]. The NPF will influence regional strategies and county development plans as it will be the central planning policy document for the Country. The NPF will identify the national infrastructure priorities to address the strategic requirements above, including, *inter alia*, the provision of retail facilities.

2.3 REGIONAL PLANNING GUIDELINES FOR THE BORDER REGION 2010



The *Border Regional Planning Guidelines, 2010* formulate public policy for the region covering Sligo, Leitrim, Donegal, Monaghan, Cavan and Louth, integrating land-use, transport, economic growth, investment and the environment. The Guidelines are set within the context and framework of the NSS, and highlight that the retail sector is "*a significant sector within the Region that will experience cycles due to currency differentials, but with improved diversity through the development of retailing in key centres, there is potential for more sustainable jobs*" (p. 68).

The *Regional Planning Guidelines* highlighted that the retail sector had grown significantly over the period 1998-2008, representing 14.7% of those employed in the Border Region as a whole. It would be expected that numbers employed in retailing will have decreased since a peak in 2008.

The Guidelines outline that in order to address retail leakage to Northern Ireland, the retail sector in the Border Region will require a regional approach, possibly by the development of a Regional Retail Strategy. The *Regional Planning Guidelines* include the following policies with respect to the retail sector: -

> *"**ESP14** Direct new retail floor space into Gateways and Hubs and those centres selected for additional population growth. Future provision of significant retail developments within the Border Region should be consistent with the policies and recommendations of the DEHLG Retail Planning Guidelines for Planning Authorities*
>
> ***ESP15** Develop a Regional Retail Planning Strategy in accordance with National Retail Planning Guidelines" (p. 83).*

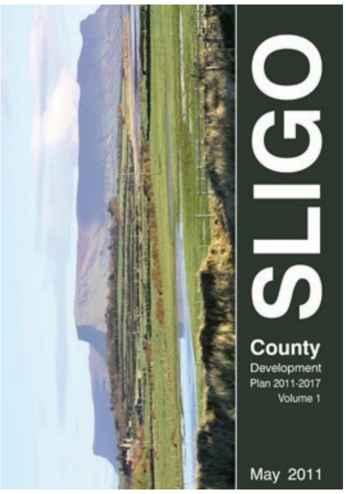
The *Regional Planning Guidelines* are expected to be replaced by Regional Spatial and Economic Strategies in 2016 following the publication of the National Planning Framework. A Regional Retail Planning Strategy should remain an important policy objective as this should provide a mechanism for more strategic distributing of retail development across the region in a balanced manner and aligned to wider hierarchical parameters.

2.4 SLIGO COUNTY DEVELOPMENT PLAN 2011-2017

The *Sligo County Development Plan 2011-2017* omitted the Sligo City and Environs area, which is covered by the *Sligo and Environs Development Plan 2010-2016*.

Population forecasts are a central component of retail capacity studies. The County Plan noted that the population of the Sligo Borough was stagnant, while that of the Gate-

5 DoECLG (2015) *Towards a National Planning Framework: A Roadmap for the Delivery of the National Planning Framework 2016*. December 2015.



way's immediate commuter belt was rising slowly to 2006.

The Plan outlined that there is a continued need for focused investment to help develop the Gateway and consolidate the towns in the County as local economic engines. The Plan supported Sligo's growth into a city with the critical mass necessary to sustain the County and the North-Western Region into the future.

Strategic Aims

The County Development Plan set out 11 Strategic Aims, broadly outlining the Council's vision for the spatial development of the County over the period 2011 to 2017. These overarching objectives generally supported the growth of the City and its environs and the focusing of development in key settlements, while aiming to restrict the sprawl of settlements. Consolidation of key support towns and ensuring that they are provided with an appropriate range of services including retail facilities were included under the Strategic Aims of the Plan. The principal direction for each of the tiers on the County Settlement Hierarchy was incorporated into the Strategic Aims, as well as noting key infrastructure projects which were supported under the Plan.

Core Strategy

A number of settlement strategy options were considered under the Plan with the final Strategy recognising the role of the Gateway City of Sligo as a key driver of social and economic development in the County and in the north-west. The Plan's Core Strategy supported growth of the Gateway towards a population of 34,000 by 2017. The overall settlement strategy for County Sligo was based on driving growth into the city and the following principal requirements: -

- Encourage growth in the Gateway and Key Support Towns;
- Manage growth in the Gateway's principal and secondary satellites;
- Encourage population growth in the Key Support Towns;
- Support and facilitate appropriate population growth in smaller settlements.

Retail Policy

The Plan recognised that most new retail floorspace will be provided within Sligo City and environs. The Plan acknowledged limited prospects of growth and expansion in the rural parts of the County, where the key thrust of Development Plan policy was to maintain and enhance the existing retail environment to serve and benefit local communities. The Development Plan included a total of 12 retail planning policies, which were very much focussed on funnelling retailing into town and village centres, while aiming to restrict development in more peripheral areas. Retail outlets outside of the City and environs with a cumulative net floorspace in excess of 500 square metres, were discouraged in the Plan. Other retail planning policies supported reuse of existing vacant premises, maintaining of traditional shopfronts and acknowledgement of the need to create compact and sustainable retail cores.

Retail Objectives

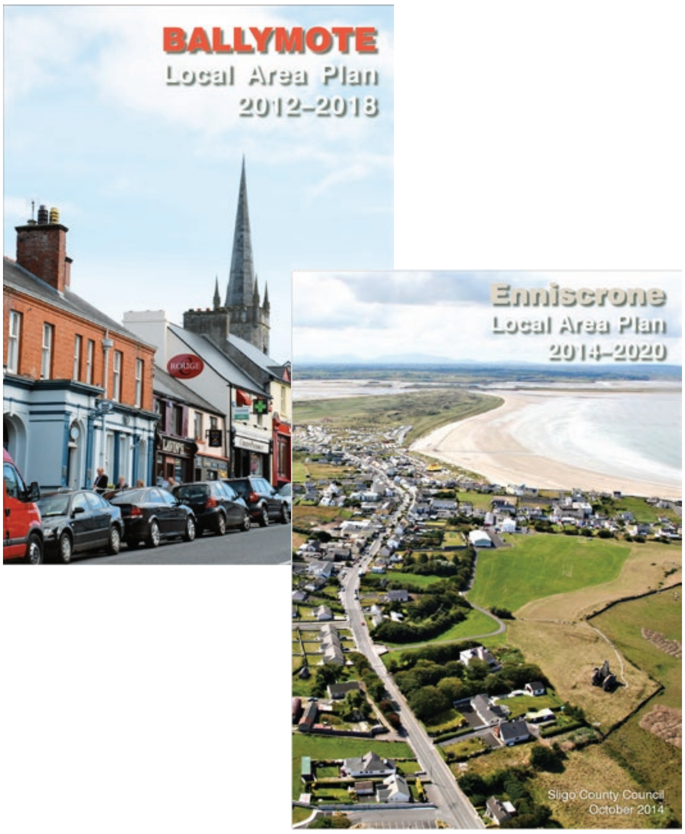
Within the County Development Plan two specific retail objectives were supported, one of which aimed to facilitate the provision of an additional supermarket in Ballymote. Proliferation of retail warehousing outside the Gateway area was restricted, as was further retail warehousing in Collooney and Grange.

2.5 OTHER REFERENCE DOCUMENTS

The following list includes a host of other Guidelines and Plans from various bodies which have pertinence for this study and shape the recommendations of the Strategy.

- Sligo County Council Local Area Plans (including any Local Area Plans commenced or under review);
    - Draft Tobercurry 2015-2021;
    - Charlestown-Bellaghy 2010-2016;
    - Ballymote 2012-2018;
    - Enniscrone 2014-2020.
- Investing for Growth and Jobs: Infrastructure Investment Priorities 2010 – 2016;
- Local Government and Regional Government Reform;
- Smarter Travel – A Sustainable Transport Future; A New Transport Policy for Ireland 2009-2020;

- Design Manual for Urban Roads and Streets (2013);
- Regional Strategic Framework for the Irish Central Border Area 2013-2027;
- Urban Regeneration & Housing Act 2015;
- Retail Ireland Town Centre Policy 2012;
- Retail Excellence Ireland A Strategy for Rural Retail 2015;
- Shaping the Future: Case Studies in Adaptation and Reuse in Historic Urban Environments.

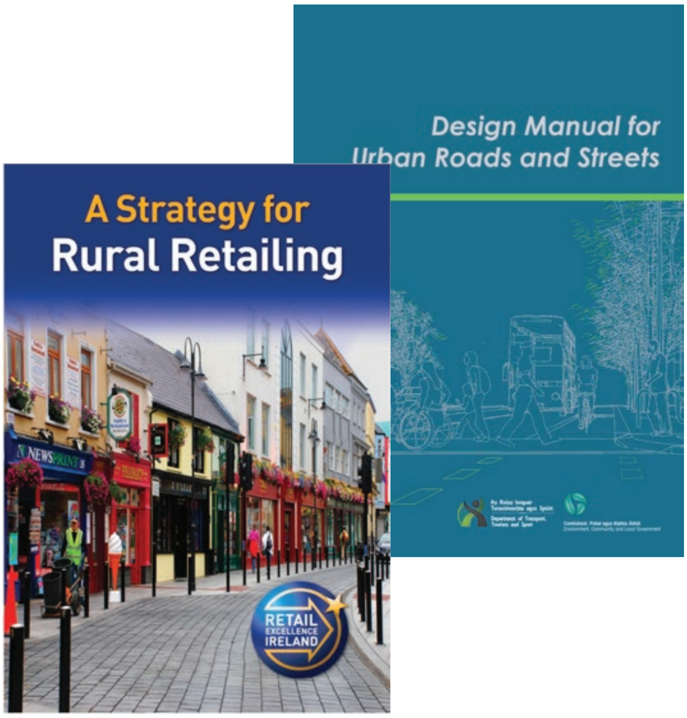


2.6 POLICY SUMMARY

While the broad policy context at national, regional and local levels has not altered significantly since preparation of the previous Retail Strategy, the retail context has changed drastically primarily as a consequence of wider economic factors. Concentration of retailing into Sligo city, effectively viewing the city as performing a higher retailing function than that provided for in the Retail Planning Guidelines may have been overambitious. The planning system must support competitiveness in the retail sector, but this must be undertaken for the benefit of the consumer. At the heart of the planning process must be the need to ensure a sustainable mix of units with ease of access for consumers, relative to the order of the goods.

Planning policy at a local level contained in the Sligo & Environs Plan 2010 and Sligo County Development Plan 2011 supports the City Centre's ongoing expansion for retail development as the main regional centre. While the city centre should remain the primary focus of retailing in the County, a more measured approach to this strategic retail policy will be needed to counteract high vacancy levels in the city. Against this backdrop there needs to be an increased focus on maintaining the existing level of retailing, as opposed to focussing on major expansion of the retail floorspace.

The Council will need to implement the measures outlined in national retail policy and continue to proactively work with stakeholders to provide a quality retail environment and opportunities, having regard to the requirements and views of the various sectors in the retail market whether on the supply or demand side. The Council should look at policy measures to improve the performance of the retail sector in the County considerate of the market context and regional context.



3.0 CENTRE APPRAISALS

Retailing and the provision of retail services is one of the primary functions of any urban settlement. The *Retail Planning Guidelines* emphasise the importance of setting retailing activities within an established settlement hierarchy. Each of the larger settlements within County Sligo has been assigned a position within both the settlement hierarchy and the retail hierarchy of the County (see section 7.1.1). This position, in both cases, reflects both its size and role within the County, and outlines the functions which are assigned to it. This follows on from national and regional policy, and that currently being formalised as part of the *Draft County Development Plan* Core Strategy.

It is essential to also identify the opportunities and constraints for retailing within the recognised centres. A key message of the *Retail Planning Guidelines* is the enhancement of the vitality and viability of city and town centres in all their functions through sequential development. To apply this to Sligo, the *Retail Planning Guidelines* outline that this should involve an examination of the existing centres against criteria, which contribute to the vitality and vibrancy of a centre: -

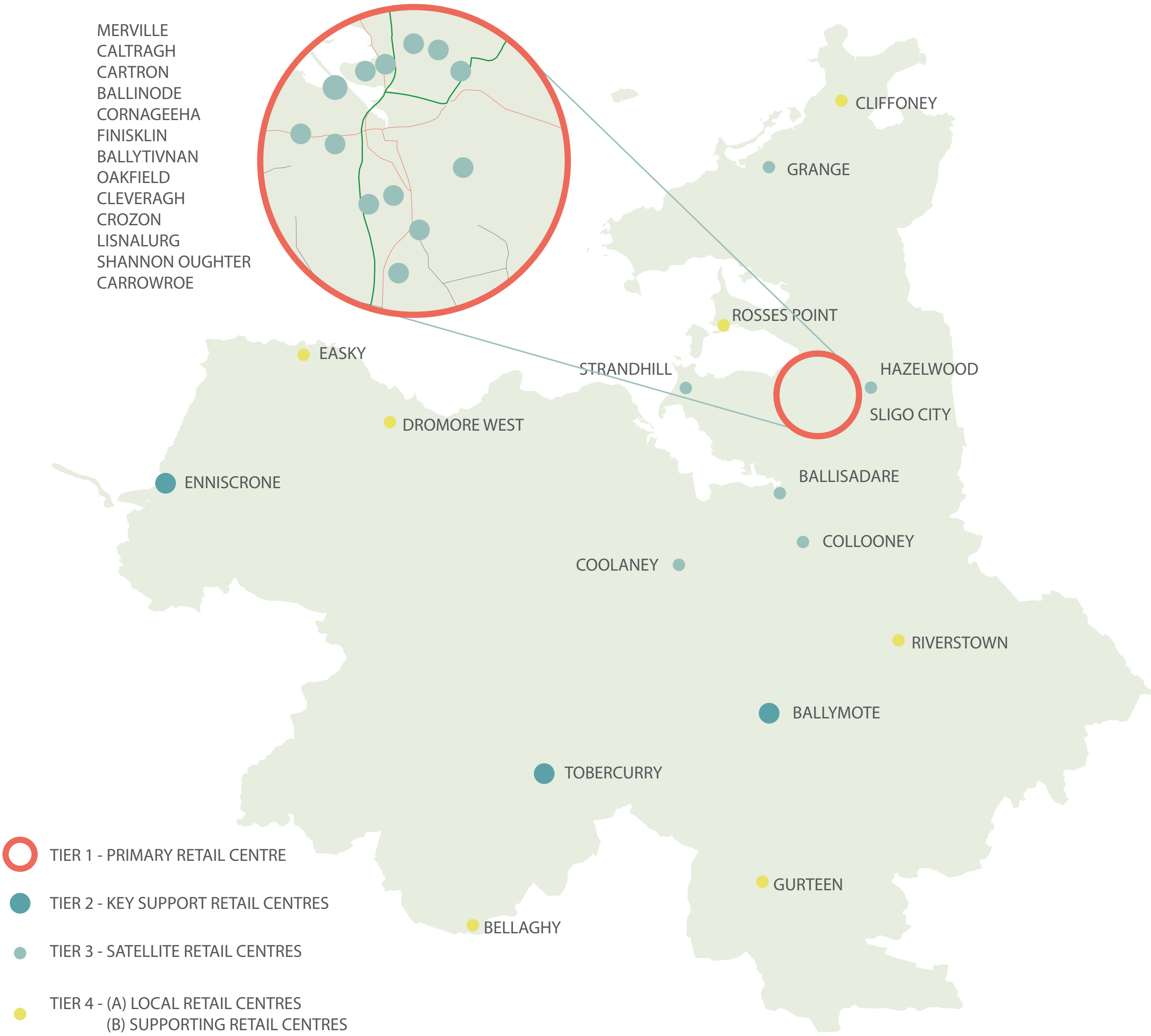


Figure 3.1 - Retail Hierarchy in County Sligo

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

The following appraisals have been undertaken to evaluate the retail functions of the main urban settlements of County Sligo, assessing the attraction, accessibility and amenity of each centre with the aim of making evidence-based recommendations regarding future actions for their improvement. These actions will be formulated to reinforce the existing retail offering within each of the towns, and where possible expand it in a sustainable manner, through the suggestion of issues to be addressed or measures to be continued or extended.

In order to allow for comparative assessment of data with previous Retail Strategy data, we have attempted to undertake the Strategy survey to align as closely as possible and to the best of our knowledge with the methodology employed in the Council's previous Retail Strategy surveys. Detailed assessment of floor area, retail mix and occupancy levels has been undertaken for the entire County, providing a comprehensive overview of the current status of retailing in the County.

3.1 SLIGO CITY

More detailed assessment of Sligo City and environs will be provided in the forthcoming Sligo City Retail Strategy. Sligo city is placed in the second tier of the national retail hierarchy, serving as a 'regional' retail centre for the western part of the Border region. The city occupies a strategic location between Sligo Bay and Lough Gill on a crossing point over the River Garavogue. The population of Sligo city amounted to 19,452 persons in 2011, but this figure has been largely consistent in recent decades, including an increase of only 50 persons recorded over the 2006-2011 period. The 'functional Gateway' population is estimated at just below 60,000 persons[6]. Research was undertaken in 2012 on behalf of Retail Excellence Ireland to rank 100 towns and cities in Ireland based on visitor and stakeholder perceptions of a variety of issues including retail mix, streetscape, parking, safety and security, attractions, events and image[7]. Sligo was placed in the lower quartile based on opinion collated, highlighting the opportunities available to further improve the city centre as a retail destination. The city performs a growing importance as a tourist destination with Fáilte Ireland recording increased numbers of international tourists to the area and anecdotal evidence of increased visitors from elsewhere in Ireland.

Recent studies relating to the occupancy of retail units in town centres, indicate that Sligo city has one of the highest levels of commercial and retail vacancy[8]. Geoview reports provide a geographical overview of commercial building stock and corresponding vacancy rates in Ireland since 2013. The latest Geoview report identifies Sligo County as having recorded the highest vacancy rate (16.4%) in the last quarter of 2015, albeit this rate did represent a slight decrease of 0.4% on Quarter 2 20159. According to data relating to quarter 2 of 2015, Sligo city had the 12th highest urban vacancy rate (21%) of 101 locations (79 towns and 22 Dublin postal addresses) in the country10.

6 The 'functional Gateway' population has been calculated as part of the Sligo Gateway Report for the Border, Midlands and Western Regional Assembly (May 2013) and consists of the population for Sligo urban area and all surrounding Electoral Divisions where more than 20% of the resident population in employment commute to the urban core of Sligo city (as derived from CSO POWSCAR data, 2011).
7 Sunday Independent supplement (October 2012) The 100 Best Towns and Cities in Ireland. Accessible at http://www.retailexcellence.ie/images/uploads/downloads/Sunday_Independent_Supplement_-_Best100_Towns__Cities.pdf
8 CBRE (2015) Ireland Retail Marketview, Q3 2015 Accessible at http://news.cbre.ie/high-street-retail-vacancy-rates-improve-as-occupier-activity-strengthens
9 GeoDirectory and DKM Economic Consultants (2016) *GeoView Q4 2015 - Quarterly Commercial Vacancy Rates Report*, Issue 10 January 2016. Accessible at http://dkm.ie/en/news/geoview_q4_2015_quarterly_commercial_vacancy_rates_report
10 GeoDirectory and DKM Economic Consultants (2015) *GeoView Q2 2015 - Quarterly Commercial Vacancy Rates Report*, Issue 9 November 2015. Accessible at http://dkm.ie/en/news/geoview_q2_2015_quarterly_commercial_vacancy_rates_report

Attractions

Sligo continues to serve a sprawling retail catchment, although in recent years the extent of retail expansion in the city has largely remained unaltered, in parallel with the situation in all construction sectors. The primary retail attractions noted in the previous Retail Strategy dating from 2009 remain, with the city comprising a network of retailing streets, two shopping centres and two retail parks. The commercial and finance core of the town remains centred around Stephen Street, while there has been increased clustering of entertainment uses such as pubs, restaurants and cafes along the Garavogue boardwalks and lanes leading towards this area. The bulk of the retail core is located on the southern side of the Garavogue River.

Convenience Shopping

Large-scale food retailers are primarily concentrated on the eastern edge of the city centre, including Dunnes Stores, Lidl and Aldi. Tesco supermarket is located on O'Connell Street and backing onto Wine Street car park. The city centre is also occupied by a range of specialist convenience stores, generally small to medium size in scale, including various butchers, bakers, fishmongers, greengrocers, food and drink specialists, health food specialists and international food products. See Table 3.1 for convenience shopping floorspace figures in Sligo City in 2015 and 2008.

Based on the Census of Ireland 2011 Small Areas data, it is estimated that there are approximately 30,000 persons within a 10-minute drive of Sligo city centre.

Comparison Shopping

Our survey of businesses in the Sligo city centre area includes a higher number of business premises than that identified in the 2008 survey. Since 2008, the number of comparison stores in Sligo has dropped, although the level of comparison floorspace has increased. This is most likely accounted for by an element of bulky goods retailers being used for convenience sales, as provided for in the Retail Planning Guidelines (20% rule). The number of bulky goods retailers has also been in decline in the city, with increased vacancies in Sligo Retail Park, although the floorspace provision has increased.

Despite high levels of vacancy, the city is currently provided with 3.9 sq.m. of occupied retail and related floorspace per person in the city, which is well above the average for other Sligo County census settlements (1.9 sq.m. per person). This is indicative of the service function the city provides to an extensive hinterland. See Table 3.1 for comparison shopping floorspace figures in Sligo City in 2015 and 2008.

Accessibility

Sligo has long been an important confluence point for various transport modes. The City is distant from the major urban centres on the island but is served by a range of transport infrastructures including a railway connection leading southeast towards the midlands and Dublin. The N4 national route which feeds into the M4 motorway east of Mullingar, provides a road connection to Dublin and this route is subject of proposals for upgrading[11]. The N17 national road branches off the N4 road just east of Collooney and this leads southwards along the Atlantic seaboard towards Galway. Each of the N15, N16 and N59 national roads merge in Sligo city and these transport arteries allow for easy access moving northwards towards Donegal, east towards Belfast and Enniskillen and west

11 Including proposed offline upgrade scheme extending from Collooney to a tie-in point with the existing N4 at Castlebaldwin. The CPO and EIS for the scheme were published in December 2013. An Oral Hearing was held on 28th April 2014 and the decision from An Bord Pleanála is awaited.

Table 3.1 Sligo City Retail Floorspace 2015 & 2008 (sq.m. net)

	Sligo City 2015			Sligo City 2008		
	Sq.M.	Number	No. as %	Sq.M.	Number	No. as %
Convenience	9,879	44	7.0	8,361	52	9.2
All Comparison	55,690	195	31.1	48,874	217	38.3
Mainstream Comparison	28,551	167	26.6	25,010	178	31.4
Bulky Comparison	27,139	28	4.5	23,864	39	6.9
Retail Services	11,084	243	38.8	13,502	219	38.7
Vacant	11,882	145	23.1	10,959	78	13.8
Total	88,535	627	100.0	81,966	566	100

towards Ballina and Mayo. This results in the city being reasonably well-connected by road infrastructures. Works to widen Hughes' Bridge in the city centre were completed in August 2015.

There are also other upgrade works being undertaken to improve accessibility including a feasibility study identifying the emerging preferred route for the N16 from the Leitrim boundary to the N15. The detailed design of the new Eastern Garavogue Bridge and Approach Roads project has been completed. The project is expected to significantly ease traffic congestion in the city centre, while also reducing journey times for cyclists, pedestrians and motorists.

A bus station is situated in the city centre and provides regular services to all Key Support Towns and cities outside the County. Local buses services (S1 and S2) operate within the city centre and the neighbouring satellites of Strandhill and Rosses Point.

Sligo's (Mac Diarmada) railway station is at the western end of the Dublin-Sligo line (7 connecting trains Monday-Saturday/6 connecting trains on Sundays).

Amenity

In recent years, Sligo city and to a lesser extent a number of its support towns, have become recognised for the number of murals appearing on vacant buildings, car parks, supporting walls and even private adverts. These renderings primarily of iconic Sligo images are impressive and create a unique character to the city. Murals are also evident in many of the satellite and support towns to Sligo city. Their ongoing proliferation and upkeep will improve the general aesthetic of the area and create landmarks of previously nondescript spaces and buildings.

The city is lacking in a centrally-located civic space, although it is understood that O'Connell Street is earmarked for this as part of the urban improvement works. In January 2016, the Department of Environment, Community & Local Government announced funding of €1.25 million for the enhancement of O'Connell Street. The enhancement plans are to include for more limited access for vehicles giving pedestrians priority along the street, with new widened pavements, new street furniture and landscaping, reduced traffic flow and shared space for cyclists. Completion of this project is vital to enhancing the overall attractiveness of the city for retailing, particularly considering the recommendations of this Strategy.

A high-level assessment of shopping centres and streets was undertaken as part of the previous Retail Strategy in 2009. Review of this assessment suggests that very little change has occurred in relation to these retail environments in the interim. As was noted in the previous Retail Strategy the traditional city centre focus has now shifted northeastwards to accommodate the developments of Johnston Court and the Quayside Shopping Centre. Any future development of the Centre Block will reinforce this shift. The O'Connell Street redevelopment may offer the opportunity in some way to readdress this shift by creating a focal point on the junction of John Street and Castle Street.

Actions

Detailed actions for addressing retailing within Sligo City will be provided in the forthcoming Sligo City Retail Strategy document.

3.2 KEY SUPPORT TOWNS

Outside the Gateway, the three key support towns of Tubbercurry, Ballymote and Enniscrone are of significance in terms of retail, due to their size, location or acknowledged importance in the Development Plan.

3.2.1 TUBBERCURRY

Situated approximately 30km southwest of Sligo City, Tubbercurry is the second most populated settlement in Sligo County, and its commercial and retail service base reflects this. In 2011 the town's population had increased to 1,747 persons from 1,421 persons in 2006. The town also serves an expansive rural hinterland including numerous rural villages, such as Cloonacool, Banada and Curry. The town has a reasonable range of convenience retail outlets primarily focussed on local and intermediary retail offering including Doohan's Daybreak. McSorley's Centra, Kennedy's, Coen's Service Station, Eurospar and Wynne's Butchers. Weekly shopping needs can be largely attained via SuperValu on Teeling Street, which includes off-street parking both sides of Circular Road. Convenience shopping is also offered on Thursdays and Fridays from stalls in Wolfe Tone Square. See figure 3.2 for Tubbercurry drive times and population catchment.

Attractions

Tubbercurry also has a good mix of retail services and comparison retailing. The previous 2009 Strategy noted that Tubbercurry had a similar population and retail mix to Ballymote. Compared to Ballymote today, the survey suggests that there is additional scope for convenience retailing within Tubbercurry given the catchment population identified in the drivetime maps accompanying this Strategy. The primary attractions to Tubbercurry would be through cultural heritage tourism, various local festivals and its physical setting against the backdrop of the Ox Mountains.

Accessibility

Tubbercurry is located on the disused railway line leading towards Claremorris in south Mayo and Sligo City over the foothills of the Ox Mountains. The town is primarily accessed *via* private motor vehicles on the N17 national route, which forms part of the Transport Infrastructure Ireland (TII) strategic Atlantic road corridor. Other important routes include the R294 regional road connecting with Ballina (32km to the west) and connecting with Boyle and the N4 national route (35km to the east). The town is served directly by Bus Éireann services including the 064 service to Knock Airport and Sligo and the 476 route connecting with Boyle and Ballymote (on Wednesdays). Nearest access to railway services is from Ballymote Railway Station, 15km to the east.

There are ongoing proposals for bypassing Tubbercurry along the N17 with a preferred route identified in early 2001, although a Compulsory Purchase Order and Environmental Impact Statement for the scheme have not been completed. Proposals have been incorporated in the 2015 *Draft Local Area Plan* for the town. Bypass proposals can have a major impact on retailing in small urban centres reliant on passing trade, although from a high-level review of the town, Tubbercurry's retail base would appear to be built on its local hinterland rather than passing trade. Consequently, the town should have capacity to benefit from bypassing, particularly if urban design objectives outlined in the Draft Local Area Plan can be realised.
The commercial services of the town are generally located within the historical urban core along Teeling Street, Humbert Street, Wolfe Tone Square and to a lesser extent Emmet Street. Some new larger operations have opened up around the town fringes including Circular Road, the West End mixed-use development and to the rear of Teeling Street (Mullarkey's Furniture).

On-street car parking is available around the town square and along the northwestern side of Teeling Street. There is some parking to the rear of the Teeling Street including Murphy's Hotel and SuperValu.

Pedestrian movement through the town is quite good given the formalised parking arrangements, topography and the lack of street furniture. The ramped pedestrian crossing on Teeling Street makes crossing of this busy intersection more readily achievable, although there is a propensity for many motorists to park on double-yellow lines resulting in restricted traffic flows. There is also a pinch-point for traffic outside Cawley's Guesthouse and Restaurant on the Boyle road. Narrow footpaths and roads restrict vehicular and pedestrian accessibility, particularly at busy times and when deliveries are being made.

Excessive way-finding signage exists in the Wolfe Tone Square area, with a plethora of finger post signs.

Amenity

The town centre's overall streetscape is of a good standard with some exemplary traditional shopfronts including

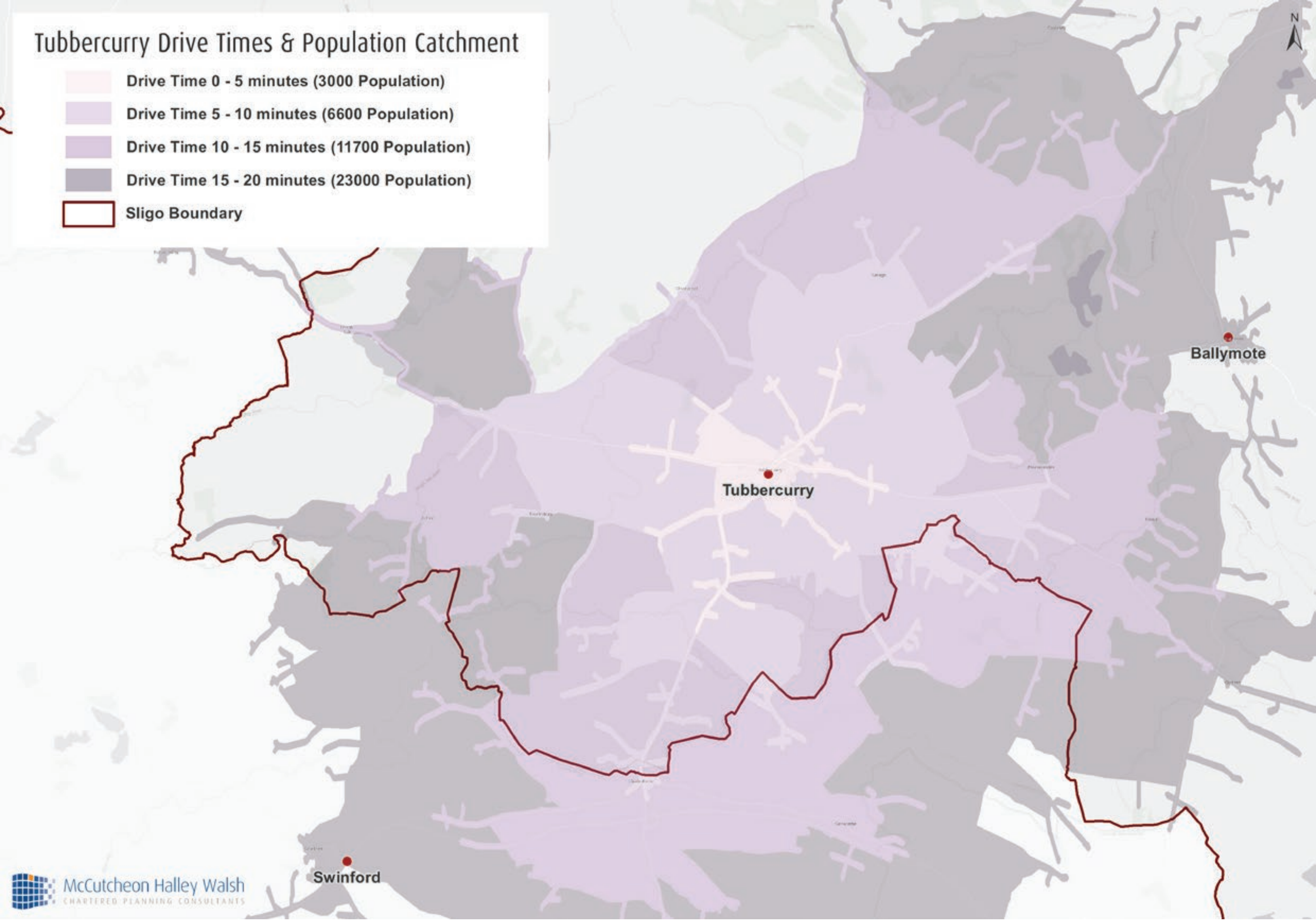


Figure 3.2 - Tubbercurry Drive Times and Population Catchment

Barry's Pharmacy. Shopfronts in the town lack a consistent approach to their treatment. A number of the vacant shopfronts include murals aimed at enhancing the visual appearance of such premises and detracting from the fact that they are vacant. There are numerous small pockets of landscaping throughout the town, which add to the overall visual aesthetics of the town, although a consistent landscaping treatment is lacking.

Wolfe Tone Square is a major amenity asset for the town and provides a central pivot for the town, although the greatest footfall would appear to be in the vicinity of the pedestrian crossing on Teeling Street. While the Square is an attractive hard landscaped space with ample seating, the size of the square has reduced considerably from its original size and the area is now largely screened from view by an enclosure of cars parking on its edge. An expanded green edge to the Square would improve its appearance and usability further. Urban Design objectives (UD01) within the *Draft Local Area Plan* should be proactively pursued to revitalise and improve the functionality of this space. Consideration should be given to creating a one-way system around this space or shared surface arrangements, subject to the various transport and traffic engineering assessments.

Figure 3.3 - Wolfe Tone Square original size and area against today's context

Table 3.2 Tubbercurry Retail Floorspace 2015 & 2008 (sq.m. net)						
	Tubbercurry 2015			Tubbercurry 2008		
	Sq.M.	Number	No. as %	Sq.M.	Number	No. as %
Convenience	853	10	10.9	1137	10	16.9
All Comparison	4,625	23	25.0	2665	14	23.7
Mainstream Comparison	798	19	20.7	385	9	15.3
Bulky Comparison	3,827	4	4.3	2280	5	8.5
Retail Services	1,335	34	37.0	1038	29	49.2
Vacant	1,256	21	22.8	1402	6	10.2
Total	8,069	92	100.0	6241	59	100

Assessment

Table 3.2 outlines retail floorspace figures for Tubbercurry in 2015 and 2008. The volume of convenience floorspace in the town is less than that surveyed in 2008, although the number of convenience retailers has remained the same. There has been an increase in comparison retail offering of the town, but this is primarily comprised of small charity shops and discount stores. Bulky goods have also increased with Mullarkey's off Teeling Street, K&B Building Supplies off Circular Road and Homeland on the Ballina Road providing the bulk of this space. There are numerous additional retail services in the town including beauticians and hairdressers.

Vacancy levels within the town have increased within the town, with no area unaffected. There is a sizeable concentration of vacancies in the new mixed-use development on the west end of town, with significant available floorspace.

This area is outside the commercial core of the town. The town is currently provided with 3.9sq.m. of occupied retail and related floorspace per person in the town, which is on par with the volume for Sligo City, but generally below floorspace provision for the other key support towns.

Based on the Census of Ireland 2011 Small Areas data, it is estimated that there are approximately 6,600 persons within a 10-minute drive of Tubbercurry. This is the highest 10-minute drivetime catchment of all the key support towns. See figure 3.2 for Tubbercurry drive times and population catchment.

Action

A shop front initiative would enhance the overall shopping environment. Reoccupation of vacancies in prime areas at Wolfe Tone Square leading onto Humbert St would help improve the town centre's vitality and viability. The town lacks retail services with an external seating onto the street area, which can add life to an area. There is scope

for same in the environs of Wolfe Tone Square, particularly on the south-facing parade. Road markings in the vicinity of the pedestrian crossing have faded and should be re-painted.

It is noted that the 2015 *Draft Local Area Plan* for Tubbercurry proposes a one-way system along Humber Street and Teeling Street and restrictive objectives regarding out-of-centre retailing. Both these objectives would have positive benefits for retailing in the town centre. There may be scope to increase the size of the central amenity space to provide a green edge with an inner event space. There may also be potential for additional parking, particularly if the proposed one-way system is extended around this.
There would appear to be some scope for additional convenience retail within the town, particularly aimed at providing additional opportunities for undertaking weekly shopping. The previous 2009 Retail Strategy claims that Tubbercurry had a similar retail mix to Ballymote. Our analysis indicates that Tubbercurry comprises less convenience retail floorspace than Ballymote and that there is a larger retail catchment supporting this. An additional convenience retail facility would need to be sited in a location that could provide footfall along the main shopping streets.

3.2.2 BALLYMOTE

Set against the backdrop of the Curlew Mountains, Ballymote provides important service functions for the surrounding south and southeast areas of Sligo, offering a reasonable range of retail and related services, including financial and legal services. The town had a population of 1,539 persons in 2011 and is positioned on the Irish Rail line connecting Sligo and Dublin. Unlike the other key support towns of Sligo, it is not served by a national primary road. However, it is situated at the confluence of three regional roads, R293, R294, and R295 and thus serves an important focal point for the surrounding rural area. See figure 3.4 for Ballymote drive times and population catchment.

Attractions

The commercial and historical core of Ballymote is generally defined by Teeling Street, Emmett Street, O'Connell Street and Wolfe Tone Street. Weekly convenience shopping can be undertaken at Kane's Supervalu and a number of local stores (Costcutters, Henry's Gala, Shearin's Butchers and Cryans).

Ballymote has a limited range of comparison and bulky comparison shopping which reflects the town's size and function. Ballymote Mart operates from the town on Thursdays and Fridays.

Historical attractions include Ballymote Castle (dating from c.1300) and a September 11 memorial (presented by the Mayor of New York in 2006. There is also a commemorative sculpture to Brother Walfrid, the founder of Glasgow Celtic Football Club.

Accessibility

Ballymote railway station is on the main Dublin-Sligo line with 7 trains each-way Monday through Saturday and 6 each-way trains on Sundays. The town is also served by the Bus Éireann 471 bus route on Monday through Wednesday, the 476 bus route on Wednesdays and the 460 bus route on Saturdays. Free on-street car parking is available throughout the town with significant scope for same given the width of the main streets. This appears to have been taken advantage of with much of the streetscape dominated by car parking, particularly the northern end of O'Connell Street, with only minimal use of backland areas for parking.

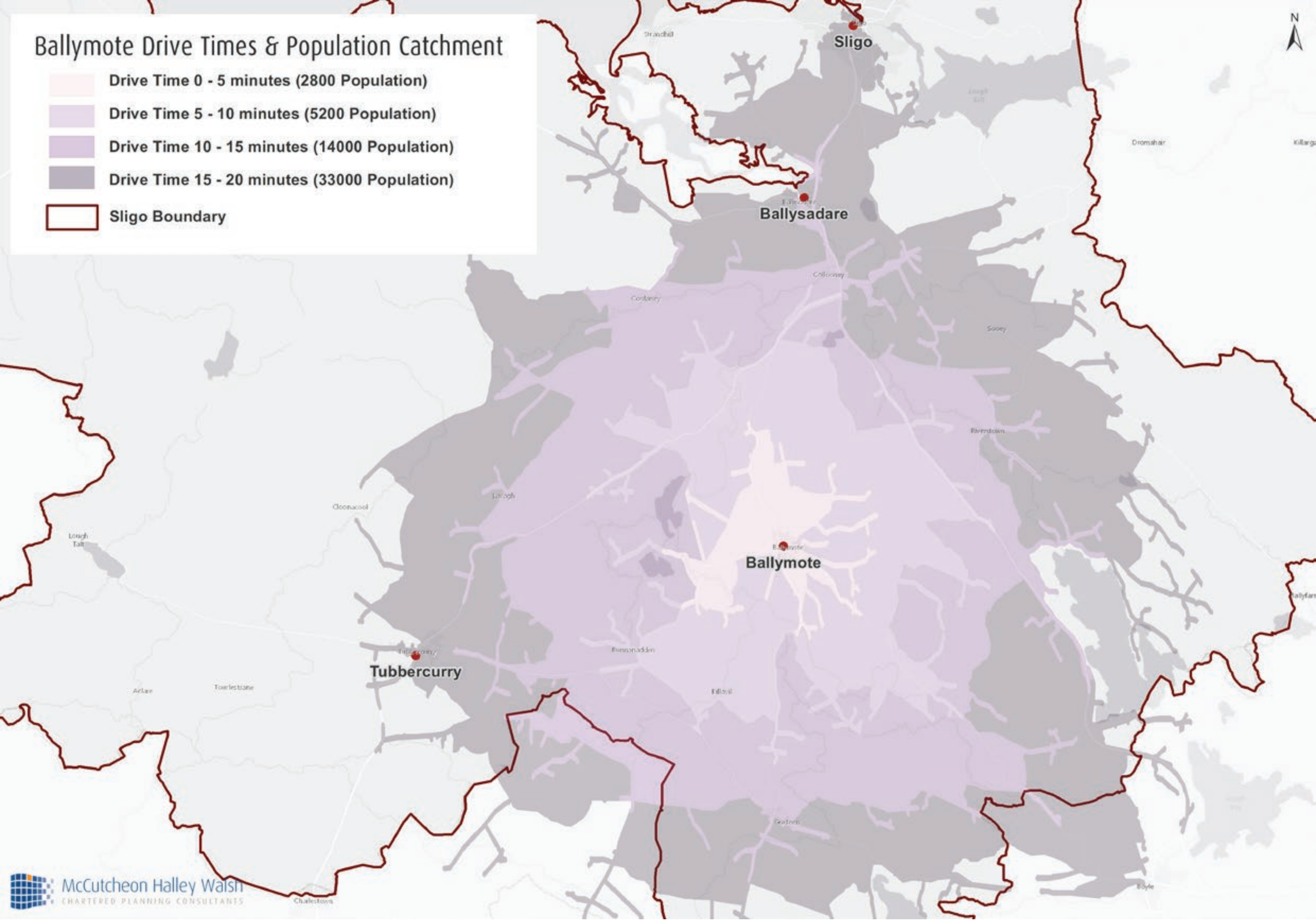


Figure 3.4 - Ballymote Drive Times and Population Catchment

Movement through the town is reasonably achievable by virtue of wide footpaths and gradual variations in surface levels. Damaged pavements in various locations, including Teeling Street fronting the Courthouse, can prove hazardous for some pedestrians. Traffic speeds through the town are quite slow, allowing for ease of movement for pedestrians crossing streets.

Amenity

Ballymote has a pleasant shopping environment with some of the shopfronts of exemplary traditional style. The public realm benefits from a small civic square with benches. The public realm fronting the Courthouse on Teeling Street has significant potential to create an attractive useable urban space at this end of the town, which appears to be waning judging by the number of vacant and derelict units. While shop fronts are generally in good condition, encouragement of further investment may be appropriate in some areas such as Wolfe Tone Street. A number of derelict buildings further affect the visual amenity of Wolfe Tone Street and Teeling Street (east).

Assessment

Table 3.3 outlines retail floorspace figures for Tubbercurry in 2015 and 2008. The volume of convenience and mainstream comparison floorspace in the town has slightly increased since 2008 with a minor increase in the number of outlets identified. Vacancy levels within the town have

Table 3.3 Ballymote Retail Floorspace 2015 & 2008 (sq.m. net)

	Ballymote 2015			Ballymote 2008		
	Sq.M.	Number	No. as %	Sq.M.	Number	No. as %
Convenience	2,102	5	7.9	1436	4	6.9
All Comparison	3,658	19	30.2	2444	17	29.3
Mainstream Comparison	1,314	16	25.4	1001	11	19
Bulky Comparison	2,344	3	4.8	1443	6	10.3
Retail Services	1,034	27	42.9	959	28	48.3
Vacant	267	12	19.0	381	9	15.5
Total	7,061	63	100.0	5220	58	100

risen slightly, particularly moving away from the primary shopping street, O'Connell Street (north end). The number of retail services within the town has only slightly altered. The town is currently provided with 4.4sq.m. of occupied retail and related floorspace per person in the town, which is higher than the average floorspace for the other key support towns and for Sligo City 3.9sq.m.

Based on the Census of Ireland 2011 Small Areas data, it is estimated that there are approximately 5,200 persons within a 10-minute drive of Ballymote. See figure 3.4 for Ballymote drive times and population catchment.

Action

The *County Development Plan 2011* included an objective to '*facilitate the provision of an additional supermarket in Ballymote*'. We note that the existing supermarket is capable of facilitating weekly shopping. The economics of whether or not there is scope for an additional supermarket in Ballymote will primarily be dictated by market. Any potential site for a supermarket needs to be strategically located to create footfall on the main shopping streets of Ballymote and encourage cross-visitation.

Car parking dominates the street environment, particularly during peak times (for example, schools runs). Parking at times is undertaken in a haphazard informal manner and can lead to traffic congestion and safety concerns. More formalised parking arrangements on-street may resolve this. Motorists appear to congregate for parking within a small area on the northern end of O'Connell Street. Provision of additional parking to the rear of units can often lead to severe reductions in footfall on the main streets. Careful consideration of large-scale proposals for parking to the rear is needed; a balance needs to be struck in meeting parking demand and retaining the primacy of the front street parade.

Urban improvement works to the front of the Courthouse are necessary and may act as a catalyst for reoccupation of units in this area. This space could be regenerated to create a useable event space.

3.2.3 ENNISCRONE

The population of Enniscrone expanded considerably over the 2006-2011 period to 1,223 persons, primarily based upon its attractive setting overlooking a 4-mile beach, two new hotels and additional residential accommodation in the town. Enniscrone now serves the recreational and tourist needs of visitors on a year-round basis. The new hotels are particularly popular venues at weekends. Year-round population has increased as a result of this. The population of Enniscrone expands considerably at weekends and during school holidays, although population estimates regarding this increase are not available.

The town is primarily in the zone of influence of Ballina, which is located 12 km to the southwest, while Sligo is approximately 42 km to the east. Further visitor accommodation is being planned *via* a new 'glamping site' to the rear of the former Tuffy's garage site on the Ballina Road. Anecdotal evidence suggests the town's caravan park behind the beach dune system has very high-occupancy levels. See figure 3.5 for Enniscrone drive times and population catchment.

Attractions

Convenience food retailing is provided by a range of small-scale family-run stores including Milo's, Checkout Store, Tuffy's Gala, Keegan's & Higgins' Centra and Igoe's butcher. The town has a very narrow comparison shopping trade with the majority of commercial ventures at street level comprising restaurants, cafes and take-aways. The previous Retail Strategy noted that the number of cafes, restaurants and other leisure outlets appeared to be limited for a popular tourist destination, but this no longer appears to be the case. These retail services are spread out over an expansive area, rather than in a central location.
Other leisure attractions asides from the beach and seawater include an 18-hole and 9-golf links, amusement arcades, supervised playground and an indoor aqua centre (Waterpoint).

Accessibility

Enniscrone is primarily accessed by car *via* the R297 regional road off the N59 (Ballina to Sligo Road). On-street car parking is restricted along the town's main road, although several shops have dedicated off-street car parking outside their outlets. Traffic speeds through the town are generally quite slow, particularly where the carriageway narrows and at 'T-junctions'. The nearest rail services are available from Ballina with 4 daily services connecting

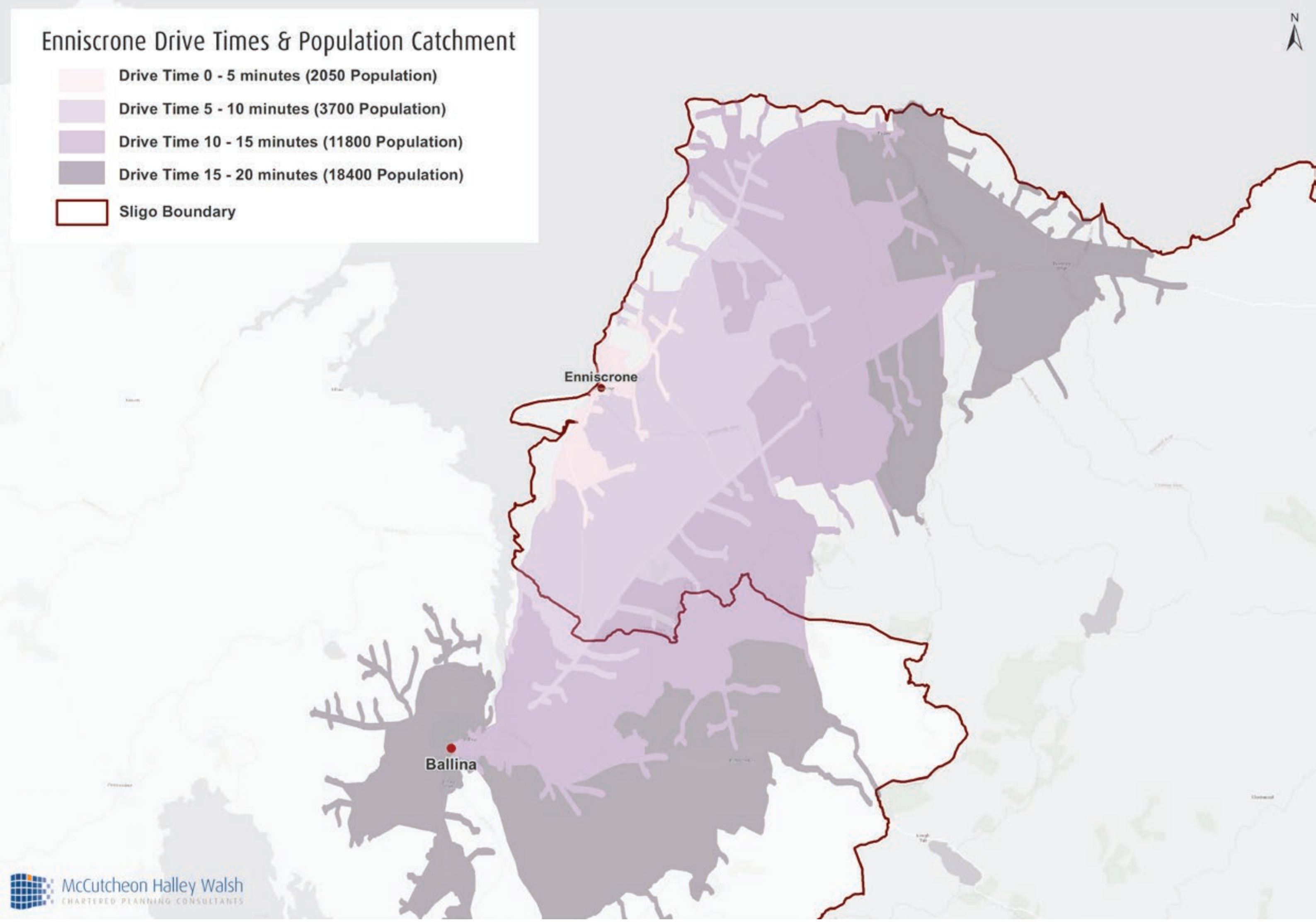


Figure 3.5 - Enniscrone Drive Times and Population Catchment

to and from Dublin. Faster rail journey times between Enniscrone and the capital can be achieved *via* Collooney station (49 km to the east).

Enniscrone is served by daily bus services to Sligo and Ballina *via* bus routes 458, 066 and U261. Pedestrian movement through the town centre (R297) is disrupted by poor-quality and narrow street pavements, a lack of pavements (along the southern side), a steep incline leading northeastwards and off-street car parking both legal and illegal. This poor accessibility is further compounded by the sprawling distribution of commercial premises in the town. A more compact town centre is necessary.

Amenity

Historically the lower side of town turned its back on the coast and in recent years attempts have been made to readdress this with mews-type developments. There are a comparatively high number of dilapidated and derelict properties within the town, and significant opportunity for infill development, which would aid in consolidating the urban core.
The town has a mixture of shopfronts, with several examples of well-designed and well-maintained new and traditional shopfronts and others building facades of very poor standard. The town ultimately lacks a civic focal point with the most appropriate opportunity for creating same fronting the Church at the top of the town.

Assessment

Table 3.4 outlines retail floorspace figures for Enniscrone in 2015 and 2008.The number of convenience and comparison outlets and floorspace has generally remained consistent in recent years with the exception of some additional convenience expansion. Retail services have expanded in recent years, with cafés, restaurants and take-aways benefitting from increased visitors to Enniscrone. Vacancy levels are high throughout seaside settlement in both newer and older premises. Enniscrone is currently provided with 1.9sq.m. of occupied retail and related floorspace per person, which is the average for census settlements in the County, but well below the levels of the other Key Support Towns and Sligo city. This low level of floorspace per head is indicative of the influence of Ballina.

Based on the Census of Ireland 2011 Small Areas data, it is estimated that there are approximately 3,700 persons within a 10-minute drive of Enniscrone, although this is likely to fluctuate significantly during the year. See figure 3.5 for Enniscrone drive times and population catchment.

Table 3.4 Enniscrone Retail Floorspace 2015 & 2008 (sq.m. net)

	Enniscrone 2015			Enniscrone 2008		
	Sq.M.	Number	No. as %	Sq.M.	Number	No. as %
Convenience	540	5	10.9	249	5	20.0
All Comparison	280	7	15.2	252	8	32.0
Mainstream Comparison	144	5	10.9	170	7	28.0
Bulky Comparison	136	2	4.3	81	1	4.0
Retail Services	1,553	24	52.2	678	11	44.0
Vacant	342	10	21.7	101	1	4.0
Total	2,715	46	100.0	1,279	25	100.0

Action

An urban environmental improvement plan incorporating many of the measures supported in the Design Manual for Urban Roads and Streets would provide a clear set of urban design initiatives for future planning applications to adhere to, improve the shopping environment and enhance the overall visual appearance and streetscape of Enniscrone. The possibility of creating a civic focal point with seating and landscaping should also be investigated. Proposals for additional commercial space should be mindful of the growing levels of vacancy in the town. Enniscrone had the second highest commercial vacancy rate in the country in the second quarter of 2015 according to Geoview12, but this must be considered in light of the seasonality of the population. The Retail Strategy survey would also suggest that the vacancy rate (21.7%) is not as high as that suggested in the Geoview report (24.2%). There are five family-run convenience stores in the town and a new retail unit was granted permission recently on the Ballina Road. There are also extant planning permissions for retail units. The absence of a large convenience retailer in the town is most likely leading to significant trade diversion to Ballina and there appears to be scope for a retailer to meet this gap in the market. Considering the results of the floorspace study, this retail offering would be best facilitated in the town centre and via replacement or extension of an existing retail operation. Such a facility will need to include a requisite level of off-street car parking. The 2014 Local Area Plan for Enniscrone notes that the town is a sufficient distance from Ballina to sustain its own services and this Strategy supports this comment.

12 GeoDirectory and DKM Economic Consultants (2015) *GeoView Q2 2015 - Quarterly Commercial Vacancy Rates Report*, Issue 9 November 2015. Accessible at http://dkm.ie/en/news/geoview_q2_2015_quarterly_commercial_vacancy_rates_report

There appears some scope for additional comparison shopping in the town, although this will primarily be dictated by market dynamics and whether a specific *niche* can be filled such as giftware and watersports.

3.3 GATEWAY SATELLITES

Below we review the five centres identified in the Settlement Hierarchy of the *Draft County Development Plan 2017-2023* as the '*gateway satellites*' serving Sligo City, based on our consultation with the Planning Authority. In terms of population, these are significant settlements in the County, particularly Strandhill and Ballysadare although their retail offer varies considerably. The extent of retail within Strandhill and Ballysadare has not been specifically reviewed in previous Retail Strategies for the County due to their proximity to Sligo City. However, we believe that considering their population and retail offer it is important to review these centres in order to provide a more comprehensive and evidence-led Strategy. Furthermore, this review is undertaken in recognition of the pivotal role of smaller centres in sustaining local communities and in reducing the need to travel extended distances, particularly for convenience shopping. This also produces clearer information in understanding the role of Sligo City centre in the wider region.

3.3.1 GRANGE

Grange straddles the N15 national road and is identified as a 'gateway satellite' in the Sligo County Settlement Hierarchy. In 2006 the satellite village had a population of 383 and by 2011 this had increased to 578. The village is 19km north of Sligo and performs a service function for the neighbouring rural area sandwiched between the Dartry Mountains and the coastline.

Attractions

The convenience shopping offering of the village has significantly increased in recent years through the opening of Mullaney's SuperValu supermarket (1,265 sq.m. gross retail floorspace). Convenience shopping is also available in the Londis shop which forms part of the service station. The Centra supermarket which was located on the northern edge of Grange has closed since the previous Retail Strategy survey in 2008. Grange has a very limited service base reflective of its population and proximity to Sligo City. The village of Grange includes public houses, a pharmacy, two restaurant/take-aways and a fuel service station.

Grange is located close to numerous tourist attractions and activities, including mountaineering routes, surfing, Drumcliff, the burial place of W.B. Yeats and the scenic Streedagh Beach.

Accessibility

The location of Grange on the N15 national road, which forms part of the Atlantic road corridor, provides the village with ease of access to Sligo city to the south and northwards towards Donegal. Bus Éireann Expressway Services (480 & 064) routed along the N15 national road 10 times daily (Monday through Saturday) either stop or have a request stop in the village.

The village is centred upon two separate locations, the historic core to the north and the newer development centre to the south including Mullaney's SuperValu. Paths in the older centre are wide and allow for ease of access. There is also a convenient path link through the park connecting the older centre with the newer centre. However, this path does not extend through the newer southern end of the village. The hard shoulder serves as a walking route through part of the newer end of the village and this is not an ideal safe route for pedestrians.

Traffic speeds through the village are generally excessive for an urban area and the village could benefit from measures to restrain speeds, which could also double-up in greening in the streetscape, particularly along the southern end of the village. An off-street parking area is situated just off the N15 (c.58 spaces) and adjacent to the small park. Off-street parking is also available to the rear and side of the SuperValu store.

Amenity

The historic centre of Grange has a relatively attractive traditional terraced streetscape with extensive pedestrian areas to the front. However, in recent years a number of units have been vacated and are gradually becoming dilapidated in this area. The newer end of the village provides a distinctly different urban aesthetic, with a lack of traditional shopfronts and a varied building line.

Assessment

Table 3.5 outlines retail floorspace figures for Grange in 2015 and 2008. The volume of convenience floorspace in the village has increased since the opening of the SuperValu supermarket, while the number of convenience retailers has reduced with the closure of the Centra supermarket. There has been a marginal change in comparison retailing within the village. Bulky goods have also decreased with the closure of the furniture store, although the bathroom and tile suppliers continue to operate. Planning policy currently restricts reuse of units in Grange for retail warehousing. There has been a slight increase in retail services in the village although the lifespan of these businesses can vary.

Table 3.5 Grange Retail Floorspace 2015 & 2008 (sq.m. net)	Grange 2015			Grange 2008		
	Sq.M.	Number	No. as %	Sq.M.	Number	No. as %
Convenience	1,276	2	8.3	411	4	23.5
All Comparison	562	3	12.5	815	4	23.5
Mainstream Comparison	110	2	8.3	39	2	11.8
Bulky Comparison	452	1	4.2	777	2	11.8
Retail Services	865	8	33.3	252	7	41.2
Vacant	899	11	45.8	227	2	11.8
Total	3,602	24	100.0	1705	17	100

Vacancy levels within Grange are quite high and are generally concentrated to the south of the SuperValu-anchored southern end of the built-up area and within the north edge of the village. Grange is provided with 4.9sq.m. of occupied retail and related floorspace per person in the village based on Census 2011 data, which is the highest ratio of all the (census) settlements in the County and well above the floorspace ratio for the other 'gateway satellites'. This potentially suggests the village has a substantial convenience catchment and also avails of passing trade.

Action

The previous Retail Strategy claimed that Grange has a relatively attractive shopping environment and appeared to be successfully fulfilling its local retail function. The shopping environment appears to have significantly changed in recent years with a shift in the village centre southwestwards away from the historic centre towards the new supermarket. This new shopping environment is not fully occupied and requires some urban improvements in order to address this. Pathways are lacking along the southern end of the village opposite SuperValu and fronting the Londis-anchored fuel station. Further greening of the entrance along this stretch of the N15 may also serve to restrict traffic speeds and improve the visual appearance of the village. This measure could include an intermediary tree-lined strip running along the Sligo entrance-straight into the village (as provided in Coolaney).

3.3.2 COLLOONEY

Collooney is located off a busy intersection of the N17 and the N4 national roads centrally within Sligo and approximately 13km south of Sligo City centre. The town centre is located on a hill overlooking the Owenmore River, with lower lands directly adjoining the historic settlement primarily occupied by housing. The village expanded significantly in an easterly and southerly direction over the economic boom of the early to mid-2000s. This expansion primarily comprised retail warehousing and business and enterprise parks on the eastern side of the N4 and with new housing to the south. The historical urban fabric of the town has largely remained in place benefitting from a reasonable separation distance from the N4 bypass. The population of the town increased from 892 in 2006 to 1,369 in 2011.

Attractions

Convenience food retailing in the town is limited in scale and operators include Whiteside's Centra; Mace Main Street, Mace Sligo Junction; Flynn's Spar and two butchers. The limited comparison shopping offering of a florist, discount shop, pharmacy and hardware shop reflects the town's population and its close proximity to Sligo city. The village also contains a narrow range of retail services (laundry, café, takeaway, shops, pubs, hairdressers and beauticians). In recent years the range of large-scale bulky comparison outlets has reduced significantly with increased vacancies as a result. Vacancy levels within the historic core are comparatively low and would suggest the town is performing quite well in serving a local catchment.

Accessibility

Collooney's railway station is on the main Dublin-Sligo line (7 connecting trains Monday-Saturday/6 connecting trains on Sundays). Access to Collooney is primarily via the N4 (Dublin to Sligo) and N17 (Sligo to Galway).

Free on-street car parking is available throughout the village which appears to be sufficient given the small scale local nature of the shopping offer and likely dwell time of shoppers. Steep gradients and narrow footpaths hinders pedestrian accessibility in places. At the junction in the centre of the village, paved footpaths and a ramped crossing point have been installed. Bollards along the footpath edge also deter illegal parking in this area. These are exemplary measures that could also be employed in other parts of the village and within other settlements in the

County. Main Street Collooney is a two-way traffic system, although at certain points along the stretch there is only scope for a single vehicle to pass and this could lead to traffic congestion at times.

The N4 forms a strong physical divide between the large floorplate business and enterprise parks on the east side of the town and the commercial and residential core on the west side of the town.

Amenity

There are attractive open areas immediately adjoining the two churches in the centre of the village. Shop frontages and building facades are generally well maintained throughout the village and a mural conveying important images of the village has been undertaken on a gable wall which is visible on the approach from Main Street.

Assessment

Table 3.6 outlines retail floorspace figures for Collooney in 2015 and 2008. The volume of convenience floorspace and the number of units in the town has been constant since the previous Retail Strategy in 2008. The larger convenience supermarkets in the area are located in Sligo City and Ballysadare and locals are likely to frequent these centres for weekly shopping. The extent of mainstream comparison retailers has increased marginally in recent years, but there has been a sizeable shift in the extent of bulky goods floorspace used in the area. Most of the bulky goods retail units have ceased business in recent years, potentially arising from poor economic conditions and with greater economies of scale and scope for cross-visitation with other similar units in Sligo Retail Park. The number of retail services has been growing along the Main Street in particular, a sign of a positive trading environment.

Vacancy levels within the historic town core are quite low with the vast majority of vacant units attributed to the town, located in the east side business parks.

Action

Movement along Main Street is restricted for pedestrians by virtue of the narrow footpaths, while movement for cars is restricted due to the two-way traffic system. A one-way looped traffic management system may allow for more car parking along Main Street, while also providing scope for wider footpaths and a more pleasant shopping environment.

As was noted under the previous Retail Strategy, the eastern side of Collooney accommodates large retail warehouses and other units. The Council adopted a strong line in restricting the use of such units for retail uses and this approach should be maintained on an ongoing basis, particularly as other non-retail uses now appear to be locating into this area, including gymnasiums, a religious hall, manufacturers, supply centres, a training institute and a radio station. While a number of units within this eastern end of Collooney remain vacant, it would appear far more sustainable to continue to operate the current planning policy approach and monitor the levels of vacancy over time before making any alternative approach on this matter.

3.3.3 BALLYSADARE

Ballysadare is a busy satellite town 7km to the south of Sligo city centre. The N59 national road, leading northwards to Sligo and westwards towards Mayo, forms the Main Street through the town centre.

Attractions

A village centre development was constructed in the late 2000s, including a supermarket, associated coffee shop and other retail units. There are a number of other small convenience operators including a butchers and newsagents. The village has a narrow comparison retail base, but does contain a large number of retail services, providing an alternative retail destination to Sligo city for

Table 3.6 Collooney Retail Floorspace 2015 & 2008 (sq.m. net)

	Collooney 2015			Collooney 2008		
	Sq.M.	Number	No. as %	Sq.M.	Number	No. as %
Convenience	758	6	14.3	743	6	17.1
All Comparison	327	4	9.5	4091	7	20
Mainstream Comparison	192	3	7.1	94	1	2.9
Bulky Comparison	135	1	2.4	3997	6	17.1
Retail Services	530	22	52.4	506	14	40
Vacant	6,499	10	23.8	4775	8	22.9
Total	8,114	42	100.0	10116	35	100

the local population (1,344 person) and its neighbouring catchment.

Accessibility

Ballysadare is proximate to Irish Rail services at Collooney and is only 2km to the west of the N4 national road. Traffic volumes though the centre are relatively high and are generally associated with passing traffic using the N59 national route, the main transport artery through the west of the County.

Ballysadare is served by daily bus services to Sligo and Ballina *via* bus routes 458, 066 and U261. Pedestrian movement through the town centre is readily available *via* reasonably wide footpaths and a fairly level topography. The roundabout junction at the entrance to SuperValu and the Main Street is a particularly awkward and hazardous point for crossing. Free on-street car parking is available throughout the centre although this can often lead to congestion during peak times. There is also free off-street parking available in the SuperValu anchored village centre development.

Amenity

Shop frontages and building facades are generally well maintained throughout the centre, with a good mix of new and old shopfronts. Vacancy levels remain high within the new village centre development. It is likely that occupation of these premises will hinge upon a commensurate increase in the catchment population.

Assessment

Table 3.7 outlines retail floorspace figures for Ballysadare in 2015. In the previous Retail Strategy dating from 2008, floorspace and unit numbers for Ballysadare were included in the overall figures for Sligo city. As a result we cannot specifically highlight changes in retail provision in the town over the intervening period. The current provision of retail space is reflective of the village location proximate to the environs of Sligo. Bulky goods retailers do not operate from Ballysadare and can be more readily catered for in Sligo Retail Park.

Table 3.7 Ballysadare Retail Floorspace 2015 (sq.m. net)

	Ballysadare 2015		
	Sq.M.	Number	No. as %
Convenience	1,257	3	12.5
All Comparison	143	3	12.5
Mainstream Comparison	143	3	12.5
Bulky Comparison	0	0	0.0
Retail Services	390	12	50.0
Vacant	208	6	25.0
Total	1,998	24	100.0

Action

Main Street provides the main shopping thoroughfare, but this shopping environment is dominated by passing vehicular traffic using the N59. A more pleasant shopping environment can be created off this busy road, although it will be difficult to create the footfall needed to create viable commercial units. Critical mass occupying residential property in Ballysadare will potentially create the demand for existing vacant units to be occupied.

With no plans in place to divert the N59 route around the village centre, the main shopping street could benefit from some measures to improve pedestrian safety. A pedestrian crossing would allow for improved and safer movement in the centre.

3.3.4 STRANDHILL

Strandhill enjoys a magnificent setting within the coastal sand dune complexes, against the backdrop of Knocknarea and fronting onto a busy beach promenade. The village has become an extremely busy tourist town with various markets being catered for, including watersports enthusiasts. Strandhill is also a popular location for housing, with many residents commuting into and out of Sligo on a daily basis.

Attractions

Coinciding with its attractive setting and its primary tourism function, Strandhill plays hosts to a comparatively high number of cafés, restaurants and bars. Convenience retailing is confined to the Gala store and Keane's Centra anchoring the fuel station on the Sligo Road. The extent of retail floorspace relative to the resident population (1,506 person) is quite low. The retail service base of Strandhill is confined to those associated with the tourism industry and the level of vacancies is well below the average for similar size settlements in the County. The village hosts a Market in the Airport on Sundays.

Accessibility

The main retail shops are located in the vicinity of the Church, while retail services are centred upon the Shore

Road approach to the seaside and fronting the sea. Pedestrian movement though the village is well catered for, with crossing at key points over busy pinch points. Parking can become difficult when tourist numbers peak, although the provision of a large off-street parking area accommodating approximately 240 spaces on Shore Road, is a major resource. Further parking is available in perpendicular spaces along the roadside fronting the sea.

Strandhill is served by the 472 bus route, providing one service per hour during daytime hours to and from Sligo City with a 20-minute journey time.

Amenity

Shop frontages are generally in good repair and are generally set back from the roadside. This offers opportunities to create external seating areas fronting the units.

Assessment

In the previous Retail Strategy dating from 2008, floorspace and unit numbers for Strandhill were included in the overall figures for Sligo city. As a result we cannot specifically highlight changes in retail provision in the village over the intervening period. Similar to Ballysdare, the current provision of retail space is reflective of the village's location proximate to the environs of Sligo. Table 3.8 outlines retail floorspace figures for Strandhill in 2015.

Action

The population of Strandhill appears to be underserved by retail floorspace and is most likely accessing Sligo for weekly shopping services. Additional retail space in the village and city will need to be considered in this context. Retail floorspace is unlikely to expand without a commensurate increase in the local population, although there is likely to be increased demand for retail services with growing tourist numbers.

Table 3.8 Strandhill Retail Floorspace 2015 (sq.m. net)

	Strandhill 2015		
	Sq.M.	Number	No. as %
Convenience	280	2	16.7
All Comparison	117	3	25.0
Mainstream Comparison	117	3	25.0
Bulky Comparison	0	0	0.0
Retail Services	504	7	58.3
Vacant	0	0	0.0
Total	901	12	100.0

3.3.4 COOLANEY

Coolaney village is set within the foothills of the Ox Mountains and is located off the main transport arteries that traverse the County. As a result the village offers a pleasant ambience, particularly along the Owenmore riverside walk. The population of Coolaney expanded by 313% or 658 persons over the 2006 to 2011 period with the construction of numerous new estates. The 2011 population has detailed in the Census results as 866 persons. Coolaney serves as a satellite to Sligo city, and is best accessed from the city along the L-2101 road off the old N4 national road at Collooney.

Attractions

Convenience retailing for the village is provided in O'Grady's shop, Lipsetts and P.K. Meats, while comparison retailing is solely contained in The Mill Pharmacy. Retail services are limited to a take-away, public bars and a hair salon.
There are plans afoot to develop a major tourist attraction in the village, harnessing onto its unique setting. A proposed 80km mountain biking trail near the village on Coillte-owned lands serving as the country's National Mountain Bike Centre is anticipated to be a major tourist draw. With the expected numbers, this will create significant additional custom for retail and retail services in the village.

Accessibility

Traffic speeds and volumes are quite low and the village is also served by tree planting along the intermediary line of Main Street. This has a dual function of restricting traffic speeds and movements, while also providing a green spine to this space. The village is positioned on a gradual incline and pedestrian movement is readily achievable.

Coolaney is served by the 460 Sligo Castlerea bus service on Saturdays and by the 2-3 times daily 475 and 475 bus connections with Sligo city. As an expanding satellite village, additional bus services to and from Sligo city would improve accessibility. Housing and the school at Rockfield are disconnected from the main village, as there is no footpath along the road connecting these two areas.

Amenity

The historical building façades in the village have largely remained intact, with minimal development in recent years along the main street. While vacancies on the main street are low, the Mill Centre development at the top of the street, contains 6 retail units, 5 of which are vacant. The Mill Centre has been developed to incorporate a landscaped park area to the front and off-street car parking.

Assessment

In the previous Retail Strategy dating from 2008, floorspace and unit numbers for Coolaney were not specifically provided. Additional retail floorspace has been provided in the Mill Centre, but this has not been fully occupied. Occupation of the retail floorspace has not run parallel with the occupation of residential accommodation in the village. Table 3.9 outlines retail floorspace figures for Coolaney in 2015.

Action

Coolaney is currently only served by two local stores and butchers for convenience shopping, and residents are therefore travelling outside the village to avail of their weekly and intermediary (top-up) shopping needs. There is existing extensive well-positioned available retail floorspace to serve the village in the Mill Centre. A flexible approach to alternative uses and floorplates for the Mill Centre should be taken to encourage their occupation, subject to residential amenity.

Table 3.9 Coolaney Retail Floorspace 2015 (sq.m. net)

	Coolaney 2015		
	Sq.M.	Number	No. as %
Convenience	85	3	20.0
All Comparison	56	1	6.7
Mainstream Comparison	56	1	6.7
Bulky Comparison	0	0	0.0
Retail Services	145	6	40.0
Vacant	678	5	33.3
Total	964	15	100.0

3.4 SMALLER VILLAGES

This Retail Strategy incorporates a health check of all villages in the County. Clear patterns emerge upon taking a visual inspection of these centres with closure of pubs, post offices and small shops and growth in the number associated retail services including take-aways, hair salons/ beauticians, charity shops and pharmacies. Small villages play an important role in the local economy and their cumulative retail floorspace should be considered as part of any retail strategy to accurately portray the retail landscape of the County.

Attractions

Retail offer varies considerably from centre to centre, and the extent of retail provision does not often match the size of the settlement population. For example, Rosses Point has an extremely narrow convenience retail base (60sq.m.) and services relative to its population (824 persons in 2011), while Gurteen (population 349 persons in 2011) contains approximately 460sq.m. of convenience retail floorspace. Clearly each of these centres serve a different purpose, have differing functions and this is largely dictated by their location relative to other centres and their historical and physical context.
Convenience and comparison retail floorspace outside the Gateway City, the Key Suport Towns and the satellite villages provides an important social and economic function to their respective catchments. These facilities reduce the necessity for rural dwellers and village residents to travel long distances to shop and access essential products and services.

Accessibility

Many of the smaller centres in the County are not served by frequent bus services, with the exception of those located on national primary routes. The primary means of accessing villages and rural areas is *via* private motor vehicles. There are also rural transport services operating in the Sligo area primarily catering for older residents in accessing urban areas, local services and retirement groups.

Most villages are of a scale and orientation that allows for ease of access for pedestrians to retail and related services. Car parking is rarely an issue, other than during community events, and is usually freely available adjacent to retailers.

Many shops serve a variety of purposes, including the local post office, convenience store, agricultural supplies and fuel station. Premises will often include a number of businesses sharing occupancy including convenience stores, pubs, restaurants and B&Bs.

Amenity

The visual appearance of villages surveyed varied considerably. For example, Riverstown in the east of the county set in rolling drumlin belt, comprises a balanced mix of retail units with low levels of vacancy and set on a narrow street plan.

Shopfronts throughout the County varied considerably in quality, but there are several high quality pub fronts and shopfronts, many of which are included as being of exemplary quality in the National Inventory of Architectural Heritage (NIAH).

Assessment

Many settlements such as Easky and Mullaghmore have a seasonal transient population and at the time of the retail survey (December), it was found that many units were unoccupied, but that during peak season many of these units would be occupied and trading successfully. Villages such as Carney and Cliffoney had a very narrow retail base and associated services relative to their population when compared with villages of a similar size. This is expected to relate primarily to their proximity to other larger urban centres.

A number of villages had no convenience retail provision, including Cloonacool (7km northwest of Tubbercurry) and Bunannaden (8km west of Ballymote).

Convenience retailers throughout the villages and rural areas, vary in size and catchment population. Comparison retailers in the more peripheral parts of the County were primarily engaged in serving the tourist trade, pharmacies and agricultural supplies or hardware. A significant quantum of floorspace in rural areas and rural villages, arises from agricultural suppliers and merchants, primarily serving the local farming clientele. Table 3.10 outlines retail floorspace figures for viallages and rural areas in 2015 while Table 3.11 and 3.12 outlines retail floorspace figures for Gurteen and Bellaghy in 2015.

Table 3.10 Villages & Rural Areas Retail Floorspace 2015 (sq.m.net)

	Sligo Villages and Rural Areas 2015		
	Sq.M.	Number	No. as %
Convenience	1,488	43	17.0
All Comparison	3,785	33	13.0
Mainstream Comparison	788	21	8.3
Bulky Comparison	2,997	12	4.7
Retail Services	N/A*	134	53.0
Vacant	N/A*	43	17.0
Total	5,273	253	100.0

*Floor Area not surveyed (recurs in tables 3.13 to 3.16)

Table 3.11 Gurteen Retail Floorspace 2015 (sq.m. net)

	Gurteen 2015		
	Sq.M.	Number	No. as %
Convenience	460	2	9.5
All Comparison	493	5	23.8
Mainstream Comparison	213	4	19.0
Bulky Comparison	280	1	4.8
Retail Services	279	12	57.1
Vacant	43	2	9.5
Total	1,275	21	100.0

Table 3.12 Bellaghy Retail Floorspace 2015 (sq.m. net)

	Bellaghy 2015		
	Sq.M.	Number	No. as %
Convenience	937	1	11.1
All Comparison	107	1	11.1
Mainstream Comparison	107	1	11.1
Bulky Comparison	0	0	0.0
Retail Services	242	3	33.3
Vacant	195	4	44.4
Total	1,481	9	100.0

Action

Several retailers and retail services operating in small villages and rural areas operate on a much reduced timeframe than their urban counterparts, often only open for business Thursday through Saturday. Footfall associated with these businesses is extremely low. However, these operators provide a vital service to their catchment and negate the need to travel longer distances to larger urban centres to access services. All means to facilitate the longevity of such businesses should be explored.

Small villages play an important role in the lives of the communities that they serve and provide valuable day-to-day retail facilities and services to their communities.

Development in such villages should be focussed in the core village area and should complement existing retail provision.

Development Plan policy has been formulated to facilitate maintaining of rural services. Few proposals for additional retail space in rural areas are expected over the lifetime of the Plan with a growing concern for retaining of the exist ing retail base.

3.5 COUNTY UNIT AND FLOORSPACE PROVISION

As noted under the previous Retail Strategy, County Sligo is considered mono-nodal in terms of its retail offering, with retailing concentrated in the city. The extent of retail businesses and services operating in villages and rural areas contributes a considerable proportion of the retail offering of the County. Future retail studies in the County need to be prepared mindful of the need to review this situation in its totality. Tubbercurry serves as the second largest centre for the County in terms of retail and related businesses, followed by the other key support towns of Ballymote and Enniscrone. The satellite villages of Collooney, Grange, Ballysadare, Strandhill and Coolaney have varying levels of retail services. The villages of Bellaghy and Gurteen may not have large populations, but they do serve sizeable hinterlands based on their service offering. Table 3.13 outlines the total number of retail and retail services in Sligo City and County.

Over half the occupied and vacant retail and retail services units in the County are located in Sligo city and its environs. The retail survey suggests that 21% of the properties surveyed in the County are unoccupied with half of these units located in Sligo City. A total of 10% of the properties surveyed fall into the convenience shopping category, while mainstream comparison units accounted for 20% of the units surveyed. The summary tables reveals a high concentration of mainstream comparison shopping in Sligo City and a wide distribution of convenience shopping spread throughout the County. Table 3.14 outlines the percentage split of retail and retail services in Sligo County and City.

While review of the number of units in the County revealed over half the units surveyed are located in Sligo city, review of the floorspace attributed to these units reveals an even greater proportion of the overall floorspace is concentrated in Sligo city. Table 3.15 outlines the retail floorspace in Sligo City and County (Table 3.16 outlines the percentage split). While bulky goods units amounted to the smallest category in terms of the number of units, the associated bulky goods floorspace occupied the second largest category in terms of overall floorspace quantum. The distribution of occupied floorspace within the county generally followed findings in relation to the number of units, although the gateway satellite of Grange appears to have a more occupied space than the key support town of Enniscrone.

Despite containing 29.8% of the overall population in 2011, Sligo City encompasses over 68.1% of the floorspace surveyed in the County. This emphasises the mono-nodal nature of the County in terms of retail provision. Collooney

13 Excludes retail floorspace in Sligo City, the Key Support Towns (Ballymote, Tubbercurry and Enniscrone), the Principal Satellites (Grange, Strandhill, Ballysadare, Coolaney and Collooney) and the villages of Bellaghy and Gurteen.

Table 3.13 Total Number of Retail and Retail Services in Sligo City and County, 2015

	Convenience	Comparison	Bulky	Retail Services	Vacant	Total
Sligo City	44	167	28	243	145	**627**
Collooney	6	3	1	22	10	**42**
Ballymote	5	16	3	27	12	**63**
Tubbercurry	10	19	4	34	21	**92**
Grange	2	2	1	8	11	**24**
Enniscrone	5	5	2	24	10	**46**
Bellaghy	1	1	0	3	4	**9**
Ballysadare	3	3	0	12	6	**24**
Gurteen	2	4	1	12	2	**21**
Strandhill	2	3	0	7	0	**12**
Coolaney	3	1	0	6	5	**15**
Villages & Rural	43	21	12	134	43	**253**
Total	**126**	**245**	**52**	**532**	**269**	**1228**

Table 3.14 Percentage Split of Retail and Retail Services in Sligo City and County, 2015						
	Convenience	Comparison	Bulky	Retail Services	Vacant	Total
Sligo City	3.6	13.6	2.3	19.8	11.8	**51.1**
Collooney	0.5	0.2	0.1	1.8	0.8	**3.4**
Ballymote	0.4	1.3	0.2	2.2	1.0	**5.1**
Tubbercurry	0.8	1.5	0.3	2.8	1.7	**7.5**
Grange	0.2	0.2	0.1	0.7	0.9	**2.0**
Enniscrone	0.4	0.4	0.2	2.0	0.8	**3.7**
Bellaghy	0.1	0.1	0.0	0.2	0.3	**0.7**
Ballysadare	0.2	0.2	0.0	1.0	0.5	**2.0**
Gurteen	0.2	0.3	0.1	1.0	0.2	**1.7**
Strandhill	0.2	0.2	0.0	0.6	0.0	**1.0**
Coolaney	0.2	0.1	0.0	0.5	0.4	**1.2**
Villages & Rural	3.5	1.7	1.0	10.9	3.5	**20.6**
Total	**10.3**	**20.0**	**4.2**	**43.3**	**21.9**	**100.0**

Table 3.15 Total Retail Floorspace in Sligo City and County, 2015 (sq.m. net)						
	Convenience	Comparison	Bulky	Retail Services	Vacant	Total
Sligo City	9,879	28,551	27,139	11,084	11,882	**88,535**
Collooney	758	192	135	530	6,499	**8,114**
Ballymote	2,102	1,314	2,344	1,034	267	**7,061**
Tubbercurry	853	798	3,827	1,335	1,256	**8,069**
Grange	1,276	110	452	865	899	**3,602**
Enniscrone	540	144	136	1,553	342	**2,715**
Bellaghy	937	107	-	242	195	**1,481**
Ballysadare	1,257	143	-	390	208	**1,998**
Gurteen	460	213	280	279	43	**1,275**
Strandhill	280	117	-	504	-	**901**
Coolaney	85	56	-	145	678	**964**
Villages & Rural	1,488	788	2,997	N/A*	N/A*	**5,273**
Total	**19,915**	**32,533**	**37,310**	**17,961**	**22,269**	**129,988**

Table 3.16 Percentage Split of Retail Floorspace in Sligo City and County, 2015 (sq.m. net)						
	Convenience	Comparison	Bulky	Retail Services	Vacant	Total
Sligo City	7.6	22.0	20.9	8.5	9.1	**68.1**
Collooney	0.6	0.1	0.1	0.4	5.0	**6.2**
Ballymote	1.6	1.0	1.8	0.8	0.2	**5.4**
Tubbercurry	0.7	0.6	2.9	1.0	1.0	**6.2**
Grange	1.0	0.1	0.3	0.7	0.7	**2.8**
Enniscrone	0.4	0.1	0.1	1.2	0.3	**2.1**
Bellaghy	0.7	0.1	-	0.2	0.2	**1.1**
Ballysadare	1.0	0.1	-	0.3	0.2	**1.5**
Gurteen	0.4	0.2	0.2	0.2	0.0	**1.0**
Strandhill	0.2	0.1	-	0.4	-	**0.7**
Coolaney	0.1	0.0	-	0.1	0.5	**0.7**
Villages & Rural	1.1	0.6	2.3	N/A*	N/A*	**4.1**
Total	**15.3**	**25.0**	**28.7**	**13.8**	**17.1**	**100.0**

accommodates a disproportionate amount of floorspace relative to its population, but this is skewed by the fact that there are a number of very large vacant retail warehouses in the village.

Tubbercurry and Ballymote clearly fit into the second tier of retail centres within the County, while the key support town of Enniscrone has less available retail space than Grange, a satellite village. The floor area of retail services and vacant floorspace in smaller villages was not fully surveyed, but if this had been included it would further highlight the extent of floorspace available in the more peripheral parts of the County. While 21.9% of the units within the County are considered vacant, only 17.1% of the overall floorspace in the County was considered vacant following the survey.

3.5.1 CHANGE IN RETAIL PROVISION 2008-2015

While we cannot precisely identify the change in retail provision for the entire County, the summary table, 3.17 and 3.18 do suggest growth in the number of vacant units and retail services, while the number of convenience and comparison units will have largely remained the same, when considering that figures for many of the villages were not included in the 2008 survey. The number of bulky goods operators within the County has reduced over the intervening period and the overall level of retail services floorspace has remained fairly consistent.

The percentage change in floorspace provision can portray a more precise overview of change in retail over the 2008-2015 period. The summary tables suggest a significant decrease in mainstream and bulky goods comparison shopping in recent years. This may be a culmination of a variety of issues including poor economic conditions and a lack of disposable income, new shopping trends including growth in online shopping and willingness to travel longer distances for comparison shopping needs.

Casual trading has also increased in the County in recent years. There is a comparatively high number of markets operating in the Sligo area, including Drummartin market Banada (Joe Dan's), the People's market in Strandhill, the Country Market in Beltra, the Flea market at the Model and the Farmers Market in Sligo IT, Wine Street Car Park and weekly market stalls in Ballymote and Tubbercurry. Furthermore at the time of the survey there was signage for numerous Christmas markets, particularly adjacent to gift shops such as Drumcliff Gift Shop, Rathcormac Craft Village (Benbulben Centre) and The Fairgreen in Skreen.

Table 3.17 Actual Change in Floorspace Provision 2008-2015[14]

	2008		2015	
County Sligo	Sq.M.	No. of Units	Sq.M.	No. of Units
Convenience	12,607	81	19,915	126
Comparison	26,699	208	32,533	245
Bulky Goods	32,442	59	37,310	52
Retail Services	16,935	308	17,961	532
Vacant	17,845	104	22,269	269
Total	**106,527**	**760**	**129,988**	**1,228**

Table 3.18 Percentage Change in Floorspace Provision 2008-2015

	2008		2015	
County Sligo	Sq.M.	No. of Units	Sq.M.	No. of Units
Convenience	11.8	10.7	15.3	10.3
Comparison	25.1	27.4	25.0	20.0
Bulky Goods	30.5	7.8	28.7	4.2
Retail Services	15.9	40.5	13.8	43.3
Vacant	16.8	13.7	17.1	21.9
Total	**100.0**	**100.0**	**100.0**	**100.0**

3.5.2 CHANGE IN RETAIL OCCUPANCY 2008-2015

Table 3.19 provides an overview of vacancy levels in the key settlements of the County for retail purposes. The 2015 survey has identified more units in Sligo City and the county in general, than the survey undertaken in 2008. Analysis of the summary data suggests that vacancy levels in the County have increased by 2.8% over the 2008-2015 period. There have been significant increase in vacancy in the towns of Tubbercurry and Enniscrone and also in the village of Grange based on the survey data.

Highest levels of vacancies appeared to be within those towns and villages that were subject of new shop units at the time of the 2008 survey, for example, Ballysadare, Bellaghy, Grange and Coolaney. New developments were constructed in these villages and there has been a subsequent difficulty in finding suitable occupants. Had the economy and population of these towns and villages continued to grow over the intervening period, there would have been greater potential for these units to be occupied. The level of vacancy in County Sligo in 2015 (21.9%), almost matches the level of vacancy noted for the adjoining County of Leitrim in 2014 (21.7%)[14], although County Leitrim experienced a slightly greater increase in vacancy levels (3.4% over the 2007-2014 period).

14 Leitrim County Council (2015) *Leitrim County Retail Strategy* 2015-2021

3.6 EXTANT PLANNING PERMISSIONS

Extant planning permissions that have not been constructed and remain live are collated in Table 3.20 according to year of the permission and general location. The vast majority of floorspace associated with extant permissions was provided for in Sligo City, and chiefly within the Wine Street car park redevelopment. Much of the extant planning permissions in the city is associated with permissions that were subject of extension of durations and were originally lodged to the Council in 2006.

The key support town of Enniscrone in the west of the county has been subject of numerous planning permissions for small-scale retail development, many of which have not yet been commenced. Another concentration of extant retail planning permissions is contained in Strandhill.

The majority of the permissions are silent as to whether the floorspace falls into the convenience, comparison or bulky goods category. Nevertheless, based on the details of the proposals and the applicant we have attempted to identify the anticipated split. This shows a concentration of units in the comparison retail category and minimal proposals for additional bulky goods floorspace. Table 3.21 ines the extant planning permissions in Sligo City and County by retail category.

15 Figures for 2015 include floor areas for convenience, comparison and retail services for the County and not solely relating to Sligo city, Collooney, Grange, Ballymote, Enniscrone and Tubbercurry, as per 2008 figures.

Table 3.19 Change in Retail Occupancy in County Sligo, 2008-2015

Town/Village	No. of Vacant Units		No. of Occupied Units		% of Vacant Units	
	2008	2015	2008	2015	2008	2015
Sligo City	78	145	488	482	13.8	23.1
Tubbercurry	6	21	53	71	10.2	22.8
Enniscrone	1	10	24	36	4.0	21.7
Ballymote	9	12	49	51	15.5	19.0
Grange	2	11	15	13	11.8	45.8
Ballysadare	N/A	6	N/A	18	N/A	25.0
Bellaghy	N/A	4	N/A	5	N/A	44.4
Collooney	8	10	27	32	22.9	23.8
Gurteen	N/A	2	N/A	19	N/A	9.5
Coolaney	N/A	5	N/A	10	N/A	33.3
Strandhill	N/A	0	N/A	12	N/A	0.0
Villages & Rural	N/A	43	N/A	210	N/A	17.0
Total	**115**	**269**	**512**	**959**	18.3	21.9

In evaluating the retail alternatives which currently exist within easy access to the main settlements of County Sligo, it is clear that there is significant scope for retail leakage to neighbouring Counties, particularly for convenience retailing. Economic conditions have very much stymied growth in comparison shopping in the region and this has allowed for the regional importance of Sligo for comparison shopping to be maintained.

Table 3.20 Retail Floor Area of Extant Planning Permissions in Sligo County & City, 2010-2015

	2011	2012	2013	2014	2015
Sligo City	10,971	11,823		2,276	
Collooney				55	95
Ballymote					612
Tubbercurry					
Grange					
Enniscrone		1,085	55	277	112
Bellaghy					
Ballysadare			324		
Gurteen					
Strandhill		821		384	28
Coolaney					
Villages & Rural		100			
Total	**10,971**	**13,829**	**379**	**2,992**	**847**

Table 3.21 Extant Planning Permissions in Sligo County & City, 2010-2015

Convenience	Comparison	Bulky Goods
5,657	23,067	295

4.0 COMPETING CENTRES

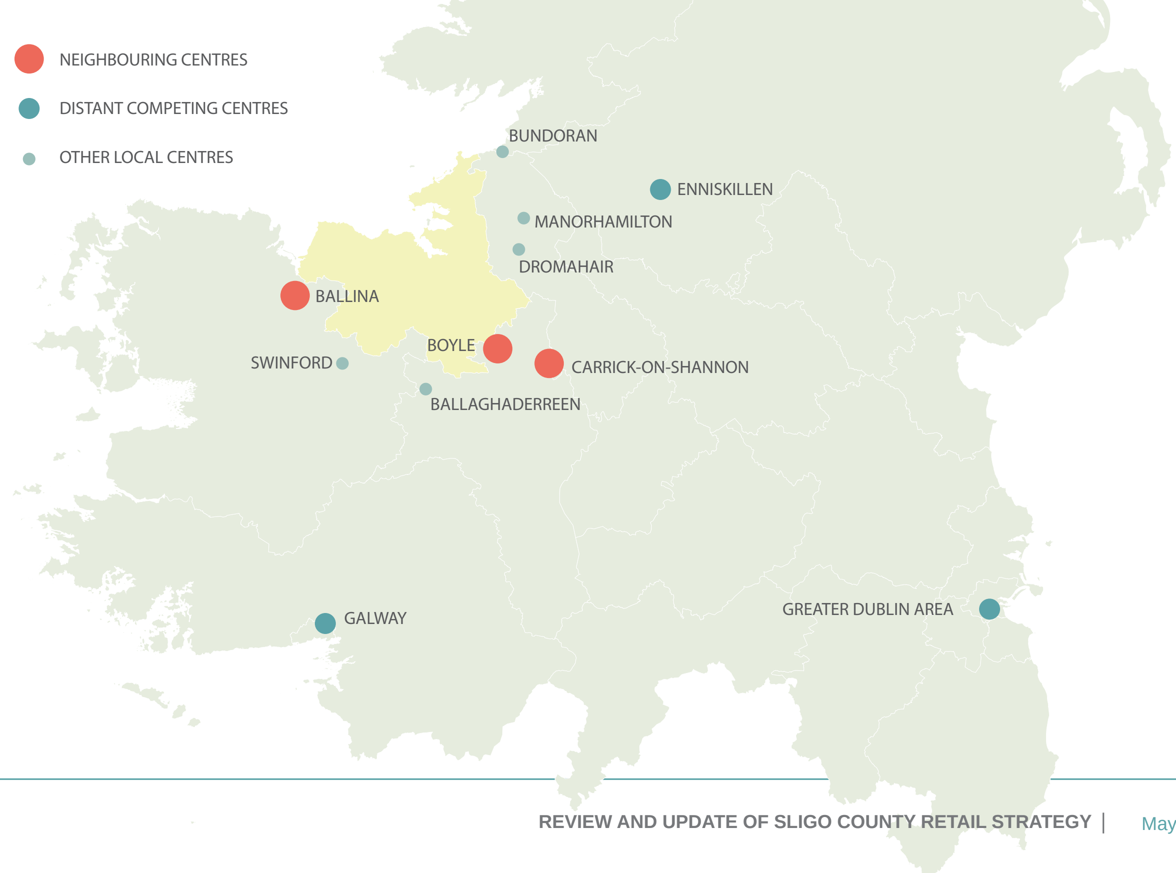
4.1 NEIGHBOURING CENTRES

4.1.1 BALLINA

The town of Ballina is located 4km from the boundary with County Sligo. Within the *Retail Planning Guidelines 2012*, Ballina is placed in the second tier of retail centres having a regional retail function alongside Castlebar. Ballina is approximately a 1-hour drive from Sligo city centre on the N59 national route. On a busy crossing point over the River Moy, historically and to this day the town serves an important market function for an expansive hinterland comprising the Moy Valley in north Mayo and west County Sligo. Of all the neighbouring centres to Sligo County, Ballina is expected to have the greatest trade draw from the County. The town's retail core is primarily lined along three main streets to the town, with minimal presence of out-of-town retailing. In recent years, urban improvement works including hard landscaping, widened footpaths and ramped pedestrian crossing points along Pearse Street have significantly improved the shopping environment. The Shaw's Department Store and Penney's store have significant draw for clothing, shoes and homewares. In recent years international multiples have set up shop in the town centre, including Boots and Holland & Barrett, although the town is primarily dominated by independent retailers. The main convenience shops in the town are Dunnes Stores, Tesco, SuperValu and Lidl. Tesco has recently received planning permission for a major redevelopment of their Market Square property, although no development has taken place as yet. Lidl has recently opened a new store on a site in the town adjoining the public car park on Humbert Street. As was highlighted under previous Retail Strategies for County Sligo, Ballina attracts significant trade draw from the west of Sligo County.

4.1.2 CARRICK-ON-SHANNON

The town of Carrick-on-Shannon is located within 40-50 minutes drivetime of Sligo gateway city along the N4 national route. The county town of Leitrim, it is located 13km from the southern boundary of Sligo County. Its context and growth in retail services has resulted in the town playing a growing role, particularly for convenience shopping in the southeastern area of County Sligo. Carrick-on-Shannon is divided into two physical distinct areas by the river Shannon, with the southwest bank comprising the Cortober area within the jurisdiction of Roscommon County Council and the northeast side within Leitrim County Council jurisdiction. The town incorporates out of centre retail parks on the western and eastern ends of the town, while the town's main street comprises the bulk of its retail services. There is also a strong emphasis on tourism-related shops and *bijou* shopping in the town centre. Convenience shopping offering has grown in recent years with SuperValu, Tesco and Aldi operating from the town. This expanded convenience retail presence is the primary reason for Sligo residents to visit the town for shopping.



4.1.3 BOYLE

Boyle is situated in the north of County Roscommon and is proximate to the southern environs of Sligo County, including Ballinafad. The town of Boyle had a population of 2,588 persons in 2011, according to the CSO. The town has quite a reasonable convenience retail provision including Mace, SuperValu, Londis and Spar shops. According to the Roscommon Retail Strategy, there was only 46 sq.m. of additional retail space permitted over the January 2007 to January 2012 period[16]. The town is a popular convenience retail destination for the immediate catchment serving both weekly shopping and top-up needs. Historically Boyle had significant presence as a comparison retail destination, but in recent years this has diminished with consolidation of comparison outlets to larger urban centres, such as Sligo city and Carrick-on-Shannon. The range and quantum of retail services contained in Boyle, would suggest that the town has a similar function and catchment to Ballymote. Despite reduction in retail presence in Boyle, based on drivetimes, the town of Boyle is expected to serve an element of the convenience shopping needs for south County Sligo.

4.2 DISTANT COMPETING CENTRES

4.2.1 ENNISKILLEN

Enniskillen is the retail and administrative centre for County Fermanagh and has a substantial number of convenience and comparison retail shops, including multiples, high-street stores and small independent traders. Located in Northern Ireland, Enniskillen is just over an hour drive from Sligo city *via* the N16 and A4 roads. Enniskillen hosts the Erneside Shopping Centre anchored by Marks & Spencer and Next. The town has an extensive convenience and comparison retail base including numerous 'high-street' brands, the Buttermarket (Arts and Crafts market) and major Supermarkets, such as Asda and Tesco. Attraction of retail spend to Enniskillen from Sligo and other parts of the Republic of Ireland fluctuates based primarily on changes in sterling-euro currency exchange rates. In recent years, with a strong Sterling currency, retail leakage north of the border has been significantly decreased and this was been reflected in growth in vacancy rates across the province[17]. Over the lifetime of this *Retail Strategy* it will be important to plan appropriately for such currency fluctuations.

4.2.2 GREATER DUBLIN AREA

Although Dublin is located 207 kilometres from Sligo city, improvements to sections of the N4 national road and M4 motorway have made it much more accessible to residents of Sligo County. Dublin city is approximately a 2 hours 40 minutes drivetime from Sligo city and is also accessible *via* public and private bus services and intercity rail services. The Greater Dublin Area comprises of several major retail areas including Dublin City Centre, Blanchardstown, Dundrum Town Centre, Liffey Valley, Swords Pavilions and Tallaght. It is envisaged that shoppers from Sligo will continue to visit Dublin City Centre and specific retail destinations such as Liffey Valley, Blanchardstown and Dundrum occasionally for comparison shopping and specialist retail facilities not readily available in Sligo.

4.2.3 GALWAY

Galway City is the principle retail destination in the Mid-west region and attracts customers from a wide catchment area. Galway is located 139 kilometres from Sligo city and is readily accessible from those parts of the county proximate to the N17 national route. Vacancy rates in the primary commercial core of Galway are one of the lowest in the country, benefitting from high level so footfall particularly along pedestrianised streets.

Galway City is the third-largest commercial and retail centre in the country, behind Dublin and Cork. The city comprises a range of international, national and local retailers and has a broad range of higher order retail services and facilities not available in County Sligo. As a higher order centre, within the western region it is likely that it will always attract some level of expenditure diversion from Sligo.

4.2.4 ATHLONE

Athlone town is strategically-located centrally within the country on a road and rail crossing point of the Shannon and along the N6 national route connecting Dublin with Galway. In 2006 the population of Athlone town and environs was 14,347, but by 2011 this had increased by over 40% to 20,153 persons. Within the *Retail Planning Guidelines 2012*, Athlone is placed in the second tier of retail centres having a regional retail function. There are two shopping centres in Athlone; the Golden Island Shopping Centre and Athlone Town Centre. Athlone has only mini-

16 Roscommon County Council (2014) *Roscommon County Retail Strategy*. Accessible at *http://www.roscommoncoco.ie/en/Services/Planning/Plans/County_Development_Plan_2014_-_2020/*

17 Lisney (2015) Northern Ireland Retail Update suggests that retail vacancy has dropped marginally across the province, but this is primarily centred upon an increase in occupancy in Belfast. Accessible at http://www.lisney.com/research/publications-ni

mal draw from Sligo for convenience and bulky goods, but may serve to attract custom from the south of the County for comparison goods, particularly with respect to the major national and international comparison retailers that are absent from Sligo city but are located in Athlone (e.g. Zara, H&M, Fields, Marks & Spencer, Topshop).

4.3 OTHER LOCAL CENTRES

4.3.1 MANORHAMILTON

Manorhamilton is located centrally within north County Leitrim and performs an important service function for the town and wider area. This north Leitrim town is bisected by the N16 national road, which connects with Sligo 26km to the west and Enniskillen 40km to the east. While the town has a narrow comparison and bulky goods retail base, the town's convenience retailing function has improved significantly in recent years. In 2011 a SuperValu supermarket was opened in the town centre and it is understood to have reduced the requirement to travel longer distances in order to undertake convenience shopping. Previous to this many north Leitrim shoppers would have had to travel into Sligo City, Carrick-on-Shannon or Bundoran to visit a supermarket. Permission for another major supermarket, Tesco, has also been granted, but work on this has not commenced to date. While the convenience retail offering in Sligo city is expected to draw in reasonable expenditure from the Manorhamilton area, it would be expected that Sligo city would have a greater draw for comparison and bulky goods shopping.

4.3.2 DROMAHAIR

Dromahair is located on the River Bonnet in west county Leitrim, a 20 to 25-minute drive from the Gateway city of Sligo and 2km from the border with Sligo County. The village previously served as a market town, but its level of services and market function has significantly reduced in recent years. Proposals dating from the mid to late 2000s to develop a supermarket anchored new centre for the village have not come to fruition and there have been further reductions in the extent of retail provision since then. The village has a minimal retail base, but does serve the eastern edge of the County south of Lough Gill for some convenience retailing, although this is not expected to comprise weekly shopping trips given the scale of the local store serving the village.

4.3.3 BALLAGHADERREEN

The town of Ballaghaderreen in northwest County Roscommon has recently been bypassed with a new route for the N5 national route skirting the northern environs. Ballaghaderreen is an important retail and commercial centre within County Roscommon. The retail catchment of Ballaghaderreen is expected to creep into the south of County Sligo including the Monastereden area. However, it would be expected that the catchment area would be limited by virtue of the proximity of other retail centres with a similar and greater retail offering. According to the *Roscommon County Retail Strategy 2014* over half of the floor area of new developments permitted between January 2007 and January 2013 is either vacant or undeveloped. A similar patterns exists in other service towns in this part of the west of Ireland, including Sligo County.

4.3.4 SWINFORD

Similar to the town of Ballaghaderreen, Swinford has been bypassed by the N5 national route and serves as an important convenience retail destination for the southwest of the County, including the Aclare and Tourlestrane area. Located in the east of Mayo, Swinford has a similar retail offer to the neighbouring Sligo town of Tubbercurry. However, the town comprises a large Tesco supermarket with extensive car parking and it is understood that this supermarket provides an alternative weekly shopping destination for residents in the southwest of Sligo County.

4.3.5 BUNDORAN

Bundoran is located 5km from the boundary with County Sligo and had a population of 2,140 persons in 2011. The town's service base is primarily pitched towards meeting its role and setting as an important tourism destination in northwest Ireland. Consequently, Bundoran has an abundance of pubs and restaurants. Retail activity within this 'holiday town' is notably seasonal with peak activity during summer holidays and at weekends. The town has a narrow comparison and bulky goods offering and the main convenience operator, SuperValu, attracts many customers from outside the County in the northern ends of Counties Sligo and Leitrim. Based on drivetimes, it is expected that an element of convenience retail requirements in the north of County Sligo will be fulfilled in Bundoran.

5.0 PROJECTED REQUIREMENTS

This section provides the floorspace capacity assessment for the County taking into account, as best as possible, changes to the economy, population and future economic and population forecasts. It should be noted that a quantitative retail appraisal of this nature is the best means of identifying the likely floorspace quantum that needs to be achieved in the County and is consistent with the approach sought under the *Retail Planning Guidelines 2012*. It involves making forecasts for the future population, expenditure, turnover and other factors using the best available data at the time. In order to reach the desired output, a number of inputs have to be estimated and have been chosen in order to be consistent and align with the core strategy and settlement strategy for the *Draft Sligo County Development Plan 2017-2023*. As the study is based on a number of assumptions, it can only provide a broad indication of anticipated capacity. Nonetheless, the quantitative study can give a useful overview of the position of the County from a retailing perspective. Furthermore, it should be noted that the figures set out in this section are not intended to be prescriptive thresholds nor should they be treated as upper limits, particularly bearing in mind future changes in economic conditions. However, at the time of preparing the Strategy, the figures presented are considered the best estimate to understand the likely requirement for additional retail space from base (2016) to design year (2023). The base year 2016 has been chosen as this aligns with the year set for population targets in the *Regional Planning Guidelines for the Border*, which is also used within the Core Strategy contained in the *Draft County Development Plan 2017-2023*. The Design Year 2023 will be the final year for the *Draft County Development Plan* and population targets assigned within the *Regional Planning Guidelines for the Border* guide the estimated catchment populations.

This chapter estimates retail expenditure growth and future floorspace requirements in the Study Area from 2016 to 2023. The approach taken is a step-by-step capacity assessment including the following steps: -

1. Estimate of total available expenditure in the base year and design year for occupied households of the catchment areas;
2. Estimate of expenditure per capita on convenience, comparison and bulky household goods at the base year and design year;
3. Estimate the catchment population at base and design years for convenience and comparison;
4. Estimate the likely increase in expenditure available for provision of additional floorspace, and changes to the proportion of expenditure on other forms of retailing such as Internet shopping;
5. Estimate the likely average turnover of new floorspace in convenience, comparison and bulky household goods (net sales density);
6. Estimate the capacity for additional floorspace throughout the County.

5.1 POPULATION ESTIMATES

The population of County Sligo increased from 60,894 persons in 2006 to 65,393 in 2011, which represents a 7.4% increase. An updated Census of the Population will take place in April of 2016 and this will provide more up-to-date information on population change over the 2011 to 2016 period[18]. Based on the existing census data year, the population increased at an average annual rate of 1.5% over the 2006-11 inter-censal period. Population projections for 2016 and 2022 need to be consistent with the population targets for County Sligo set in the *Regional Planning Guidelines 2010-2022*. Table 5.1 outlines the recorded populations and population projections for County Sligo.

Taking Sligo County as the catchment, the baseline population for the base year is 71,851 persons and for the

18 Preliminary results will be available in June 2016 with first publications due for release in March 2017

Table 5.1 Recorded Populations and Population Projections for County Sligo

2006	2011	2016	2022	2023
60,894	65393	71,851	77,350	78,267

Table 5.2 Estimated Convenience & Comparison Shopping Catchments and Projections for County Sligo

Convenience		Comparison	
2016	2023	2016	2023
71,851	78,267	111,202	125,732

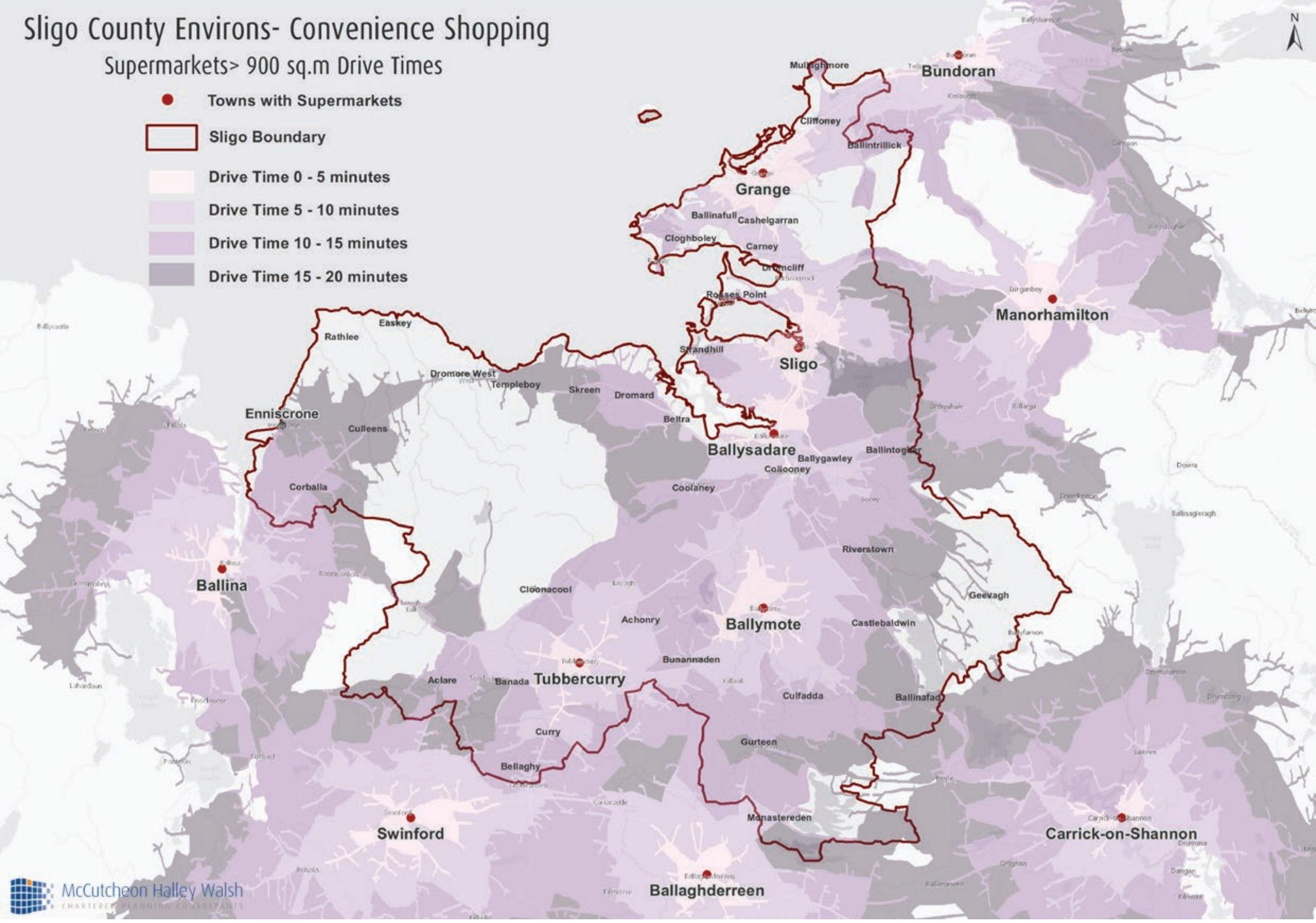


Figure 5.1 - Sligo County Environs - Convenience Shopping: Supermarkets > 900 sq.m (Net Floor Area) Drive Times

design year, 78,267 persons by following the population trends envisaged under the *Regional Planning Guidelines*. Further reasoned assumptions on both market share and trade draw inform this aspect of the retail expenditure estimates. Use of geographic information systems (GIS), in particular, drivetime modelling, can more readily allow for the population of the comparison and convenience catchments to be calculated (See figures 5.1 - 5.4). This analysis can also draw on previous household surveys undertaken as part of reviews of the County Retail Strategy and also through analysis of place of work catchments[19]. Convenience shopping, particularly at its lowest tier incorporating local stores, draws trade primarily based on accessibility. The convenience and comparison shopping catchment based on our modelling is delineated within Table 5.2 and this reasonably accounts for much of the trade draw and leakage in the Sligo County catchment. Review of the estimated population catchment for the convenience shopping revealed little, if any difference between the convenience catchment and County populations. Consequently we have used County figures for the convenience catchment.

19 CSO Census of Population of Ireland 2011/All-Island Research Observatory (AIRO). Place of Work, School or College. Census of Anonymised Records (POWSCAR).

5.2 RETAIL EXPENDITURE

The Central Statistics Office provides data for the total estimated breakdown in household expenditure on convenience, comparison and other expenditure categories for the most recent period, 2009-2010 period[20]. An adjustment for the County retail expenditure using a 0.949 weighting based on State averages in 2010 is incorporated into the estimated spend[21]. This is to account for the fact that disposable incomes will vary across the country with a greater prevalence for higher levels of disposable income in counties proximate or comprising the largest ur-

20 Fieldwork for the CSO Household Budget Survey 2015-2016 began in February 2015 and will continue until March 2016. Results of this survey are not expected to be published until late 2017. When available, this survey will provide more up-to-date information on household expenditure. It is important to note that household expenditure is only referred to and this does not include retail expenditure by businesses, on items like food, drink or stationery nor does this include retail expenditure by communal households, such as nursing homes, hospitals or boarding schools.

21 This weighting is based on Table 7.1 of the Central Statistics Office publication (2013), County Incomes and Regional GDP 2010, which refers to 'indices of disposable income per person by County in 2005 and 2010.

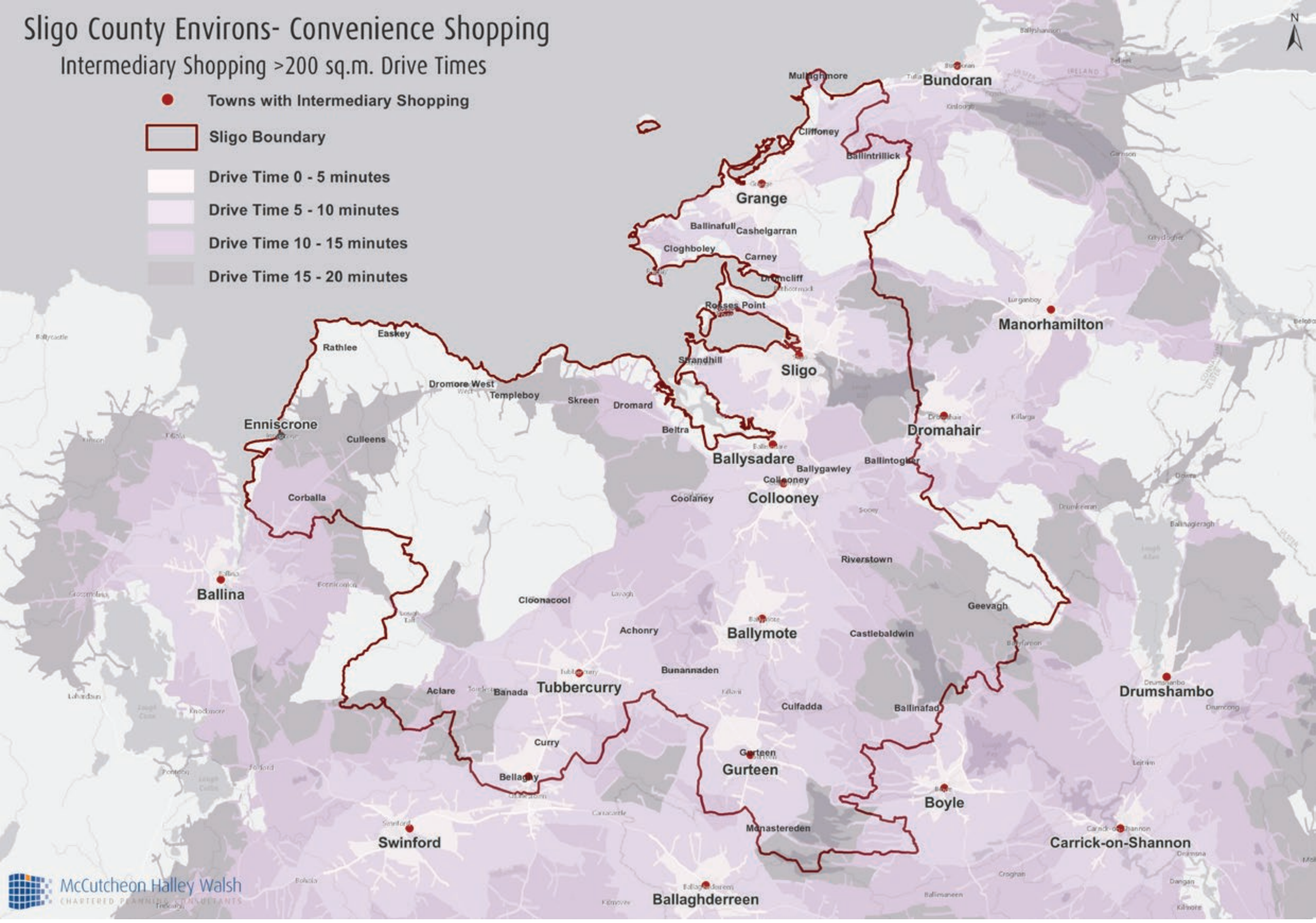


Figure 5.2 - Sligo County Environs - Convenience Shopping: Intermediary Shopping > 200 sq.m (Net Floor Area) Drive Times

ban centres. Household income expenditure is known to vary between rural and urban households and weighting was also included for this based on an estimated number of occupied urban and rural households in 2010 (using CSO Census stats). Average and total weekly expenditure per household in 2010 and *per capita* can then be estimated. Indicators of growth and decline in disposable income are then used to estimate the potential change in average expenditure per capita at the base year, 2016. The reasonable means of identifying change in disposable income is *via* review of the Retail Sales Index (RSI)[22], as improved retail sales performance is generally an indication of increased levels of disposable income. It is possible to also review variations in the retail sales index for convenience and comparison goods, thereby excluding motor sales from the estimations. Our review indicates that the retail sales index for the sale of all retail goods, excluding motor sales, increased from an index measure of 96.0 in November 2010 to 102.0 in November 2015.

22 The Retail Sales Index collated by the CSO measures the trend in the level of average weekly sales for each month. It provides an accurate and objective measure of retail trading and supplies a valuable guide to consumer behaviour in the Irish retail market. At the time of the study the latest RSI was available for November 2015. For the purposes of this exercise, all retail sales indices for the months of November 2010-2015 are used.

When broken down into weekly spend and multiplied *per* resident of Sligo for 2010[23], the estimated annual spend *per capita* is calculated as €3,371 on convenience goods and €1,719 on comparison goods in the base year, 2016. It is noted that this is very much in line with figures for other neighbouring Counties[24] who have recently undertaken County Retail Strategies.

Table 5.3 Estimated Spend on Comparison & Convenience Goods for Sligo County, 2010 - 2016

	Convenience	Comparison
Total Weekly Household Spend	€3,885,939	€2,768,636
Weekly Spend per Capita	€60.25	€42.93
Annual Spend per Capita, 2010	€3,133	€1,597
Annual Spend per Capita, 2016	€3,371	€1,719

23 No precise population figures are available for the year 2010, as the Census of Population was undertaken in 2011. The Border Regional Planning Guidelines estimate a population of 66,430 for County Sligo in 2010, but this is considered to have significantly overestimated the population based on the Census 2011 figure for the County of 65,393. Consequently, a figure of 64,493 is considered a more reasonable estimate of the 2010 population for County Sligo, based on an evenly distributed population increase over the 2006-2011 period.
24 For examples, see Roscommon County Retail Strategy 2014-2020, p. 29 and Leitrim County Retail Strategy 2015-2021, p. 55.

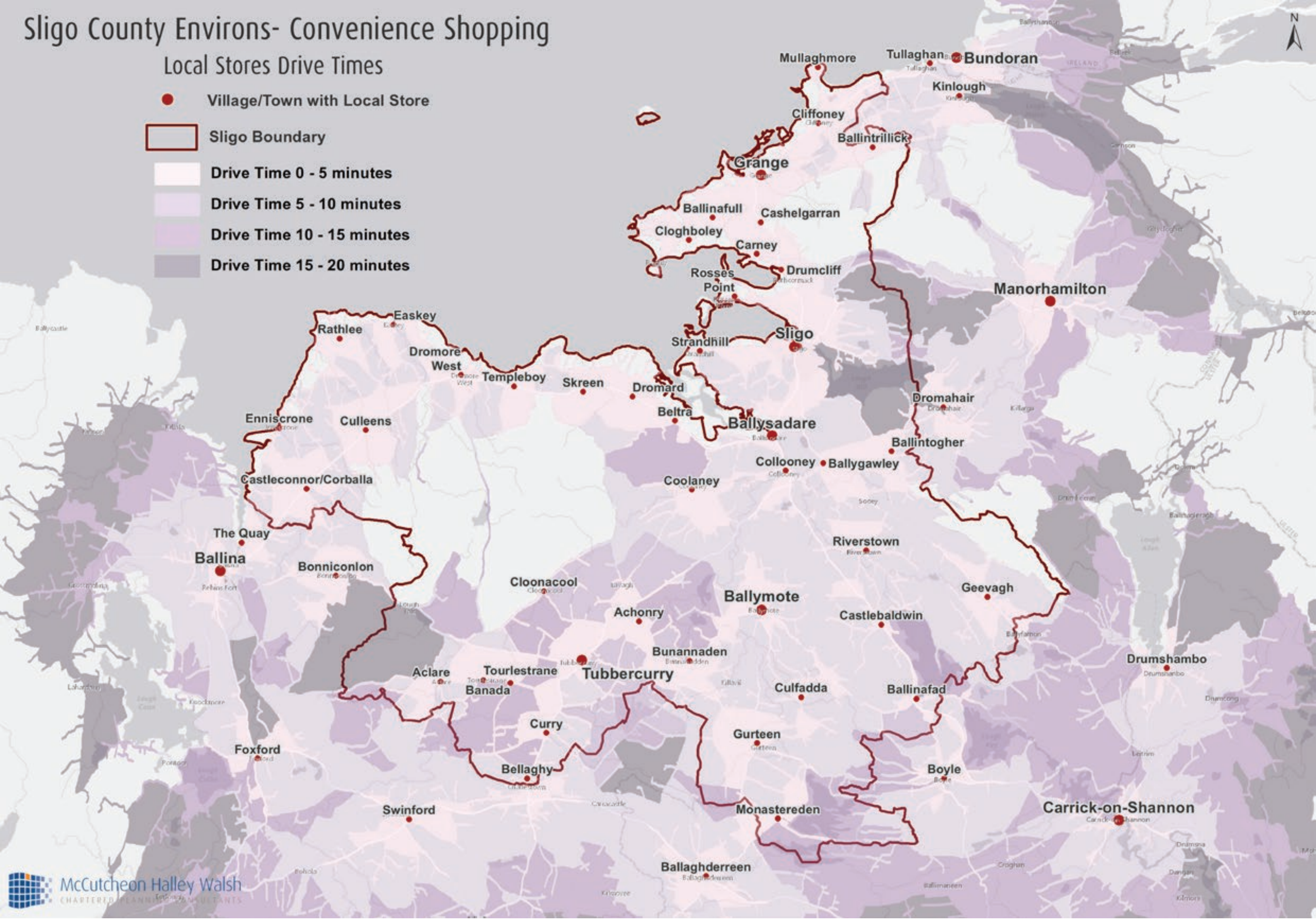


Figure 5.3 - Sligo County Environs - Convenience Shopping: Local Stores Drive Times

5.3 FUTURE FLOORSPACE REQUIREMENTS

The demand for additional commercial facilities will be dependent on population increase and an increase in *per capita* expenditure. However, this needs to consider the existing and future dynamics of retailing in the catchment and the existing provision of retail floorspace.

Future Estimates (2016-2023)

For the purposes of estimating the future floor area requirements, it is essential that future changes in retail sales are estimated. A host of economic measures can be utilised to forecast future variations in retail expenditure. Trading Economics[25] use econometric models to estimate changes in disposable income and consumer spending. Forecasts are projected using an autoregressive integrated moving average (ARIMA) model calibrated by economic analysts. Similar to approaches by academics and research bodies, analysts build a model based on the past behaviour using vast amounts of historical data and adjust the coefficients of the econometric model by taking into account analytical assessments and future expectations. This will provide a current estimate and an estimate of consumer spending *per capita* in County Sligo in the design year 2023.

The total annual spend for the respective County catchments is estimated in Table 5.4 based on population projection trends and figures identified in the *Border Regional Planning Guidelines*. Further reasoned assumptions on both market share and trade draw inform this aspect of the retail expenditure estimates. The convenience and comparison shopping catchments based on drive-time modelling is included in the maps accompanying this Strategy (see figures 5.1 - 5.4).

In considering the above expenditure levels, it is important to note that significantly different levels of turnover will apply to town-centre comparison goods, such as clothing and footwear and smaller household durables than would apply to 'bulky-household goods' sold in retail warehouses. Retail warehouses have a distinct function and are generally located outside of town centres. It is necessary to establish the expenditure potentially available to town centre comparison floorspace. In this regard, it is considered important to split between expenditure available for bulky household goods and comparison goods within the study area. Having regard to those items that clearly fall

25 Trading Economics uses official sources, such as CSO historical data to identify economic patterns. Accessible at http://www.tradingeconomics.com/about-te.aspx

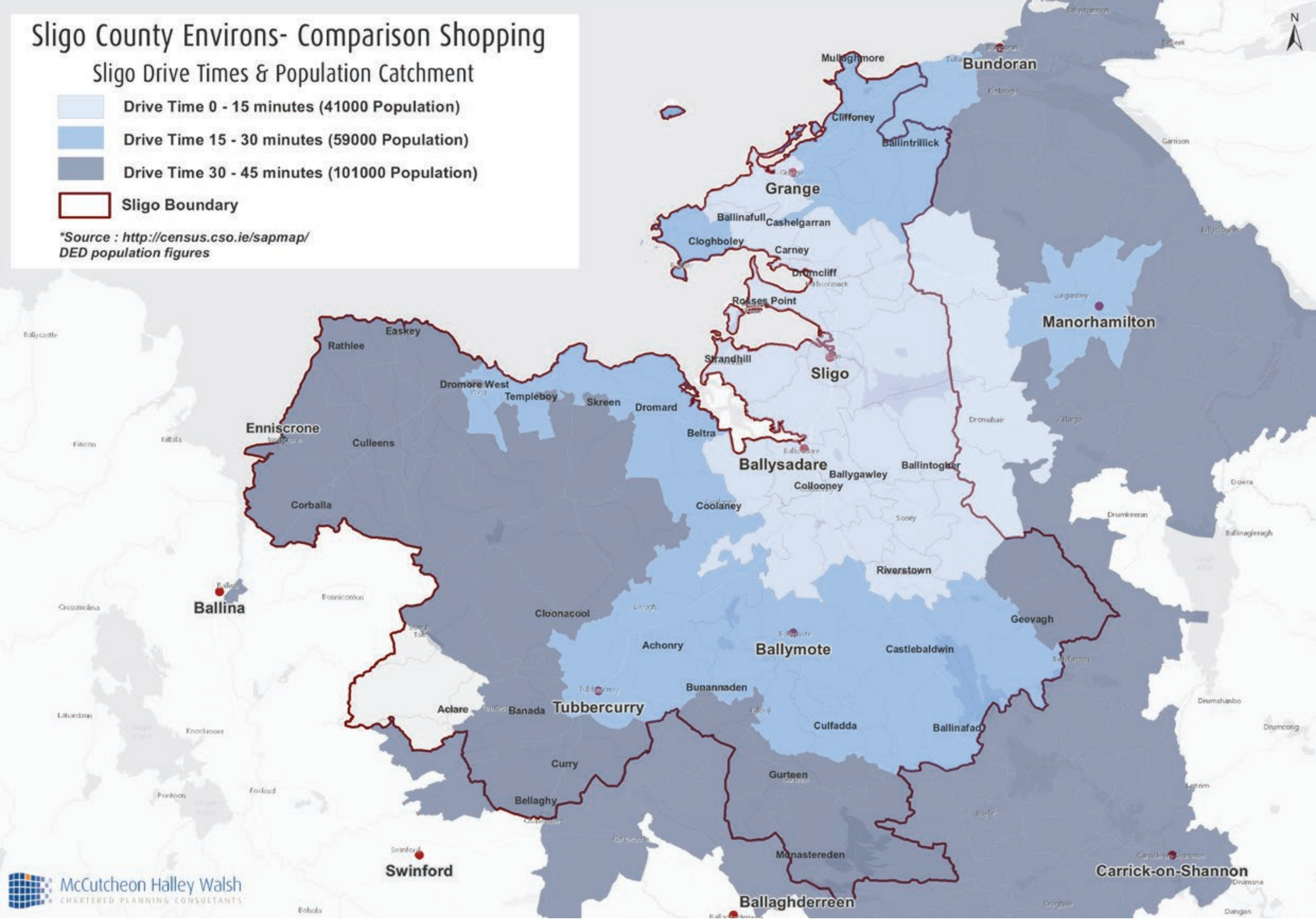


Figure 5.4 - Sligo County Environs - Comparison Shopping: Drive Times and Population Catchment

into the definition of bulky goods in the CSO Household Budget Survey (average of 14.8% cost of weekly expenditure), experience elsewhere in this respect (10%-20%) and the proportion of floor area identified for bulky goods in Sligo County (24.9%), it is estimated that approximately 19.8% of comparison expenditure will be accounted for by bulky household goods in retail warehouse type premises. The split in estimated spend on comparison, convenience and ‘bulky-goods’ is detailed in Table 5.5 below.

Table 5.4 Estimated Spend on Comparison & Convenience Goods for County Sligo, 2016 - 2023

	Convenience	Comparison	Total
Annual Spend per Capita, 2016	€3,371	€1,719	€5,089
Annual Spend per Capita, 2023	€3,621	€1,846	€5,468
Total Annual Catchment Spend, 2016	€242,192,636	€191,111,803	€433,304,439
Total Annual Catchment Spend, 2023	€283,427,219	€232,144,184	€515,571,403

Table 5.5 Total Estimated Spend on Comparison, Convenience & Bulky Goods, 2016 - 2023

	Convenience	Comparison	Bulky Goods	Total
Total Annual Spend, 2016	€242,192,636	€153,271,666	€37,840,137	€433,304,439
Total Annual Spend, 2023	€283,427,219	€186,179,636	€45,964,548	€515,571,403

Expenditure Adjustments (2016-2023)

Allowances have to be made for special forms of trading (SFT) which covers expenditure through the internet, market stalls, mail order and other non-store locations. Following analyses of various sources[26] and practise in Ireland and the UK, a reduction in comparison expenditure of 15% is assumed in 2016 rising to 20% in 2023, reflecting the increasing use of internet trading. This also absorbs the market share attributed to expenditure draws towards other non-store locations.

Online grocery shopping is becoming increasingly widespread with each of the main convenience retailers having some current presence or intention to tap into this market. In Ireland, online grocery retail is currently held back by a relatively low broadband penetration and logistical issues. However, each of the key market players are keen to expand their online operations in Ireland over the next 5 years. Information on levels of market draw from online grocery shopping are not commercially available. Figures relating to the UK market suggest in the region of 2% to 5% of market share comes from online grocery shopping[27]. Trends also suggest a greater concentration of online grocery sales in more urban locations. While online grocery shopping is expanding, a restrained approach to estimating the market share is taken in term of adjusting the market share and also taking into consideration the farmers' markets in the County and the fact that in many situations revenue from online shopping generally reverts back to the local shop. A 2% reduction is applied for the base year, 2016, increasing to 5% at the design year, 2023, to account for assumed increase in this type of shopping.

After applying these adjustments, household expenditure is estimated to be €454 million in 2023. Application of the market shares gives in the region €255 million retail expenditure for Sligo City in 2016, increasing to €291 million in 2023. Table 5.6 outlines the estimated market share of comparison, convenience and bulky goods for Sligo City and County in 2023.

It is estimated that there will be almost a €55 million increase in retail spend in the County over the 2016 – 2023 period based on population projections, catchment area and forecasted economic trends (see Table 5.7). A survey of existing occupied floorspace within County Sligo clarifies the extent of convenience, comparison or bulky goods.

Table 5.8 does not take into consideration retail floorspace, which has been permitted, but not yet constructed. Due to the constrained economic growth outside of the Dublin region, continued uncertainty as to which developments will be implemented and the extent of existing vacant stock, it is considered that the situation should be reviewed and assessed in considering future applications having regard to the situation at that time. Any implementation of such permissions is likely to be on a much-reduced scale from that originally approved, and / or on a phased basis.

26 For examples, see Retail Ireland (2013) Retail Focussed on €4.1 billion online shopping market. Accessible at http://www.retailireland.ie/IBEC/Press/PressPublicationsdoclib3.nsf/wvRINewsByTitle/retailers-focused-on-E4.1bn-online-shopping-market-23-05-2013?OpenDocument and Euromonitor International (2015) Internet retailing in Ireland. Accessible at http://www.euromonitor.com/internet-retailing-in-ireland/report.
27 See 'E-Commerce in Europe and Ireland' (August 2015). Accessible at http://exsite.ie/e-commerce-in-europe-and-ireland/

Table 5.6 Value of Market Share Comparison, Convenience & Bulky Goods, 2023*

	Convenience	Comparison	Bulky	Total
Sligo City	€133,567,679	€130,714,785	€26,747,400	€291,029,865
Collooney	€10,248,270	€879,032	€133,052	€11,260,354
Ballymote	€28,419,346	€6,014,043	€2,310,177	€36,743,566
Tubbercurry	€11,532,684	€3,653,476	€3,771,779	€18,957,939
Grange	€17,251,705	€503,612	€445,478	€18,200,795
Enniscrone	€7,300,878	€659,274	€134,038	€8,094,190
Bellaghy	€12,668,376	€489,877	€0	€13,158,253
Ballysadare	€16,994,823	€654,696	€0	€17,649,518
Gurteen	€6,219,267	€975,176	€275,960	€7,470,403
Strandhill	€3,785,641	€535,660	€0	€4,321,301
Coolaney	€1,149,212	€256,384	€0	€1,405,597
Villages & Rural	€20,117,976	€3,607,693	€2,953,755	€26,679,425
Total	**€269,255,858**	**€148,943,709**	**€36,771,639**	**€454,971,205**

Table 5.7 Total Adjusted Estimated Spend on Comparison, Convenience & Bulky Goods, 2016 - 2023				
	Convenience	Comparison	Bulky Goods	Total
Total Annual Spend, 2016	€237,348,783	€130,280,916	€32,164,116	€399,793,816
Total Annual Spend, 2023	€269,255,858	€148,943,709	€36,771,639	€454,971,205

Table 5.8 Existing Floorspace within County Sligo, 2015				
	Convenience	Comparison	Bulky Goods	Total
Floorspace (m^2)	19,915	32,533	37,310	89,758

Turnover Capacity of Existing Floorspace (2016)

The turnover figures for 2016 set out in Table 5.7 above are an estimate of the amount of expenditure that is currently being sustained in the County. For example, in 2016 Sligo had 19,915 sq.m. convenience floorspace in 2016, which is estimated to be generating a turnover of €237 million; 32,533 sq.m. of comparison floorspace, which is estimated to be generating €130 million; and 37,310 sq.m. of bulky household floorspace, which is estimated to be generating €32 million. Looking at indicative turnover ratios (turnover divided by floorspace), trading conditions in the convenience sector would be considered to be trading at a reasonably healthy level (€11,918 per sq.m) with a good mix of stores. Dividing by the volume of net comparison floorspace, gives an average sales density of €4,005 per sq.m, for comparison shopping lower than the general average for centres of this type (around €5,000 per sq.m.). Bulky-goods floorspace is trading poorly at €862 per sq.m. (reflected in high-vacancy rates), suggesting an over-provision of this type of retailing. Review of the largest retail centres in the country by Sherry FitzGerald in 2013, highlighted that the level of retail warehousing in Sligo, relative to the county population, was well in excess of the state average[28]. For comparison, Table 5.9 identifies net sales density figures identified recently within other neighbouring Retail Strategies and previously within the *Joint City and County Retail Strategy 2011-2017*.

Turnover Capacity of Floorspace (2023)

Assuming a similar trend in retail spending change to that exercised within 5.5 and 5.6 above, we can calculate the estimated turnover per floorspace in County Sligo in 2023.

By dividing the estimated change in retail expenditure 2016-2023 (see Table 5.7) with the estimated turnover per floor area for 2023 in Sligo, the additional floorspace envisaged to be required in Sligo County over the 2016-2023 period can be estimated (see Table 5.11).

28 DTZ Sherry FitzGerald (2013) *Irish Shopping Centres and Retail Parks: A Stock Analysis*. Accessible at http://www.sherryfitz.ie/media/irish-shopping-centres-and-retail-parks1.pdf

Table 5.9 Comparison Net Sales Densities			
	Convenience	Comparison	Bulky Goods
Sligo 2016	**€11,918**	**€4,005**	**€862**
Sligo 2008	€12,820	€5,982	(N/A)
Leitrim 2014	€10,064	€5,035	€596
Louth 2014	€11,186	€4,224	€1,861
Longford 2014	€8,347	€8,787	€606
Roscommon 2014	€9,000	€4,050	€2,160

Table 5.10 Estimated Turnover per Floor Area in County Sligo, 2016-2023			
Year	Convenience	Comparison	Bulky Goods
2016	€11,918	€4,005	€862
2023	€12,804	€4,302	€926

Table 5.11 Estimated Additional Retail Floor Area in County Sligo, 2016-2023				
Year	Convenience	Comparison	Bulky Goods	Total
2023	2,492	4,338	4,975	11,805

Future Floorspace Requirements

Approximately 2,492 sq.m. of net convenience floorspace is anticipated to be required over the lifetime of the Strategy. Considering the current geographical distribution of this floorspace throughout the County and neighbouring areas and the need to provide for more sustainable shopping patterns, it would be anticipated that this should not be exclusively provided within Sligo City. Extant planning permissions can facilitate in the region of 5,600sq.m. convenience retail floorspace, if enacted, however, these permissions are concentrated in Sligo city and Enniscrone and nearing expiration. These permissions are looking increasingly unlikely to be realised. This situation should be monitored over the lifetime of the strategy. Proposed increase in convenience shopping floorspace is most likely to be required in Sligo city and the key support towns.

Any proposed increased in comparison shopping is most likely expected to locate in Sligo city. While there may be scope for comparison shopping in smaller study area centres, a lack of footfall is more likely to direct these developments towards Sligo city centre.

The extent of additional bulky goods retail floorspace expected over the lifetime of the Strategy can readily be absorbed in the existing stock of vacant retail space. The low level of extant planning permissions for bulky goods (295sq.m.) is a reflection of the current market for this type of retailing and restrictive planning policy. It would be expected that the Council will continue to receive pressure to allow for more mainstream comparison and convenience use of permitted retail warehousing. Considering the extent of existing vacant bulky goods shops and the anticipated volume of new floorspace, the Council should resist proposals to reuse the existing vacant retail warehousing for more mainstream or convenience shopping.

Considering the current scenario and estimates of change over the 2016-2023 period, robust Retail Impact Assessments will be required as part of future planning applications for retail development, in order to best guide the development of retail planning in Sligo, in particular based on sound rationale, evidence and the findings of this Retail Strategy. In considering proposals for future retail provision, the Council will have regard to the need to avoid unnecessary leakage of retail expenditure to competing centres outside of the County, where this is not considered a sustainable form of development.

Summary of Capacity Assessment

Future floorspace requirements were arrived at initially by identifying the catchments for convenience and comparison goods in both the base year 2016 and design year 2023. In order to best estimate the available expenditure, it was essential to assign a weighting regarding the disposable income of the county relative to regional variations, urban-rural divide and housing occupancy. Estimates regarding changes in consumer spending, retailing trends and population based on statutory plans and reliant sources could then be assigned to estimate demographic and economic change. Household spending data could be used to estimate the breakdown of convenience, comparison and bulky goods expenditure. Using the detailed floor area surveys, the turnover per floor area in the base year could be identified and the net sales density arrived at. An understanding of the available additional expenditure relative to population projections and economic trends could then be used to identify the expected additional floorspace requirement over the period of the Plan. Table 5.12 below provides a summary of the results of the assessment undertaken, which was backed by a detailed statistical model.

Retail and related policies in the *Sligo & Environs Development Plan 2010-2016* and *Sligo County Development Plan 2011-17* were heavily informed by the findings of the *Sligo City & County Joint Retail Strategy 2010-2017*. This chapter examines the extent to which the strategy has been implemented and draws comparisons based on the fieldwork and analysis which was completed in 2008. The previous Retail Strategy was very much focussed on the ongoing development of Sligo City as the primary driver of retail development in the region.

Table 5.12 Sligo County Retail Capacity Assessment Summary

<table>
<tr><td rowspan="2">Population</td><td colspan="6">2016</td><td colspan="6">2023</td></tr>
<tr><td colspan="6">71,851</td><td colspan="6">78,267</td></tr>
<tr><td rowspan="2">Catchment Population</td><td colspan="3">Convenience</td><td colspan="3">Comparison</td><td colspan="3">Convenience</td><td colspan="3">Comparison</td></tr>
<tr><td colspan="3">71,851</td><td colspan="3">111,202</td><td colspan="3">78,267</td><td colspan="3">125,732</td></tr>
<tr><td>Retail Expenditure per capita</td><td colspan="3">€3,371</td><td colspan="3">€1,719</td><td colspan="3">€3,371</td><td colspan="3">€1,846</td></tr>
<tr><td rowspan="3">Total Annual Spend</td><td colspan="3">€242,192,636</td><td colspan="3">€191,111,803</td><td colspan="3">€283,427,219</td><td colspan="3">€232,144,184</td></tr>
<tr><td colspan="2">Convenience</td><td colspan="2">Comparison</td><td colspan="2">Bulky Goods</td><td colspan="2">Convenience</td><td colspan="2">Comparison</td><td colspan="2">Bulky Goods</td></tr>
<tr><td colspan="2">€242,192,636</td><td colspan="2">€153,271,666</td><td colspan="2">€37,840,137</td><td colspan="2">€283,427,219</td><td colspan="2">€186,179,636</td><td colspan="2">€45,964,548</td></tr>
<tr><td>Adjusted Annual Spend</td><td colspan="2">€237,348,783</td><td colspan="2">€130,280,916</td><td colspan="2">€32,164,116</td><td colspan="2">€269,255,858</td><td colspan="2">€148,943,709</td><td colspan="2">€36,771,639</td></tr>
</table>

	Convenience	Comparison	Bulky Goods
Existing Floorspace (2015)	19,915sq.m.	32,533sq.m.	37,310sq.m.
Expenditure Turnover/Net Sales Density (per sq.m. in 2015)	€11,918	€4,005	€862
Expenditure Turnover/Net Sales Density (per sq.m. in 2023)	€12,804	€4,302	€926
Future Floorspace Requirement (2015)	2,492sq.m.	4,338sq.m.	4,975sq.m.

6.0 SLIGO CITY & COUNTY JOINT RETAIL STRATEGY 2010-2017

Future Requirements

The previous Retail Strategy recognised the need for carefully planned major retail development up to 2015 and noted the high level of comparison retail floorspace permitted in the city in the years leading up to 2010. While recognising that Sligo County's retail facilities are concentrated in the city centre with very little suburban retailing, the Strategy supported the ongoing concentration of such retailing into the city centre. The Strategy considered that there was scope for significant additional mainstream shopping floorspace in the city centre in addition to the Centre Block (Wine Street car park) development. This strategic approach was followed through into the Development Plans for the County and the city and environs. Minimal comparison retail development has occurred in the interim period and many of those developments that were completed at the time of the previous Retail Strategy have remained vacant. Planning policy was framed to allow for previous retail planning permissions to be extended further and a number of these remain extant.

The Strategy highlighted the need for gaps in the Sligo's retail provision to be addressed and opportunities to enhance the attractiveness of the city centre to be pursued. The Strategy suggested that there was also scope for additional convenience floorspace in Sligo city centre (c. 1,280 sq.m.), its environs and in other neighbourhood centres (c. 1,220 sq.m.). There has been minimal additional convenience retail floorspace constructed throughout the County, with the exception of the new Aldi supermarket on the Cranmore Road in Sligo city.

The quantitative case for further allocations of retail warehousing over and above the then existing and permitted provision of such retailing was not supported by the capacity analysis undertaken as part of the previous Retail Strategy. This was reflected in the low level of retail warehouse permitted since 2010 in the County.

Location of New Floorspace

The Strategy sought to ensure that new retail development was directed into the County's centres at a level appropriate to the size and projected roles of its various settlements. For comparison goods shopping, the strategy supported the further development of higher-order shopping facilities in Sligo, consistent with its Gateway designation. A proactive approach to enhancing the role performed by Sligo city was supported in the previous Strategy, by aiming to reduce the level of expenditure exported to centres outside the County.

The Strategy set out a rationale towards focussing new comparison retail development primarily into Sligo city centre, particularly on the back of the development of the Centre Block and attracting higher-order comparison-goods retailers into neighbouring development sites. The encouragement of site identification and assembly as a means towards focussing development into the city centre was proposed. In the absence of construction relating to the Centre Block Masterplan there has been minimal pressure for site assembly in the city centre. Furthermore, there has also been minimal rationale for extending the city centre into the area west of Hughes' Bridge. The N4 national road ('Inner Relief Road') continues to act as a major physical barrier severing the city and proposals to improve pedestrian and vehicular linkages would remain essential to any further extension of the city centre west of the N4.

Rather than develop the city centre for further convenience retailing purposes, the previous Retail Strategy identified a need to ensure additional convenience retail facilities are accessible and convenient across the city. In order to achieve this, the Strategy set out strategic locations, which could facilitate additional convenience facilities based on Development Plan commitments (Carrowroe and Lisnalurg) and growing communities (Ballinode and Pearse Road/Cleveragh). The Strategy put forward proposals to relax floorspace limitations in the defined neighbourhood centres, in order to facilitate the locating of convenience retail development in these centres. The overall scale of neighbourhood centres should not exceed 2,750 sq.m. (net), convenience retail development up to a maximum unit size of 1,500sq.m. (net) and 1,750 sq.m. (net) in total, and a continued restriction on retail units to a maximum of 250sq.m. Caltragh neighbourhood centre at Rusheen Ard has commenced business since the previous Strategy was published. A convenience store and hairdressers has opened in this centre, while one unit is vacant. However, the neighbourhood centre (Crozon) at Knocknaganny in Caltragh is now completely vacant.

With regards to convenience shopping outside the city centre, the Strategy identified a significant lack of such retailers in the remainder of the County. This resulted in drivetimes well above state averages in accessing convenience shopping. The Strategy identified that there was scope for a small to medium-sized supermarket in Ballymote and potentially elsewhere in the County, subject to the emerging pattern of population growth. There has not been a planning application for an additional supermarket in Ballymote and the towns of Enniscrone and Strandhill have been subject of numerous small scale convenience stores, which are unlikely to improve the retail mix of these centres.

Criteria for Assessment

The Strategy set out a number of additional measures to be employed when considering proposals for large foodstores, retail warehousing, neighbourhood centres, discount foodstores and other retailing formats and these measures have been transcribed into the Development Plans.

The previous strategy was informed by a both a Shoppers' Survey and a Household Survey solely relating to Sligo city's vitality and viability relative to neighbouring competing centres. Retail floorspace for Sligo city, Tubbercurry, Ballymote, Collooney, Enniscrone and Grange was only surveyed, with the remainder of the County excluded from the survey. This failed to recognise the extent of retailing ongoing and continuing today in smaller villages and rural areas. The survey for Sligo City highlighted that in comparison to other survey responses, the extent of supporting positive sentiments was relatively infrequent with few people praising the range and quality of the shops and fewer still having favourable comments on the environment. With increased vacancies in recent years and a lack of capital to improve the environment it is likely that such sentiments will persist.

The Strategy considered that the addition of Johnston Court and Quayside Shopping Centre and the partial pedestrianisation of O'Connell Street, had undoubtedly improved the retail environment since the 2004 strategy was formulated. Today Johnston Court and Quayside remain important centres for retailing in the city centre, but they are disjointed due to the fact that Wine Street car park has not been developed. O'Connell Street enhancement works remain a major catalyst for the city centre's vitality. Much of the analysis and observations made in the 2004 and 2010 Strategies remain pertinent, including traffic congestion and car parking concerns.

The *Retail Planning Guidelines* (2012) emphasise that enhancing the vitality and viability of town centres in all their functions through sequential development is an overarching objective in retail planning. The Guidelines include a presumption against large out-of-town retail centres, in particular those adjacent to or close to existing, new or planned national roads / motorways. More than ever the Guidelines aim at enhancing the retail performance of town and city centres.

The *Retail Planning Guidelines* also provide specific guidance for the content and role of Development Plans including the requirement to have clear evidence-based policies and objectives in relation to retailing in a discrete section of the Plan. Throughout this Retail Strategy proposals actions and measures to guide the future of retailing in the County from a planning perspective are suggested.

This Strategy sets out the retail hierarchy for the County and confirms the level and form of retailing activity appropriate to each of the main settlements in Sligo. The Strategy also appraises the primary retail centres in the County. Identification of the extent of the retail catchment areas has been undertaken as part of the Strategy in order to identify the estimated populations for respective catchments. Following detailed analysis and survey a detailed assessment of the additional quantitative retail floorspace

7.0 RECOMMENDATIONS

requirements (capacity and need) for the County is outlined. Finally, recommendations on key policy approaches for assessing retail proposals are provided in the conclusion to the Strategy.

There are two aspects to the policy recommendations, including a broad description of the overall strategy over the period of the *Sligo County Development Plan 2017-2023* and for the forthcoming Local Area Plan for Sligo City and environs. The second set of recommendations relate to policy requirements for the range of locations in the County retail hierarchy with appropriate policy advice and guidance.

7.1 POLICIES & OBJECTIVES

The previous Retail Strategy acknowledged that Sligo was identified as a third-tier retail centre according to the *Retail Planning Guidelines 2005* retail hierarchy. However, the *Sligo and Environs Development Plan 2004-2010* included a strategic policy to assist the city in making the transition from a third tier to a second tier shopping centre on the national retail hierarchy. Within the previous Retail Strategy this strategic policy was broadly promoted by reference to Sligo's status as a Gateway settlement in the *National Spatial Strategy*. Within the 2005 Guidelines the third tier included the neighbouring towns of Ballina, Castlebar and Letterkenny, while the second tier included Cork, Limerick, Galway and Waterford. The *Retail Planning Guidelines 2012* did place Sligo in the second 'regional' tier of the hierarchy, but this merely continued its retail positioning alongside Ballina, Castlebar and Letterkenny and below the 'metropolitan' tier comprising Cork, Limerick, Galway and Waterford.

Expansion of the retail function of Sligo city over other parts of the County and competing centres, was a clear priority of recent Development Plans for the city and county areas. The results of the surveys undertaken as part of this strategic review suggest that the thrust of forthcoming Plans for the County and City should be realigned to allow for more measured expansion in order to enhance and maintain retailing in the city and key support towns. Sligo city as the key economic driver of the region will enhance its role, but the level of enhancement needs to be complementary to the role of other urban centres.

The *Border Regional Planning Guidelines* supported the preparation of a Regional Retail Strategy, but this has not occurred to date. It is considered that in this vacuum there is propensity for competing centres to allow for retail floorspace beyond their requirements, which can lead to unbalanced regional development. Preparation of a Retail Strategy for the region, similar to that undertaken for the Greater Dublin Area, would provide a more measured framework for retail development across the counties in the region.

7.1.1 RETAIL HIERARCHY

The retail hierarchy recommended is largely aligned with the settlement hierarchy proposed within the *Draft County Development Plan 2017-2023*, while also having regard to reviews undertaken as part of this Strategy.
A balanced development model is supported, promoting the treatment of urban and rural settlements, together with the surrounding countryside, as functional, spatially-integrated entities. The Retail Hierarchy identified below has been prepared mindful of this model. It should be noted that there are no District Centres, as defined in the *Retail Planning Guidelines* in County Sligo. Detailed discussion regarding the function of each tier is discussed below relative to the location and scale and development.

7.1.2 RETAIL BOUNDARIES

The zoning maps for each of the towns and villages will inform the retail boundaries (i.e. Local Area Plans and the Book of Mini-Plans accompanying the Development Plan). Mixed-use zones generally define the retail boundaries along the main shopping parades within each centre[29].

7.1.3 FUTURE FLOORSPACE REQUIREMENTS

The potential requirement for planned retail development to 2023 is demonstrated in Chapter 3 of this Strategy. This additional potential requirement does not account for the existing vacant floorspace and the amount of permitted floorspace in the retail development pipeline.

Analysis demonstrates scope for additional convenience floorspace in Sligo County, both within the City and in the County generally. Over the period of the Plan, these requirements are considered modest, but will primarily allow for improved retail mix within the County and also allow for reduced drivetimes for shoppers. Outside the Gateway, the requirement for additional convenience retail floorspace is estimated to be 1,270 sq.m net up to 2023.

29 Mixed-Infill Development Zone in Enniscrone LAP 2014, Mixed-Use zones in Ballymote LAP 2012 and Tubbercurry Draft LAP 2015 and Mixed-use zones in the Mini-plans.

Figure 7.1 - County Retail Hierarchy

This additional floorspace may entail expansion of an existing retail operation(s) or a new build retail unit, such as a supermarket. However, given the average floor plates of new supermarket facilities (generally above 1,000 – 1,300 sq.m. net), potential for extending above the estimated requirements noted above should be allowed for in such instances.

In quantitative terms, between 2016 and 2023 there is scope for further mainstream comparison retail development of some 4,338 sq.m (net). However, in contrast with the previous Retail Strategy it is emphasised that this requirement is currently absorbed by extant permissions in Sligo city.

While analysis identifies a requirement for additional bulky retail floorspace in the County, it is clear that this is already provided for in existing vacant units. There currently is a significant oversupply in retail warehousing and there is a need to constrain this type of development.

The survey highlights the distribution of convenience retail space throughout the County, with approximately one third of total convenience retail floorspace in Sligo City and environs (Tier 1 and 3b), one-third in the key support towns (Tier 2), satellite villages (Tier 3a) and local centres (Tier 4a) and the remaining one third in support retail centres, rural villages and local stores (Tier 4b and Tier 5). In 2015, Sligo city contained almost 88% of comparison retail floorspace within the County and 72% of 'bulky goods' retail floorspace in the County. The number of vacant retail units in the County increased marginally by 3.2% since the 2008 survey to 21.5%. It should be an objective of the Council to keep the Retail Strategy under review in order to react to any significant shift in economic circumstances.

7.1.4 LOCATION & SCALE OF RETAIL DEVELOPMENT

The preferred location for retail development is within the existing city and town centres. Development proposals not according with the fundamental objective to support the vitality and viability of city and town centre sites must demonstrate compliance with the sequential approach. Sligo County Council will require that a full assessment of all suitable, viable and available sites is undertaken.

Considering the outcomes of this Strategy, the extent of vacant floorspace and anticipated additional floorspace required over the lifetime of the Plan, all applications for significant additional retail floorspace, will be required to be accompanied by a Retail Impact Statement, examining the impact of the proposal relative to the Council's Retail Strategy and the viability and vitality of the respective retail centres.

While the analysis indicates limited scope for additional convenience floorspace development, there is a need to address the balance of retail provision across both the City and the County. Sligo City centre should not be the sole focus of convenience retailing. There is a need for a reasonable mix of convenience within the remainder of the County, but this should be steered towards the Tier 2 centres.

The quantitative case for further allocations of retail warehousing over and above existing allocations is not supported by the capacity analysis. While the floorspace study suggests that additional floorspace of this type is necessary, the existing high level of vacancy of retail warehousing will reasonably account for the anticipated demand. The existing restrictions to the sale of bulky goods only, or goods generally sold in bulk should stay in place and a requirement to meet the 20% rule should be sought and enforced where feasible.

Tier 1 – Primary Retail Centre (Sligo City)

While the convenience shopping function of the City Centre is important to its ongoing vitality, it is also necessary to ensure that convenience retail facilities are easily accessible across the City as a whole. Details regarding the location and scale of retail development in the city will be addressed in the future Sligo City Retail Strategy. Over the period of the Plan it is anticipated that the majority of demand for comparison retail growth will be centred upon Sligo city (Tier 1) and the Council should continue to focus comparison retailing into the city centre.

Tier 2 – Key Support Retail Centres (Tubbercurry, Ballymote & Enniscrone)

Sligo County Development Plan 2011-2017 planning policy *P-RP-7* generally discouraged any retail outlet in excess of 500 square metres net retail floorspace, outside of Sligo City and Environs. The *Retail Planning Guidelines 2012* require consideration of the mix of units, in order to ensure more sustainable patterns of retail distribution. The above cap on net retail floorspace restricts the potential for key support towns in the County to provide their catchment with convenience retail offering on a par with neighbouring centres outside the County and with Sligo city. Consequently, this encourages a greater need to travel longer distances outside the County and into Sligo city for larger convenience shopping trips, in turn leading to unsustainable travel patterns and traffic congestion. The Council should consider lifting the cap, particularly in the key support towns, but mindful of the anticipated need for additional floorspace to 2023. A sequential approach to the location of new retail outlets greater than 500 square should be adopted. The Council should also take a proactive approach to site identification and assembly to support the sustaining of retail in these key locations.

Enniscrone is not currently served by a large convenience retailer and the town has one of the highest retail vacancy rates in the country. There are numerous small to medium convenience retailers in the town and extant permissions for 11 retail units in the town ranging from 85sq.m. to 227 sq.m. These extant permissions do not provide for a large convenience retailer in the town. Current population based on 2011 Census data estimates that approximately 1,223 persons reside in the town. However, during seasonal peaks and at weekends, this population expands considerably and as a result the catchment population fluxes throughout the year. Considering the above it is considered that the town is capable of absorbing a larger convenience retailer, which may encourage occupation of existing vacant units in the town, diverting the need for journeys to other neighbouring centres. A facility capable of serving weekly shopping needs may potentially involve extension of an existing facility or a new build facility, however it will be important to ensure linkages with the town centre and car parking to meet anticipated demand.

The 2011 County Development Plan objective *O-RP-1 to 'facilitate the provision of an additional supermarket in Ballymote'* should be reviewed. Analysis undertaken as part of this Strategy suggests that both Ballymote and Tubbercurry have a similar level of retailing mix, but that Tubbercurry has less provision of convenience retail floorspace and a greater population catchment. Considering this there is greater scope to locate an additional supermarket in Tubbercurry.

Tier 3a – Satellite Retail Centres – (Strandhill, Grange, Collooney, Coolaney & Ballysadare)

These retail centres primarily function as suburbs of Sligo City and are a tier above 'Neighbourhood Centres' on the proposed county retail hierarchy, as they generally serve a greater population catchment and contain a wider retail base. Such centres usually accommodate a medium-sized convenience shopping outlet and a number of smaller convenience and non-retail businesses. Based on the assessment of the existing performance of Satellite Retail Centres, Strandhill and Collooney appear to be functioning quite well with low vacancy rates and there may be further demand for additional retail and related services in their centres.

Survey of Collooney and Grange suggests that objective O-RP-2 of the County Development Plan 2011-2017 '*to encourage the conversion of vacant (retail warehouse) units to appropriate uses*' is paying dividends and this objective should be continued.

Tier 3(b) – Neighbourhood Centres

Neighbourhood Centres (i.e. locations providing retail and other related services outside of the core town centre area) only occur in Sligo city. Details regarding the scale and location of retail floorspace in the neighbourhood centres will be provided in the forthcoming Sligo City Retail Strategy.

Tier 4(a) – Local Retail Centres – (Gurteen & Bellaghy)

The local retail centres of Gurteen and Bellaghy comprise retail services significantly greater than that of the other villages in the County and are therefore recognised as performing a higher retail function. Without a commensurate increase in population, it is unlikely that there will be significant rationale for increased retail floorspace in these centres. Bellaghy currently comprises a relatively high stock of vacant premises and additional retail space needs to be considerate of capacity in Charlestown. Proposals for retail development in Charlestown should also be assessed with respect to retail provision in Bellaghy. The Council should continue to cap the maximum net retail floorspace in the Local Retail Centres at 500sq.m. as these centres function as secondary rural service centres to the key retail support centres (Tier 2).

Tier 4(b) – Supporting Retail Centres - (Rosses Point, Riverstown, Cliffoney, Dromore West & Easky)

The Supporting Retail Centres forming Tier 5(a) of the hierarchy are characterised by basic convenience shopping functions, some limited incidences of comparison shopping and local retail services including post offices, pubs and cafes. These centres have a narrow retail base and proposals for additional services in these centres is likely to be limited over of the lifetime of the Plan (2017-2023).

Tier 5(a) –Village Stores

Village stores include Aclare, Tourlestrane, Ballygawley, Banada, Curry, Bunannaden, Mullaghmore, Cloonacool, Monastereden, Ballinafad, Drumcliff, Carney, Culfadda, Castlebaldwin, Geevagh, Rathcormac and Ballintogher. These village stores play a vital role in catering for the daily or casual needs of nearby residents or of those passing by. Primarily convenience outlets, they provide a readily accessible service for basic goods, especially for the less mobile members of communities.

Where appropriate, villages shops shall be recognised in the relevant parts of the Development Plan, with policy primarily aimed at supporting the maintaining of such services.

7.2 DEVELOPMENT MANAGEMENT STANDARDS

Retail development decisions will be informed by the *Sligo County Retail Strategy 2016-2023,* and the *Retail Planning Guidelines for Planning Authorities 2012* including the accompanying *Retail Design Manual*.

7.2.1 CRITERIA FOR ASSESSMENT

A set of criteria for assessing retail developments needs to be incorporated into the *Sligo County Development Plan 2017-2023* and the forthcoming Local Area Plan for the City and environs, in order to best provide for consolidation of the respective role of the city and the town centres throughout the County. The *Retail Planning Guidelines 2012* provide the main principles for assessing new retail proposals and this Strategy suggests that these should be referred to and reflected in the County Development Plan. The *Guidelines* state that the main planning considerations for retail development include;

1. Location (site selection);
2. Suitability of use (land use zoning and specific objectives)
3. Size and Scale (impact, form and design);
4. Accessibility (access and servicing arrangements).

Criteria for assessment of the scale and location of convenience, mainstream comparison and bulky goods retailing have largely been addressed above. In assessing retail development proposals the Council will need to utilise the following: -

1. **The Sequential Test -** All applications for retail developments at edge-of-centre or out-of-centre locations will be subject to the sequential test as set out under the Retail Planning Guidelines
2. **Retail Impact Assessments -** Retail Impact Assessments will be required for significant retail development where due to its scale and/or location, it may impact on the vitality and viability of centres. These assessments will be prepared in accordance with the current Retail Planning Guidelines.
3. **Traffic and Transport Assessments -** A Traffic and Transport Assessment (TTA) may be required for retail developments over a particular threshold, as set out in the *Traffic & Transport Assessment Guidelines 2014*.

Large Stores

The *Retail Planning Guidelines* set a 3,000sqm retail floorspace cap on food store development. Where practicable, new medium (500sq.m.plus) to large convenience developments should only be located within or on the edge of a town centre. Access to these retail facilities is generally undertaken by private motor vehicle, but there should also be an aspiration to access such facilities by all modes of transport. As a consequence areas where accessibility is highest should be preferred. As a pre-requisite large stores will require car parking to meet anticipated demand. Focus in providing new retail floorspace within Tier 1 and 2 centres of the County Retail Hierarchy will help to strengthen these centres and clearly establish their primacy in terms of retailing roles and functions. Future retailing proposals which cannot be accommodated within established centres should be steered towards proposals for occupying the existing vacant sites at edge of centre sites. Retail supermarket proposals will be required to clearly delineate the extent of floorspace intended for the sale of convenience and comparison goods and conditions attached to planning permissions to control same.

Retail Warehousing

It is noted in the *Retail Planning Guidelines* that there should in general, be a presumption against further development of out-of-town retail parks. The quantitative assessment in the Retail Strategy details a high level of vacancy for retail warehousing centred on Sligo and Collooney. In this regard, it is envisaged that there will be a limited demand for further retail warehouse development in the County over the period of the Plan. Any application for further retail warehouse development should be considered carefully in the context of the ongoing level of provision, including vacancy. The range of goods sold in existing or planned parks should be restricted to bulky goods as defined in Annex 1 of the *Retail Planning Guidelines 2012*.

Consideration should also be given to alternative uses for existing vacant retail warehouses, provided proposals are not contrary to the proper planning and sustainable development of the area. The occupancy of these units for purposes deemed compatible with the adjacent land uses in the area provides a better alternative than to allow these units to remain vacant and inevitably fall into a state of disrepair.

Markets

Casual trading, including farmers' markets and street markets, can make a valuable contribution to the local economy and contribute to the vitality and viability of a retail centre. Such activities should be properly regulated as per the provisions of the *Casual Trading Act 1995* and consideration should be given to the quality of offer of such casual trading. Such markets are best served in central locations, adhering to sequential testing and meeting specialist and tourist markets.

Forecourt Trading

Existing motor-fuel stations often provide an important function as the local shop or small supermarket, but if their retailing element is not controlled they can have a major impact on more localised shops. Retail sales from fuel-filling stations should be limited to those required to meet local need. The operational requirements of a filling station must remain unaffected by proposals to extend or upgrade such a facility. The Council should discourage fuel-filling station forecourt retailing in excess of 100 sq. metres (net), as per the *Retail Planning Guidelines*. Where permission is sought for floorspace in excess of 100 sq. metres in retail units associated with fuel-filling stations, the 'sequential approach' to retail development shall apply. Proposals will need to specifically identify the use of floorspace within the station, including dining, seating, retail, staff, and back of shop areas. Where intensification of use is envisaged as a result of forecourt upgrades, cognisance should be had of likely road safety issues.

Retailing in Villages and Rural Areas

Local villages and shops in rural areas play an important role in the lives of the communities that they serve and provide valuable day-to-day retail facilities and services to their communities. Development in such villages and small towns should be focussed in the core village/town centre area and should complement existing retail provision. Market dynamics generally curtail the extent of retail provision in these areas, although there is a clear need to ensure that provision should be cognisant of the retail role and function of such centres within the retail hierarchy (Tiers 4 and 5).

7.3 CONCLUSION

The *Sligo County Retail Strategy 2016-2023* has been prepared for Sligo County Council in accordance with the requirements of the *Retail Planning Guidelines 2012*. In compiling this Retail Strategy, due regard has been had to the most up-to-date information regarding population growth projections, the prevailing economic outlook and retail sales information. This has been used to provide a firm basis on which to inform future policy direction with the aim of enhancing and developing the retail offering of Sligo County.

The over-arching aim of the Retail Strategy for County Sligo is to ensure that future retail development in the County is accommodated in a manner that is efficient, equitable and sustainable. Analysis of recent changes and forecasts for the retail sector points towards a gradual improvement in the markets over the lifetime of the Strategy and coupled with *Regional Planning Guidelines* population targets this suggests a more positive outlook for the retail sector in Sligo. However, this growth must be considered in the context of the extent of available floorspace and the need to focus new retail development into existing urban centres. The retail sector is one of the most dynamic sectors in the economy and is particularly susceptible to wider economic change. The Council should continue to monitor trends including baseline data, and update retail policies, as appropriate, over the lifetime of the Plan in order to suitably address issues arising.


PADDY
Heineken

McCutcheon Halley Walsh
CHARTERED PLANNING CONSULTANTS