MAYO COUNTY RETAIL STRATEGY 2008

Mayo County Council

Ballina Town Council

Castlebar Town Council

Westport Town

CONTENTS

1 INTRODUCTION

Requirements of the Study

1.1 The Retail Planning Guidelines, as published in December 2000, and updated in 2005 requires that County and Town Councils prepare a comprehensive retail strategy that outlines relevant policies and addresses a series of matters to be included in their Development Plans. These include:

- Confirmation of the retail hierarchy, the role of centres and the size of the main town centres;
- Definition in the Development Plan of the boundaries of the core shopping area of town centres;
- Broad assessment of the requirement for additional retail floorspace;
- Strategic guidance on the location and scale of retail development;
- Preparation of policies and action initiatives to encourage the improvement of town centres; and
- Identification of criteria for the assessment of retail developments.

1.2 This exercise focuses in particular on the three major towns in Mayo of Castlebar, Ballina and Westport, as well as a number of key (second tier) towns.

Study Context

1.3 The preparation of this study provides an update to the Mayo Retail Strategy as adopted in 2002. This retail strategy has been prepared as a joint strategy between Mayo County Council, Ballina Town Council, Castlebar Town Council and Westport Town Council with technical input from Roger Tyms and Associates as well as Jonathan Blackwell & Associates.

Previous Mayo County Retail Strategy 2002

1.4 The previous Mayo County retail strategy made an assessment of future retailing requirements for the duration of the previous County Development Plan period, i.e. 2003-2009, and suggested policies and actions for Castlebar, Ballina and elsewhere in the County, as well as containing the criteria against which to assess future retail development proposals.

1.5 In brief, the previous Mayo County Retail Study drew conclusions and policy recommendations for a quantitative retail need in Mayo in the period up to 2007. These were as follows:

- **Convenience**: By 2007, it was estimated there would be between 590 sq m and 1,170 sq m of net convenience goods floorspace capacity in County Mayo. This would equate to 590 - 994 sq m of superstore floorspace; or 660 - 1,110 sq m of medium supermarket floorspace; or 700 – 1,170 sq m of local convenience shopping floorspace.
- **Comparison**: There would be capacity for between 4,400 sq m and 11,100 sq m net comparison goods floorspace by the year 2007. This is typically equivalent to 4,400 – 6,600 sq m net high-order town centre comparison floorspace; or 5,770 – 8,630 sq m of middle-order town centre comparison floorspace; or 7,422 – 11,100 sq m net of retail warehousing floorspace. The

strategy indicated that additional floorspace is likely to comprise a combination of each of these three components.

1.6 The previous retail strategy also stated that new additional floorspace provision would reflect the need to compete with larger nearby centres such as Galway City and Sligo, whilst also seeking to address the emerging needs and inefficiencies of current provision within Mayo. The broad quantitative distributional requirements are described beneath.

1.7 The limited **convenience** capacity identified was to be distributed in three ways:

- Small scale local convenience shopping floorspace that would offer benefits to the immediate town, village and local community;
- Store extensions to existing convenience supermarkets (excluding those larger than 1,000 sq m net, situated in Castlebar, Ballina and Westport); and
- Additional convenience floorspace in Westport, as a means to serve local and visitor needs, and encourage greater sector competition and sustainability;

1.8 The considerable identified scope and capacity for **comparison** goods shopping was to be distributed as follows. The overall aim of this approach was to improve the diversity, quality and competitiveness of the retailing offer in County Mayo:

- Retail warehousing in Ballina, with limited provision in Westport (primarily so as to help protect its character as a tourism destination);
- Retail warehousing in Castlebar will be adequately met by the extant permission for circa 8,000 sq m in the Castlebar environs;
- Retail warehousing provision could be supported in Claremorris and Ballyhaunis. Claremorris by virtue of its strategic potential as a key retailing centre, in addition to the considerable catchment area served by the town of Ballyhaunis; and
- Further high and middle order comparison shopping should be encouraged in the town centres in Castlebar, Ballina and Westport;

Study Approach for new County Retail Strategy 2007

1.9 There have been several key stages in the preparation of this strategy review, with the timing of some aspects tapered accordingly to ensure that the findings of the review were made available to form part of the input to the County Development Plan Review.

Survey

1.10 In the first stage of the review exercise we carried out a review and update survey of the floorspace within each of the centres (where available), building upon previous surveys undertaken in 2002 and those subsequently completed by Mayo County Council (and town councils) during the early part of 2007.

Consultation

1.11 The survey work was coupled with a focused programme of wider local consultation, including taking account of representations made by the Chambers' of Commerce of Ballina, Castlebar and Westport.

1.12 The main purpose of this consultation was to collate and understand better the specific local views of each of the town centres, in particular the wider perceptions of retail and services within these towns. We have utilised this detailed information in the preparation of our town assessment and study review.

Town Centre Assessment

1.13 A comprehensive healthcheck and assessment was carried out of Castlebar, Ballina and Westport (and a minor healthcheck for each of the six second tier

sub-county towns of: Claremorris, Ballinrobe, Ballyhaunis, Swinford, Belmullet and Crossmolina). This, in tandem with the details collected through the survey work and the consultation exercise, has informed the present review of the County Mayo retail strategy. All these towns with the exception of Crossmolina are key towns as set down in the Settlement Strategy in section 2.2 of the County Development Plan 2008-2014.

Strategy and Policy Recommendations

1.14 This is followed by identification of an appropriate retail strategy for County Mayo. This is based on the results of survey work, consultation and the output of the quantitative capacity assessment undertaken by Jonathan Blackwell and Associates.

Structure of the Report

1.15 Following this initial section and introduction, the structure of this report provides a summary of the main findings of the study programme.

1.16 In the next section of the report, details of retail trends and the retailing hierarchy in County Mayo are outlined and a summary of the three main retail centres, namely Castlebar, Ballina and Westport. This is followed by a review of planning policy and strategy context in section 3.

1.17 The results of the above are then brought together in Section 4 to draw up an appraisal of the three main retail centres in Mayo. This information is then utilized in developing the strategy and policy aspects of the study review. In section 5, key requirements are set out for additional retailing floorspace across the county, which is then followed in Section 6 by a presentation of the broad recommendations for strategy and policy. The report concludes with Section 7, through providing details on monitoring and implementation.

2 RETAIL TRENDS AND HIERARCHY

National Trends and Retail Hierarchy

Retailing Trends

2.1 The Irish economy is one of the fastest growing in the Western world. A boom in the mid-to-late-1990s saw a prolonged period of double-digit growth in GDP, ultimately doubling the size of the economy. Economic growth translated to increasing consumer affluence and strong growth in retail sales. This high rate of economic growth has resulted from the following:

- A generally benign global (and particularly US) economy;
- Ireland's ability to attract inward investment, especially from the US;
- Historic and continuing investment in infrastructure improvements;
- The emergence of a large, young and relatively well educated labour force which has been fuelled by increased female participation and, more recently, by immigration from overseas; and
- Income growth and increased discretionary spending;

2.2 The Irish retail market has also nearly doubled in size since 1995 with retail sales amounting to around €24 billion in 2005. It still remains, however, one of the most fragmented markets in Western Europe with only a small number of multiples presently operating in the country. There remains strong independent operator representation in the smaller towns, although with the development of a number of national chains these retailers are increasingly choosing to align themselves under the banner of a choice of buying/marketing groups.

Retail Hierarchy

2.3 The retail hierarchy reflects both the settlement structure of the Irish State and low residential densities in rural areas. Four tiers of shopping provision may be identified. The classification is indicative and the functions provided by each tier overlap in some respects; below Dublin, there are not clearly defined cut-off points between different levels of the retail hierarchy.

Tier One - Metropolitan Dublin

2.4 Metropolitan Dublin contains over a quarter of the total population and accounts for a high proportion of Irish national retail turnover. It provides by far the broadest range of comparison goods shopping.

Tier Two Centres – Cork, Limerick, Galway & Waterford

2.5 In the second tier Cork, Limerick, Galway and Waterford, with a combined urban population amounting to 10% of the State, provide a range of high order comparison shopping which is largely unmatched elsewhere. These four centres, together with Dublin account for over a half of all total comparison goods turnover.

Third Tier Centres

2.6 A third tier of towns cannot be precisely defined but includes Athlone, Carlow, **Castlebar**, Clonmel, Drogheda, Dundalk, Ennis, Kilkenny, Letterkenny, Monaghan, Mullingar, Newbridge Portlaoise, Sligo, Tralee, Tullamore and Wexford. The combined population of these towns amounts to 6% of the Irish State total. The vibrancy of these centres, some of which are now attaining functions previously found only in higher order centres, is steadily increasing.

2.7 These first three tiers in the hierarchy account for 78% of all total comparison goods turnover whilst also accounting for nearly two-thirds of convenience goods turnover.

2.8 However, there is a further group of towns which may also be regarded as third tier shopping locations, albeit to a more limited extent. These contain convenience goods outlets on a par with the settlements listed above. Most have a national supermarket chain representation. The examples are Arklow, Athy, **Ballina**, Cavan, Dungarvan, Enniscorthy, Killarney, Longford, Mallow, Midleton, Naas, Navan, Nenagh, New Ross and Thurles. Many of these individual towns have significant comparison goods shopping provision. In the Mayo context, the town of Westport would ideally sit between this tier and the lower fourth tier in the hierarchy. On the basis, however, of the importance of the town in respect of tourism we would place **Westport** amongst this group of additional national tier three towns.

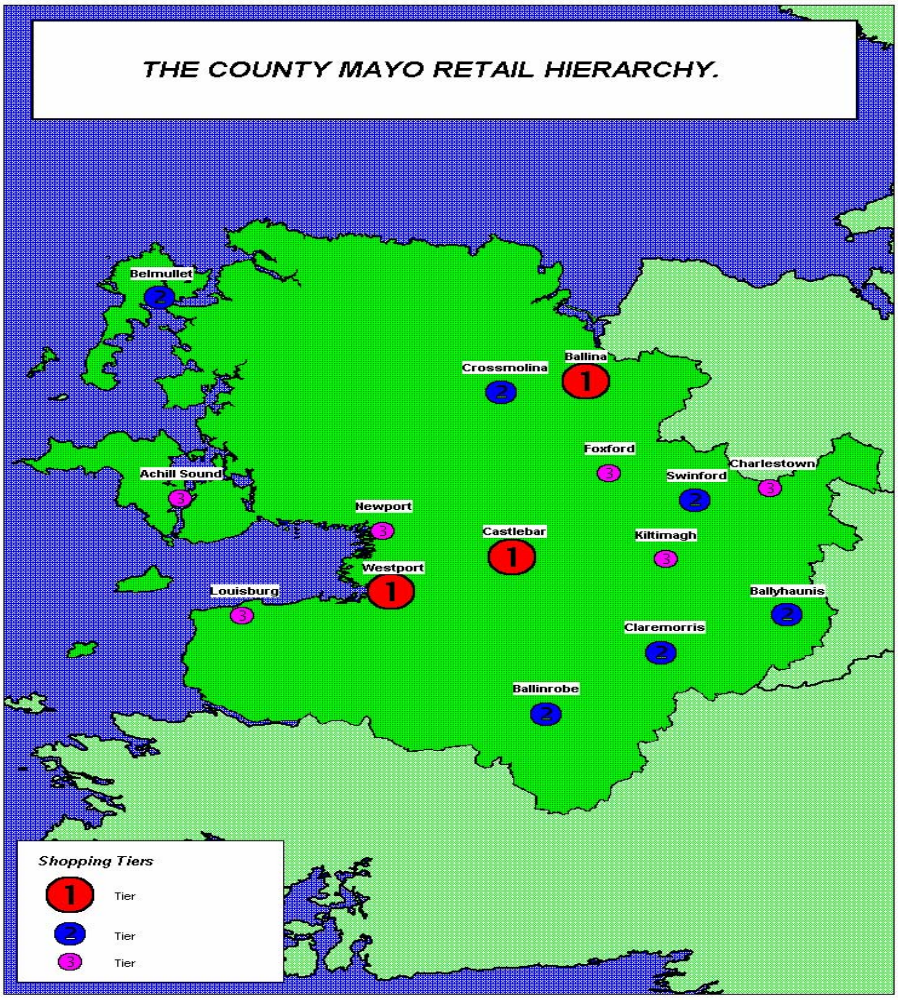
Fourth Tier Centres

2.9 The fourth tier of the hierarchy comprises a large number of towns in the 1,500 to 5,000 population category – some 75 in all – comprising 6% of the State population, most of which provide basic convenience shopping, either in small supermarkets or convenience shops and in some cases, lower order comparison shopping such as hardware and clothes. In the Mayo context, the six sub-county towns of **Ballinrobe, Ballyhaunis, Belmullet, Claremorris, Crossmolina** and **Swinford** would fall within this particular tier of the retailing hierarchy. Crossmolina, though not a key town as set down in the Settlement Strategy of the Draft Development Plan also falls within this category due to its range of retail services.

Other Local Centres

2.10 Beyond these tiers, shopping at the most local level is provided by corner shops in suburban areas, smaller town and village stores, post offices and retail units on petrol filling station forecourts. The rural shop and post office are recognised as having a particular and important role in supporting the social and economic life of remote areas and their communities.

County Mayo Retail Hierarchy



Introduction

2.11 The current Retail Planning Guidelines 2005 require retail strategies to examine the retail hierarchy, the role of the main retail centres and the relevant size of each centre.

2.12 In the context of this particular study we regard the whole of Mayo County as the area being examined, and on this basis we have defined the current Mayo retail hierarchy as comprising:

- First Tier: Castlebar and Ballina town centres. Westport is also included at this level by virtue of its growing importance as a year-round tourism destination;
- Second Tier: Ballinrobe, Ballyhaunis, Belmullet, Claremorris, Crossmolina and also Swinford, as the key sub-county town centres;
- Third Tier: Local town centres such as Charlestown, Kiltimagh, Foxford, Newport, Louisburgh and Achill Sound;
- Fourth Tier: Villages and rural settlements, including all other villages and smaller centres, as well as small local shops. These would generally equate

with the towns and villages of the 3rd and 4th level of the County Settlement Strategy as set down in the Mayo County Development Plan 2008-2014.

2.13 In the remainder of the section below we provide a summary of the role and size of each centre within the Mayo retail hierarchy.

Retail Hierarchy

2.14 In general terms, **Castlebar and Ballina (and to a differing extent Westport)** town centres function and perform the role of the main town centres within Mayo, and therefore tend to dominate the retail hierarchy in the County. Castlebar serves as the traditional Mayo county town and service centre, whilst Ballina performs a similar role for those residing in parts of North and West Mayo. Westport meanwhile benefits significantly from the town's appeal as a key tourist destination in the West of Ireland, attracting an increasing number of year-round visitors.

2.15 Each of these towns have a diverse range of comparison and convenience shopping floorspace selling higher and medium order goods and services not as a 'rule of thumb' found elsewhere within the County. The towns also offer a choice of entertainment and leisure amenities, and pubs and restaurants etc. In this context, none of the towns are likely to or are envisaged to lose their status or position as major town centres within the Mayo County retail hierarchy.

2.16 The second tier towns of Mayo such as the likes of **Ballinrobe, Ballyhaunis, Belmullet, Claremorris, Crossmolina and Swinford** are recognised as having key roles to play in serving the shopping patterns and needs of Mayo.

2.17 The second tier towns have an established local catchment area and defined town centre area, and serve a more distinct local service role than the larger centres. The towns often comprise a handful of convenience goods shops, as well as a few retailers selling everyday comparison goods (e.g. clothes, etc).

2.18 The third tier of smaller towns and centres in Mayo comprises those that are slightly larger than other villages, and especially those that have potentially strategic locations and/or wide surrounding catchment areas. This would include: **Charlestown, Louisburgh, Kiltimagh, Foxford, Newport, Knock and Achill Sound.** Of these, the towns of Kiltimagh, Knock and Newport are identified as key towns in accordance with as set down in the Settlement Strategy in section 2.2 of the Mayo County Development Plan 2008-2014.

2.19 Finally, the fourth tier of the County retail hierarchy consists of **all other villages and small settlements, as well as local shops** which will normally serve localised residential areas, and include small shops associated with petrol filing stations, post offices and smaller villages which solely serve their more rural and local area.

3 POTENTIAL FOR CHANGE

Introduction

3.1 In this section we broadly review the planning policy context in Mayo, including the National Spatial Strategy, the State Retail Planning Guidelines, the Regional Planning Guidelines for the West, and the County Development Plan. We highlight the key policies, which need to be addressed, and the key implications of these policies.

National Spatial Strategy

3.2 This National Spatial Strategy for Ireland (NSS) was published as a 20-year planning framework (for the period 2002-2020) designed to achieve a better balance of social, economic, physical development and population growth between the Irish regions. Its main focus is therefore on its people, on places and on building its communities. The most significant NSS implications for the County of Mayo are summarised below.

3.3 County Mayo holds a strategic location of regional importance in the West of Ireland, with effective linkages between the 'joint hub' of Castlebar-Ballina, and the designated 'gateways' of Galway, Sligo and the Midlands (Athlone-Mullingar-Tullamore). Mayo through the NSS seeks to connect the surrounding hinterland of West Mayo, to the strengthening Atlantic 'axis' linking Donegal, Sligo and Galway.

3.4 The central location occupied by the Castlebar-Ballina hub will act as a vital catalyst towards achieving economic growth (building upon regional and State success), which in turn will help to re-establish and reinvigorate Mayo.

3.5 The strategy proposes support for rural diversification and rural economic development throughout Mayo, based on its key strengths in tourism, enterprise, local services and employment, fisheries and forestry. The detailed methodology in which to achieve such diversification is to be addressed through the regional and county-level strategies.

3.6 The strategy places emphasis upon developing the smaller towns and villages, through revitalising and strengthening areas in population decline, and whose services are simultaneously under threat. Encouraging a programme of residential development in these villages and towns would help accomplish this.

3.7 Enhancements to the existing transportation network (i.e. road, rail and bus) between County Mayo (Ballina and Castlebar) and key centres such as Athlone, Galway and Sligo, as well as longer distance connections to Dublin and overseas, are recognised as being vital components to realising full economic development potential as well as increasing Mayo's overall competitiveness.

Retail Planning Guidelines

3.8 The Department of the Environment and Local Government issued the Retail Planning Guidelines in December 2000, as a result of increasing pressure for retail development lasting over the last decade.

3.9 The retail planning guidelines identifies a **national retail hierarchy**, which reflects the primacy of Dublin, whilst also recognising three other broad tiers of the hierarchy. The first three tiers account for 78% of State comparison turnover and almost two thirds of convenience turnover. The third tier incorporates the Mayo town of Castlebar.

3.10 The key (five) policy objectives of the guidelines are summarised as follows:

- Ensure that all development plans have clear retail polices and proposals;

- Facilitate competitive and healthy environment for retail industry i.e. it is not the role of the planning system to stifle competition, preserve commercial interests or prevent innovation in retailing;
- Promotion of development which is easily accessible – particularly by public transport – and in locations which encourage linked shopping, business trips;
- Support continuing role (and vitality and viability) of town and district centres, with established centres being the preferred location for new retailing development, and them acting as the focus for social, business and community activities; and
- Presumption against large-scale retail centres adjacent or in close proximity to existing, new or planned national roads and motorways.

3.11 The guidelines emphasise the need for retail planning strategies and decisions made on retail planning applications to be firmly embedded in the plan-led system. The guidelines therefore place a requirement on the preparation of strategic retail studies for the 6 main conurbations as well as more localised policies elsewhere.

3.12 The planning guidelines firmly indicate the application of the **sequential test** approach to the location of retail development, with preference given to town centre sites, followed then by edge-of-centre sites - within an easy and convenient walking distance from the primary shopping core (i.e. 300-400 m) - and only then where there are no out-of-centre alternative suitable, viable and available sites.

3.13 **Retail Impact Assessment** - Finally the guidance outlines the approach to be taken in assessing retail impact with all large scale retail developments required to be appraised in relation to:

- Supporting long term strategy for town centres whilst not materially diminish the prospect of attracting private sector investment to town centres;
- Adverse impact on town centres, individually or cumulatively, in particular the quality of the centre and its economic and social role within that community;
- Diminish range of supportable town centre activities and services;
- Likelihood of increased vacant properties in the designated primary retail area;
- High levels of accessibility by public transport, walking and private car; and
- Likelihood of achieving commercial synergy with the existing town centre.

3.14 Furthermore, in addition to the above criteria there are specific policy guidelines for particular types of retail development. The application of floorspace caps to forms of retail development will not only help the planning system but also reduce the potential likelihood of local monopolistic effects. The specific criteria are noted below:

- Regional shopping centres – outside Greater Dublin, there is no justification for new large scale regional shopping centres;
- District centres – development plans will identify any need for new district centres, comprising up to 10,000 sq m in the main towns and 20,000 sq m in Dublin;
- Large foodstores – 3,500 sq m net retail sales floorspace cap in Greater Dublin, and 3,000 sq m net retail sales floorspace elsewhere;
- Discount foodstores - up to 1,500 sq m gross floorspace have a potential role in extending the choice and range of retailing;

- Retail parks – in the range of 8,000 to 15,000 sq m will generally be acceptable provided the range of goods is conditioned to the sale of bulky household goods only, i.e. carpets, furniture, white electrical goods and DIY items;
- Retail warehousing units – a threshold cap of some 6,000 sq m gross floorspace (including ancillary garden centre) is applied across the country on single large retail warehouse units. There may similarly wish to be a minimum size condition imposed (700 sq m) on units in out-of-centre locations to prevent sub-division or smaller stores; and
- Retail in petrol filling stations - up to 100 sq m net retail sales area may be allowed.

Retail Planning Policy Guidelines (Amendment 2005)

3.15 More recently an amendment to the Irish Retail Planning Guidance became effective in February 2005. This has had the **effect of lifting current retail warehousing floorspace restrictions** (see above) for individual single large-scale retail warehouse developments in Dublin, and the 'gateway' towns and cities identified by the National Spatial Strategy. This only applies to those areas subject to Integrated Area Plans under the provisions of the Urban Renewal Act 1998.

3.16 In the wider context of County Mayo this change in policy guidelines relates primarily to Galway and Sligo. The relaxation aims to not only encourage and enable new retailers to enter the Irish retail market, but simultaneously provide greater competition and wider consumer choice. The potential likely effect of this significant change on centres within County Mayo will need to be considered.

Regional Planning Guidelines for the West

3.17 The Regional Planning Guidelines for the West (adopted in May 2004) provides the planning policy guidance for the West region, covering Galway City and the Counties of Galway, Mayo and Roscommon.

3.18 The Regional Planning Guidelines provides up-to-date population projections for the West Region, based on a series of data from CSO, 2001, along with the NSS regional projections used to stable inter-regional migration pattern derived from historically observed trends up to the year 1996. The Regional Planning Guidelines estimate that the population for the West region will be 460,000 in the year 2020, equivalent to a 21% rise in population from 380,000 in 2002. This is deemed as being reasonable.

3.19 The Regional Planning Guidelines for the West identifies the Galway City 'gateway', along with Tuam 'hub' and the Castlebar-Ballina 'linked hub' as the focus for attracting population as well as business/employment to the region. As these are established towns with existing infrastructure provision, and a wide range of functions, they are identified as being the most suitable locations to accommodate further levels of development and growth.

3.20 To provide for the anticipated future development and growth of the West region the Regional Planning Guidelines outline three alternative development scenarios, as a means of accommodating the growth in population envisaged by year 2020.

3.21 The three different strategic scenarios include:

- *Emphasis on Galway as the 'gateway'* - concentration of the region's projected growth towards the gateway of Galway City;
- *Dispersal of development* – dispersed development spread throughout the West region; and

- *Development of Gateway, Hub and Linked Hub* – development in Galway, Tuam and Castlebar-Ballina, supported by development in other key settlements and in rural locations. This is the preferred identified strategic option;

3.22 The Regional Planning Guidelines adopt a developmental framework based on the sub-division of the region into six development zones:

- *North Mayo:* this is predominantly rural, stretching west from Mulranny area, to the Crossmolina hinterland and the Kilalla/Ballycastle area. Belmullet is the key town;
- *Central Mayo*: stretching from Westport hinterland, northeast to Ballina hinterland, and then east to Charlestown/Kilkelly. Castlebar-Ballina is the linked hub, with the key towns of Westport, Swinford and Charlestown;
- *North Roscommon*: zone is in the north east of the region, and includes key towns of Boyle, Castlerea, Strokestown and Ballaghadereen;
- *West Galway and South West Mayo*: stretching from West of Rossaveal hinterland north to the Clonbur area, and north-west to western edge of Westport hinterland. This includes the key towns of Carraroe, Clifden and Louisburgh.
- *North Galway and South Mayo*: this zone includes the key towns of Claremorris and Ballinrobe, and stretches to encapsulate the Headford hinterlands.
- *Roscommon and East Galway*: includes the Tuam 'hub', in addition to key towns of Roscommon, Ballinasloe, Ballyhaunis, Mountbellew and Monksland (Athlone).

3.23 The overall development strategy for achieving these Regional Planning Guidelines objectives will rely on developing the urban structure and settlement hierarchy, and thereby promoting the growth of a broad range of distinct settlements and their functions/roles. The hierarchy will tend to be as follows:

- NSS 'Gateway'– focusing on the City of Galway;
- NSS 'Hub' town of Tuam, along with 'Linked Hub' of Castlebar-Ballina; and
- Key service towns, local service towns and other villages;

3.24 In relation to the retail strategy, the population of the 'linked hub' of Castlebar-Ballina is projected to increase significantly to 30,000 in the years leading up to 2020.

County Mayo Development Plan

County Development Plan 2008-2014

3.25 Mayo County Council adopted its new County Development Plan in May 2008. The plan will provide an up-to-date planning and development strategy for the County for a six-year period from 2008-2014 reflecting a range of national and regional strategies and guidelines. Please refer to the Retail Sections in Part 3 and Part 4 of the 2008-2014 County Development Plan alongside this Retail Strategy.

4 TOWN CENTRE ASSESSMENTS

Introduction

4.1 The Retail Planning Guidelines indicate that there are a variety of reasons and factors which contribute to the successful and vibrant health of a town centre. The planning guidelines continue by stating that the vitality and viability of each town centre requires a balance to be struck with choice of key qualities that can be classified into four broad categories, consisting of: attractions, accessibility, amenity and action.

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

4.2 In this section of the report a review and update of the detailed town centre health checks and assessments was completed as part of the Mayo Retail Strategy in 2002. A summary has been provided of the healthcheck of Castlebar, Ballina and Westport, on the basis of interpretation and assessment of the four 'A's' as outlined in the Retail Planning Guidelines. These summaries have drawn upon the town centre assessments and local consultations.

Ballina

Attractions

4.3 Ballina is one of the three main towns in County Mayo and sits on the southern edge of Killala Bay. Ballina is known to attract a considerable amount of trade from parts of Northern Mayo and Southern Sligo. The town also attracts many tourists, many from angling and fishing related trips taken on the River Moy. The area around the River and waterfront has begun to improve in recent years through provision of amenities and facilities, including the proposed new marina.

4.4 In tourism terms, Ballina occupies a prime geographical location that is only further enhanced by its scenic setting on the River Moy. Nonetheless, the town of Ballina has still not realised its full tourism potential. The tourism offer has improved in recent years although some of this improvement is somewhat lessened by the prominence of some areas of poor environmental quality and appearance, most notably in relation to property vacancies, building fabric and aspects of dereliction. Ballina is nonetheless very popular at peak times including July when the Ballina Street Festival and Arts Week is held. This focuses on 3 key events, but most notably National Heritage Day.

4.5 Despite the high profile of the River Moy in the town context, and signs of development of some riverside apartments and other facilities, the development potential of the riverside has still to be fulfilled. This can be achieved through the

creation of improved linkages between the riverside areas and key points within the core town centre.

4.6 The traditional town centre is concentrated in the area bound to the east by Cathedral Road; to the west by Barret Street, James Connolly Street and Bury Street; to the north by Circular Road and Humbert Street; and south by Kevin Barry Street, Teeling Street and Pound Street. The River Moy also acts as a physical boundary for central Ballina.

4.7 The primary focus of the commercial and shopping core in Ballina is on Pearse Street, O'Rahilly Street, Tolan Street and Tone Street.

4.8 This area has a traditional streetscape and building lines that are very much in keeping with many such Irish market towns of the scale of Ballina. There are a number of multiple retailers within the town centre, including Tesco, Penny's, Lidl, Eason's and Dunnes Stores which are all key anchors and attract customers to the town centre. The town in recent years has had no cinema until the opening of the Cineplex.

Accessibility

4.9 The main thoroughfares for local traffic through the town centre are very frequently congested, with heavy through traffic (which could be alleviated through the future provision of a Ballina ring road. There are no truly significant areas of pedestrianisation in the town centre, with the exception of a number of small mall shopping units spread throughout the town centre.

4.10 The provision of dedicated off-street car parking throughout Ballina is of varied quality combined with a range and supply of on-street parking. All parking in the town centre is now 'pay and display' and time restricted. Illegal on-street parking is noted as being prevalent throughout the main shopping streets. Car parks can be found at Market Road/Pearse Street, Humbert Street, Emmet Street and Teeling Street/Bury Street.

4.11 Many of the existing footpaths and pavements in the town centre would appear to have potential to benefit from a programme of improvement. There are also a number of dedicated pedestrian crossing facilities in the core town centre, and pedestrian access through the town centre shopping area is relatively good with wide footpaths.

4.12 Public transport accessibility to Ballina is reasonable. Ballina is designated a principal location served by a choice of national and regional bus services run by Bus Eireann linking to major destinations such as Galway, Belfast and Dublin, as well as intervening towns in the Midlands and West. There area number of local taxi operators trading in Ballina and the town environs.

4.13 Ballina is also served by an Irish Rail train station which is situated a short walk south from the town centre. Ballina offers a daily passenger (and regular freight) service to nearby Foxford, Manulla Junction, with onward services to Dublin and other locations such as Westport, Castlebar, Claremorris, Ballyhaunis, Athlone and Tullamore.

Amenity

4.14 Some parts of the traditional shopping core within Ballina town centre appear to have suffered from a lack of overall investment in recent years, although this is beginning to change through a number of key development proposals, such as Penny's new store under construction adjacent to Tesco, and planned major expansions by both Dunnes Stores and Tesco in the town.

4.15 The overall quality of public realm and streetscape is of varied quality, particularly on the more secondary streets, where shop units are showing signs of neglect and lack of maintenance, with poor shop fronts and low quality of signage and

fascia. The town centre has, however, benefited in part from past 'shop front' initiatives, led by Ballina Chamber of Commerce and the local town Council.

4.16 The Market Square is seen by many (including the local Chamber of Commerce) as a valuable amenity and asset for the town centre, which has greater potential as an area of formal civic space with links to the River Moy.

4.17 Throughout the town centre many pavements remain in a relatively good condition, although in side streets and the lanes off the main streets this is not true. Many of these provide linkages to and from the core shopping areas, and should therefore be improved to enhance the wider vitality and viability of the town.

4.18 Ballina as a whole has limited provision of street furniture and displays of public art. As a whole the streetscape in much of Ballina town centre is relatively attractive, although some environmental improvements could be achieved in selected works on upgrading of pavements, signage, building and shop fabrics, and street furniture.

Action

4.19 In order for Ballina to continue to retain and enhance its standing within the County and national retail hierarchy, a number of initiatives need to be implemented. There is need for greater choice and an improvement in the quality of the retail offer whilst achieving the ongoing renewal of the wider town. This momentum should be continued in long to medium term, through identification, assembly and planning of town centre and edge-of-centre key sites for future development, which can be used to target and bring high order comparison retailers to Ballina (reflecting its 'linked hub' status with Castlebar).

4.20 The overall town centre and pedestrian environment within parts of the traditional core shopping area needs to be upgraded, with greater encouragement towards improved interaction between different parts of the town centre. Accessibility as a whole to the town centre also needs to be addressed, in particular the balance between all vehicle movement and pedestrian access.

Castlebar

Attractions

4.21 Castlebar is the main market town and service centre for its surrounding catchment and arguably for this part of County Mayo. Castlebar is ideally located within County Mayo enabling it to draw from an extensive catchment area.

4.22 The majority of retailing in Castlebar is concentrated in the town centre around the main shopping streets of Main Street, Bridge Street, Linen Hall Street, Shambles Street, Duke Street, Ellison Street and Hopkins Road. The town centre environment in Castlebar is relatively attractive, which has been enhanced in recent years by more modern retail format development situated off the traditional shopping street (Main Street). This includes Dunnes Stores, Tesco, Aldi, Shaws, Argos and other retailers.

4.23 There has also been recent out-of-town development in the form of retail warehousing (i.e. Woodies DIY & Garden Centre, Toymaster) with further development proposals noted in the planning pipeline.

4.24 The Castlebar town and environs population has grown considerably in recent years and this trend is expected to continue as the town seeks to develop and grow in line with its NSS role as a 'linked hub' with Ballina. This will simultaneously be reflected by the scale, range and offer of retail provision in the town.

Accessibility

4.25 The town centre and the approaches to Castlebar continue to suffer from heavy traffic congestion, relating to the key through routes such as the N5, N60 and N84.

4.26 The provision of car parking in Castlebar is as a whole perceived to be adequate for now, although the view backed by the consultation process indicates that additional and improved parking facilities (including a multi-storey car park) will be needed soon. There are a number of large and small well utilised car parks lying to the rear of and adjacent to the main shopping streets, such as beside Supervalu. The town also has a limited range of on-street car parking.

4.27 The standard of car parking provision is generally good with adequate hard surfacing, landscaping (where applicable) and signage. The car park facilities in the town centre are all fee paying and/or time restricted (generally up to two hours limit), including the large surface car parks at Tesco/Dunnes Stores and Aldi/Shaws.

4.28 At present, off-street car parking provides a degree of penetration and pedestrian links to the traditional shopping core at Main Street and the associated side streets, such as Linenhall and Shambles Street.

4.29 Pedestrian accessibility throughout the town centre is generally good, although there is a very limited amount of pedestrianised areas in the town centre.

4.30 Public transportation in Castlebar is primarily limited to Irish Rail train and Bus Eireann national bus routes. Castlebar is situated on the Dublin – Westport rail service line and there are daily train services running through to Claremorris, Ballyhaunis and on to Athlone and Dublin in one direction, and Westport in the other.

4.31 The town is served by a regular bus services linking Castlebar to all major and regional towns and destinations such as Dublin, Athlone, Ballina and Westport. There are local taxi companies serving Castlebar and its environs, with a range of pick-up locations throughout the town centre, some which appear to be more readily utilised than say others, i.e. on Main Street.

Amenity

4.32 Castlebar town centre as a whole is well established and attractive town centre. It has attractive streetscape, well maintained buildings, and a number of civic and institutional buildings, including Mayo County Council offices. The main streets are of typical Irish design and building layout. Castlebar has a mix of modern and traditional shop fronts, and as a general rule of thumb these are well managed and designed.

4.33 The standard of paving and footpaths throughout the town centre is relatively good and there is a relatively high quality public realm, street furniture and decorations in the more modern parts of the town centre (i.e. Tesco/Dunnes Stores). The town is well provided with litter bins and this is evident from an overall lack of litter in most parts of the main shopping areas.

4.34 In Castlebar, the level of vacancies in the town centre is comparatively low, there does not seem to be a significant incidence of vandalism or dereliction. The environmental quality of some of the secondary shopping streets in the town centre is somewhat less attractive, in particular more peripheral areas of the traditional main street where there are emerging signs of deterioration and poor maintenance.

Action

4.35 In Castlebar, the future vitality and viability of the town centre will focus on its ability to adapt to changing consumer trends and needs, no more so than in the

identification of a range of sites to be brought forward and made available for retail and associated development. This will be important for Castlebar to grow as part of the NSS 'linked hub' and help meet the needs of its increasing population.

4.36 At the same time, however, there needs to be improvement to the traditional heart of the town centre in Castlebar, namely along Main Street, where there are some signs of properties and shop front neglect, and where heavy traffic congestion and movement is hindering its retail prosperity. The rejuvenation of this area is seen by many (including the Chamber of Commerce) as important.

4.37 A series of phased programmes and key actions need to be drawn up, to perhaps initially consist of environmental and shop front improvements, a review of traffic management and parking regulations, as well as initiatives for pedestrian crossings, lighting, security and safety, as well as a general public awareness campaign to improve civic pride and encourage town centre maintenance.

4.38 In addition, the concept of pedestrianisation of the Main Street has been promoted by the Castlebar Chamber of Commerce in recent discussion. This would help remove the issues of heavy through traffic and congestion, whilst also enhancing the overall town centre shopping environment and its attractiveness, by virtue of its pedestrianisation.

Westport

Attractions

4.39 Westport is a busy and leading Irish tourist destination and town. Although it acts as a key tourism hub Westport draws significantly from a relatively wide catchment area. The town offers a diverse range of convenience, comparison and tourist-related retail, many of whom are independent and family run businesses.

4.40 The main shopping and retailing area is situated on Bridge Street, Shop Street, James Street, The Octagon and Mill Street and to a differing extent North and South Mall. The town centre environment of Westport is very attractive, and has been a regular winner or challenger as Ireland's Tidiest Town. The town's Leisure Park is situated off James Street and includes a multiplex cinema.

4.41 Westport town and Westport Harbour are located close to Westport Lake, which is very attractive to both residents and visitors, especially those enjoying fishing and related water sports. The Carrowbeg River also runs through Westport town and this helps the town environment and also in attracting tourism, in particular creating Westport as an ideal location as a base for visiting Westport, Mayo and the surrounding area.

Accessibility

4.42 Westport town centre suffers from traffic congestion at peak times, which is heightened predominantly during the summer periods and during special events, in particular on Bridge Street. Westport is accessed from Castlebar to the east via the N5, from the north (Newport) and south (Leenaun) via the N59, and west from Louisburgh (R335).

4.43 Car parking in Westport is as a whole reasonable, with a small number of well located and well utilised off-street car parks lying to the rear of the main shopping area. These include the car parks at Mill Street, Market Lane, Westport Leisure Park, and to rear of James Street. The town has a range of restricted on-street car parking spaces. There is further parking at the rear of Supervalu on Shop Street.

4.44 The standard of car parking provision is generally good with many of the dedicated parking spaces well surfaced, landscaped and adequately signposted. At present, the off-street car parks provide a direct pedestrian link to the traditional shopping streets, in particular Bridge Street. Pedestrian accessibility in

the town centre is generally reasonable, although there are no fully pedestrianised areas in the town centre.

4.45 Public transportation in Westport is available by means of rail and bus routes with the town's Irish Rail station located on the eastern edge of the town centre. Westport is situated on the Dublin – Westport service line and there is daily passenger service linking to key settlements such as neighbouring Castlebar, Claremorris, Ballyhaunis, Athlone, Tullamore and onto Dublin.

4.46 The town is also served by a national bus routes operated by Bus Eireann. Services provide key connections to most national and regional towns, including at Castlebar, Athlone and key towns on route to Dublin. There a small number of local taxis in the Westport town and harbour area.

Amenity

4.47 Westport town centre has a well established and attractive streetscape where the majority of the buildings are well maintained, and there are a number of fine civic and institutional buildings, including the Town Hall. The main shopping streets are typical of many traditional Irish towns with low rise buildings and relatively narrow and small area as building plots.

4.48 Most shop fronts in the town centre are well maintained, with a range of traditional and more modern shop fronts, carefully designed in planned liner format so as to respect the character and amenity of Westport town centre. Many would suggest that the high quality of its shop fronts is perhaps one of the key assets to Westport.

4.49 The standard of paving and footpaths throughout the town centre is high as is street lighting and floodlight buildings. The town centre also has a high quality public realm, with good street furniture and decorations, and hanging baskets. The town centre is also well provided with the supply of litter bins and this contributes directly to the lack of presence of litter and rubbish in public places.

4.50 In Westport, the level of vacancies in the town centre is comparatively low and there does not seem to be any significant incidence of vandalism or indeed significant areas of dereliction within the town centre. The environmental quality of the town centre is as a whole of a high standard, clean and well maintained.

Action

4.51 In Westport, it is important that the town centre continues to be well maintained and provides the requisite range of retail and other services required to serve the town's wide catchment population and the growing number of visitors. At the same time, consideration must be given to implementation of a relief road that would alleviate congestion on Bridge Street and remove through traffic. It may simultaneously provide a long-term opportunity to achieve pedestrianisation of Bridge Street as the main street for shopping in the town centre.

4.52 Furthermore, Westport is increasing in popularity in terms of some multiple and chain retailers and the town has been identified as having potential for additional retailing development. The town is currently subject to a major proposal for mixed comparison and convenience use. It will be vital that such developments in edge-of-town centre sites are implemented to a high quality and standard that seeks to maintain the unique and positive characteristics of Westport. This should be supplemented by improved car parking and accessibility.

Second Tier Towns

4.53 The scope of this particular component of the strategy has been extended to include a short assessment of the network of second tier towns in the retail hierarchy. For purposes of clarification, these consist of the sub-county towns of Claremorris, Ballinrobe, Ballyhaunis, Swinford, Belmullet and Crossmolina.

Claremorris

4.54 Claremorris is a second tier and sub-county town in Mayo which occupies a strategic geographical location in the County. The town is situated at the crossroads of the N60 national secondary route (running east-west) and the nearby N17 national primary road (north-south). The town is readily accessible from Tuam and Galway to the south, Ballyhaunis to the east and Castlebar to the north. Accessibility to and from the town (and Knock) has been improved from the N17 bypass opening, which simultaneously has opened up the town for new development.

4.55 Claremorris is a thriving market town in South Mayo with a town population in excess of some 3,000 people and a wide rural catchment and hinterland bringing this to in excess of 14,000 people (census preliminary 2006). The town and local community has benefited from public and private sector investment in more recent years.

4.56 Claremorris railway station acts as an important 'hub' for train services connecting the Greater Dublin area to Westport and Ballina. Claremorris has been part of the ongoing campaign seeking the opening of the West rail line, which would provide a rail link from Claremorris to Galway and Sligo, offering the potential for a Knock Airport link. A daily bus service operated by Bus Eireann runs to most major destinations from Claremorris. There are also a number of local taxi operators serving the town.

4.57 Parking is available at the main off-street public car park in the town centre, situated at Chapel Lane, which has been subject to improvement. Mayo County Council has also introduced further parking facilities at Dalton Street and Mount Street. In addition, new parking regulations (including pay parking) have been introduced in late 2006.

4.58 Claremorris town centre provides a diverse and range of comparison and convenience shopping, which includes a purpose built Supervalu supermarket and other new retail in the town centre. The town is now a target for many national chains and multiples, such as Aldi who have opened a new store. The development of a Tesco supermarket is under construction on the edge-of-town as part of a mixed use scheme to include a hotel, residential, office and small retail units.

4.59 The environmental appearance and quality of the town centre has been enhanced in recent years through County Council investment in the streetscape and public realm.

Ballinrobe

4.60 The town of Ballinrobe is located in South Mayo and is ideally placed along this stretch of the N84 Castlebar-Galway national secondary route to benefit from potential growth in both population and economic development opportunities, linked to the growth of the Galway 'gateway' and the Castlebar-Ballina 'linked hub'. The town is also accessible directly via the R331 regional road from Claremorris. Ballinrobe is a small market town with a town population of some 3,000 people with a rural catchment and hinterland bringing this to in excess of 12,900 people (census preliminary 2006).

4.61 Ballinrobe racecourse is situated about a mile outside Ballinrobe on the main Castlebar Road (N84). It is the only racecourse in Mayo and with 5 race meetings per annum it is a makes a valuable contribution to the local economy. The racecourse has seen recent infrastructure improvements and building development.

4.62 Ballinrobe does not have railway station. The town is connected by bus (Glebe Street) to a number of regional towns and destinations serviced by Bus Eireann. This includes routes to and from Castlebar, Westport and Galway.

4.63 Parking is available at the main off-street public car park in the town centre, situated off New Street beside the Supervalu supermarket. On-street car parking is all pay parking, with many parts of the town centre restricted to a two hour limit.

4.64 The town centre in Ballinrobe offers a range of predominantly convenience shopping and retail services provision as well as a few comparison goods outlets. Key retailers in Ballinrobe include Supervalu, Londis, Centra, Spar and Mace. There is the Connaught Gold Co-op Mart and DIY Garden Centre outlet situated on the edge of town.

4.65 The town centre has a pleasant environmental appearance and quality public realm. This has added to the relative attractiveness of the town and its main shopping area.

Ballyhaunis

4.66 Ballyhaunis is located in the south-east of Mayo, and holds a strategic location on the N60 national secondary route which runs from Castlerea and Roscommon town to the east, to Claremorris and onto Castlebar towards the west. The population of Ballyhaunis town is some 2,500 people (census preliminary 2006).

4.67 Ballyhaunis railway station is situated towards the periphery of the town. The station has a frequent rail service connecting with Dublin in one direction, and Claremorris, Castlebar and Westport and Ballina in the other. Ballyhaunis would benefit, as would Claremorris, from any future opening of the west rail link to Galway, Sligo and Knock International Airport. Bus Eireann picks up from the stop on Main Street and operates a regular service to most regional and national towns across Ireland.

4.68 Car parking is generally available on-street (Bridge Street, Clare Street etc) throughout the town centre where parking is free of charge. There are also dedicated off-street car parks throughout the town centre including at the swimming pool and public library.

4.69 A traffic and transportation study has commenced relating to the N60-N83 Ballyhaunis Outer Distribution Road. This is being completed simultaneously with preparation of a traffic management plan for Ballyhaunis town.

4.70 Ballyhaunis is a busy town which has a diverse economy and employment base that includes manufacturing, agriculture, business and industry. The town centre provides a wide range of comparison and convenience shopping, as well as retail services. The main retailing businesses in Ballyhaunis town centre are Costcutter Express, Londis and Supervalu (purpose built supermarket). The Connaught Gold DIY and Garden Centre opened recently on the Charlestown Road. We are aware there are a number of retail development proposals currently in the planning pipeline for Ballyhaunis.

4.71 The town centre in Ballyhaunis benefits from a good quality environmental condition and appearance, with town centre having been enhanced through a scheme of public realm and streetscape improvements (with local sculptures) based around The Square (pedestrianised) and the adjacent area.

Swinford

4.72 The second tier town of Swinford is ideally located adjacent to the junction of the N26 and N5 national primary routes through County Mayo, and in close proximity to Knock International Airport just 12 kilometres to the south. Swinford had a town population of some 2,600 people, and a rural catchment and hinterland bringing this to in excess of 15,900 people (census preliminary 2006).

4.73 The bustling town of Swinford lies on the tributary of the famous River Moy, and in close proximity to Knock Airport, makes it an attractive holiday destination, especially in terms of fishing waters, in particular Callow Lakes and Conn and Cullin lakes. The town is famous for the County’s largest summer festival –

Siamsa Sraide Swinford (or Fun in the Streets of Swinford) which takes place in August to celebrate many of the traditions of East Mayo.

4.74 Swinford is not part of the Irish rail network so travel to the town is primarily road based by either bus or car. Bus Eireann operates a daily service from Swinford to most of the region's main destinations including Charlestown, Castlebar and Westport.

4.75 Car parking is available throughout the town centre on most of the main streets with no fee payable, and generally with no time restrictions.

4.76 Swinford has a fairly broad range of predominantly convenience shopping and retail services provision in the town centre, including retailers such as Mace, Costcutters and EuroSpar supermarkets, as well as local independent traders. There are also a handful of comparison and bulky good retailers.

4.77 The physical appearance and overall character of the town centre environment in Swinford is one of reasonable quality, with no major negative aspects of public realm.

Belmullet

4.78 Belmullet is situated on the north western coast of Mayo, and serves a predominantly rural catchment area. The town is accessed solely by road from the east, via the N59 national secondary route and R313 regional routes. The town of Belmullet is relatively remote but is nonetheless a small and important town in North West Mayo. Although the town population is in excess of 2000 people (preliminary census 2006) the Erris hinterland represents a wider catchment population in excess of 12,000 people.

4.79 Belmullet is not connected to the Irish rail network. The town is however connected to other regional towns by a daily local bus service operated by Bus Eireann, with runs from Blacksod in one direction, through Belmullet, Bangor and Crossmolina, and on to Ballina (where regional onward connections can be made). Belmullet does have a local taxi service.

4.80 On-street car parking is available throughout the town centre in Belmullet, although there are traffic restriction and limits applied. Free parking is generally available on the secondary side streets where a more flexible regime is in force. Car parking does not appear to be a particular issue in the town centre.

4.81 Belmullet town centre acts as the main retail and recreational centre to the surrounding hinterland. The town is focused around the main crossroads and roundabout, with most shops located along two or three of the adjoining roads. Belmullet provides a range of convenience, some comparison and most key retail services required for a settlement of this size. Most traders are independents although recognised brand retailers such as Londis and Spar do have a presence in Belmullet.

4.82 The environmental appearance and quality of the town centre is as a whole of fairly reasonable standard, although there are areas towards the periphery of the town and the main shopping streets that are displaying signs of deterioration and vacancy.

4.83 New residential apartments, under construction at time of reporting, occupy a prime location at the heart of the town. They have pleasant views overlooking the harbour, and the presence of additional resident population in the area should help to improve the overall vibrancy and vitality of Belmullet.

Crossmolina

4.84 The town of Crossmolina is located to the immediate west of the main County town of Ballina, and is accessible from the east and west by the main N59 route, and north and south from the R315. Crossmolina is a small town with a

population, including immediate catchment area of 1,700 people (census preliminary 2006) . The town is located at the northern end of Lough Conn.

4.85 Crossmolina is not currently linked by rail to other parts of the County, and therefore those dependent on public transport as a means of travel must use the bus services operated to and from the town by Bus Eireann. Bus Eireann operates local and regional bus routes to nearby Mayo towns of Ballina, Castlebar and Westport as well as longer journeys to destinations in Galway, the Midlands and Dublin. There are also a number of taxi firms in the Crossmolina and Ballina area.

4.86 Parking is freely available on the majority of streets in the town centre with no limits or restrictions applicable to on-street spaces. Off-street private car parking (restrictions apply) is available at a few locations such as the Centra supermarket on Main Street.

4.87 Crossmolina town centre provides a good selection of comparison and convenience shopping, as well as essential retail services. The main retailers in the town include Centra, Mace, Texaco, Statoil and the post office, although there are also a number of local and independent traders.

4.88 The overall quality of the environment in Crossmolina town centre is one of reasonable standard, although the presence of through traffic and peak time congestion along the town’s thoroughfare (Main Street) detracts from this otherwise pleasant town. The river passing through the town is, however, an additional positive feature of Crossmolina.

5 FUTURE FLOORSPACE REQUIREMENTS

Introduction

5.1 This chapter of the report presents:

- Base year (2004) and current year (2006 – when review commenced) spending in County Mayo, on convenience and comparison goods.
- Projection of expenditure in the County, including the impact of tourism spending.
- Allocation of County spending growth and consequent floorspace requirements in the periods to 2011, 2016 and 2021, for convenience, comparison and bulky goods

Base Year Spending Estimate for the Study Area

5.2 Technical Appendix 2 sets out in detail the methodology and results relating to the establishment of national per capita expenditure levels in the base year (2004) and the current year (2006).

5.3 The first step in the projection process for Mayo is to calculate the equivalent base and current year figures for the County. These figures will diverge from those established at the national level because of: differences in average income levels between Mayo and the State; differences in income distribution between the Mayo and the State; and differences in the extent of tourism expenditure.

5.4 Data is therefore required on: population, expenditure per head on convenience and comparison goods and the number of tourists visiting the area and their expenditure.

Population of County Mayo in the Base and Current Year

5.5 The population of the study area in 1996, 2002 and 2006 is recorded as follows:

Table 5.1 Population of County Mayo in 1996, 2002 and 2006

Data	1996 persons	2002 persons	2006 persons	1996-2002 growth	Annual % growth rate	2002-2006 growth	Annual % growth rate
Persons	111,524	117,446	123,648	5,922	0.87	6,202	1.29

Source: Census of Population (COP)

Estimation of the Expenditure per head in County Mayo

5.6 The latest year for which **personal/household incomes** by regions and counties is available is 2003. Mayo income in 2003 was 89.3% of the State and 95.3% of the Region. The trend in the index for Mayo was steady from 1997 to 2000, then after oscillating, rising slightly. In the absence of a clear recent trend, it is wise to assume that the expenditure relationship established below for 2000/2002, from the Household Budget Survey and the Census of Population, still holds.

5.7 **Expenditure per head** may be obtained by examining the social group structure of the County population, in the COP, and relating these to expenditure of social groups at State level as set out in the Household Budget survey, 2000 - assuming the *shift* effect within social groups (arising from differential salary levels for the same job in different locations) is small compared to the share effects of the make-up of the households between social groups.

Table 5.2 Index Numbers of Expenditure per head (State=100)

Area	Convenience	Comparison
Mayo	97.4	95.7
State	100.0	100.0

Source: based on COP data on social group composition and HBS data on expenditure by social group

5.8 Table 5.2 gives an index number for County Mayo in relation to the State which is higher than that obtained by looking at income data. This may be partly because of the shift effect referred to above and partly because of the relatively income inelastic nature of expenditure on convenience goods in particular.

5.9 Assuming these relationships still hold in 2004 and 2006, the following spend per head figures may be calculated for the County as follows (Table 5.3):

Table 5.3 Expenditure per head, €, 2004 and 2006

	2004		2006	
Area	Convenience	Comparison	Convenience	Comparison
State	2,954.6	2,740.6	2968.9	2930.6
Mayo	2,878.2	2,622.8	2892.1	2804.6

Source: Table 5.1 and Appendix 2, Table A13

Tourist Spending

5.10 In addition to the aggregate spending set out in Table 5.3 above, tourism spending must be added. It has been calculated by Failte Ireland 1 that €98 million of revenue accrued to County Mayo from tourism activity in 2004. If national proportions apply, then 15.2 per cent will be on shopping, of which 80 per cent is estimated to be on comparison goods – a total of €11.92 million in 2004 (2.98 on convenience goods).

Projection of Expenditure in Mayo

Projection of Expenditure per head at State level

5.11 Projection at national level follows the projection of consumption in the ESRI Medium Term Review (MTR) 2 High Growth Model to 2015, and then extends the projections based on the 2010 to 2015 trend. The High Growth model is preferred because it is more likely in the shorter term and from a planning perspective, will provide a scenario which will facilitate more robust planning decisions in terms of making adequate retailing provision.

5.12 The growth of convenience spending is set at 50 per cent of the growth of overall consumption, and comparison set at 160 per cent of the same (see Appendix Section 4.2). The resultant figures are set out below, in Table 5.4

5.13 The results from Table 5.4 are summarised in Table 5.5, where a comparison is made with UK projections. From this comparison, it is clear that total consumption growth is similar over the period 2003/4 to 2013, convenience goods growth is less in Ireland but comparison goods growth is higher (after 2008). It may be that the rapid immigration into Ireland is impacting on spending per head on convenience goods. Certainly the MTR suggests that consumption will contribute less to growth and points out that GDP per head growth rates will fall sharply. The level and character of immigration may well be a significant factor in determining expenditure patterns in the period ahead.

[1] Failte Ireland – Tourism Facts 2004 – West Region
[2] Fitzgerald et al *Medium Term Review 2005 – 2012*, Economic and Social Research Institute, December 2005

Table 5.4 Projected Growth of Expenditure per head at State Level (€, 2004 prices)

Element	2004	2005	2006	2007	2008	2009	2010	2011	2012
Rate (%) High		5.2	5	3.7	3.5	3.3	4.7	4.1	3.7
Convenience	12043	12344	12,573	12,858	13,135	13,401	13,787	14,134	14,455
Comparison	11171	11875	12,411	13,146	13,882	14,615	15,714	16,745	17,736
Consumption	67,733	71,255	74,818	77,586	80,302	82,952	86,850	90,411	93,756
Population	4,076	4,155	4,235	4,319	4,403	4,487	4,571	4,655	4,735
				4,287	4,365	4,444	4,522	4600	4,660
Conven % grow		2.5	1.9	2.3	2.1	2.0	2.9	2.5	2.3
Comp % grow		6.3	4.5	5.9	5.6	5.3	7.5	6.6	5.9
Cons % grow		5.2	5.0	3.7	3.5	3.3	4.7	4.1	3.7
Convenience PH	2,955	2,971	2,969	2,977	2,983	2,987	3,016	3,036	3,053
Compar PH	2,741	2,858	2,931	3,044	3,153	3,257	3,438	3,597	3,746
Consum PH	16,617	17,147	17,667	17,964	18,238	18,487	19,000	19,422	19,801

Element	2013	2014	2015	2016	2017	2018	2019	2020	2021
Rate (%) High	3.7	3.7	3.7	4.7	4.7	4.7	4.7	4.7	4.7
Convenience	14,783	15,119	15,462	15,908	16,367	16,839	17,324	17,824	18,338
Comparison	18,786	19,898	21,076	22,661	24,365	26,197	28,167	30,286	32,563
Consumption	97,225	100,823	104,553	109,467	114,612	119,999	125,639	131,544	137,726
Population	4,815	4,895	4,975	5,055	5,124	5,194	5,263	5,333	5,402
	4,720	4,780	4,840	4,900	4,960	5,020	5,080	5,140	5200
Conven % grow	2.3	2.3	2.3	2.9	2.9	2.9	2.9	2.9	2.9
Comp % grow	5.9	5.9	5.9	7.5	7.5	7.5	7.5	7.5	7.5
Cons % grow	3.7	3.7	3.7	4.7	4.7	4.7	4.7	4.7	4.7
Convenience PH	3,070	3,089	3,108	3,147	3,194	3,242	3,292	3,342	3,395
Compar PH	3,902	4,065	4,236	4,483	4,755	5,044	5,352	5,679	6,028
Consum PH	20,192	20,597	21,016	21,655	22,366	23,104	23,871	24,668	25,495

Table 5.5 Summary of Spending Growth at State Level (Average annual growth rates in spending per head at constant prices) and comparison with UK Data

	2006-2011	2011-2016	2016-2021	2004-2008	*UK 2003-2008*	2004-2013	*UK 2003-2013*
Convenience	0.1%	0.7%	1.1%	0.1%	0.5%	0.2%	0.8%
Comparison	4.3%	4.9%	6.1%	3.6%	4.0%	4.1%	3.5%
Consumption	2.0%	2.6%	3.4%	2.4%	2.1%	2.3%	2.1%

Source: Table 5.4

5.14 Nevertheless, the brisk growth in convenience spending observed on the ground in recent years suggests that it may be wise to take a higher percentage growth rate for this category in the period ahead. Accordingly, for the Study area, it is assumed that per capita convenience spending growth will average 1.0 per cent per annum in the period 2006 to 2021.

Population Projections for County Mayo

5.15 Population projections for County Mayo were undertaken as part of the County Development Plan Review which commenced in 2006, and are summarised in Table 5.6. The projections adopted will result in a very significant increase in the population of the County to 2021, when it may reach 152,000.

Table 5.6 Population Projections from the County Development Plan Review

Zone	2006	2011	2016	2021
TOTAL	123,648	133,016	143,412	152,234

Projection of Aggregate Expenditure in the Study Area

5.16 Table 5.7 sets out the projections of expenditure. These combine:

- Relationship between national spend per head and Mayo spend per head in 2006 (Tables 5.2 and 5.3);
- Projections of national/state spend per head (Table 5.4); and
- Projections of county population (Table 5.6).

Table 5.7 Growth of Aggregate Expenditure in County Mayo to 2021 (€, 2004 prices)

Time Period	Population	Convenience Goods		Comparison Goods	
		Weighted spend ph	Total spend	Weighted spend ph	Total spend
2006	123,648	2892.1	357,607,543	2804.6	346,779,966
2011	133,016	2936.3	390,568,612	3343.5	444,744,433
2016	143,412	3020.9	433,229,747	4046.0	580,240,482
2021	152,234	3229.9	491,701,786	5252.8	799,661,751

5.17 Table 5.7 indicates that over the period to 2021, expenditure in the study area at 2004 prices will rise from €358 million to €492 million for convenience goods and from €347 million to €800 million for comparison goods.

Growth in County Tourism Spending

5.18 It is assumed that tourism spending in the County will grow throughout the projection period at the rate of one per cent per annum in real terms.

Leakages and Inflows

5.19 Figures in Table 5.7 must, for the purposes of projecting required floorspace, be modified to take into account inflows to the County and leakages from it. However, no survey data are available on which to base estimates of inflows and outflows.

5.20 A conservative position has been adopted on inflows, with the assumption of zero throughout, largely because of the location of Mayo on the Western seaboard and the influence of Galway City to the South.

5.21 Regarding leakages, the County is deemed to be self-sufficient in terms of convenience goods, by virtue of its size, the disposition of major settlements and the expected geographical pattern of growth to 2021. The position for comparison goods is more complex, but largely unknown in the absence of household surveys. The position is made more complex by the significant additions to floorspace in the period 2001 to 2006 (see Table 5.8). A leakage rate of 10 per cent for comparison goods is adopted for the base year and maintained throughout the projection period.

Current, Committed and Required Floorspace

Current Floorspace in 2006

5.22 Table 5.8 presents the floorspace data for years 2001 and 2006, in square metres.

Table 5.8 Floorspace in 2001 and 2006 (sq m selling space)

Town	2001/2002				2006/2007 (*1)			
	Convenience (m sq)	Comparison Non Bulky (m sq)	Comparison Bulky (m sq)	Total	Convenience (m sq)	Comparison Non Bulky (m sq)	Comparison Bulky (m sq)	Total
Castlebar and Environs	8,334	12,648	11,087	**32,069**	7,171	11,605	34,272	**53,048**
Ballina and Environs	6,900	8,203	12,598	**27,701**	6,644	10,214	29,750	**46,608**
Westport and Environs	3,469	5,855	2,161	**11,485**	4,832	8,680	2,578	**16,090**
Claremorris	1,906	1,781	1,328	**5,015**	3,666	2,841	13,846	**20,352**
Ballinrobe	1,997	1,132	1,745	**4,874**	1,697	3,142	1,483	**6,323**
Ballyhaunis	1,756	1,510	1,960	**5,226**	3,816	1,381	3,086	**8,282**
Swinford	1,775	1,223	972	**3,970**	1,509	895	1,591	**3,995**
Belmullet	1,324	1,317	2,154	**4,795**	1,380	2,358	1,831	**5,570**
Crossmolina	752	570	1,945	**3,267**	767	448	2,542	**3,757**
County Mayo	**26,973**	**34,239**	**35,950**	**97,162**	**31,481**	**41,565**	**90,979**	**164,026**

*Note 1: this includes floorspace under construction at the time of the survey

5.23 It should be noted that the figures recorded in Table 5.8 for 2006/07 include floorspace under construction and thus anticipate additions to floorspace over a period longer than five years. This having been said, the table records a significant level of growth, or committed growth, in the comparison goods sector, and particularly the bulky goods sector. Overall, there will have been an increase of two-thirds in the floorspace in the County when current projects are completed. The great majority of this space is in the bulky goods sector.

5.24 Table 5.9 indicates the derived turnover figures, based on the expenditure calculations and the spending allocations, including leakages. The figures include tourism spend.

Table 5.9 Derived Turnover per sq m in 2006 (at 2004 prices, and including floorspace under construction)

Area	*Net floorspace*	*Total turnover (€ m)*	*€ per sq m*
Convenience	37,037	358.6	9,683
Comparison	132,544	312.1	2,355

5.25 The turnover per square metre for convenience goods is in line with expectations, given the structure of retailing in the County. Comparative figures for towns elsewhere (€9,136 for Tullamore and €10,907 for Athlone, for example) suggest the figure is a reasonable one. It suggests that turnover in the largest centres of the County may be in the region of €11,000 to €12,000 per square metre.

5.26 Figures for comparison goods are, however, extremely low, and suggest considerable under-trading in this sector, probably arising from the considerable addition to the retail warehousing floorspace in this period. Without this additional floorspace, turnover per square metre would have been some €4,447 in 2006 – in line with expectations.

Committed and Proposed Floorspace

5.27 Table 5.10 sets out new floorspace approved or under discussion or appeal, but not commenced. The table indicates that three-quarters of the space granted

consent but not commenced relates to bulky goods retail floorspace in three centres – i.e. Ballina, Claremorris and Ballyhaunis.

Table 5.10 Floorspace Approved but not Commenced and in the Planning System (expressed in sq m net selling space)

Town	Approved but not Commenced				Within the Planning System			
	Conven-ience	Com-parison Non Bulky	Com-parison Bulky	**Total**	Conven-ience	Com-parison Non Bulky	Com-parison Bulky	**Total**
Castlebar and Environs	-	3,506	-	3,506	1,403	-	-	1,403
Ballina and Environs	-	6,440	15,300	21,740	1,870	1,750	-	3,620
Westport and Environs	-	630	-	630	-	-	-	-
Claremorris	-	435	5,544	5,978	-	-	-	-
Ballinrobe	-	351	-	351	4,001	1,530	-	5,530
Ballyhaunis	170	36	10,842	11,047	-	-	-	-
Swinford	-	-	-	-	2,125	-	893	3,018
Belmullet	-	63	-	63	-	-	-	-
Crossmolina	-	-	-	-	-	-	-	-
Total	**170**	**11,461**	**31,685**	**43,317**	**9,398**	**3,280**	**893**	**13,570**

Required Floorspace to 2021 based on Expenditure Projections

5.28 Overall floorspace requirements for the County are set out below and are based on the following assumptions:

- Market shares remain unchanged, including leakages;
- No net inflows assumed;
- Tourism spending growing at 1.0 per cent per annum;
- Turnover for new convenience goods outlets is €11,000 per sq m in 2011 and increasing at 0.5% per annum thereafter;
- Turnover for new pure comparison goods outlets is €5,000 per sq m in 2011 and increasing at 1.5% pa thereafter;
- Turnover for new bulky goods outlets is €2,800 per sq m in 2011 and increasing at 1.5% pa thereafter;
- Efficiency increases in existing stores are at 0.5% per annum for convenience goods and 1.5% pa for comparison goods; and
- Non-shop comparison spend increases its overall market share by 0.35 percentage points per annum throughout the period.

Table 5.11 Floorspace Requirements (sq m net)

Centre	Requirements		
	Convenience	Pure Comparison	Bulky goods
2006-2011	2,000	7,500	-
2011-2016	3,000	10,000	-
2016-2021	4,000	16,000	-
Total	9,000	33,500	20,000

5.29 The question of the spatial distribution of this additional floorspace requirement within the County is the subject of discussion in Chapter 6.

Comparison of the Required Floorspace with Committed and Expected Floorspace: Policy Implications

Convenience

5.30 In the convenience goods sector, the requirement of 9,000 sq m over the period 2006 to 2021 may be compared to some 9,500 sq m granted or in the planning system. However, some 40% of the space currently within the planning system is proposed for Ballinrobe, in three possible schemes. Choices will require to be made regarding this key town in order to avoid over-provision. With this exception, the quantum of development proposed is broadly in line with the requirements at present. Policies on the distribution of the required floorspace are dealt with in Chapter 6.

Pure Comparison

5.31 In the pure comparison goods sector, a requirement for 33,500 sq m over the next fifteen years may be compared to a total of 15,000 sq m granted approval but not commenced or within the planning system. However, the low figures for turnover per square metre in this sector suggest that there may currently be an element of under-trading. Even allowing for this, however, there is therefore an opportunity for additional floorspace provision in this sector in the period beyond 2011. Policies for this provision are set out in Chapter 6.

Bulky Goods and Retail Warehousing

5.32 Regarding bulky goods, provided for by retail warehousing units, it is evident from the data on turnover per square metre (Table 5.9 and Para 5.27) that there is currently under-trading in this particular sector, probably arising from the large increase in the floorspace provided between 2001 and 2006 – from 36,000 to (potentially, when all the projected floorspace currently under construction are completed) 91,000 sq m. These units have yet to reach their full trading potential.

5.33 This further implies that the projected requirement for an additional 20,000 sq m may in fact be an overestimate, since a proportion of the additional projected spend, beyond that allowed for by normal increases in floorspace efficiency, will be absorbed by existing outlets. Coupled with the considerable volume of space (32,000 sq m) proposed for this sector, these factors give rise to clear policy recommendations for restriction of further space, as set out in Chapter 6.

6 RETAIL STRATEGY AND POLICIES

Introduction

6.1 In this section we bring together the output and key findings of our study, and set out a strategy for planning for future retail development in County Mayo.

6.2 This retail strategy for the County of Mayo, is one which seeks to achieve:

- A broad indication of the quantum of development to be provided across Mayo;
- Advice on the appropriate policy approach for assessing retail proposals; and
- Guidance on an appropriate approach to monitoring and implementation, and the need for strategy flexibility over time to reflect data monitoring.

Retail Strategy

Introduction

6.3 The great majority of any future retail floorspace requirements will be provided within the town centres of the three main settlements of Castlebar, Ballina and Westport, and to a lesser extent within one or more of the six second tier sub-county towns in Mayo, as well as the additional key towns as per the County Development Plan Settlement Strategy.

6.4 This additional floorspace will strengthen the town centres and their respective roles and function. There will, however, also be future retail development which will not be able to be accommodated within these established town centres, and where this duly occurs there will be a need to facilitate edge-of-centre sites for this purpose.

Future Floorspace Requirements

Convenience

6.5 In respect of convenience shopping floorspace, there is expected to be only a limited requirement for additional convenience floorspace (i.e. 2,000 sq m net) in County Mayo over the next five years, to 2011. This reflects the number of commitments and proposals in the main towns as well as some of the six second tier sub-county centres.

6.6 Beyond 2011, there will be a requirement for a similar level of additional convenience goods floorspace that will be needed to serve the changing population across the County. It is estimated that 3,000 sq m net of additional floorspace will be required in the period 2011-2016; with 4,000 sq m further net floorspace in the period 2016-2021. This represents a total requirement of 9,000 sq m net additional floorspace for convenience goods in the 15-year period, from 2006 to 2021.

Pure Comparison

6.7 The current level of commitments and emerging proposals in the main and sub-county towns of Mayo for comparison goods floorspace is considerable. There is though still a capacity identified for a further requirement of up to 7,500 sq m net floorspace so as to meet the needs of the County for the period to 2011. This excludes retail warehousing requirements which are later discussed in detail.

6.8 In the medium and longer-term there is additional scope for considerable comparison goods floorspace within the County. The projected requirements beyond 2011, include up to 10,000 sq m net floorspace in the period 2011-2016, and then 16,000 sq m net floorspace in the longer term period from 2016-2021. This represents a future total requirement of up to 33,500 sq m net of additional

comparison goods floorspace in the 15-year period, from 2006 to 2021. We would though recommend that the need for longer term retail development is reviewed towards the end of 2016, to ensure that there is adequate flexibility in the retail strategy to adapt to changing needs.

Bulky Goods and Retail Warehousing

6.9 To safeguard and continue to promote the ongoing regeneration and revitalisation of the County's main town centres the retail strategy should be reviewed in relation to all development proposals relating to retail warehousing.

6.10 The retail assessment indicates that a total additional retail warehousing requirement of some 20,000 sq m net floorspace will be needed by year 2021. On the assumption, however, that existing retail warehousing commitments and proposals will all proceed in the short-term (i.e. before 2011) then it is estimated that there will be no further requirement for additional retail warehousing floorspace in the short-term, and in particular in the lifetime of the emerging development plan.

6.11 As there will be a significant retail warehousing requirement (up to 20,000 sq m net) in the longer term period leading up to 2021, the need and best spatial distribution for this additional floorspace provision should be reviewed after year 2011. As there are a significant number of commitments in the planning pipeline at present (and on the assumption that these will be implemented/constructed in the period 2006 to 2011), these will satisfy the requirements for retail warehousing during this period until 2011. **In recognition of this position, the retail strategy should therefore adopt a strict presumption against any further such development of this type for the time being (until 2011).**

Strategy for Floorspace Spatial Distribution

6.12 A formal approach in terms of policy requires to be adopted by Mayo County Council, in relation to the spatial allocation of new additional retail development across Mayo County. As there is at present a broad recognition of a degree of uncertainty in terms of the precise nature and pattern of trading within Mayo, it has been difficult to provide with precise accuracy, the detailed quantification of the required amount of floorspace that should be directed to each particular location.

6.13 The retail strategy therefore provides a broad, but yet focused approach on which to base the planning policies and strategy for retail development in the County.

- The primary focus of the retail strategy should be to **consolidate the role and function of the established town centres and retail hierarchy**, including all tiers of centres, by encouraging the retention and improvement of all retail and services appropriate to each centre. (We do recognise that there may be issues related to traffic which will require to be considered in detail simultaneously);
- As with the current retail strategy, the focus on **convenience** shopping should be on the provision of local and accessible facilities, which actively encourage a more sustainable approach to shopping, through a reduction in distances traveled by motor vehicle, linked to greater opportunities to maximise linked shopping trips. This would necessitate the provision of modern supermarket developments in each of the main town centres, including the 'hubs' and other key settlements;
- In terms of (general) **comparison** goods shopping, the thrust of the retail strategy should be towards achieving a critical mass of higher order shopping facilities in the twin hub centres of Castlebar and Ballina. This will assist in the regeneration and development of these towns, whilst simultaneously enhancing its overall status and competitiveness as a key shopping centre and destination. Indicatively, we would suggest that up to 75% of the

identified comparison goods requirement will best be directed to Castlebar and Ballina. The distribution of the remaining 25% should be targeted to Westport and the identified second tier town centres.

- In the **smaller, local and lower tier centres** within County Mayo there is unlikely to be much increase in retail requirements in the short-to-medium term. This position should of course be reviewed in time especially where a future need emerges to serve the immediate local population.

Role of Town Centres

6.14 The relative retail hierarchical role and function of each centre within County Mayo was illustrated in graphical form previously in Section 2. The town centres in Castlebar, Ballina and Westport have also been mapped to provide definition to the core retail and shopping area within each town centre.

Key Retail Development Policy Issues

Criteria for Assessment

6.15 The hierarchical role of each of the towns, villages and settlements within County Mayo has been devised with a view to encouraging the improvement of all the town centres in the County. To strengthen the respective role of each town centre, it is necessary for the County Development Plan Review to incorporate a set of criteria for assessing retail developments.

6.16 The current provisions of paragraphs 55 to 65 of the Retail Planning Guidelines outline the main principles for assessing new retail proposals. These should be referred to in the County Development Plan to inform site selection, scale and form of development, access and servicing arrangements, linkages and support for creation of a competitive retail sector throughout the County of Mayo.

6.17 The preferred location for retail development is within existing town centres. In the instances where towns cannot accommodate retail provision within the defined town centres then edge-of-centre locations require to be identified. The precise distance to and from the defined core shopping area will vary according to the unique local circumstances of each town but nonetheless this should preferably be of no more than 300-400m from the edge of the central area.

6.18 Initially in the short-term period up to 2011 it is envisaged that retail development will be focused in the main town centres, and on edge-of-centre sites adjoining these town centres. There may, however, be a number of commitments for development in out-of-town-centre sites that we have assumed will be implemented in full by the year 2011. Therefore, in the period beyond 2011 development sites in or on the edge of the town centres should be identified so as to accommodate and meet the County's longer term retailing requirements.

Large Foodstores

6.19 We have examined the issue of the present upper threshold cap applied on superstore provision, as outlined in the Retail Planning Guidelines. Despite the amendment in 2005 to lift the aspects of thresholds relating to development of large scale retail warehousing developments in the key gateway towns across the State, the 3,000 sq m maximum threshold cap for convenience foodstores still applies throughout Mayo. We do not consider that there is any localised justification for altering this floorspace cap.

6.20 Where practicable, new large convenience foodstore developments should be located within or on the edge of a town centre or rather within a designated District Centre (if appropriate) serving a large residential area and community. The level of accessibility by all modes of transport is therefore vital – more so for

pedestrians and those using public transportation – in choosing the location of new foodstores.

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

Retail Warehousing

Retail Warehousing and Retail Parks

6.22 It is recognised within the Retail Planning Guidelines that retail warehousing is not, as a rule of thumb, very easily accommodated within the confines of a town centre, mainly due to the physical requirements and need for large on-site parking areas. On this basis, it is more appropriate to plan retail parks on the edge-of-town centres (where a site may be available) where one or more retail warehouse units could preferably be accommodated, and no alternative town centre site is suitable, or on out-of-centre sites should no edge-of-centre site be available.

6.23 In assessing the suitability of any retail warehousing it will be important to consider the scale, design and character of development; the vehicular access and movement arrangements, as well as the quantitative and qualitative need for such development.

6.24 The Retail Planning Guidelines indicates that individual retail warehouses should not be less than a minimum of 700 sq m gross floorspace (with no permission to sub-divide), but yet no more than 6,000 sq m in size. It is also important that all retail warehousing is restricted solely to the use of bulky household goods. The use of planning conditions (and subsequent enforcement powers) will ensure that the range of goods sold from these premises will tend to comply with DIY and garden materials, carpets, furniture and white electrical goods. The sale of goods outside of the foregoing categories will not normally be permitted.

6.25 In Mayo, there should be a presumption that the range of uses to be allowed should be strictly limited to that recommended in the Retail Planning Guidelines.

6.26 While it is recognised that there is an over provision of retail warehousing in the county as a whole, this distribution is concentrated primarily in Ballina/Castlebar, as well as other second tier towns in the county, and therefore we do not foresee the need for any further such retail warehousing in any town. However in order to provide a full range of retail services in Westport, thus emphasizing its status as a first tier town in the Strategy, it is proposed to allow for a limited level of retail warehousing in Westport subject to appropriate siting and design. The overall position in relation to retail warehousing provision in the county will be reviewed 3 years after the adoption of the County Development Plan.

Retail Warehouse Clubs

6.27 Retail warehouse clubs, as identified in the Retail Planning Guidelines, should be treated in the same way as other large scale retail developments, as they share a similar number of characteristics.

6.28 Retail warehouse clubs are best located on the edge of the existing town centres or on out-of-centre sites if no sequentially preferable sites are available within the hierarchy, and there should be a clear and demonstrable quantitative and qualitative need for its development prior to receiving approval. In addition, particular consideration must be given to the details of design, scale, format and characteristics, as often they will not be compatible or in keeping with the wider town centre environment. As the retail warehouse clubs will tend to be focused more towards the provision of bulky goods they should have adequate car parking.

District and Neighbourhood Centres

District Centres

6.29 Taking into account the nature and size of existing population settlements in the county and because it is a policy of the Council "To actively promote the retention and and further development of local shopping facilities in other retail centres to provide for local need, to help smaller centres to retail their local catchment areas to support local development in accordance with the County Settlement Strategy" (P/EA-RT5), there will be a presumption against the development of District Centres in the County.

6.30 At this moment in time, the majority of projected convenience and comparison goods requirements in Mayo can be met on town centre or edge-of-centre sites, within the main and second tier towns. There is therefore no need within this strategy to consider the designation of any purpose built District Centre.

Neighbourhood Centres

6.31 In the Retail Planning Guidelines local or neighbourhood centres are defined in the following terms: small groups of shops, typically comprising a newsagent, small supermarket/general grocery store, sub-post office and other small shops or a local nature serving a small, localised catchment population. No specific quantitative criteria for a Neighbourhood Centre are provided.

6.32 The essence of Neighbourhood Centres is that they serve a local catchment area in a way which is convenient to the population served. The distribution of such facilities cannot be too widespread however, as this would negate the benefits of a local focus of provision and development could be unviable. Thus, there needs to be reasonable quantum of scale to provide a good local range and provide a viable focus of shopping and service outlets.

6.33 It is not the purpose of the strategy to define the specific locations for development of neighbourhood centres, but this should instead form part of the wider process of the preparation of the local town and development plans.

Other Forms of Retailing

Discount Foodstores

6.34 Discount format convenience retailing represents a niche market sector and one that is increasingly dominated by the continental European retailers such as Aldi and Lidl. It is considered that these supermarket formats will complement supermarkets and larger superstores through the provision of additional variety and competition in the retail market. Discount supermarkets are established in some Mayo towns.

6.35 Discount foodstores will typically comprise about 1,500 sq m gross and are served by a surface car park with up to 100 spaces. The preferred location for a discount foodstore would be town centre.

6.36 The main criteria that can be adopted to assess the suitability of discount foodstore proposal may include the likely impact of the store on the urban design, character and amenity of the town or area, as well as its overall accessibility by all means of travel, especially pedestrians, and its impact on the vitality and viability of the town centre.

Factory Outlet Centres

6.37 Factory outlet centres are not currently part of the retail hierarchy or provision within the County of Mayo. In general, the factory outlet centre is deemed to be an inappropriate development if sited in close proximity to higher order comparison centres. This is due to the direct competition offered through the provision of fashion related retail outlets and products.

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

6.39 It is stated in the Retail Planning Guidelines that the success of the factory outlet centres will normally depend on drawing customers and visitors from a wide catchment area, including tourists and there may be implications for existing tourist facilities and established town centres, even those some distance from the proposals.

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

Markets

6.41 Markets are a popular form of traditional retailing which meets local shopping needs, often with a range of other specialist and tourism related shopping. Markets are sometimes perceived as creating adverse environmental effects such as noise, litter, and traffic congestion. To this end it would be appropriate for the County Council to develop and initiate a markets strategy for Castlebar, Westport and other appropriate towns across the County.

6.42 In broad policy terms, Mayo County Council may wish to grant planning permission for the creation – or indeed continuing operation - of a street, off-street or covered market (or individual stalls) provided that broad policy criteria and conditions such as those outlined below, are met:

- There should be no adverse effect on adjacent residential amenity, any nearby conservation areas, the general town centre environment or existing shops;
- Existing road network should have sufficient capacity to take any additional traffic generated by the proposal market introduction; and
- The proposal should include adequate arrangements for traders vehicle parking, servicing, storage, as well as the disposal and recycling of refuse and storage of market stalls.

Petrol Filling Station and Forecourt Convenience

6.43 Convenience retail floorspace associated with petrol filling station forecourts is a growing and expanding sector of the Irish retail market. The location for proposed petrol filling stations is often designated by the development plan, and is situated on the edge-of-town and town development limit. The shops have a part to play in serving the needs of some of the more isolated and rural communities in the County.

6.44 It is acknowledged, though, that care should be taken given that the development of such joint facilities on out-of-town sites may have a detrimental effect on the performance of an established town centre, and more importantly on the convenience shopping outlets within that town centre. Thus, reflecting the guidance provided by the Retail Planning Guidelines, local policies should be put in place that restrict the maximum floorspace for retailing at petrol stations to no more than 100 sq m.

Local and Village Shops

6.45 The provision of local and village shops have an important part in supplying the day to day and top-up shopping requirements of the local community. The development of local small-scale shops should normally be encouraged to be located in the existing smaller towns and villages across the County. It is essential

that local shops should be easily accessible to all sections of the local community, in particular the elderly or less mobile, and those people with disabilities.

6.46 There will be a broad presumption in favour of new small-scale retail development in the form of local shops, in villages, provided:

- There would be likely to be no significant adverse impact on the vitality and viability of existing centres;
- There are no existing vacant and suitable premises in the immediate area;
- The proposal is of an appropriate scale and is acceptable in terms of design, impact on any residential amenity, servicing and parking arrangements; and
- Where the local council demonstrates the local importance of such shops in defined local centres, they will safeguard them in development plans, through appropriate land-use zoning.

Isolated and Rural Small Shops

6.47 It is a general existing policy within most Counties, including Mayo that all retail development should be directed to existing settlements (as per the hierarchy) and that as a ‘rule of thumb’ development in the countryside should be resisted.

6.48 There will though in certain circumstances be exceptions to this accepted policy where a number of specific criteria can be adequately satisfied. These tend to be where a:

- Small retail unit is designed to serve a dispersed rural population;
- Shop serving a tourist or recreational facility, and secondary to the main use;
- Shop which is ancillary to activities arising from farm diversification; or
- Shop attached to a craft workshop retailing the product direct to the public.

7 IMPLEMENTATION & MONITORING

Review of the Retail Strategy

7.1 The guidelines and policy proposals outlined in this report are not intended to be treated inflexibly for a period of the next ten years, up to the year 2016.

7.2 It is essential that in the context of monitoring information that may be available, and the ever changing market conditions and dynamics that there will be a requirement for the retail strategy to be reviewed and subsequently updated where applicable.

7.3 Consequently, the proposed monitoring procedures and systems to be put in place and established should assist in achieving the monitoring and charting of relative progress.

7.4 For the immediate future we have set out a retail strategy for County Mayo, and provided broad policies to guide the detailed preparation of the County and Town Development Plans within County Mayo. It is intended that these proposals will simultaneously aim to achieve development control and plan decisions. These should be read alongside the criteria outlined in the Retail Planning Guidelines.

7.5 It is pertinent as outlined in the Retail Panning Guidelines that there is a continuing and co-ordinated approach to retail strategy development and implementation in County Mayo, in particular with the urban district authorities due to the shared administrative responsibilities within the Castlebar, Ballina and Westport town environs. The recommendations of this retail strategy review will need to be reflected in consideration of all retail proposals throughout the County.

7.6 Furthermore, given the relevant links between vitality, viability and performance of the town centre with its broad accessibility, it will be important to ensure that a programme or strategy for reviewing transport planning and traffic management within the main towns is in place. This will be necessary in light of changes in retail strategy, and then through the monitoring the overall effectiveness, whereby lessons and areas of good practice can be adopted from one part of Mayo to another. This programme will include examination of the Park & Ride concept.

Collation of Retail Data

7.7 It is advised that (where appropriate) a GIS based system for retailing should be firmly established in Mayo, to report and capture relevant data, such as floorspace and land uses for all individual properties across the town centres. This system would become helpful in ensuring regular and efficient updating of town centre floorspace data, in particular that from planning applications and permissions, as well as less frequent details on change of uses. The internal IPlan system in place in each of the Councils also offers potential in this regard depending on the quality of the data that is inputted to the system.

7.8 A retail GIS system would perform as a data storage, information management and analysis tool that would be extremely beneficial to the continuing development of the retail strategy and other planning matters. In terms of monitoring, there would need to be a commitment from Mayo County Council (and the urban authorities in Castlebar, Ballina and Westport) to providing a system which contains up-to-date data and correct information, which will obviously be very important to the usefulness of the system.

Implementation

7.9 It is envisaged that the GIS dataset would comprise a range of information in respect of the main towns throughout Mayo, such as Castlebar, Ballina and Westport and other key retail centres from within the hierarchy. The most recent

survey undertaken would ideally form the basis of such a system. The data captured would typically comprise:

- Geographical reference;
- Unique geo-directory reference identification (providing a link to the address of the property as contained in any dataset);
- Name of the town or retail centre;
- Measure of floorspace area (sq m) for all shops and premises, irrespective if they should be occupied or vacant; and
- Use category, based on up to 5 retail and 4 non-retail types.

Monitoring

7.10 Over a period of time there will be changes required to be made to the GIS dataset, due to changes in the dynamics and composition of each town or retail centre – predominantly due to new or re-development, changes of use within premises, and in some instances the demolition of premises. It should therefore be noted that most of these would normally necessitate recording via means of the need for securing some form of planning approval. As a result the GIS system will frequently require to be duly amended to reflect the change in circumstances.

7.11 The key issue to the success of such a system will remain the ability for the planning authority to actively monitor and be notified of such changes. In most cases this could be monitored through links to development control processes and decisions – which could be assisted through electronic data storage of planning cases.

7.12 Whilst such an approach will cover the greatest proportion of changes, some aspects may not require formal planning permission, and in these cases an alternative method of monitoring will need to be undertaken. On this basis, we would recommend that a regular survey and update is completed, perhaps on an annual or bi-annual basis.

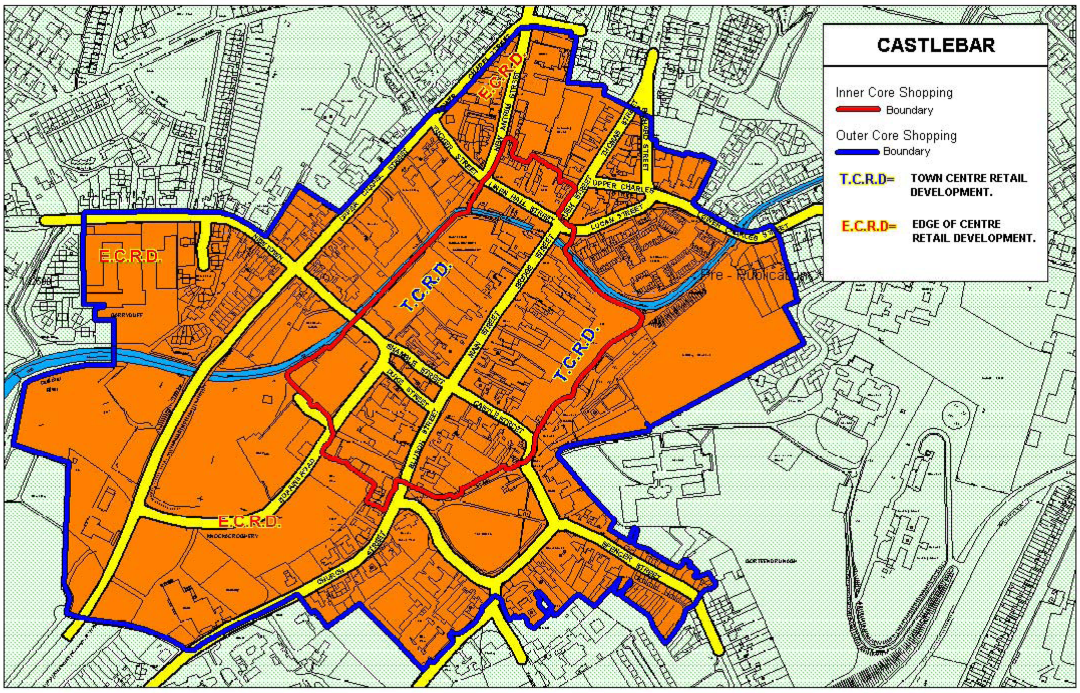
7.13 This method would ideally involve a walk-through re-survey of all town and retail centres, utilising maps and dataset schedules already collected through the GIS system. This process may be completed by the planning authority themselves, or handled by a team of external consultants appointed by the planning authority.

APPENDIX ONE

CORE RETAIL AREAS

The maps presented in this appendix indicate the locations considered most suitable for retail development in Castlebar, Ballina and Westport.

The maps should not be interpreted legally. For specific zoning, objectives etc, the relevant Development Plan should be consulted.


CASTLEBAR
Inner Core Shopping Boundary
Outer Core Shopping Boundary
T.C.R.D= TOWN CENTRE RETAIL DEVELOPMENT.
E.C.R.D= EDGE OF CENTRE RETAIL DEVELOPMENT.
T.C.R.D.
T.C.R.D.
E.C.R.D.
E.C.R.D.
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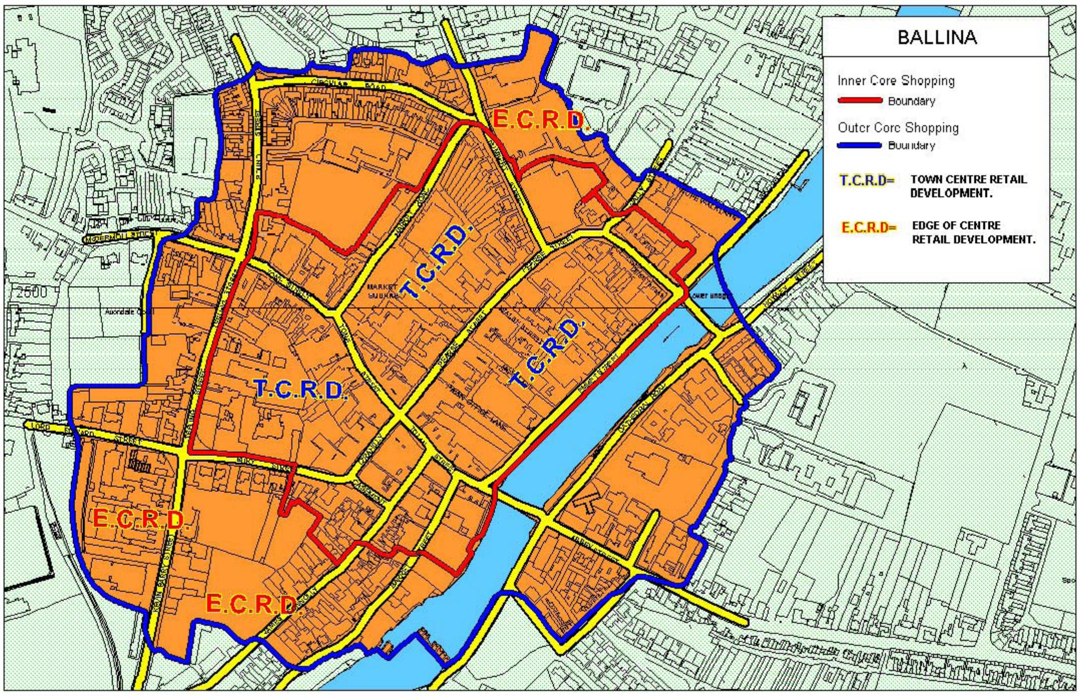
BALLINA
Inner Core Shopping Boundary
Outer Core Shopping Boundary
T.C.R.D= TOWN CENTRE RETAIL DEVELOPMENT.
E.C.R.D= EDGE OF CENTRE RETAIL DEVELOPMENT.
T.C.R.D.
T.C.R.D.
T.C.R.D.
E.C.R.D.
E.C.R.D.
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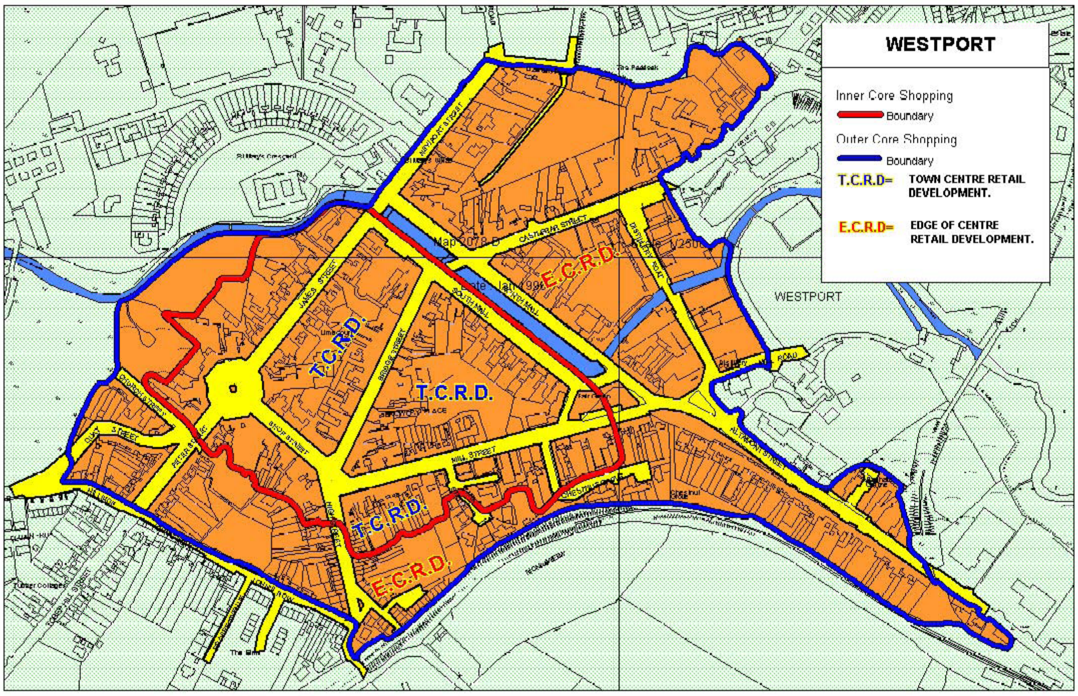
WESTPORT
Inner Core Shopping
Boundary
Outer Core Shopping
Boundary
T.C.R.D= TOWN CENTRE RETAIL DEVELOPMENT.
E.C.R.D= EDGE OF CENTRE RETAIL DEVELOPMENT.
T.C.R.D.
E.C.R.D.
WESTPORT

8 CALCULATING RETAIL TURNOVER FOR THE STATE IN 2003

8.1 Abstract data from the latest available Annual Services Enquiry

The CSO annual services enquiry provides data on turnover in retail establishments under the detailed categories [3] set out below.

Table 1: Categories of goods sold by NACE Classification from the ASI

NACE4 (Year 2003)	Ref. No.	Description
5211	1	Retail sale in non-specialised stores with food, beverages or tobacco predominating
5212	2	Retail sale: Other retail sale in non-specialised stores
5221	3	Retail sale of fruit and vegetables
5222 - 5223	4	Retail sale of meat and meat products, fish, crustaceans and molluscs
5224	5	Retail sale of bread, cakes, flour confectionery and sugar confectionery
5225 - 227	6	Retail sale of alcoholic and other beverages, tobacco products and Other retail sale of food, beverages and tobacco in specialised stores
5231 - 5233	7	Retail sale: Dispensing chemists, sale of medical and orthopaedic goods, cosmetic and toilet articles
5241	8	Retail sale of textiles
5242	9	Retail sale of clothing
5243	10	Retail sale of footwear and leather goods
5244	11	Retail sale of furniture, lighting equipment and household articles n.e.c.
5245	12	Retail sale of electrical household appliances and radio and television goods
5246	13	Retail sale of hardware, paints and glass
5247	14	Retail sale of books, newspapers and stationery
5248	15	Retail sale: Other retail sale in specialised stores
5250	16	Retail sale of second-hand goods in stores
5261 - 5263	17	Retail sale via mail order houses, Retail sale via stalls and markets, Other non-store retail sale

8.2 Estimate the expenditure on comparison and convenience goods using unpublished breakdowns of the ASI available from the CSO

Previous research carried out suggests that in general, the ASI is a very accurate source for estimation of retail turnover.

For the purposes of this research, the CSO provided Table 2, set out overleaf, which cross-classifies NACE code (somewhat aggregated) by product. This facilitates a refinement of convenience and comparison sales, with the italicised items being included as convenience goods and the bolded items as comparison goods.

However, the following should be noted

- Only half of the sale of spare parts and accessories for motor vehicles has been included, since some of these sales are related to car servicing etc.
- Only one quarter of the sales under the category 'Other goods and services' has been included. The bulk of sales here are estimated to be services.

[3] This is unpublished data obtained from the CSO

Using these adjusted data, Table 3 sets out the best estimate of turnover in convenience and comparison goods in 2003 at 2003 prices. VAT has been estimated by applying the same aggregate rate that was calculated from the published tables after having made a broad division into convenience and comparison goods (VAT data relating to Table 2 is not available).

Table 2: Cross Classification of NACE outlet codes with products sold (€ thousand)

Product:	Car Trades NACE 50	non-spec stores and dept stores NACE 521	food, bev and tobacco NACE 522	Pharm, Medical and cosmetc NACE 523	Textiles and clothing NACE 5241-5242	Footwear and Leather NACE 5243	Furniture and lighting NACE 5244	Electrical NACE 5245	Hardware paint and glass NACE 5246	Books, newspapers and stationery NACE 5247	Other retail sales NACE 5248	Bars NACE 554	TOTAL (EXCL BARS)
Bread, Cakes & Cereals	*34,834*	*356,243*	*109,851*	*0*	*6,613*	*0*	*0*	*0*	*86*	*385*	*0*	73	508,011
Meat, Poultry & Game	*15,384*	*1,870,871*	*412,225*	*0*	*0*	*0*	*0*	*0*	*0*	*29*	*0*	0	2,298,508
Fish	*1,285*	*268,353*	*45,628*	*0*	*1,593*	*0*	*0*	*0*	*0*	*0*	*0*	0	316,860
Milk, Cheese & Eggs	*31,183*	*666,720*	*96,439*	*0*	*0*	*0*	*0*	*0*	*0*	*521*	*722*	0	795,585
Butter, Oils & Fats	*10,296*	*203,257*	*4,664*	*0*	*0*	*0*	*0*	*0*	*0*	*35*	*0*	0	218,252
Fresh Fruit	*17,845*	*139,777*	*3,388*	*0*	*0*	*0*	*0*	*0*	*0*	*315*	*0*	0	161,323
Vegetables, Potatoes & Other Tubers	*5,579*	*636,551*	*7,862*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	*0*	0	649,992
Sugar, Jams, Chocolate & Sugar Confectionery	*60,921*	*388,762*	*13,928*	*0*	*0*	*0*	*0*	*0*	*0*	*6,594*	*12,803*	23,861	483,008
Other Food Products	*57,777*	*3,163,218*	*59,494*	*5,672*	*136*	*0*	*0*	*0*	*0*	*1,037*	*0*	490,376	3,287,335
Coffee, Tea & Cocoa	*18,372*	*116,752*	*9,194*	*0*	*0*	*0*	*0*	*0*	*0*	*95*	*1,678*	3,292	146,091
Mineral Waters, Soft Drinks & Juices	*49,407*	*436,671*	*34,158*	*0*	*55*	*0*	*0*	*0*	*0*	*2,364*	*0*	285,599	522,655
Alcoholic Beverages	*24,355*	*301,637*	*261,816*	*0*	*86*	*0*	*0*	*0*	*0*	*0*	*0*	2,351,357	587,895
Tobacco	*148,957*	*728,770*	*33,319*	*0*	*0*	*0*	*0*	*0*	*0*	*15,000*	*6,734*	72,621	932,781
Clothing	432	117,800	0	0	1,422,198	50,755	50,612	40,084	0	0	218,089	0	1,899,970
Footwear	0	4,466	0	0	75,880	175,734	0	7,032	1,493	0	121,581	0	386,186
Goods for Household Decoration & Minor Repair	9,601	15,917	0	0	9,256	98	134,269	10,807	416,797	0	21,046	0	617,789
Household Textiles, Curtains, etc.	131	275	0	0	66,407	0	44,341	7,736	45,801	0	15,009	0	179,699
Furniture, Carpets & Other Floor Coverings	0	0	33	0	407	0	217,342	8,288	77,527	0	203,080	0	506,677
Heating, Cooking, Refrigeration & Washing	0	439	0	0	26,110	0	2,662	117,263	67,271	0	15,444	0	229,189
Glassware, Tableware & Household Utensils	0	7,714	295	0	329	0	54,581	703	45,207	510	35,034	0	144,373
Household & Garden Tools & Equipment	0	5,716	0	0	0	0	52,108	1,406	63,357	0	19,902	0	142,488
Non-durable Household Goods (not for personal	11,583	206,184	9,577	0	6,350	0	0	0	131	298	21,508	101	255,630
Medical Products, Appliances & Equipment	0	20,988	64,504	946,514	0	0	0	0	0	0	49,616	0	1,081,623
New & Second H& Motor Cars	9,578,999	0	2,408	0	0	0	0	0	0	0	0	0	9,581,407
Other Motor Vehicles	968,326	0	0	0	0	0	0	0	0	0	0	0	968,326
Bicycles	0	0	0	0	0	0	0	703	0	0	10,589	0	11,293
Domestic Heating Oil	158,452	0	0	0	0	0	0	0	1,173	0	144,942	0	304,567
Domestic Liquid Gas	51,814	20,178	473	0	0	0	0	0	3,749	68	10,396	0	86,678
Solid Fuels	19,093	28,942	2,679	0	0	0	0	0	10,775	29	6,988	0	68,506
Petrol & Other Fuels & Lubricants	1,155,196	176,501	0	0	0	0	0	0	3,321	0	7,731	8,039	1,342,749
Maintenance & Repair of Motor Vehicles	489,661	0	33	0	0	0	0	0	0	0	0	0	489,694
Spare Parts & Accessories for Motor Vehicles	1,178,912	0	0	0	0	0	0	0	0	0	20,518	0	1,199,431
Audiovisual, Photographic & Data Processing	375	0	0	20,411	0	0	198	321,105	0	19,686	60,421	0	422,197
Other Major Durables	0	0	0	63	0	0	1,393	20,928	25,097	87,451	8,717	0	143,649
Other Games & Sports Equipment, Flowers, Toys &	2,639	15,136	594	0	0	18,797	0	22,367	9,549	2,511	414,552	0	486,145
Newspapers, Books & Stationery	33,429	277,642	8,466	227	0	0	0	0	1,883	336,815	21,432	3,990	679,893
Products, Articles & Appliances for Personal Care	8,029	124,181	6,502	448,158	0	52	0	1,406	0	114	17,223	0	605,667
Other Goods & Services	524,336	352,976	110,419	285,430	108,647	5,443	104,591	427,298	454,394	54,379	1,429,372	129,421	3,857,286
													0
Sum	14,667,204	10,652,638	1,297,947	1,706,477	1,724,067	250,879	662,097	987,127	1,227,611	528,234	2,895,128	3,368,730	36,599,409

Source: unpublished data provided by the CSO

Table 3: Retail Turnover derived from the Annual Services Enquiry - 2003

Category	2003 Prices		
	Turnover excl. VAT (€000)	VAT on Turnover (€000)	Total turnover
Convenience (note 1)	10,908,297	1,019,761	11,928,058
Comparison	9,366,764	1,414,400	10,781,164
Total	20,275,061	2,472,259	22,747,319

Source: CSO *Annual Services Enquiry,* 2003 – Derived from unpublished data obtained from the CSO. See text and Table 2 for an explanation of the elements which comprise convenience and comparison goods from this source.

It should be noted that the definition of convenience and comparison goods varies somewhat from some definitions used in the UK, for example.

The *Retail Planner* briefing note defines convenience goods as comprising food and non-alcoholic drinks, tobacco, alcohol, newspapers and 90 per cent of non-durable household goods. In this work, newspapers are linked to books and treated as comparison goods and all non-durable household goods are classed as comparison goods.

It should also be noted that products, articles & appliances for personal care sold in chemists shops are also treated as comparison goods.

8.3 Comparison with NIE data

Data have also been assembled from National Income and Expenditure tabulations, with unpublished data facilitating a finer breakdown of the categories of final consumption published each year. The results show a very good match on the comparison goods side, with spending estimated at €9,395 million in 2003 at 2003 prices, excluding VAT. This is within 0.2% of the estimate obtained from the ASI.

Results are less encouraging on the convenience goods side, with the NIE estimate at €6,872 million, compared to €10,908 from the ASI data. A number of explanations may be offered for this anomaly:

1. NIE data includes only spending from own resources (e.g. excludes food subsidies)
2. NIE data includes final consumption, whereas there are elements of sales to offices, other traders, restaurants etc. included in the ASI data.

For these reasons, the ASI data are to be preferred, as they give a more accurate account of sales in the retail sector. The implicit assumption, when using population to project the floorspace requirements, is that the relationship between household final demand and overall retail sales, is a stable one.

9 ESTABLISHING EXPENDITURE AT STATE LEVEL TO 2004 (BASE YEAR)

Updating the retail store turnover figure

9.1 Approach One: Use the Index of Retail Sales

The index of retail sales, in volume terms, is available in published form, under the following categories of relevance:

1. Non-specialised stores - NACE 52.11 (excluding Department Stores)
2. Department Stores (NACE 52.12)
3. Specialised Stores (NACE 52 (remainder) - food beverages and tobacco)
4. Pharmaceutical, Medical and Cosmetic articles
5. Textiles and clothing
6. Footwear and Leather
7. Furniture and Lighting
8. Electrical goods
9. Hardware, paints and glass
10. Books, newspaper and stationery
11. Other retail sales

These categories broadly relate to the Annual Services Enquiry, which can thus be used to provide the base weighting required for updating.

The updating should be from the annual index number for 2003, to the annual index number for 2004, in volume terms, initially Table 4).

Table 4: Estimated turnover changes using 2003 ASI base weights and RSI growth factors to 2004 (volume index).

Category of Business 2000=100	2003	2004	% Increase
Non-specialised Stores (excl Dept Stores)	108.8	113.6	4.4
Department Stores	121.3	126.3	4.1
Food Beverages and Tobacco	100.1	101.2	1.1
Pharmaceutical Medical and Cosmetic articles	117.2	122.3	4.4
Textiles and Clothing	129.2	139.6	8.0
Footwear and Leather	129.4	137.4	6.2
Furniture and lighting	100.3	106	5.7
Electrical goods	114.6	114.6	0.0
Hardware, paints and glass	111.1	120.8	8.7
Books, newspapers and stationary	103.3	102.7	-0.6
Other retail goods	105.5	108.2	2.6
Convenience			**4.0**
Comparison			**4.4**

Source: Index numbers from RSI series; base weights from ASI
Notes: Convenience comprises items 1 and 3 and 20% of item 2. Comparison comprises remainder. Forecourt sales where petrol does not predominate, not added.

9.2 Approach Two: Use the National Income and Expenditure Data

Expenditure on convenience and comparison goods may be derived from Table 14 of the National Income and Expenditure accounts, which sets out consumption of personal income (except taxes on personal income and wealth) at constant market prices.

A more detailed, unpublished, breakdown of Table 14 was obtained from the CSO, comprising the following elements:

Food and non-alcoholic beverages
Food
Non-alcoholic beverages

Alcoholic beverages, tobacco and narcotics
- Alcoholic beverages
- Tobacco
- Narcotics

Clothing and footwear
- Clothing
- Footwear

Housing, water, electricity, gas and other fuels
- Actual rentals for housing
- Imputed rentals for housing
- Maintenance and repair of the dwelling
- Water supply and miscellaneous services relating to the dwelling
- Electricity, gas and other fuels

Furnishings, households equipment and routine maintenance of the house
- Furniture and furnishings, carpets and other floor coverings
- Household textiles
- Household appliances
- Glassware, tableware and household utensils
- Tools and equipment for house and garden
- Goods and services for routine household maintenance

Health
- Medical products, appliances and equipment
- Out-patient services
- Hospital services

Transport
- Purchase of vehicles
- Operation of personal transport equipment
- Transport services

Communications
- Communications

Recreation and culture
- Audio-visual, photographic and information processing equipment
- Other major durables for recreation and culture
- Other recreational items and equipment, gardens and pets
- Recreational and cultural services
- Newspapers, books and stationery
- Package holidays

Education
- Education

Restaurants and hotels
- Catering services
- Accommodation services

Miscellaneous goods and services
- Personal care
- Prostitution
- Personal effects n. e. c.
- Social protection
- Insurance

Financial services n. e. c.
Other services n. e. c.
FISIM
Total

From this listing, the following estimate may be made of convenience and comparison goods categories:

Convenience Goods
- Food
- Non-alcoholic beverages
- Alcoholic beverages
- Tobacco
- Narcotics

Comparison Goods (goods only)
- Clothing
- Footwear
- Furniture and furnishings, carpets and other floor coverings
- Household textiles
- Household appliances
- Glassware, tableware and household utensils
- Tools and equipment for house and garden
- Medical products, appliances and equipment
- Audio-visual, photographic and information processing equipment
- Other major durables for recreation and culture
- Other recreational items and equipment, gardens and pets
- Newspapers, books and stationery

Comparison goods (mixed goods and services)
- Goods and services for routine household maintenance
- Personal care
- Personal effects n. e. c.

Further unpublished data from the CSO enabled a refinement of the last category to eliminate the service (rather than goods) elements. Data was also used from Table 2 to eliminate sales of drink and tobacco in bars. .

With these adjustments, the following volume changes may be observed in the period 2003 to 2004, and compared with the ASI changes. Again, the comparison goods figures are close, but there is some considerable discrepancy between the convenience goods figures.

Table 5: Volume changes in retail turnover/expenditure (€ millions), 2003 to 2004

Category	2003	2004	% Change NIE	% Change ASI/RSI
Convenience	6,872	7,030	2.30	4.05
Comparison	9,395	9,816	4.48	4.54

Similar calculations are possible for the longer period, 2000 to 2004, and these are set out in Table 6 below. Examination of the two figures over the longer period 2000 to 2004 is set out below.

Table 6: Annual volume changes in retail turnover/expenditure (millions of Euros), 2000 to 2004

Category	% Change NIE	% Change ASI/RSI
Convenience	1.1	2.9
Comparison	5.1	4.5

9.3 Comparison of the performance of the alternative methods for updating from 2003 to 2004

Table 7 below compares the outcomes of the two methods and shows a broad correspondence between them. However, because the RSI can be obtained for a more recent period, it is the method to be preferred.

Table 7: Performance of alternative methods of up-dating retail spending for the period 2003-2004

Category of Turnover	% Change over period 2003-04 at constant prices	
	NIE	RSI
Convenience	1.1	2.9
Comparison	5.1	4.5

The two data sources are largely in agreement for the growth of comparison goods, but do not agree on the growth of convenience goods. Since population is estimated to have grown by 1.63 per cent in the year in question, the NIE growth in spend, at 1.1, implies a fall in spend per head. With a rapidly growing population and prosperous economy, it seems unlikely that there was no increase in the volume of food and drink sold per head. Thus the RSI figure is to be preferred, since this would give a per capita growth of about 1.3 per cent, close to the average of 1.1 per cent recorded for the period 1995 to 2004 in the longer run NIE data. Overall, therefore, it seems better to choose the RSI data for both convenience and comparison goods.

Having made, this decision, the 2004 figures should be translated into 2004 prices, by using the value index change from 2003 to 2004, instead of the volume index. This is set below.

Table 8: Retail Turnover derived from the Annual Services Enquiry in 2003 updated to 2004 turnover at 2004 prices using RSI data

Category	2004 Prices		
	2004 Turnover excl. VAT (€000)	**2004 VAT on Turnover (€000)**	**2004 Total turnover**
Convenience	11,413,579	1,066,997	12,480,576
Comparison	9,800,402	1,479,880	11,280,282
Total	21,213,980	2,546,877	23,760,857

Estimate the population for the year in question

The next step is to estimate the population in the year in question -2004

Here, a distinction should technically be made between the *de facto* population and the normally resident population, and between private and all households.

The CSO estimate for the *de facto* State population in 2004 was 4,043,800. This has been revised after the publication of the 2006 COP, and a figure of 4,076,064 is used here.

Estimate the level of tourist expenditure in the year

Details of expenditure obtained from the ASI, and indeed from Table 14 of the National Income Accounts, include expenditure within the State by non-residents.

Estimates of tourism expenditure are obtained from information from the CSO's Country of Residence Survey (CRS) and Bord Failte's Survey of Overseas Travellers (SOT). Latest available data relates to the year 2004.

This data is available for different markets, but at national level, the totals are all that is required.

Table 9 below sets out the position for the year 2004

Table 9: Estimate of Tourist spending in the Year 2004 in 2004 Prices

Category of expenditure	€m at 2004 prices
Bed and Board	991
Other food and drink	1,265
Sightseeing/entertainment	137
Internal transport	308
Shopping	547
Miscellaneous	171
Total	3,418

A breakdown of retail expenditure of tourists between comparison and convenience spending is not available directly. Eighty per cent of this retail expenditure is allocated to comparison spending[4], since this is dominant in tourists' expenditure patterns. In 2004 price terms, therefore, the shopping element of Euros 547m may be divided into Euros 437.6m on comparison goods and the balance of Euros 109.4 on convenience goods.

Estimate the extent of retail spending not made by the final consumption sector

In calculating the turnover of shops, it must be recognized that there is an element of expenditure which will be business to business.

Either this can be removed, to give a true picture of how much was actually household expenditure, or left, on the assumption that there is a reasonably stable relationship between household and business expenditure in shops, or that the latter is very small.

[4] Following established practice in the Retail Planning Guidelines

One possible method of removing the business to business element may be through the use of national input-output tables. This has not been investigated in this study.

As indicated earlier in this appendix, it is assumed that the relationship is a stable one. Projections of turnover per head used for calculations of floorspace requirements therefore implicitly include business to business sales.

Estimates of turnover per head of resident (de facto) population, excluding tourists, for 2004

Table 10: Estimates of turnover per head for 2004

Category of Turnover	(€000) 2004 prices				Per Capita expenditure in Irish shops 2004 (€)
	2004 Turnover incl. VAT	Tourist spending	Net of tourism turnover	April 2004 de facto population	
Convenience	12,480,576	437,520	12,043,056	4,076,064	2,955
Comparison	11,280,282	109,380	11,170,902	4,076,064	2,741
Total	23,760,857	546,900	23,213,957	4,076,064	5,695

10 UPDATING EXPENDITURE AT STATE LEVEL TO 2006

Projecting consumption

This process involves examination of short run forecasts;

Two main sources are available:

- Department of finance, review and outlook 2005 (Prn A5/1026)
- The ESRI Medium Term review

The Department of Finance Review and Outlook forecasts personal consumption growth of 5.0 per cent in 2005 and the ESRI MTR agrees.

For 2006, the MTR forecasts a growth in consumption in volume terms in 2006 of 3.7 per cent.

Relating retail spending to consumption growth

The relationship of convenience and comparison spending to consumption changes has then to be assessed. This is set out in Table 11 below:

Table 11: relationship of growth in consumption to retail spending

Period	Convenience	Comparison

1995-2004	40.0%	161.3%
2000-2004	30.6%	140.9%

Source: NIE unpublished data

Table 11 effectively sets out a pseudo income elasticity calculation for convenience and comparison goods, on the assumption that there is a linear relationship between income and overall consumption. If overall consumption rose by 10 per cent between (say) 1995 and 2004, then convenience spending would rise by 4 per cent, and comparison spending by 16.1 per cent (first line of Table 11)

Table 11 appears to show declining income elasticity in the later period. However, the slowing of the economy in 2001 may have distorted the picture, and on balance it is preferable to retain the relationship established over the longer period 1995 to 2004. Indeed, for convenience goods, a pseudo-elasticity of 60% has been adopted after 2006 in order to make the projections more robust

On this basis, the following results are obtained.

Table 12: Indices of aggregate expenditure growth at State level 2004 to 2006

Category	2004	2005	2006
Consumption	100.0	105.0	108.9
Convenience	100.0	102.5	104.4
Comparison	100.0	106.3	111.1

Table 13, below, shows a flat trend in convenience spending per head, which may be associated with record levels of immigration of workers with low income and consumption patterns.

Table 13: Growth in per capita spending at 2004 prices in the State between 2004 and 2006

Category	2004	2005	2006
Convenience (€000)	12,043	12,344	12,573
Comparison (€000)	11,171	11,875	12,411
Population (000)	4,076	4,155	4,235
Spend per head			
Convenience	2,955	2,971	2,969
Comparison	2,741	2,858	2,931