

**SECTION 6d -
CRITICAL ECONOMY
SECTOR: RETAIL
(CROSS BORDER)**

Overview of Data Sources

<http://www.cso.ie/px/pxeirestat/statire/SelectVarVal/Define.asp?Maintable=RSM03&PLanguage=0>
RoI 2012 Retail Sales Index

<http://www.lisney.com/About-Lisney/News-And-Research/Retail-Update-2012-Northern-Ireland.aspx> Sample private sector report on retail vacancies

<http://www.intertradeireland.com/trade-statistics/> Cross-Border Shopping tab on LHS, mid-page, 2008 - 2012

<http://airomaps.nuim.ie/flexviewer/?config=AIROAccessMap.xml> AIRO Accessibility - click on Retail theme, All-island, selected towns / catchments

6d.1 Significance of Retail Sector

As can be seen from Table 27, and from the LGD profiles at the end of this document, retailing is amongst the most important sectors in the economy of the Central Border Region - both in terms of the number of businesses / shops and in terms of numbers employed. Additionally, the retailing sector is of great significance as it forms the backbone of the business / vitality of the many towns and smaller settlements, therefore being critical to their health, prosperity and appearance. The quality of shopping experience also contributes to the 'quality of life' for residents and visitors to the Region.

Retailing is sometimes criticised as being an essentially 'local' activity - with local shops and towns competing against each other for a limited supply of customers, but bringing very little 'new money' into the economy of the Region. On the other hand, it is important to have strong retailing in order to minimise 'leakage' of spending from the Region. Retailing is also criticised for paying relatively low wages and using many part-time / casual staff. In terms of data, the 'retail' classification tends to be grouped together with 'wholesale' and 'repair of motor vehicles', though actual 'retailing' businesses would be expected to dominate this category.

6d.2 Number of Retail Firms

Commentary

There has been a reduction of 189 representing 2.44% in the number of registered retailing businesses between 2009 and 2010 /11. Whilst these figures are important, they show that the retail sector actually appears to have been more resilient than the Region's economy generally (4.6% less firms). Within the Region, Mid Ulster District Council has more registered shops / retail businesses in 2010/11 than in 2009.

Table 45: Number of Retail* Firms in Central Border Region 2009 - 2010/11**

Area	Number of Retail* Firms 2009	Total Firms 2009	Number of Retail* Firms 2010 /2011	Total Firms 2010 /2011	Reduction in Retail*		Reduction in Total Firms 2009-2010/11
					Firms 2009-2010/11	%	
Cavan	791	3,261	770	3,056	-21	-2.7%	-6.3%
Donegal	1,518	6,176	1,431	5,649	-87	-5.7%	-8.5%
Leitrim	351	1,408	344	1,330	-7	-2.0%	-5.5%
Monaghan	775	2,792	751	2,641	-24	-3.1%	-5.4%
Sligo	583	2,607	553	2,458	-30	-5.1%	-5.7%
Armagh, Banbridge and Craigavon Borough Council	1,520	8,390	1,480	8,100	40	2.63%	3.46%
Fermanagh & Omagh District Council	1,000	7,560	995	7,345	-5	-0.5%	-2.8%
Mid Ulster District Council	1,200	8,315	1,225	8,140	25	2.1%	-2.1%
Fermanagh	570	4,220	575	4,190	+5	0.9%	-0.7%
ICBAN Region	7,738	40,509	7,549	38,719	189	2.44%	4.42%
Rep of Ireland*	45,347	206,575	43,981	195,431	-1366	-3.0%	-5.4%
Northern Ireland	12,295	70,620	11,960	67,955	-335	-2.7%	-3.8%

Source: CSO & DETI / NISRA

* category includes 'retail, wholesale and repair of motor vehicles / motor trades'

**Rol Latest figures are 2010, NI figures are 2011.

<http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=BRA18&PLanguage=0> 2009/10

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http://www.detini.gov.uk/facts_and_figures_edition_12_dec_2009-3.pdf p2 Link, Table 1.5, NI 2009

http://www.detini.gov.uk/idbr_publication.pdf Page 2 Link, Table 1.5 or

<http://www.ninis2.nisra.gov.uk/public/Theme.aspx> NISRA NINIS2, Statistics, Business & Energy, VAT / PAYE Businesses, by LGD 2008-2012

6d. 3 Numbers Employed in Retail

Commentary

The Census figures show that there has been a steady increase in the number of people employed in retailing - across all counties and districts. There are over 55,000 people employed in retailing in the Region, almost 8,000 in Donegal alone, with the highest proportions being in Armagh City, Banbridge and Craigavon Borough, Mid Ulster District and Fermanagh and Omagh District.

Table 46: Employment in Retail* in Central Border Region - Census 2001/02 - 2011

Area	2001 / 02		2006		2011	
	Number	% of total pop that is At Work	Number	% of total pop that is At Work	Number	% of total pop that is At Work
Cavan	2,695	12.0%	3,596	12.7%	3,758	13.8%
Donegal	6,429	13.3%	7,730	13.6%	7,896	14.8%
Leitrim	1,075	10.8%	1,351	10.7%	1,538	12.8%
Monaghan	2,956	14.0%	3,491	13.8%	3,654	15.9%
Sligo	2,863	12.0%	3,443	12.6%	3,528	13.9%
Armagh City, Banbridge and Craigavon Borough	12,737	17.2%	N/A	N/A	16,732	18.6%
Fermanagh & Omagh	6,479	15.7%	N/A	N/A	8,467	17.2%
Mid Ulster	7,538	15.9%	N/A	N/A	9,955	16.3%
ICBAN Region	42,772	14.8%	N/A	N/A	55,528	16.3%
Rep of Ireland	219,165	13.4%	257,309	13.3%	265,751	14.7%
Northern Ireland	114,721	16.7%	N/A	N/A	139,384	17.5%

Source: Rol Census - CSO & NI Census - NISRA

* category includes 'retail, wholesale and repair of motor vehicles / motor trades'

<http://www.cso.ie/px/pxeirestat/Statire/SelectVarVal/Define.asp?maintable=CD319&Planguage=0> Rol 2011 Census (& 2006) Broad Ind. Group - Wholesale & Retail Trade
<http://census.cso.ie/Census/TableViewer/tableView.aspx?ReportId=1485> Rol 2002 Census, Interactive Tables, Volume 5, Table 13

http://www.nisra.gov.uk/Census/key_stats_bulletin_2011.pdf 2011 NI Click on p 31 link to Table KS605NI (Persons) (or KS607NI (Males), KS608NI (Females))
<http://www.nisra.gov.uk/Census/2001%20Census%20Results/Key%20Statistics/KeyStatisticstoOutputAreaLevel.html> 2001 NI Scroll down to Table KS11a.

6d.4 The Retail Centres / Firms of the Central Border Region

Retailing / shops range from the many large international food stores such as Tesco, Asda, M&S, Dunnes Stores, SuperValu, etc., to Aldi / Lidl, the range of Spar, Mace, Vivo, etc. and local independent stores. Other convenience shops include chemists, 'pound shops', newsagents, confectionery and public houses. Comparison shops include clothing, jewellers, hardware, etc. up to bulky durables such as electrical

appliances, catalogue outlets, furniture, carpets, garden centres, fuel retailing and car showrooms. As well as the traditional 'high street' locations, there is increasing retail provision in the numerous 'retail parks', 'business parks' or shopping centres that are often located in edge-of-town or town centre locations. The larger towns tend to attract the 'national' multiples and big-name superstores whereas other towns tend to build upon the variety of their local shops / independents. Internet shopping is also a major threat to retailing, unless it can be embraced and exploited locally. At the bottom of the spectrum, many rural areas are struggling to retain their local shops - as a vital resource that is at the centre of the community.

Cross-border retailing is of particular interest in this Region, being particularly connected to the relative strength of the exchange rate and price differentials on a particular side of the border. Over the longer term, this has caused significant swings of business across the border, but in recent times the NI centres have been the main beneficiaries - with towns such as Enniskillen being recognised as strong cross-border attractors.

6.d.5 Other Key Retail Data for the Central Border Region

In addition to the above-mentioned key retailing data, some other statistics and reports would also be useful on other aspects of retailing in the Central Border Region, such as:

Nos. Employed F/T & P/T

Vitality - New Shops

Floorspace

Rental Value - Zone A

Closures

Vacancy Level

Town Centre Health Checks - <http://www.towncentrehealthcheck.org.uk/>

<http://www.northernireland.gov.uk/index/media-centre/news-departments/news-doe/news-releases-doe-november-2010/news-doe-111110-enniskillen-remains-vibrant.htm>

The websites detailed above do provide some information on these aspects - but it is often not compatible in both jurisdictions and may not be available at local or LGD level.

Data Difficulties - Retailing

There is a need to be cautious with the data on numbers of VAT / PAYE businesses - in this sector particularly; as all businesses use their main or headquarters location

(often in Dublin, Belfast or beyond), the local outlets may not actually be counted in this data. Therefore, certain settlements / LGDs with many of the multiples / chain stores may appear to have many fewer shops than they actually have in reality.

In terms of data, the 'retail' classification tends to be grouped together with 'wholesale' and 'repair of motor vehicles'; whilst the RoI and NI categories seem quite similar, they are not exactly the same, and hence compatible / comparable: In Table 45, Number of Firms, the RoI CSO category (NACE Rev2) is for 'Wholesale and retail trade, repair of motor vehicles and motorcycles' whereas the NI category (SIC 2007) is divided into separate 'Wholesale', 'Retail' and 'Motor Trades' data; whilst the data should be 'addable' and hence compatible, there does seem a surprisingly large amount of wholesale and motor trades businesses relative to retail. In Table 46, Employment, the RoI Census Broad Industrial Group is 'Wholesale & Retail Trade' for persons aged 15 years and over, whereas the NI Census is 'Wholesale and retail trade, repair of motor vehicles' and is for persons aged 16-74.

Additional data may be available in retailing / town centres from the respective local planning offices - some of whom prepare surveys / reports as part of a monitor of retailing and other land uses.