2016

DRAFT LAOIS COUNTY RETAIL STRATEGY

2017 - 2023

5th August 2016

Contents

1.0 Introduction

1.1 Function of the Updated Laois Retail Strategy

This retail strategy has been prepared by Future Analytics Consulting Ltd. on behalf of the Laois County Council in accordance with provisions set out in the 'Retail Planning Guidelines for Planning Authorities' published by Department of the Environment, Heritage and Local Government (DoECLG) in 2012.

The overriding aim of the strategy is to create the appropriate conditions necessary to foster a healthy and vibrant retail environment in County Laois over the Development Plan period of 2017-2023. It does so through retail policy recommendations which are framed in the context of national and regional plans, strategies and guidelines. The strategy provides important information on the quantum, scale and types of retail development required over the period to 2023, with further outlook to 2030.

1.2 Methodology

The County's previous Retail Strategy 2011-2017 was prepared during a time when the national retail market was experiencing a significant decline due to the recession and national economic downturn. Over the course of the preparation of this strategy the retail market is beginning to show signs of improvement, albeit slow. High levels of market uncertainty, the changing nature of the retail industry, high vacancy rates and credit considerations are key elements which typify the current retail market and the applied methodology considers these aspects in detail.

The key objectives of this retail strategy are as follows:

- Define the retail hierarchy in the County and related retail core boundaries;
- Undertake a health check appraisal of the key retail centres in Laois, to ascertain the need for interventions in these areas;
- Identify the broad requirement for additional retail floorspace development in the County over the plan period, to support the established settlement hierarchy, and;
- Provide guidance on policy recommendations and criteria for the future assessment of retail development proposals over the Development Plan Period 2017-2023.

A key intention was to produce a succinct and readable strategy document. To avoid duplication with content in the Draft Laois County Development Plan 2017-2023, this document does not include a chapter setting out the background policy context.

1.3 Definition of Retail Typologies

Annex 1 of the 2012 Retail Planning Guidelines provides clear guidance on the classification of the two types of retail goods categories, convenience and comparison, and defines each category as follows:

Convenience

This category includes all supermarkets, smaller convenience stores and retail food outlets (excluding fast food takeaways, restaurants and cafes) serving food, alcoholic and non-alcoholic beverages, tobacco and non-durable household goods.

Comparison

The list of goods which fall under this category is as follows: clothing and footwear, furniture, furnishings and household equipment (excluding non-durable household goods), medical and pharmaceutical products, therapeutic appliances and equipment, educational and recreation equipment and accessories, books, newspapers and magazines, goods for personal care, goods not elsewhere classified and ***bulky goods.***

***Bulky Goods* -** While the bulky goods category is listed under the classification of comparison floorspace above, it is considered appropriate to make a distinction within the Retail Study between pure comparison floorspace and floorspace used for the sale of bulky goods. The Annex 1 definition includes a list of goods which are considered to fall within the bulky goods category as follows: Goods generally sold from retail warehouses where DIY goods or goods such as flat pack furniture are of such a size that they would normally be taken away by car and not be portable by customers travelling by foot, cycle or bus, or that a large area would be required to display them e.g. repair and maintenance materials, furniture and furnishings, carpets and other floor coverings, household appliances, tools and equipment for the house and garden, bulky nursery furniture and equipment including perambulators, bulky pet products such as kennels and aquariums, audio visual, photographic and information processing equipment, catalogue shops and other bulky durables for recreation and leisure. However, the Guidelines state that 'the list is not exhaustive – bulky goods not mentioned in the list should be dealt with on their merits in the context of the definition of bulky goods').

1.4 Revised Regional Planning Guidelines for the Midland Region Population Projections

The Regional Planning Guidelines for the Midland Region 2010-2022 (RPG) set a 2016 population target of 75,931 people for County Laois. High levels of housing delivery and significant in-migration to the County has resulted in the 2016 target being exceeded in advance of the forecasted period. **A revised population target for 2016 of 83,656 people has subsequently been agreed with the Midland Regional Authority Technical Working Group, and this target provides the basis for population modelling carried out in this strategy.**

1.5 The Retail Hierarchy

The Retail Planning Guidelines require that retail development and activity must follow the settlement hierarchy of the State. They outline that retail functions tend to reflect broad tiers of urban development including Metropolitan, Regional, Sub-Regional (including District Centres within larger urban areas) as well as Small Towns and Rural Areas.

1.5.1 National Settlement Hierarchy

The Retail Planning Guidelines for Planning Authorities published by the Department of the Environment, Community and Local Government in April 2012 advocated strict guidance in relation to the sustainable organisation of retail activity in Ireland to reflect the existing national settlement structure. Taking account of historical patterns, in addition to preceding retail planning policies, this retail hierarchy reflected the broad tiers of urban development and recognised that such a system of classification is indicative only, with scope for overlap between the specific retail functions provided in each tier.

The **Metropolitan level** of the retail hierarchy applies to the higher-level settlements of Dublin City, Cork, Limerick/Shannon, Galway and Waterford and provides the broadest range of comparison goods shopping, including higher-order comparison and specialist retail functions. The **Regional level** of retail provision focuses upon the tier of Gateways, Hub Towns and other large settlements and provides for high-level regional retailing functions in localities including Portlaoise, Naas/Newbridge, Tullamore and Kilkenny. The **Sub-Regional level** of the retail hierarchy includes places such as Athy, Carlow and Thurles. The **District Centre level** incorporates the designated urban growth centres of the Gateways, Hubs and large towns providing them with essential services, in addition to an appropriate level of retailing and amenities to serve their population catchments. The **Small Towns and Rural Areas level** of the hierarchy is characterised by basic convenience shopping functions and some limited incidences of comparison shopping. The final **Local Shopping level** tier applies to neighbourhood and suburban village stores, post-offices, casual trading and farmers' markets.

1.5.2 Laois Retail Hierarchy

The purpose of the retail hierarchy is to indicate the level and form of retailing activity appropriate to the various urban centres in the County. Taking a criteria-based approach enables the Council to protect each centre's overall vitality and viability whilst allowing each centre to perform its overall function within the County's settlement hierarchy. It is the core concept of the retail hierarchy that the principal urban areas (principal towns) are supported by key service towns and to a lesser extent local service towns and villages. As such this retail strategy focuses primarily on the upper levels of the hierarchy. It is important to note that this is not to deter or discourage smaller scale retail development and investment in the smaller villages. Rather, it is important to set a clear hierarchy which identifies where the distribution of new retail floorspace should be delivered and which is appropriate in scale and character to the hierarchical role of the centre.

The Laois County Retail Strategy 2011-2017 sets out the previous retail hierarchy within the County (Table 1.1). The Draft County Development Plan includes a settlement hierarchy as part of the Core Strategy for the Plan and is illustrated in Fig 1.1 below.

Table 1.1: Laois Retail Hierarchy as taken from Laois Retail Strategy 2011-2017

County Laois Retail Hierarchy	
Retail Function	**Centre**
Major Town Centre	Portlaoise
County Town Centres	Portarlington
	Mountmellick
	Rathdowney
	Mountrath
	Stradbally
	Durrow
	Abbeyleix
District Centre	Carlow Environs
Neighbourhood Centres	Fairgreen, Mountmellick Road, Portlaoise Kilminchy, Dublin Road, Portlaoise

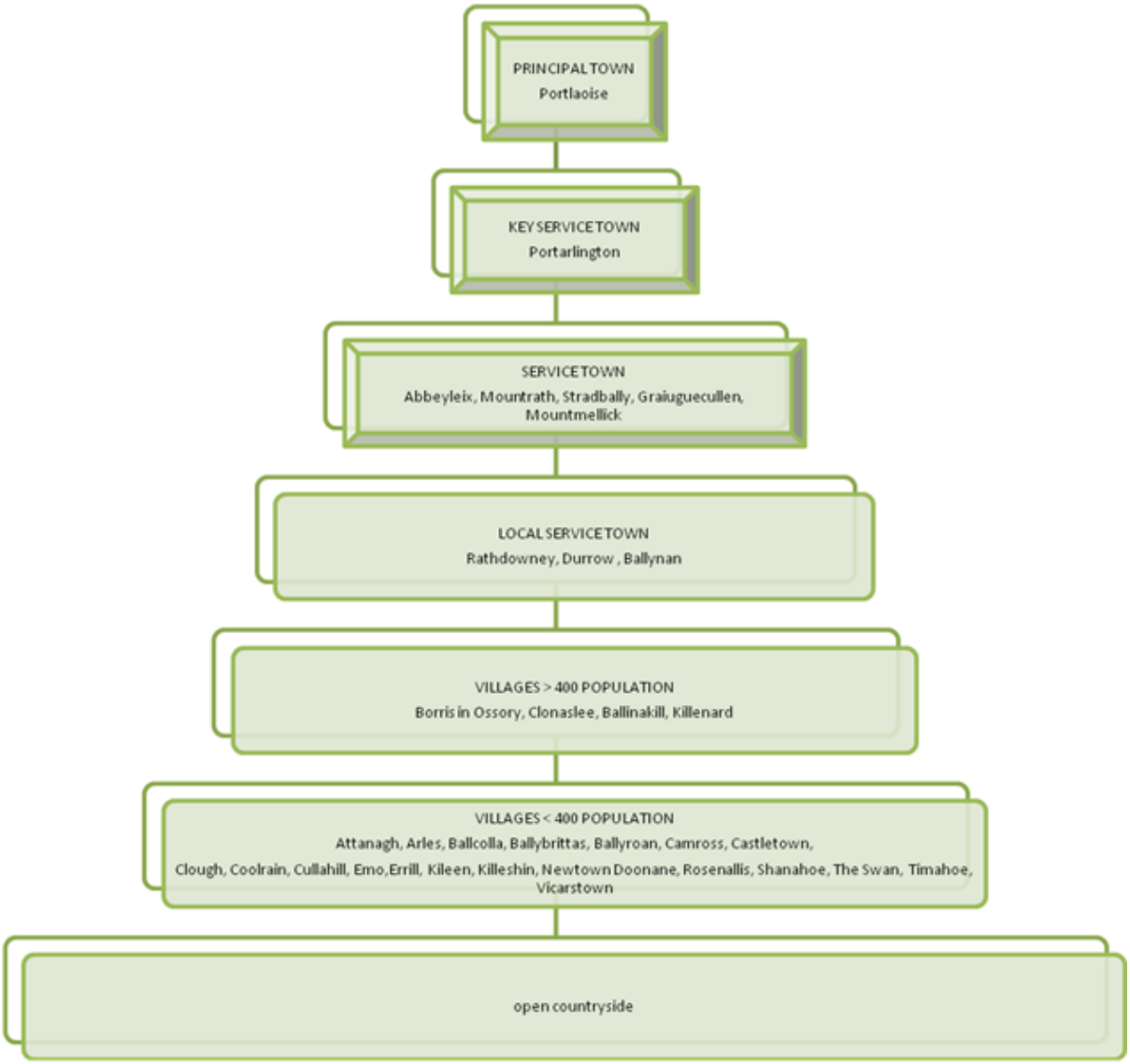

Figure 1.1: Laois Settlement Hierarchy (Source: Draft Laois Development Plan 2017-2023)

Taking account of the recently revised settlement hierarchy, as published within the Laois Core Strategy, the revised retail hierarchy consisting of five tiers has been adopted for inclusion in this strategy. This new retail hierarchy has been informed by the latest Midland Regional Planning Guidelines, published in 2010, and the Retail Planning Guidelines, published in 2012. The revised Laois County Retail Hierarchy is set out as follows:

Table 1.2: Updated Laois County Retail Hierarchy 2017-2023

Hierarchy Level	Retail Hierarchy Settlement Designation	Settlements
Tier I	Principal Town	Portlaoise
Tier II	Key Service Town	Portarlington
Tier II	Service Town	Abbeyleix, Mountrath, Stradbally, Graiguecullen, Mountmellick
Tier IV	Local Service Towns	Rathdowney, Durrow
Tier V	Villages, Rural Serviced Settlements and Hinterlands	Villages, small settlements and the Open Country side of County Laois

2.0 Retail Trend Analysis and Assessment of Competing Centres

2.1 Current Retail Trends

The Retail Economy

The retail sector is a vital element of the Irish economy. Nationally, there are 275,000 people employed in the provision of retail services, which equates to the cumulative equivalent of the total number of those employed in ICT, agriculture, forestry and fishing, in addition to the financial and insurance sectors. Regionally, many of the largest towns exhibit the broadest retail offer, in keeping with the retail hierarchy set out in the Retail Planning Guidelines 2012. This is not to discount the role of smaller towns and settlements, where the provision of retail services is often the life blood of communities, fulfilling the important role of providing local goods and services to the population and the surrounding rural hinterlands.

At present, retail sales remain subdued, however, they are recovering. Since the economic boom, sales have fallen by 25%. The hardest hit sectors have been furniture and lighting, books, newspapers and stationary, household equipment, hardware paints and glass, and electrical goods. This has led to a loss of about 50,000 jobs, directly impacting on communities and exchequer revenues. The effects of the recession has had a negative impact on many towns throughout Ireland, with contracting local economies no longer able to support the retail offer which had developed previously. This has resulted in an increase in vacancy rates within many towns and counties and impacted on the attractiveness of many areas as retail destinations.

Assessment of the most recent Retail Sales Index, published by the Central Statistics Office (CSO) for September 2015 (provisional) and August 2015 (final), indicated that there has been an increase in the volume of national sales, both in comparison with the previous months and with September 2014. However, in terms of value, the index was down slightly from the previous month, however, this was up from the same time last year. The value index has increased from 92.4 in September 2014 to 96.9 in September 2015. However, it is worth noting that the overall retail sales index figures illustrate that there has been a continuous decline in the values of retail sales since 2008, falling from a peak of 110.8 in 2008. This decline has become less marked since 2010, but there was still an annual decrease of approximately one index point between 2010 and 2012. The fourth quarter of 2012 saw a slight recovery to 88.7 over the preceding quarters, but the first quarter of 2013 coincided with the third consecutive quarter of negative economic growth, as the country slipped back into a recession[1]. It is within this context that these figures represent some of the most substantial increases in the retail sales index since 2009.

These increases have been attributed to a number of factors including that the Country is now emerging out of recession and the reform of the motor vehicle registration system to break the year into two separate periods for the purposes of registering new vehicles. It is hoped that this could mark the beginning of a sustained period of gradual economic growth.

The impacts of the decline in national retail sales and overall economic activity have disproportionately affected independent retailers, many of whom would have had higher costs bases than the multiples with which they competed. In the case of convenience retailers, many of the independent retailers who remain are now opting to join the multiple franchise groups. This has led to a proliferation of homogenous shop front designs and colour schemes replacing the more individual shop-fronts which have long been a distinctive feature of the typical Irish streetscape.

The Changing Nature of Retail Services in Ireland

The challenges the sector faces also goes beyond economic contractions and weakened domestic demand, due to the changing nature of shopping habits. The continued growth of online shopping is mirroring a shift in consumption patterns. A number of factors driving growth in this sector include customers' appetite for value for money and greater variety, the increased usage of mobile devices, improved security and convenience, as well as increased marketing and use of social media promoting online campaigns. In Ireland, an estimated 43%

of people between the ages of 16 and 74 made purchases on the internet in 2011[2]. With an average expenditure in excess of €1,000[3], the most popular online purchases for Irish households in 2011 were 'other travel arrangements' (30%) and 'holiday accommodation (28%). 20% of online purchases in Ireland were for 'clothes or sports goods' and 14% were in 'films/music'.

One significant trend which has impacted on the viability of retail services in Irish centres, and especially town centres, has been the drive by retailers to increase the size of the floor plates in which they operate, precipitating the move towards out of town shopping centres and retail parks. Out of town or edge of centre retail has become a growing feature of the Irish retail offer since the 1980's but there has been a significant increase in the number of such centres, as well as in their size and scale since the early 2000's. These shopping centres and retail parks have become a feature of many urban centres throughout the country, consisting of a mixture retailers catering to consumer demands for convenience, comparison and bulky goods. The proliferation of out of town shopping centres and retail parks has also coincided with the increasing market presence of large European and UK multinational multiples in the Irish market.

These trends, coupled with the difficult economic conditions, has seen sizeable increases in vacancy rates within town centres, as some retailers close and others simply move to alternative locations which better fulfil their requirements. Those that remain are forced to compete for the shrinking market share as the retail attraction of the town diminishes. The provision of parking has become another issue of note, as many towns now impose parking charges which are not applicable in out of town centres. Despite the cap on the size of retail units imposed by the Retail Planning Guidelines 2012, there remains a demand for larger multiple convenience retail units within most parts of the country. This is reflected in the large number of established convenience retailers now offering a growing proportion of comparison goods within their stores.

In the case of the larger scale multiples, this move towards the provision of comparison goods is a reflection of the policy of increasing diversification which many are pursuing in an attempt to obtain a greater market share. These multiples are continuing to broaden the range of comparison goods which are available from their stores. Tesco in particular, who have the largest share of the national convenience trade within Ireland have become increasingly involved in the comparison market over the last decade. In addition they are also increasing their presence in the small and medium scale convenience market as emphasised by a recent announcement of five new stores in the cities of Dublin and Cork[4]. Dunnes Stores has experienced an increase in market share over the past year. The discounters are continuing to grow and their market share continues to increase.

Table 2.1: Multiples share of the Irish convenience market, Source (Kantar Worldpanel, accessed October 2015)

Retailer	Market Share (%)
Tesco	**24.5%**
Dunnes Stores	**23.2%**
Super Valu	**24.4%**
Lidl	**8.8%**
Aldi	**8.6%**
Other	**10.5%**

The anticipated increase in online sales may have a significant impact on the future demand for retail floorspace in the medium to longer term. Some industry experts predict that the need for larger convenience/comparison stores will subside as an upward trend in home deliveries gathers pace. At present, a large proportion of the main high street comparison retailers and three of the six major convenience retailers offer online shopping with home delivery as an alternative to in-store shopping, with many multiple retail chains giving increasing priority to online aspects of their offer[5]. It remains to be seen if future trends in this area will provide for increased demand for storage and distribution facilities.

[2] CSO, 2012
[3] IMR Smart Knowledge Base, 2011
[4] McCabe, S., 'Tesco Jobs boost with 7 new stores', Irish Independent, 17/09/2013.
[5] Kelpie, C., 'Anxious time for workers as some Argos stores to close', Irish Independent, 25/10/2012.

2.2 Assessment of Competing Retail Centres

Accessibility

The retail industry market is highly competitive and Laois's location relative to national transport linkages is a primary consideration in this regard. The two National Primary Routes, the N7 and the N8, which connect the West, South and East Coasts, converge on the County, in addition the M9 runs to the east of the County. The rail line linking Limerick and Cork to Dublin also traverses the County. The presence of these infrastructural links, which have undergone significant upgrades in the last decade, has made the urban centres of the Greater Dublin Area much more accessible than was previously the case. It is now possible to travel between Portlaoise and Dublin City Centre in 73 minutes by car and 58 minutes by train (Heuston), while the travel times from Laois to retail centres such as the Liffey Valley Centre by car can be as little as 57 minutes. A summary table of the various distances and travel times between the main urban centres of Laois and those which they compete with is presented below.

Table 2.2: Summary table of distances and travel times by road between the main urban centres of County Laois and the main urban and retail centres with which they compete[6].

		Portlaoise	Portarlington	Abbeyleix	Mountrath	Stradbally	Graiguecullen	Mountmellick
Tullamore	Distance	35	27	47	23	41	67	23
	Time	35	27	47	23	45	70	23
Carlow	Distance	46	46	32	45	33	N/A	47
	Time	45	49	32	45	39	N/A	49
Newbridge	Distance	50	29	53	54	38	49	41
	Time	60	27	35	35	31	39	32
Kildare Village Outlet Shopping	Distance	36	20	45	46	30	55	37
	Time	22	24	28	28	24	43	28
Liffey Valley Shopping Centre	Distance	86	71	96	96	80	84	83
	Time	54	50	47	56	53	57	54
Dublin City Centre	Distance	94	79	103	104	88	92	90
	Time	62	59	67	68	64	65	77
Kilkenny	Distance	49	67	35	48	50	39	59
	Time	48	61	35	48	47	34	60
Athlone	Distance	77	69	91	81	85	117	67
	Time	64	54	74	65	73	98	52
Thurles	Distance	63	81	47	57	75	79	71
	Time	40	54	34	42	48	65	49

Table 2.3: Summary table of the travel times between the urban centres of County Laois which feature rail links and the available competing centres served by the same rail lines[7].

	Portlaoise	Portarlington
Newbridge	**31mins**	**20mins**
Thurles	**31mins**	**48mins**
Tullamore	**N/A**	**15mins**

[6] Travel times and distances taken from Google Maps.
[7] Time table and rail travel time information current as of 22/10/2015, as obtained from Irish Rail website.

Dublin City Centre (Hueston)	**58mins**	**49mins**

Competing Centres

In evaluating the retail alternatives which currently exist within easy access to the main settlements of County Laois, such as Kilkenny, Athlone, Newbridge, Liffey Valley Shopping Centre and Retail Park and Dublin City Centre, it is clear that these regional retail attractors are amongst the biggest competition to the existing retail offer in the County.

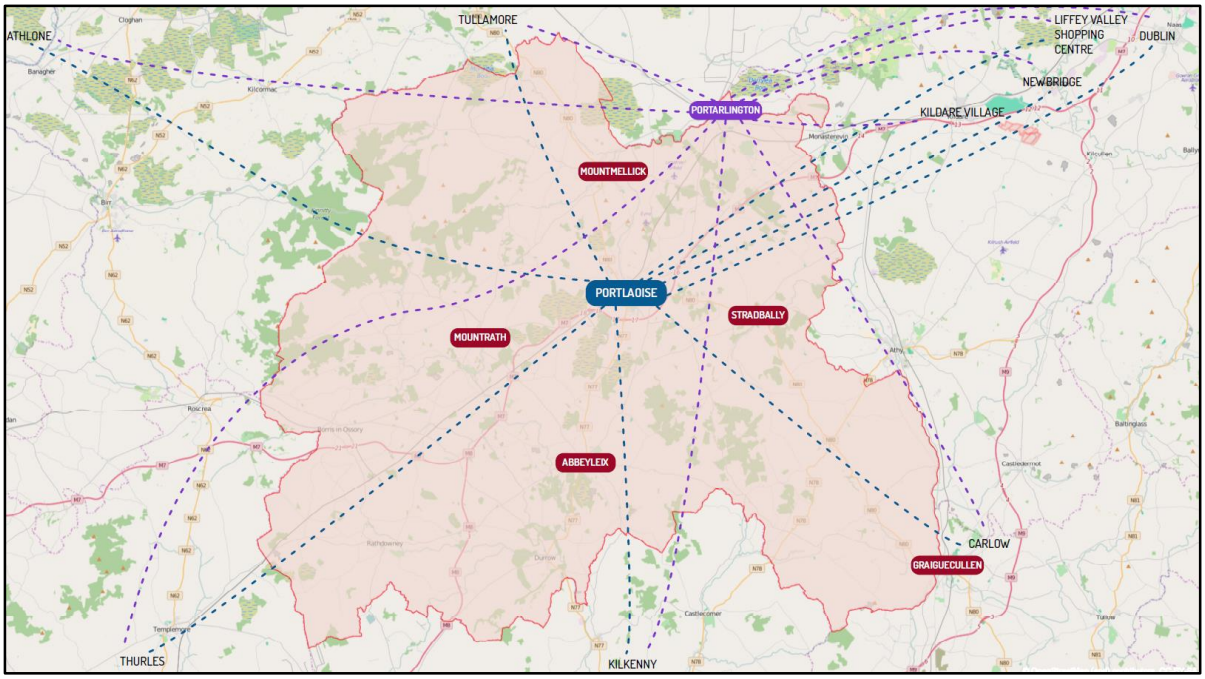

Figure 2.1: Competing centres in relation to Laois settlements.

Tullamore

Tullamore, with Mullingar and Athlone, is part of the Midlands Linked Gateway and is classified as a 'regional' retailing destination under the Retail Planning Guidelines 2012. The Offaly County Development Plan classifies Tullamore as a Tier 1 Linked Gateway Town. Tullamore is identified as a driver for regional growth. As such, Tullamore has been the focus for retail development in Offaly. The Bridge Shopping Centre is located in the centre of Tullamore and has over 30 stores. However, it does not possess large international retailers on the scale on offer in Athlone for instance. It is anchored by Dunnes Stores. Tullamore Retail Park is home to Tesco, Atlantic Homecare, D.I.D Electrial, Furniture Depot and Harry Corry.

Carlow

Carlow is classified as a 'sub-regional' retailing destination under the Retail Planning Guidelines 2012. The Carlow County Development Plan 2009 includes Carlow Town as a Level 1 County Town Centre. While there have been some recent developments that have improved the offer within the town, additional retail space is promoted as part of the Carlow Retail Strategy.

Fairgreen Shopping Centre provides 14,000sqm gross retail floor space. This is anchored by Tesco and has outlets such as Heatons, Pamela Scott, Barretts, Best Menswear and A-wear. Phase 2 of the centre included Next and River Island. Carlow Shopping Centre is home to Supervalu and Claire's. Penney's is also located in the town centre. Hanover Retail Park (or Carlow Retail Park) proved 12,635sqm of gross retail floor space. It is anchored by Woodies DIY.

Newbridge

Newbridge is classified as a 'regional' retailing destination under the Retail Planning Guidelines 2012. Newbridge is identified as a Large Growth Town II under the Kildare County Development Plan 2011-2017. This signifies a town of a smaller scale but economically vibrant with high quality transport links to larger towns/city.

Newbridge has a significant retail offer, which has elevated the town to one of the most important Level 2 centres in the Greater Dublin Area. The Whitewater Centre is the most important comparison retail destination in County Kildare. It has 22,000sqm of net retail floorspace. It is home to large international retailers including H&M, M&S, Oasis and Zara. It also has a cinema and food offerings including Gourmet Burger Kitchen, Burger King, Subway and Quigleys. The Courtyard Shopping Centre, located in the middle of Newbridge and adjacent to the Whitewater Shopping Centre, also provides retail offer within the town. It is anchored by TK Maxx. It is also home to Lidl. Other large retailers in the town include Dunnes Stores, Tesco and Penneys. In relation to bulky goods floorspace, Newbridge Retail Park on the Athgarvan Road provides bulky goods floorspace and accommodates operators such as Woodies and D.I.D. It is envisaged that the town will continue to be the focus of regeneration and future retail expansion.

Kildare Village Outlet Shopping

Kildare Village Outlet Shopping is located on the outskirts of Kildare, at exit 13 off the M7. It is located roughly 25 minutes from Portlaoise by car. Kildare Village exclusively provides a luxury outlet shopping offer. The outlet was developed by Value Retail who specialise in creating 'Chic Outlet Shopping', defined by luxury brands, 'charming open-air village settings' and a superior service. The concept is that leading brands offer saving of up to 60% on the recommended retail price all year round. The shops are located within a landscaped setting, offering a village type environment. The outlet is home to over 60 brands including Louise Kennedy, DKNY, Juicy Couture, Brooks Brothers, Anya Hindmarch and Hugo Boss. The food offering includes Crêperie Angélie, Joe's Coffee, L'Officina (Dunne & Crescenzi), Le Pain Quotidien and Starbucks. The outlet has recently undergone a €50 million investment which has increased the number of boutiques to 100, added two new restaurants and a visitor's centre. This outlet provides competition to Dublin City Centre and offers high end retailing within easy reach of Laois.

Greater Dublin Area

Liffey Valley Shopping Centre

Liffey Valley Shopping Centre is anchored by M&S and Dunnes Stores and offers a range of national multiples, including Carraig Donn, Easons and Lifestyle Sports, as well as large international comparison multiples such as Coast, H&M, Oasis, River Island and Topshop. The adjacent retail park includes Argos, B&Q, Carpet Right and Halfords, all of which would be classified as being within the bulky goods retail category. In addition to the retail offering, there are also other leisure amenities available, including a large multi-screen cinema as well as numerous restaurants and eateries. Unlike many of the more recent out of town retail parks which have been developed in the last number of years, there are no large convenience multiples located within this complex, although M&S does provide a convenience offer. An extension of 10,500sqm is currently underway and will include a Penneys store as well as six restaurants over three floors. The project will also entail the construction of a new facade to the western end of the complex and reconfiguration of the existing VUE Cinema.

Dublin City Centre

The retail offering of Dublin City Centre, in keeping with its position at the top of the national retail hierarchy (as set out within the Retail Planning Guidelines 2012[8]) is the largest within the country. As with both Liffey Valley and the Blanchardstown Centre, the improvements in infrastructural linkages have enhanced the attraction of the city as a shopping destination to wider catchments across the country. The retail offering, which is located throughout a number of large shopping centres (including the Ilac Centre, the Jervis Centre and the Stephen's Green Shopping Centre), as well as shopping districts (such as the Grafton Street, illustrated left, and Henry

[8] Retail Planning Guidelines, Section 2.2.1, page 11.

Street areas) features a number of large department stores as well as flagship stores of many national and international comparison retailers.

Unlike the free parking provided in competing out-of-centre or suburban centres such as the Liffey Valley Shopping Centre, parking is not free and can be relatively expensive. However, critically this does not undermine its attraction as there are significant alternative modes of transport available, with regular train services available from Portlaoise to and from Dublin City Centre to Heuston, as well as direct bus links from Portlaoise to Dublin by both public and private operators. While Heuston is not at the heart of the shopping district, the Luas red line now brings passengers straight to the Henry Street area.

Kilkenny

Kilkenny is classified as a 'regional' retailing destination under the Retail Planning Guidelines 2012. Kilkenny is identified as a hub town within the settlement strategy of the Kilkenny county Development Plan 2014-2020 and a Level 1 Major Town Centre/County Town under the Retail Hierarchy. The discounters have established four sites within Kilkenny city and environs.

Kilkenny has a vibrant town centre, with an important tourism offer and a strong retail base. The town has a considerable number of independent retailers with a focus on arts and crafts. It also a number of high end ladies clothes and shoe boutiques. Market Cross Shopping Centre is anchored by SuperValu and Penneys. Good's on High Street offers Coast, Dorothy Perkins, Oasis and Warehouse.

McDonagh Junction Shopping Centre offers both comparison and convenience retailing in a high quality setting. The anchor tenants include Dunnes Stores, H&M, River Island, Next and TK Maxx. The centre offers a number of food options including the Courtyard Bar & Grill. The centre has 40 retail units, including leisure amenities and performance spaces.

There are two retail warehouse parks in Kilkenny. Kilkenny Retail Park is occupied by Woodies and D.I.D Electrical. Ormonde Retail Park accommodates Chadwick's Builder-Providers and Furniture Depot. The Retail Strategy identifies that there are two edge-of-centre sites that could accommodate expansion – the former Kilkenny Mart site (5.5ha) and the former Smithwick's site (5.4ha). The Mart site was sold to IMC Cinemas in 2014.

Athlone

The town of Athlone is considered to be one of the primary shopping destinations within the Midland Region. Boasting a healthy and vibrant town centre, Athlone offers significant competition to retailers operating in the urban centres of County Laois. The opening of a substantial shopping centre within the town centre in 2007 supplemented the strong retail offer already in existence at Golden Island Shopping Centre. In addition, there is a sizeable retail park located on the periphery of the town on the Old Dublin Road which serves as a location to support a number of retail warehouse type operations providing a range of goods from convenience, comparison and bulky retail categories. The town offers a mixture of free and pay parking facilities, which offer substantial choice for those travelling by car, and there is a dedicated bus route which operates between Portlaoise and the centre of Athlone on a daily basis[9]. The retail offer of the town itself is located within quite a compact area, with both shopping centres located within or close to the commercial core of the town. Amongst the retailers who operate from the town are comparison retailers Barratts, Clarks, Easons, and Oasis, with most of the main convenience retailers also having a substantive presence within the town.

[9] Time table and bus travel time information for Bus Éireann route no. 73 current as of 22/10/2015, as obtained from Bus Éireann website.

Thurles

Thurles is classified as a 'sub-regional' retailing destination under the Retail Planning Guidelines 2012. Under the North Tipperary Development Plan 2010-2016 Thurles is a Tier 1 Primary Service Centre. The town provides a wide range of shops, particularly convenience shops, to meet the needs of the residents, workers and visitors. Thurles Shopping Centre is the only shopping centre in Thurles and has been recently extended. It now offers a 5 screen 3D cinema. The anchor tenant is Dunnes Stores. Other shops include Boots and Easons. The main shopping area in Thurles town is centred around Liberty Square which will benefit from of a revamp, including the removal of car parking from the central median. The discounters have stores located on the main arterial routes into Thurles.

3.0 Health Check Analysis

3.1 Retail Health Check Analysis of County Laois

The Retail Planning Guidelines clearly highlight how the concepts of vitality and viability are central in maintaining and enhancing town centres. The concept of vitality and viability is central to sustaining and enhancing town centres. As defined in the Retail Planning Guidelines:

> *"Vitality is a measure of how active and buoyant a centre is, whilst viability refers to the commercial well-being of a town".*

Each of the primary settlements within County Laois has been assigned a position within both the settlement hierarchy and the retail hierarchy of the County. This position, in both cases, reflects both its size and role within the County, and outlines the functions which are assigned to it. This follows on from national and regional policy, and that currently formalised within the Laois Core Strategy.

Retailing and the provision of retail services is one of the primary functions of any urban settlement. This health check analysis has been undertaken to evaluate the retail functions of the main urban settlements of County Laois. A health check assessment essentially analyses the strengths and weaknesses of town centres. The Retail Planning Guidelines provide general direction as to the fundamental factors contributing to a 'healthy' town centre. These include:

- **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 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. It should be attractive in terms of environmental quality and urban design, it should be safe, and have a distinct identity or 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 co-ordinated town centre management initiatives to promote the continued improvement of the centre.

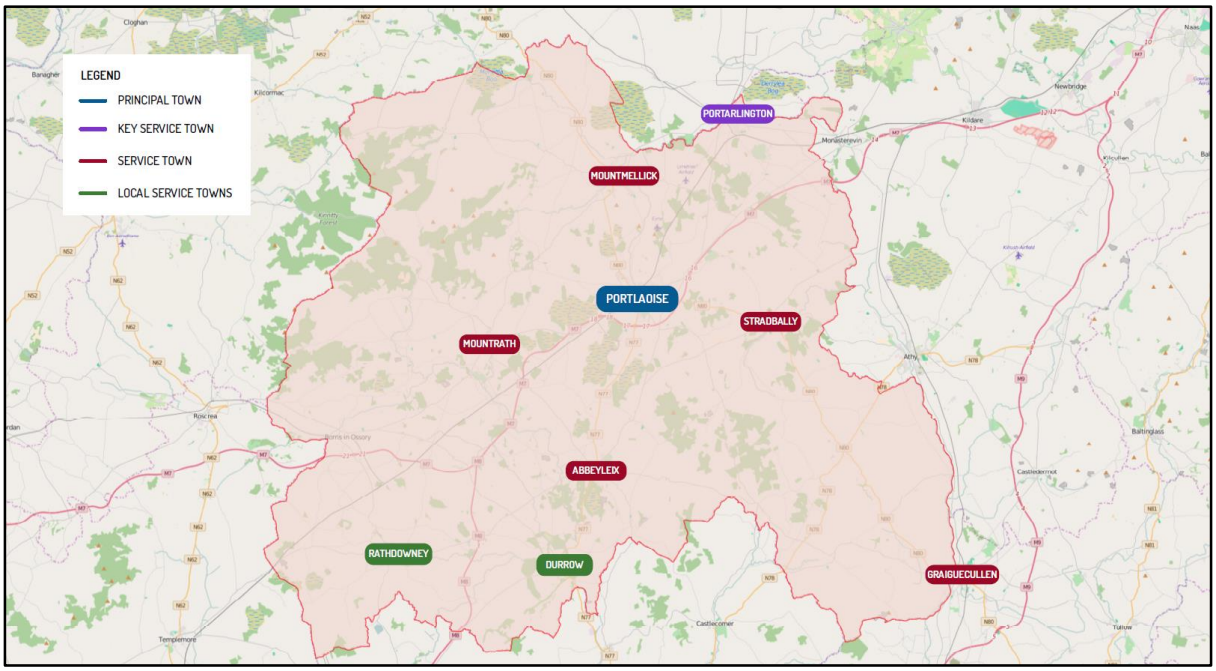

Fig 3.1: Illustration of the main settlements within County Laois.

Although the Retail Planning Guidelines are explicit in stating that no single indicator on its own can measure the performance of a town in relation to these four elements of general 'health', the Guidelines do note that it is possible to gain a good appreciation by undertaking a health check assessment using a variety of indicators. In this way the strengths and weaknesses of town centres can be analysed systematically and planning authorities, such as Laois County Council, will be able to ascertain how well centres are performing in terms of their attraction, accessibility, amenity and action programmes.

In view of the above, the health checks were structured as follows:

- Diversity of uses;
- Accessibility;
- Environmental Quality;
- Level of vacancy; and
- Action programmes.

3.2 Portlaoise

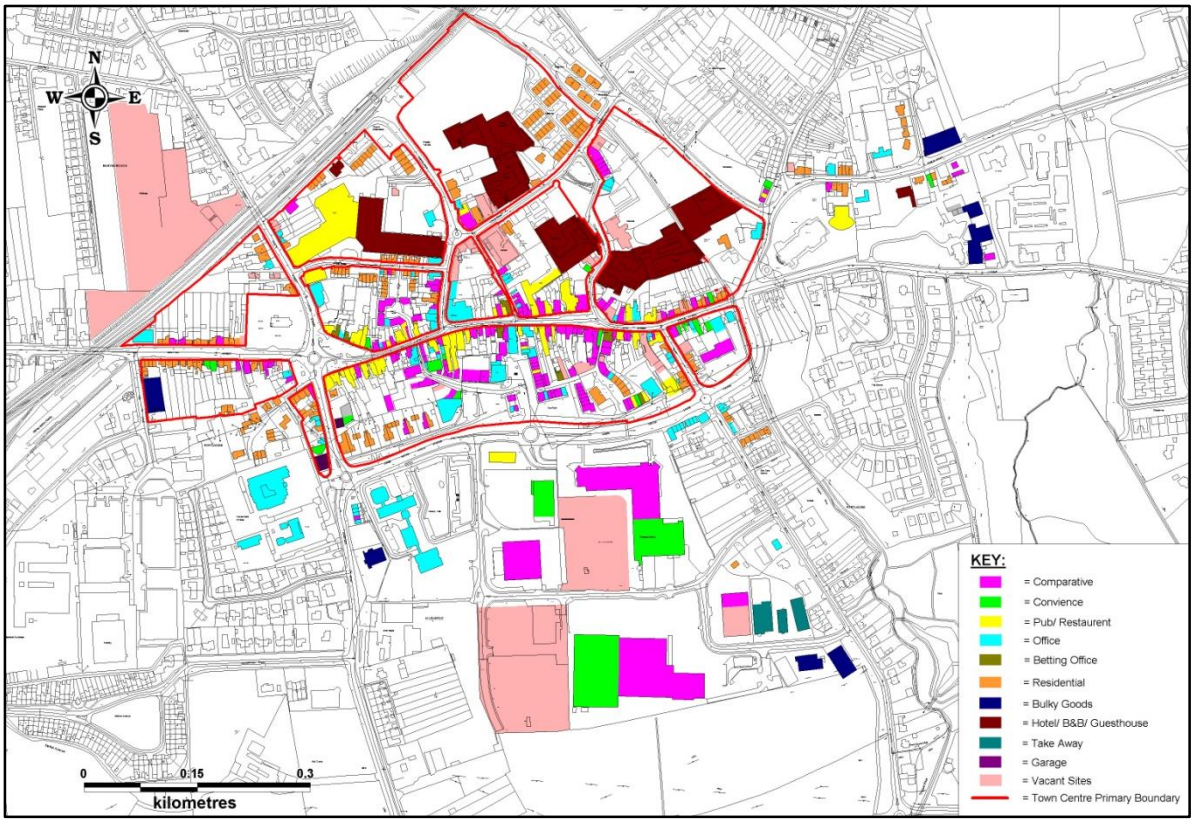

Figure 3.2: Portlaoise retail area

3.2.1 Diversity of Uses

Portlaoise is the county town and administrative centre of County Laois. It is also the largest population, employment and service centre in the county. The town has experienced dramatic growth particularly since 1996. In that year Portlaoise had a population of 9,474; by 2006 this had risen to 14,613 an increase of 54% and by 2011 it reached 20,145, a further increase of 37%. While all parts of the town have witnessed new residential development, it has been particularly concentrated north, east and west of the town centre along Ridge Road, Mountmellick Road, Borris Road and Kilminchy. A significant migrant community has settled in the town over the last decade, many of whom have found work in the then booming construction sector. Relatively cheap house prices compared to many other locations and vastly improved road and rail linkages between Portlaoise and Dublin have resulted in a significant local commuter population as well.

Employment in Portlaoise is dominated by the services sector with significant numbers employed in local government, the decentralised section of the Dept. Of Agriculture, Portlaoise and Midlands Prisons, Midlands Regional Hospital, ESB, Eir, An Post, the various primary and post-primary schools and the VEC. On the other hand, traditional forms of employment in manufacturing and milling have declined steadily in recent years while the construction industry, which was a major employment source for the past decade, has contracted dramatically since 2008 as a consequence of the recession. At present, there is c. 2,600 people registered as unemployed on the live register.

The growing significance of culture and tourism for the local economy is also evident. The historic core of the town centred on the Dunamaise Theatre, Church Street, Church Place, Fitzmaurice Place and the remnants of Fort Protector offers much potential in this regard. Such potential is recognised by Laois County Council with the introduction of initiatives by Council's Arts, Tourism and Heritage Officers to further develop this niche market.

3.2.2 Accessibility

Portlaoise is centrally located at the intersection of the Dublin-Cork/Limerick M7/M8 Motorway and the cross-country Mayo/Longford/Wexford National Secondary Route (N80). As a result, the town has major advantages in terms of its accessibility. Journey times to Dublin (and by extension Dublin Port and Dublin Airport) have been reduced to c. 1 hour while journey times to the other major urban centres and the key ports in the south-east are now well within a 2 hour range of the town.

In terms of rail communications, three strategic rail corridors converge at Portlaoise. In addition, the town was chosen by Iarnrod Eireann as the location for its national maintenance and service centre situated in the south-eastern suburbs. Bus Eireann and a number of private companies operate daily mainline services to and from Portlaoise. Car parking provision is concentrated in the following locations - Church Street multi-storey-386 spaces, Civic Plaza beside County Hall-155 spaces and surface carpaking on Lyster Square – 245 spaces.

Accessibility around Portlaoise has improved over the last decade with the completion of road improvements along the Dublin Road, Stradbally Road, Mountmellick road, the western Relief Route and will continue with the planned Southern Relief route from the Timahoe Road to the Abbeyleix Road imminent during the next plan period.

The unique accessibility of Portlaoise, in both a regional and national context, has been recognised by the National Spatial Strategy which has designated the town as a key **National Transport Node** with the potential to act as a major driver in facilitating related economic, transport and logistical activities as well as supporting the gateway towns of Athlone, Mullingar and Tullamore.

3.2.3 Environmental Quality

Portlaoise has an attractive town centre characterized by small streets and lanes opening onto squares and pedestrian spaces. The scale of the town centre is typical of many Irish towns with a fine urban grain of small street-facing plots and backland areas. However, in general most of these backland areas have been developed to give the town a coherent and compact appearance. Architecturally, the town displays a range of vernacular-style buildings reflecting the histioric nature of the town such as the Courthouse, Church of Ireland and terraced dwellings on Grattan Street.

Amenity and landscaping measures carried out under various LURD programmes are evident throughout the town centre, along James Fintan Lalor Avenue and in a number of wildlife designated areas, including Glendowns, the People's Park, Kilminchy Lake, the riverside walk and James Fintan Lalor Avenue. The opening of the Civic Plaza and Leisure Centre has further contributed to the leisure and amenity resources of the town. Authentic limestone kerbing remains in place along some of the main streets. The soon to be completed revamp of the front curtilage of Laois County Council headquarters on James Fintan Lalor Avenue is another positive development in this regard,

A Public Realm Strategy has also been commissioned by Laois County Council to look at the general structure, appearance, heritage implications and potential of Portlaoise Town Core Retail Areas, with a view to informing policies and objectives for improvement to the sense of place, visual amenity and identity of the Town.

3.2.4 Current Retail Trends

Main Street with offshoots onto Hinds Square, Lyster Square, Grattan Street, Church Street, Railway Street, Bridge Street, Borris Road and Mountmellick Road formed the traditional shopping heart of the town. The composition of retail provision in this area is still characterized by a relatively large number of independent operators including Shaws Department Store. In recent years however, the retail focus has changed. A large amount of new retail floorspace has been developed in Kylekiproe, Abbeyleix Road, the neighbourhood centres in Fairgreen and Kilminchy and in a number of petrol stations on approach roads to the town. The emergence of Kylekiproe as a major retail area to such an extent that it is now rivalling and surpassing the Main Street in terms of commercial focus and investment has been facilitated by the opening in the mid 1980's of an inner relief road -James Fintan Lalor Avenue. The availability of much larger site areas to accommodate on-site parking and easier access for deliveries are other contributory factors. The Laois Shopping Centre containing Penneys and Tesco as its anchors in addition to Dunnes, Lidl and Aldi Stores and retail warehousing are all based in Kylekiproe while Shaws have recently relocated there as well.

Simultaneously, Main Street and associated streets are in a state of stagnation and decline. Despite the proximity of Main Street to Kylekiproe, one of the main problems is a real sense of disconnect between the two areas especially for pedestrian traffic. Notwithstanding the provision of a pedestrian crossing, navigating James Fintan Lalor Avenue continues to be a major issue for would be shoppers moving from Kylekiproe back to Lyster Square and Main Street or vice versa. Ultimately, it is hoped that following the departure of the schools (with their extensive curtilages) from Tower Hill and Fitzmaurice Place to the new campuses on Borris Road and Lismard, extensive development opportunities will arise in the traditional town centre, thereby redressing the balance to some extent at least. Indeed, a major landbank in this area is currently on the market.

The town's total retail floorspace at the time of the 2003 Laois County Retail Strategy was estimated at 22,363 m^2 while the 2011 Retail Strategy noted that a significant quantum of additional retail floorspace had been developed or approved in the interim including at the following places:

- Kyle Shopping Centre, Kylekiproe (c. 8,185m^2 net) anchored by Dunnes Stores;
- Laois Shopping Centre redevelopment off James Fintan Lalor Avenue (18,840m^2 net initially but reduced in subsequent application by 842m^2 to 17,998m^2 net),
- The former Tretorne Factory, Kylekiproe (11,214m^2 gross) anchored by Aldi;
- Parkside Shopping Centre, Abbeyleix Road anchored by Superquinn (now Super Valu) with c. 5,500m^2 net retail floorspace; and
- new neighbourhood shopping centres at the Fairgreen on the N80 Mountmellick Road and in Summerhill, just off the N80 Stradbally Road.

These new developments together with upgrades of some of the longer established outlets in the town will increase considerably the range, quality and profile of shopping in Portlaoise and help fulfill its role in the national retail hierarchy, as a principal town in the Regional Planning Guideline and as a county town.

Table 3.1: Retail Planning History 2004-2010 (Portlaoise)

Ref No	Applicant	Description	Floor Area m^2 (net space)	Location	Built: Yes/No
04/374	McNamara	Additional retail. This proposal was subsequently subsumed into Lindat proposal under Pl Ref 06/480	**3,653**	Off James Fintan Lalor Avenue	No
04/449	Graham	Retail development -Dunnes Stores	**9,750**	Kylekiproe	Yes
041029	Maryboro' Construct. Ltd	Retail Development .This permission **expired** in December 2009.	**10,588**	MinchNorton Maltings, Mountmellick Road	No. Permission expired
06/179	Corrigeen Construct.	Erect a two-storey extension and make alterations to existing warehouse incorporating 4 new retail units and all associated site works	**1,680**	Kea-Lew Business Park,	No

06/200	Dunnes Stores,	Revise previously approved retail development granted under ref. 04/449	**48**	Kylekiproe Road,	Yes
06/480	Lindat Limited,	Re-development of Laois Shopping Centre	**18,840**	James Fintan Lalor Avenue	Yes
06/555	Millers Hardware Ltd	New Retail Building	**786**	Bull Lane	Yes
07/425	Dunnes Stores,	Redivision of previously approved area – no additional retail area	0	Kyle shopping Centre,	N/A
07/1099	John Hanniffy	Retail development. Refused on appeal by An Bord Pleanala	**11,956**	AbbeyleixRoad/Fr.Brown Avenue	No
07/1241	Dunnes Stores,	Additional area	**85**	Kyle Shopping Centre,	Yes
07/1556	AldiStores (Ireland) Ltd.,	Construction. of 6 no. retail units and 1 no. discount foodstore	**8,058**	Kylekiproe Road,	Yes
07/1668	Dunnes Stores,	Change of use of approved retail warehousing to retail. Relevant floorspace is already included in overall figure for Pl Ref 04/449	**0**	Unit 1 & 2, Kyle Shopping Centre,	Yes
07/1826	Dunnes Stores,	Change of use of approved retail warehousing to retail. Relevant floorspace is already included in overall figure for Pl Ref 04/449	**0**	Kyle Shopping Centre,	Yes
08/151	Lewis	Erect neighbourhood centre as part of large residential development.	**2,436**	Summerhill	No **Still Valid**
08/332	Corrigeen Construct.	Erect a retail unit and all associated site works. Refused on appeal by An Bord Pleanala	**269**	Kea-Lew Business Park,	No
09/69	Kellyville Ltd.	Erect supermarket and 5 no. retail units	**1,400**	Boghlone,Mountrath Road	No
09/120	P.J. O'Gorman	Erect 7 no. retail units	**750**	Boghlone,Mountrath Road	No-**Still valid**
09/699	Lindat Limited	Revise previously approved retail development granted under ref. 06/480. Reduction in retail floorspace of 842. sq. ms. net	**17,998 in lieu of 18,840**	James Fintan Lalor Avenue	Yes
09/765	Booths	Retail development	**300**	Mountrath Road	No-**Still Valid** ***eod***

Table 3.2: Retail Planning History 2011-2016 (Portlaoise)

Ref No	Applicant	Description	Floor Area m² (net space)	Location	Built: Yes/No
12/465	Hynes	Retail development	**100**	Mountrath Road	No-**Still Valid**
13/187	Shaws	Mezzanine storage space only	**230**	Kylekiproe	Yes
13/262	McNamee	Retail development	**10**	Bull Lane, Lyster Sq	Yes
15/357	Kellyville.	Retail development	**250**	Lyster Square	No-**Still Valid**

3.2.5 Vacancy Levels

It is generally accepted that all town centres will experience some level of vacancy caused by changes to ownership, amalgamation of sites, expiration of leases and shop fit outs. At present, Portlaoise has a current vacancy rate of 16%, however, vacancy is a cause for concern among the local authority and the business community. In addition, there is a high presence of non-core retail outlets including public houses, take-aways and licensed betting parlours.

A Business Incentive Scheme has recently been introduced by Laois County Council to encourage the use of vacant commercial premises within a designated area along the Main Street of Portlaoise over a three year period. This incentive scheme will assist new commercial businesses to set up in the main street area of Portlaoise which is the traditional retailing, commercial and social heart of the town. The objective of this scheme is to provide a grant incentive for new businesses to locate in premises that have been vacant for a period exceeding six months and to encourage diversity of retail opportunities within a designated area

3.2.6 Health Check Conclusion

The Health Check assessment indicates that Portlaoise is, by far, the chief shopping destination in County Laois with a wide range of convenience and comparison retailing, financial institutions and service providers. However, going forward, attention needs to be focused on combating the declining fortunes of the traditional high street shopping area.

3.3 Portarlington

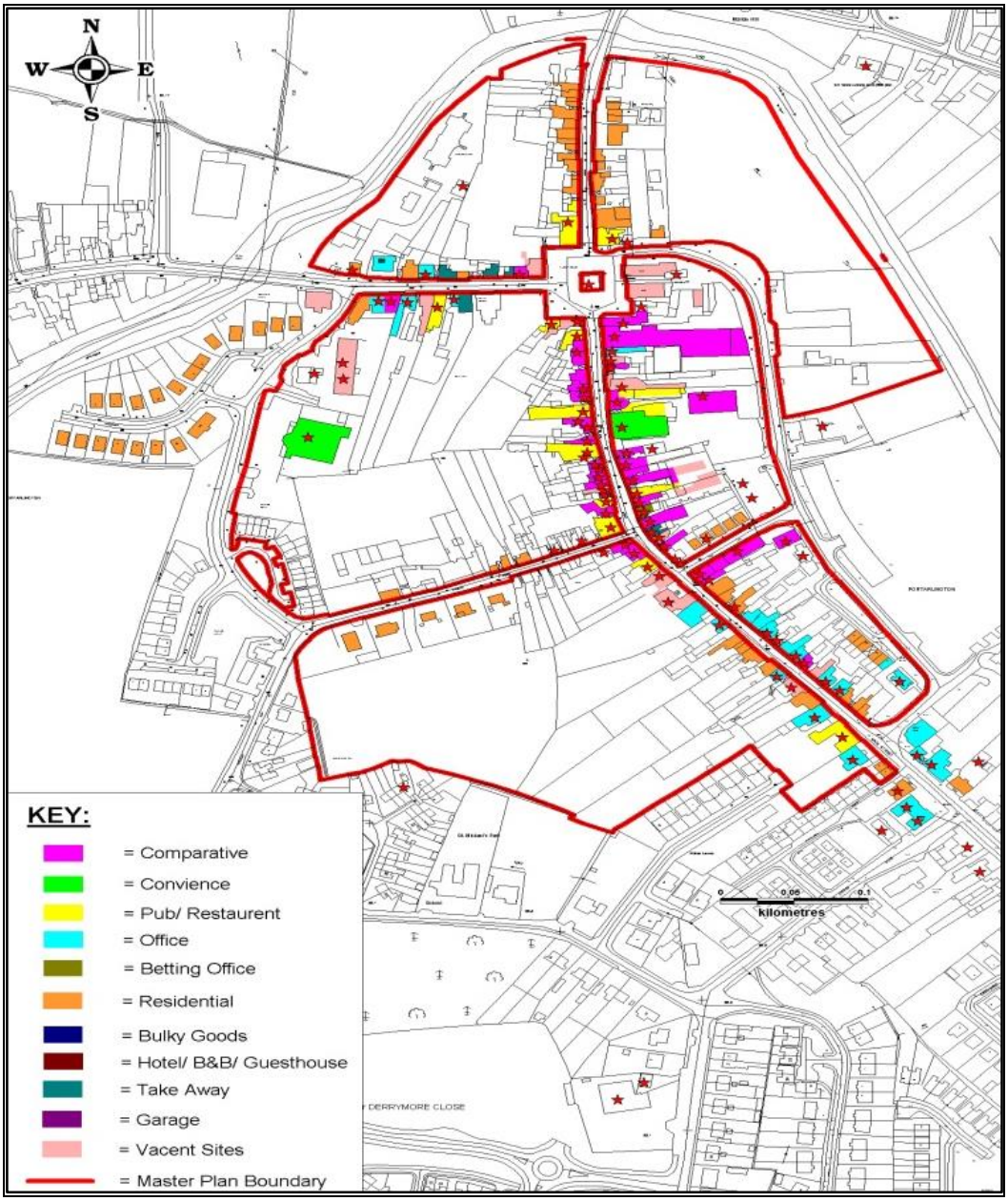

Figure 3.3: Portarlington retail area

3.3.1 Diversity of Uses

Portarlington is the second town of County Laois even though a sizeable portion of it is in the functional area of County Offaly. The River Barrow which flows through the town is the official divide between the two counties. The commercial centre of the town is primarily in County Laois; the County Offaly side is mainly residential in nature. As with Portlaoise, the town has undergone major expansion since the mid 1990's, and especially so since the millennium. In 2006, the County Laois part of the town (Portarlington South in CSO terms) had a population of 4,395. By 2006 this had reached 5, 847 representing an increase of 33% over the five years.

Much of the growth is attributable to in-migration from Dublin commuters, attracted to the town by affordable house prices and the availability of excellent rail links back to the capital. Not surprisingly, the bulk of the new residential development has occurred in the eastern suburbs in close proximity to the railway station. The Edenderry Road to the north has also witnessed substantial residential development during this period.

The main employment sources in the town are the Odlums milling plant on Station Road, Jamestown cladding and roofing and the enterprise park at Clanmalire and various service and retail providers around the town. The construction sector was once a major local employer but in common with all other centres is now at a standstill with a resultant impact on unemployment levels, currently standing at c. 2,035.

3.3.2 Accessibility

Portarlington is linked to neighbouring towns by a series of Regional Routes including R419 to Portlaoise, and Edenderry, R423 to Mountmellick, R424 to Monasterevin and R420 to Tullamore. While it is not directly accessible to the M7 Motorway, the R420 does join with the original N7 National Primary Route between Ballybrittas and Monasterevin. In the absence of any by-pass, the town centre streets are prone to serious congestion. The publication of a LUTS plan for the town has highlighted the need to tackle this problem through a series of joint initiatives between the two local authorities including provision of an outer relief road and better traffic management.

Regarding rail linkages, Portarlington is on the intercity network serving Cork, Kerry, Limerick, Galway and Dublin. Frequent daily commuter services to Dublin are also available. A major expansion of its carparking facility adjoining the local station was carried out by Iarnrod Eireann in 2010. While there are no direct or intermediate stops provided by Bus Eireann in the town, there is one local bus operator who provides a service to and from Dublin. The local Town Link bus service serves Portarlington, Mountmellick and Portlaoise. The relative compactness of the town centre assists in the convenient movement of pedestrians.

3.3.3 Environmental Quality

Much of the early growth of the town in the seventeenth century is associated with the arrival of the Huguenot settlers from mainland Europe whose legacy survives through local place names, surnames and building heritage. Portarlington developed into a town of exceptional architectural quality. The resident gentry built fine town mansions with high quality cut-stone facades. The town centre was dominated by Market Square which marked the intersection of four streets: Bennett Street, Kings Street, Queens Street and James Street. Unfortunately, today the Square is in an unkempt and semi-derelict condition, is dominated by vehicular traffic and requires redevelopment. Nonetheless it retains the potential to become a major focal point for the town.

The new Leisure Complex on Link Road is a welcome addition to the town as are the Derryounce Lake and walk project on the northern outskirts. The riverside offers major tourism and leisure potential through, for example, extension to and improvement of the existing riverside walk route. Litter control is good particularly along the Main Street was but needs more monitoring in outlying areas. There is a large number of open space car parks located to the rear of Main Street which are badly kept and detract from the visual amenity of the area.

3.3.4 Current Retail Trends

Main Street along with Bracklone Street, French Church Street and to a lesser extent Spa Street comprise the traditional retailing centre of Portarlington accommodating a diverse range of retail services mainly in the control of independent operators such as Lyles, Burbages, Fletchers, Mullaneys Pharmacy, McConvilles Super

Valu, Centra and Brackens. The immediately adjacent Inner Relief Road is also being developed for retail space provision including Honans Pharmacy and Daniels Centra while a Lidl store and another Centra store were opened in suburban locations on Canal Road and Station Road in 2006. An Aldi store at the south-eastern end of Main Street was developed in 2011.

As existing retail units are in many cases constrained in terms of size and parking provision, multiple retailers are increasingly unable to locate in the town centre. Planning permission has therefore being sought for larger retail parks outside of the town centre where more spacious units will attract some of the brand name retailers for example the Sandy Lane development project.

Table 3.4: Retail Planning History 2004-2010 (Portarlington)

Planning Ref No	Development	Floor area–net m²	Built-Yes/No
03/1684	Retail development.	3,165	No
04/187	Lidl discount food store	1,286	Yes
04/1186	Retail unit	129	No-**Refused**
05/315	Tesco Store	3,300	No-**Refused**
05/804	Retail unit (same site as in 04/1186)	129	No
04/788	McConville Super Valu	31	No
04/794	McConville Super Valu	240	No
06/405 supersedes both 2004 files on same site.	McConville Super Valu	794	Yes
07/1014	Tesco store (same site as in 05/315)	2,180	No-**Refused**
07/1515	Retail element of large office development	336	No-**Still Valid**
07/2382	Household/clothes retail sales area-amendment of 03/1684	1,608	No
09/606	Aldi discount food store	1,125	Yes

Table 3.5: Retail Planning History 2011-2016 (Portarlington)

Planning Ref No	Development	Floor area–net m²	Built-Yes/No
12/130	Retail development of 10 unit (same site as in 05/315 and 07/1014)	1,770	No-**Refused**
13/331	Pharmacy Outlet	100	No-**Still Valid**

3.3.5 Vacancy Levels

It is generally accepted that all town centres will experience some level of vacancy caused by changes in ownership, amalgamation of sites, expiration of leases and shop fit outs. At present, Portarlington has a current vacancy rate of 20%, a figure which is a cause for concern among the local authority and the business community. In addition, there is a high presence of non-core retail outlets including public houses, take-aways and licensed betting parlours.

3.3.6 Health Check Conclusion

The Health Check assessment indicates that Portarlington has a mix of convenience and comparison retailing, financial institutions and service providers. For the most part, retailing activity is concentrated in the town centre.

3.4 Mountmellick

3.4.1 Diversity of Uses

Mountmellick is the third town of County Laois and saw a 16% increase in its population from 4,069 in 2006 to 4,735 in 2011. While in-migration from Dublin accounted for some of this growth, this phenomenon was less of a factor here than in Portlaoise or Portarlington mainly because of the extra distance involved and the absence of a rail connection. The bulk of the new housing development has taken place in the northern and eastern suburbs of the town.

The main employment sources in Mountmellick are the enterprise park on Bay Road and various service and retail providers around the town. Traditional industries like bacon processing and textiles have declined and the construction sector has also haemorrhaged a large amount of jobs. The town accommodates primary and secondary schools providing educational and community uses for the town and its hinterland. Mountmellick was the only urban centre outside Portlaoise to have Town Council status but this has lapsed on foot of recent local government reform.

The National Spatial Strategy states that Mountmellick can be enhanced through physical and townscape improvements, water services, facilities for smaller enterprises and enhancements to road and bus networks, offering an attractive environment for residential, employment, retailing and service functions. It is noted that the town square has undergone some recent improvements, including the introduction of new businesses and the refurbishment of older buildings.

3.4.2 Accessibility

Mountmellick is located in the northwest of the county at the intersection of the R423, R422 and the N80 c. 21 kms south-east of Tullamore and 10 kms north-west of Portlaoise. Access to the motorway is via Portlaoise. The town lacks a rail connection and bus services are limited. Congestion is a major issue for Mountmellick. Plans for a much needed inner relief road (which would have reduced through traffic and just as importantly opened up significant backland areas for town centre development) were refused by An Bord Pleanala in 2004.

3.4.3 Environmental Quality

Mountmellick town centre presents as an attractive streetscape with a number of fine Georgian buildings many of which are associated with the Quaker community which settled in the town in the mid seventeenth century. The main focus of the town centre is O'Connell Square which along with Patrick Street has been subject to a number of environmental initiatives in recent years including pavement upgrade, provision of street furniture and installation of traditional lamp standards. However, none of the central area is pedestrianised and facilities for cyclists are poor.

Mountmellick is adjacent to the river Ownenass which is an important natural resource for the town. Landscaping and floral displays on the main approach roads and a picnic area on the Portlaoise Road increase the environmental quality of the town. In addition, Mountmellick Business Park is well presented.

Nonetheless there are some litter issues present particularly in the vicinity of the Library, along the Tullamore Road, at the riverside area and on the Clonaslee/Rosenallis Road.

3.4.4 Current Retail Trends

The convenience retail offer in Mountmellick is now dominated by the Super Valu store and ancillary units opened on the site of a disused textile plant at the junction of Davitt Road and Connolly Street in 2011. The largest comparison outlet is Shaws on Sarsfield Street. However, given the limited offer range, it is likely that much of the town populations middle and higher order comparison shopping is carried out in Tullamore and Portlaoise.

Table 3.6: Retail Planning History 2004-2010 (Mountmellick)

Planning Ref No	Development	Floor Area m²	Built-Yes/No
07/2029	Mixed Use development with retail floor space	1,033 sq. ms	Yes
10/245	Two additional retail units to 07/2029	164 sq .ms	Yes

Table 3.7: Retail Planning History 2011-2016 (Mountmellick)

Planning Ref No	Development	Floor Area m²	Built-Yes/No
13/334	One additional unit to 07/2029	160 sq. ms.	Yes

3.4.5 Vacancy Levels

It is generally accepted that all town centres will experience some level of vacancy caused by changes in ownership, amalgamation of sites, expiration of leases and shop fit outs. Vacancy levels in the traditional town centre area are high and a cause for concern among the local authority and the business community. In addition, there is a high presence of non-core retail outlets including public houses, take-aways and licensed betting parlours.

3.4.6 Health Check Conclusion

From the health check it can be concluded that Mountmellick performs an important local service function. It is anticipated that the role can be sustained and strengthened in order to further support the surrounding population in the provision of top up shopping need and local services.

3.5 Rathdowney

3.5.1 Diversity of Uses

Rathdowney is located in the southwest of the county c. 36 kilometres from Portlaoise, the furthest distance of any urban centre in County Laois from the county town. The name of the town derives from a Rath which stood at the north end of the town. The town developed around a central square and brewing became the main industry until its closure in the 1960's. The urban structure of the town is quite compact with the square dominating the urban form. Other prominent focal points within the town centre are the Mill Pond, Mill Street, Pound Street, the Church of Ireland and the River Erkina. Rathdowney had a population of 1,208 in 2011, an actual decrease of 0.3% since 2006 which reflects the west/east divide in population growth rates in County Laois. Rathdowney is unique in this regard as all other urban centres with starting populations in excess of 1,000 witnessed population increases during this inter-censal period.

The town acts as a higher order service and employment centre for its catchment. Rathdowney has been designated as a local service town in the Midlands Regional Planning Guidelines. The largest employer in the town continues to be the meat factory.

Following redevelopment of the former mart site in the late 1990's, a large convenience supermarket was opened in the town centre and has subsequently been expanded. The development of the Retail Outlet on the Johnstown Road, south of the town established a strong retail and commercial presence serving a wide hinterland and attracting consumers from outside Laois. The Retail Outlet closed in 2011, however, has been used occasionally as a pop-up shopping village and is currently seek a range of new uses.

Laois County Council in conjunction with Laois Local Enterprise Office, Laois Partnership and the Institute of Technology Carlow have launched "INSPIRE Rathdowney" which has the objective of providing targeted interventions to assist innovators, entrepreneurs and SMEs to develop their skills and abilities with a view to providing greater levels of economic growth and employment as well as fostering competitiveness. The initiative will recruit 20 participants from the Rathdowney area and its hinterland and assist them through the provision of dedicated facilitation and support to explore and create new business opportunities that will enhance the targeted Rural Economic Development Zone of Rathdowney.

The main employers in Rathdowney include Meadow Meats, Dunne's Stores, Supervalu, Midland Hardware and local banks and schools.

3.5.2 Accessibility

Rathdowney is located at the junction of Strategic Regional Routes R433 and R435 which along with a wider local road network converge on the town. Rathdowney is serviced by Laois Trip bus services. Its location in proximity to the N7 and N8 national routes and the M7 and M8 motorways provides the town with a unique opportunity to develop as the main service town and enterprise centre for south west County Laois and adjoining parts of Counties Tipperary and Kilkenny.

3.5.3 Environmental quality

The main square provides a focal point in Rathdowney. The centre of the town requires controlled and sustainable development in conjunction with services and infrastructure to cater for the current and future population. A town centre masterplan focuses on the provision of appropriate development in and linkages to backland areas off the Main Square. Recent traffic management improvements have been carried out off the Main Square (in the vicinity of Super Valu) resulting in increased calming, improved traffic flows and more efficient car parking provision.

3.5.4 Current Retail Trends

Apart from the closure of the Outlet Centre**,** Rathdowney has experienced limited retail activity since the last retail strategy was prepared in 2011. Super Valu and Dunnes Stores are the dominant retail outlets for convenience shopping while the independent comparison sector is some smaller comparison shops also exist within the town centre. The town has the benefit of a Retail Outlet Centre which offers a large range of comparison goods. At the same time a number of traditional retail outlets on Lower Main Street have closed and this is a matter of concern for the local authority.

Table 3.8: Retail Planning History 2004-2010 (Rathdowney)

Planning Ref No	Development	Floor Area m²
04/563	Dunnes Stores	2,091
05/1634	Construct a single storey retail unit	1,743
05/1725	Extension to Rathdowney Outlet Mall	1,316

Table 3.9: Retail Planning History 2011-2016 (Rathdowney)

Planning Ref No	Development	Floor Area m²
n/a	n/a	n/a

3.5.5 Vacancy Levels

It is generally accepted that all town centres will experience some level of vacancy caused by changes in ownership, amalgamation of sites, expiration of leases and shop fit outs.

Vacancy levels in the town centre area are high and a cause for concern among the local authority and the business community. In addition, a number of properties have been entered in the Council's Derelict Sites Register and there is a high presence of non-core retail outlets including public houses, take-aways and licensed betting parlours.

3.5.6 Health Check Conclusion

From the health check it can be concluded that Rathdowney performs an important local service function. It is anticipated that the role can be sustained and strengthened in order to further support the surrounding population in the provision of top up shopping need and local services. Levels of vacancy and dereliction require immediate attention.

3.6 Mountrath

3.6.1 Diversity of Uses

Mountrath is located in the centre of the county c. 14 kilometres south-west of Portlaoise and had a recorded population of 1,661 in 2011, an increase of 16% on 2006.

Mountrath is classified as a County Town Centre in the Retail Hierarchy of the Laois Retail Strategy 2011. It is the policy of the Council to acknowledge the importance of town centres in providing a wide range of both convenience and comparison shopping close to significant centres of population. There are two main centres of employment or industrial activity—the area associated with the wood processing /milling plant on the Abbeyleix Road and the industrial estate on the Portlaoise Road. Smaller commercial areas have also developed on the

Roscrea Road and Portlaoise Road outskirts of the town.

3.6.2 Accessibility

Mountrath is located on the former N7 Dublin to Limerick National Primary Route and is serviced by national and Laois Trip bus services. For years, the town was synonymous with severe congestion and tail backs resulting in environmental and business stagnation. As part of the M7/M8 Laois Motorway scheme, Mountrath was bypassed in 2010. It is predicted that, on the whole, this will represent a positive development regarding the future social and economic expansion of the town.

The NRA and Laois County Council have prepared a traffic calming scheme to address traffic speeds in the areas on the north side from the national speed limit on the Portlaoise Road to the junction of Main Street/Church Street and on the southern side from due south of the new hotel site to the bridge. This scheme is in place.

3.6.3 Environmental Quality

Many areas are well maintained such as the Church of Ireland, Catholic Church, The Mission Hall and Parochial Hall and Garda station. However, some commercial premises look neglected. Substantial work was carried out in 2008 to improve the amenity potential of the riverbank area. It is recognized that this needs to be further exploited. Landscaping and planting have been carried out in a number of locations throughout the town such as the roundabout of the town square and in the Quaker Park. Existing estates are also generally well maintained in particular Saint Fintan's Terrace where mature trees are in place. A town centre framework plan was prepared and endorsed by the elected members in 2005. This focuses on the provision of appropriate development in and linkages to backland areas off the Main Square. It is noted that works are needed to be carried out to main square with works currently being addressed by the area engineer in relation to parking and streamlining traffic management.

3.6.4 Current Retail Trends

The majority of the town's convenience shopping on offer is provided by Costcutters and Centra within the town centre. There are also a number of smaller convenience stores on the main approach roads to the town. There is limited comparison shopping within the town centre. Teflords Bulky Goods outlet is located within the town centre also. Given the limited retail offer it is assumed that many residents currently travel to Portlaoise and Abbeyleix for much of their convenience and comparison shopping needs.

Table 3.10: Retail Planning History 2011-2016 (Mountrath)

Planning Ref No	Development	Floor Area m^2
n/a	n/a	n/a

3.6.5 Vacancy Levels

It is generally accepted that all town centres will experience some level of vacancy caused by changes in ownership, amalgamation of sites, expiration of leases and shop fit outs. A relatively large number of units are currently vacant in the town. Vacancy levels in the traditional town centre area are high and a cause for concern among the local authority and the business community. In addition, there is a high presence of non-core retail outlets including public houses, take-aways and licensed betting parlours.

3.6.6 Health Check Assessment

From the health check it can be concluded that Mountrath performs an important local service function. It is anticipated that the role can be sustained and strengthened in order to further support the surrounding population in the provision of top up shopping need and local services.

3.7 Stradbally

3.7.1 Diversity of Uses

Stradbally witnessed a 9% increase in its population from 1,056 in 2006 to 1,154 in 2011. The structure of Stradbally is that of a long linear street with two squares on the western side – The Market Square and The Courthouse Square. The history of the town stretches from the sixth century when a monastery was established close by. Stradbally developed under the influence of the Cosby Family, owners of Stradbally Hall located west of the main street, at the end of the seventeenth century. Milling was an important activity in the development of the town. This function has now become obsolete and the structures have been adapted to provide a quality residential development in the centre of town.

The primary function of the town is that of a service centre for the surrounding agricultural hinterland. In addition, it is an important centre for steam machinery enthusiasts with an annual steam rally being held at Stradbally Hall. This is also the venue for the annual Electric Picnic music festival since 2004 which the promoters aim to continue given the appropriate nature of the venue at their disposal. This will further contribute to the economic and social growth of the village and promote its location as both a tourist and events centre.

3.7.2 Accessibility

Stradbally is located on the N80 Portlaoise to Carlow National Secondary Route c.12 kms south east of Portlaoise. Stradbally is serviced by National and Laois Trip bus services.

3.7.3 Environmental Quality

Traditional shopfronts are largely maintained along the main street in Stradbally. The Church of Ireland, the adjacent Catholic Church and the mill renovation contribute greatly to the streetscape. The Market House and Court house are also very important and significant buildings in the town. It is the wide market street which gives the town its uniqueness.

Floral displays and landscaping at the grandstand, Courthouse Square and on the Carlow end of the main street add to the environmental quality. The lakeside area has been developed. Litter control is generally good. The town generally has a neat and ordered appearance. A playground facility was opened in 2007 and additional facilities provided in 2012 while the Market House underwent a major upgrade in 2015.

The housing stock in the town centre is well maintained, in particular, the stone houses on Main Street at the Carlow end. Views from both the Carlow and Portlaoise approach roads provide a pleasant backdrop to the village.

3.7.4 Current Retail Trends

The majority of the convenience shopping on offer is provided by a Super Valu centre on the Main Street. There is little if any comparison shopping within the town centre. Given the limited retail range on offer, it is assumed that many residents travel to Portlaoise or Carlow for much of comparison shopping needs.

Table 3.11: Recent Retail Planning History 2004-2010 (Stradbally)

Planning Ref No	Development	Floor Area m²	Built-Yes/No
05/443	Mixed use development incorporating supermarket	2,768	Yes

Table 3.12: Recent Retail Planning History 2011-2016 (Stradbally)

Planning Ref No	Development	Floor Area m²	Built-Yes/No
n/a	n/a	n/a	n/a

3.7.5 Vacancy Levels

It is generally accepted that all town centres will experience some level of vacancy caused by changes in ownership, amalgamation of sites, expiration of leases and shop fit outs. There is currently some vacancy within

the town centre though it is not as problematic as in some of other urban centres. The large mill site on Main Street which was closed temporarily is now trading as an agri-business centre.

3.7.6 Health Check Assessment

From the health check it can be concluded that Stradbally performs an important local service function. It is anticipated that the role can be sustained and strengthened in order to further support the surrounding population in the provision of top up shopping need and local services.

3.8 Durrow

3.8.1 Diversity of Uses

Durrow is located in the south of the county c. 28 kilometres south-west of Portlaoise. The chief sources of local employment in include Durrow Castle, Dunnes Garden Nurseries, Castle Arms Hotel and Glanbia Creamery near Ballyraggett. The town also has its own credit union and Bank of Ireland branch which provides financial services for both the town and the surrounding hinterland. The population of Durrow in 2011 was 843, a 4% increase on the 2006 figure.

3.8.2 Accessibility

Durrow is located at the intersection of the former N8 Portlaoise to Cork National Primary Route, the N77 Durrow to Kilkenny National Secondary Route and the R434 to Ballacolla. As with Abbeyleix and Miountrath, the opening of the M7 / M8 motorway has brought about a major reduction in through traffic with resultant benefits for local businesses and residents as well as visitors to the town. Public transport is available from Bus Eireann and a number of private operators at regular intervals.

3.8.3 Environmental Quality

Essentially, the layout of the village remains unchanged from its planned 18th/19th Century form. The 18th Century Castle (1713–1732) is the last large pre-Palladian house to be built in Ireland. Set in 30 acres, it was designed and owned by Colonel William Flowers. The Castle is set in a 30 acre estate with landscaped gardens, woodlands, orchards and paddocks. Since 1998 it has undergone significant refurbishment and is now in use as a Country House Hotel and wedding venue. The traditional townscape character is well maintained and the majority of the retailers have retained the traditional shopfronts.

Laois County Council in association with the local development association carried out a major revamp of the town square in 2015. The revamp focused on traffic management, parking, landscaping and surface paving.

New residential estates at Seandoire and Derrywood, on the southern and eastern) approach roads-have extended the influence of the village out into its rural surrounds. The new estates are well maintained and presented.

On approach to the town from the Dublin side, the development of the riverside gives an overall attractive appearance to the town. The open space at Tae Lane on the junction at the Kilkenny Road and the village's green areas is well maintained. Planting at Oak Grove, along the Dublin Road and in front of Lawlor's Garden Centre also adds to the environmental quality of Durrow. The town also has a number of leafy loops walkways. A playground facility was opened in 2009.

3.8.4 Current Retail Trends

The majority of the town convenience shopping is mainly provided by The Stores and the Gala shop. Comparision shopping floorspace is quite limited. As a result there is significant retail spend leakage to Abbeyleix, Portlaoise and Kilkenny city.

Table 3.13: Recent Retail Planning History 2011-2016 (Durrow)

Planning Ref No	Development	Floor Area m²	Built-Yes/No
n/a	n/a	n/a	n/a

3.8.5 Vacancy Levels

There is currently some vacancy within the town centre though it is not as problematic as in some of other urban centres.

3.8.6 Health Check Assessment

4.7.6 From the health check it can be concluded that Durrow performs an important local service function. It is anticipated that the role can be sustained and strengthened in order to further support the surrounding population in the provision of top up shopping need and local services.

3.9 Abbeyleix

3.9.1 Diversity of Uses

Abbeyleix has been designated as a Service Town in the Midlands Regional Planning Guidelines, and provides an important retail, residential, service and amenity function for the local hinterland and support for the Principal Town of Portlaoise. The main employers in Abbeyleix include manufacturing and service facilities such as First Ireland Spirits, Super Valu, Clelands, District Hospital, bank and Credit Union. It had a recorded population of 1,827 in 2011, an increase of 16% on 2006.

3.9.2 Accessibility

Abbeyleix is located approximately 14 kilometres south of Portlaoise on the former main Dublin-Cork (N8) route and at the intersection of the following interregional routes: R430 – to Carlow, R433 –to Rathdowney and R 425 to Ballyroan. The town was a noted congestion blackspot particularly as a result of Dublin-Cork through traffic. The opening of the M7 / M8 motorway has resulted in the bypassing of the town which is of considerable benefit to locals and visitors alike. Public transport is available from Bus Eireann and a number of private operators at regular intervals.

3.9.3 Environmental Quality

Abbeyleix is a designated Heritage town. Although its origins date from the ecclesiastical importance in 1184, Abbeyleix is a fine example of an eighteenth century planned town built by Viscount De Vesci with some of its buildings, notably the Church of Ireland and the Market House dating from the 1830's. Abbeyleix developed around its Market Square which is at the heart of the town dominating the centre of the Square. Traditional shopfronts are largely maintained along the main street in Abbeyleix. These contribute to the built form and townscape character of Abbeyleix. Work to the Market House has substantially improved the streetscape with the introduction of granite bollards and cobbled paving incorporating sophisticated ramps and steps and it also had a modern "glass box" punching through its façade area, which works very effectively. Unique amenities such as the Heritage House, Father Breen Park and the sensory gardens are available in the town centre.

There are many new houses in the style of the town with its Neo-Gothic tones – both individual houses and estates while the houses at Pembroke Terrace are quite charming and sport an historical information board.

A number of actions targeted under the Abbeyleix Sustainable Communities Plan have been undertaken by Laois County Council. The aim of this plan is to build on the positive aspects of the town's natural setting and topography, its links to the wider landscape and environs, its natural and built heritage and its diversity and mix of uses, in order to make it a more attractive place to live, work and visit. Recent works undertaken include the softening of the space adjacent the road intersection at the northern 'bookend' of the town. Here, paving has been replaced with a landscaped lawn which has greatly enhanced this junction which is considered to be an integral part of the heritage townscape.

3.9.4 Current Retail Trends

The majority of the town's convenience shopping on offer is provided by Costcutters and a Super Valu store on the Main Street. There is limited comparison shopping available within the town centre, mainly provided by long established independent operators such as Fyffes, Leinster House and Bramleys. Given the limited retail offer it is assumed that many residents currently travel to Portlaoise and Kilkenny for much of their convenience and comparison shopping needs.

Permission for a large retail development of c. 1,100m^2 of mainly convenience space was granted on a town centre site in 2015. To date, it has not been built.

Table 3.14: Recent Retail Planning History 2004-2010 (Abbeyleix)

Planning Ref No	Development	Floor Area m^2	Built-Yes/No
06/1050	Retail unit	125	Yes-but not trading
08/96	Tesco store. Refused on appeal by An Bord Pleanala	5,680	No

Table 3.15: Recent Retail Planning History 2011-2016 (Abbeyleix)

Planning Ref No	Development	Floor Area m^2	Built-Yes/No
14/369	Retail unit	1,100	No-Still Valid

3.9.5 Vacancy Levels

It is generally accepted that all town centres will experience some level of vacancy caused by changes in ownership, amalgamation of sites, expiration of leases and shop fit outs. Compared to other urban centres in the county, there is a relatively low level of vacancy prevailing in Abbeyleix town centre currently.

3.9.6 Health Check Conclusion

From the health check it can be concluded that Abbeyleix performs an important local service function. It is anticipated that the role can be sustained and strengthened in order to further support the surrounding population in the provision of top up shopping need and local services.

3.10 Craigcuecullen, Carlow environs

3.10.1 Diversity of Uses

Graiguecullen forms the western environs of Carlow Town, on the west side of the River Barrow within the jurisdictions of both County Carlow and County Laois. Historically development located around Chapel Street and Chaff Street. On the County Laois side, there has been significant development in terms of both housing and retail warehousing. These developments have been assisted by major road construction including the Northern Relief Road. The Shamrock Business Park and Sleatygraigue Retail Park (Carlow Business Park) have been developed in recent years.

A Joint Spatial Plan for the Greater Carlow Graiguecullen Urban Area 2012-2018 was prepared and adopted by Carlow Town Council, Laois County Council and Carlow County Council which provides a detailed framework for the management and regulation of spatial development and use of land. The Joint Spatial Plan is concerned with charting the future built, environmental, social and economic development of the Graiguecullen Urban Area. Its goal is to retain the unique and special character of the Greater Urban Area, while also fostering positive change and good development. It is concerned with steering development so that it contributes positively to social, economic and environmental well-being, prioritising changes that are needed and identifying opportunities to enhance the Greater Carlow Graiguecullen Urban Area and the available quality of life.

3.10.2 Accessibility

Graiguecullen is part of the Carlow environs which is highly accessible by road and public transport. Located on the intercity line between Dublin and Waterford, Carlow has excellent connections to both cities as well as to

Kilkenny which was given Hub Status in the National Spatial Strategy. In addition, Iarnrod Eireann runs a commuter service which facilitates both commuters and business located within the hinterland of the town. Bus Eireann and private operators provide daily bus services within the county, to surrounding counties and nationwide from the bus interchange adjacent to Hanover Bridge. In addition to bus and rail services, there is an official taxi rank at the Potato Market providing a 24 hour taxi service. It is recognised that this good accessibility has positive connotations for the town adding to its attractiveness and competitiveness.

3.10.3 Environmental Quality

On the outskirts there are several large commercial buildings of modern design with well-kept curtilages, among them the Peugeot Centre, Boland's Car Sales, Sleaty Road retail park next to the Talbot Hotel.

The approach roads into Graiguecullen are well maintained with attractive landscaping. Traffic congestion is an issue for both Graiguecullen and Carlow town, particularly at the Numbers Road area, though the further extension of the Northern Relief Road will help in this regard.

3.10.4 Current Retail Trends

The Sleatygraigue Retail Park (Carlow Business Park) includes Dunnes Strores, Lifestyle Sports, and Hughie Doyle Furniture in addition to the Talbot Hotel and Dome Bowling Alley and Arcade. The Shamrock Business Park includes Doyles, K-Lan Furniture Flooring and Lighting and other retail warehousing as well as the Graigue Shopping Centre which consists of neighbourhood facilities such as a Spar. Land of Furniture & Zokia and Brooks building materials are located on Sleaty Road, while Lowry Carpets is located on Castlecomer Road. As these sites are still being developed a number of units remain unoccupied.

Table 3.2: Recent Retail Planning History 2004-2010 (Graiguecullen)

Ref No	Surname	Description	Floor Area - m² (net space)	Location
04/822	Redhill Properties	Change of use of previously approved retail warehouse units to supermarket	**2,342**	Off Carlow Northern Relief Road
05/794	Karl Dunny	Convenience Store	**394**	Shamrock Business Park, Portlaoise/Castlecomer Road
05/1637	Redhill Properties	Erect a comparison goods store in lieu of previously approved retail warehouse units Refused on appeal by An Bord Pleanala	**1,809**	Off Carlow Northern Relief Road
05/1777	Redhill Properties	Revisions to previously approved units and garden centre. No net increase in relevant floorspace		Off Carlow Northern Relief Road
06/1862	Redhill Properties	Erect 3 no.bulky goods retail units	**4,183**	Off Carlow Northern Relief Road
07/148	Tommy Hayden	Erect a portal frame unit	**3,450**	CarlowBusinessPark Sleaty Road.
07/538	Terry Smith	Change of use from light industrial/commercial to retail/commercial.	**850**	Shamrock Business Park, Portlaoise/Castlecomer Road
07/1098	Redhill Properties	Extend previously approved retail warehouse development	**791**	Off Carlow Northern Relief Road
07/2129	Redhill Properties	Extend previously approved retail warehouse development	**1,350**	Off Carlow Northern Relief Road,
07/2149	Redhill Properties	Extend previously approved retail warehouse development -	**717**	Off Carlow Northern Relief Road
08/84	Karl Dunny	Commercial Building (not conventional retail)	**1,000**	Shamrock Business Park,

				Portlaoise/Castlecomer Road
08/1474	Redhill Properties	Extend previously approved warehouse development to be used for clothes retailing	**1,474**	Off Carlow Northern Relief Road

Table 3.17: Recent Retail Planning History 2011-2016 (Graiguecullen)

Ref No	Surname	Description	Floor Area - m² (net space)	Location
11/224	James Dunne	Service Station with ancillary retail unit	**100**	Castlecomer Road
14/163	James Dunne	Building for sale of coal, turf, firewood, marked gas oil, kerosene oil, animal feeds and light hardware	**200**	Castlecomer Road

3.10.5 Vacancy Levels

Recently a number of units have become vacant for example the 4Homes Store. It is clear however that Graiguecullen is striving to achieve its role in the Midland Regional settlement hierarchy as a Service Town and within the County's retail hierarchy as a District Centre. The shopping provision within Graiguecullen contributes towards Carlow's ability to compete with other centres including Portlaoise, Kilkenny and Newbridge.

3.10.6 Health Check Assessment

It is considered that existing and emerging convenience and comparison retail representation in Graiguecullen reflects its role in the County Settlement Hierarchy as a District Centre. It is envisaged that this type of retail provision will be enhanced and sustained. From the health check, it is evident that residents do need to travel to larger shopping centres in order to fulfil their comparison shopping needs. Given the proximity to Carlow town it is important that the future retail development of Graiguecullen compliments that of Carlow town and does not adversely impact the Carlow town core retail area.

3.11 Ballylynan

3.11.1 Diversity of Uses

Ballylynan vis located in south-east County Laois in close proximity to the Carlow/Kildare border, c. 24 kms from Portlaoise on the N78 National Secondary Route between Athy and Castlecomer. It is one of the fastest growing villages in County Laois based on CSO data from 2006-2011 when its population grew from 754 to 1, 084 an increase of 44%. With the exception of Carlow Environs this represents the highest percentage growth rate of any settlement in the county. The development envelope for Ballylynan stretches in a North East direction along the N78 and extends East/West along the adjoining linear approach roads. The village core centres around Ballylynan's main street where the vast majority of the commercial activity is found.

Today the village consists of both long established and more recently developed residential areas, as well as a number of community and amenity facilities. A Centra store is located in the village centre while there are valid planning permissions for additional retail units as well.

3.11.2 Accessibility

Ballylynan is highly accessible mainly on account of its prime location on National Secondary Route N78 between Athy and Castlecomer. This accessibility in the context of adjoining larger urban settlements such as Portlaoise, Athy, Kilkenny and Carlow has been the principal factor (along with lower land costs) in attracting large scale residential development to the settlement in recent years. In addition, Bus Eireann and a number of private operators offer daily commuter services linking Ballylynan to provincial and nationwide locations. One such service is to the third level college in Carlow which is of major benefit to local students.

3.11.3 Environmental Quality

The County Council has taken a pro-active role in promoting environmental improvements in Ballylynan. Firstly, street furniture and landscaping initiatives on the main thoroughfare through the village have been funded and carried out under the LURD programme. Secondly, a number of high profile derelict properties are the subject of action taken by the County Council under the Derelict Sites Act, 1990 and remedial works are underway in a number of cases. Thirdly, traffic calming measures and footpath provision have been undertaken in order to tackle the problem of excess speeding through the village. Fourthly, the Council has set a high standard in terms of building design and layout as a result of its development of a very attractive public housing scheme located just off the main street. Also, Ballylynan has a strong and active local development association in place which, as well as promoting wider socio-economic development, helps maintain the amenity spaces and green areas in the village.

3.11.4 Current Retail Trends

A total of 1,318m^2 of net retail space has been approved in Ballylynan since 2006 of which a Centra store of 512m^2 has been opened for business. This is a very notable statistic and is testament to the degree to which retail activity and demographics are inextricably linked.

Table 3.18: Recent Retail Planning History 2004-2010 (Ballylynan)

Planning Ref No	Development	Floor Area m^2	Built: Yes/No
04/1577	Anchor unit and 3 no. retail units (I subsequently changed to turf accountant)	811	Yes
05/1296	Extension to Petrol Station	307	No
07/695	Erect 2 no. replacement retail units	130	No
08/31	Construct a single storey retail unit	90	No

Table 3.19: Recent Retail Planning History 2011-2016 (Ballylynan)

Planning Ref No	Development	Floor Area m^2	Built: Yes/No
n/a	n/a	n/a	n/a

3.11.5 Vacancy Levels

Vacancy levels in the traditional town centre area are high and a cause for concern among the local authority and the development association. A number of properties have been entered in the Council's Derelict Sites Register.

3.11.6 Health Check Assessment

From the health check it can be concluded that Ballylynan performs an important local service function. It is envisaged that this function will expand in line with the exceptional population growth experienced in recent years.

3.12 Health Check Conclusions

Shopping provision is a key component of town centres, and makes a major contribution to their vitality and viability. It is important therefore that they retain retailing as a core function. The health check analysis was carried out during a turbulent time in Laois's economic history. Rising unemployment and economic recession have presented considerable challenges for the residents and retailers across all settlements. However, the results of the health check analysis appear to indicate that, in spite of obvious and substantial difficulties in the retail sector over the last 7 years, the main settlements in County Laois continue to provide the necessary retail services required by their communities. Portlaoise remains the most important retail centre within the County, and is the location for the majority of the retail floorspace within both the comparison and bulky goods retail categories as well as the chosen location for larger convenience multiples. All of the other settlements within the County continue to fulfil their ancillary roles to the primary centre, supporting their local communities and surrounding hinterlands, in keeping with their respective positions within both the settlement and retail hierarchies.

The mix and balance of different type of retail (including retail services) is important to attract people to these centres, and to ensure town centres remain the main meeting point for the community. A significant trend which was apparent in a large number of settlements was the high presence of non-core retail outlets including public houses, take-aways and licensed betting parlours located within their centres. Too many of certain types of outlet can destroy the balance of the town centre, and accordingly the Planning Authority will control the number of bookmakers, off-licences (including off-licences in convenience stores), financial institutions, and other uses that can adversely affect the character of a town centre.

A high level of vacancy within the town centre areas has been a recurring issue across the majority of settlements which formed the basis of this health check analysis. Retail vacancies were not a concern under previous health check appraisals carried out for the County, however it is clear that this specific issue needs to be addressed. Vacant retail units have a very negative impact on town centres - visitors and shoppers can be discouraged from return visits, the look and feel of the town centre is one of decline, the retail offer is weakened and investment stagnates. It is imperative that those retail units which are vacant at present are not allowed to become derelict. The use of windows for display and appropriate advertising can improve the environmental quality of areas.

Going forward, there are a number of opportunity sites within the main towns, as highlighted in their respective Local Area Plans, which would improve and enhance the retail provision. The supporting towns provide a range of services to their surrounding areas, however it is noted that the development of these towns should not have a negative impact on the primacy of Portlaoise and should be in keeping with the existing scale and character of individual settlements.

4.0 Projected Floorspace Requirements

4.1 Introduction

This section establishes the future retail floorspace requirements for County Laois within the convenience, comparison and bulky goods retail categories, as specified within the Retail Planning Guidelines 2012. The assessment below has been produced having regard to existing floorspace capacity and projections[10] on the future demand for retail services within the County, and takes account of identified levels of vacancy detailed in Section 3. This will ensure that future development requirements will absorb existing vacancy which may otherwise hamper the vitality and viability of centres.

In brief, the following methodology has been used to define the future retail floorspace requirements for County Laois:

- Undertake an estimate of the population at base year and design year;
- Estimate the available expenditure per capita on each of the retail categories (convenience, comparison and bulky goods) at the base year and design year;
- Compile a projection of the total available expenditure in the base year and design year for residents of County Laois to allow for assumed expenditure inflows and outflows;
- Undertake a projection of the likely increase of available expenditure which will support the provision of additional floorspace;
- Estimate the likely average turnover of new floorspace in convenience, comparison and bulky goods retail categories; and
- Estimate the capacity for additional floorspace within each of the three retail categories, taking account of the existing vacancy rates and planning permissions.

4.2 Population

The population of Laois has demonstrated substantial growth since 1996, with the most sizeable increases occurring since 2002. An analysis of census figures between 2002 and 2011 reveals that the population of the County expanded from 58,774 to 80,559 representing an increase of some 37.07% in nine years.

This growth rate ultimately meant that County Laois had all but achieved its 2016 population projection by 2011. Revised figures are set out in table 4.1 below[11].

Table 4.1: Recorded Populations and Population projections for County Laois.

2006	2011	2017 (Updated Projection)	2023 (Updated Projection)
67,059	80,559	84,465	89,790

The starting point in any assessment of future floorspace requirements is projected population growth over the plan period. In accordance with the revised RPG population forecasts, the population of the County is projected to increase by 9,231 people between 2011 and 2023, which reflects an approximately 10% increase over that period.

4.3 Expenditure Estimates

The expenditure analysis, upon which the subsequent floorspace turnover calculations are formulated, have been projected using figures derived from a number of Central Statistics Office (CSO) sources including the National Services Inquiry, the County Incomes and Regional GDP 2010[12] and the Retail Sales Index[13].

[10] Some figures in this section may not sum due to rounding.
[11] A revised population target for 2016 of 83,656 people has been agreed with the Midland Regional Authority
[12] CSO, 'County Incomes and Regional GDP', 13/02/2013.
[13] CSO, 'Retail Sales Index', July 2013, 29/08/2013.

Per capita spend on an annual basis from 2013 to 2025[14] has been established using the population projections outlined above in addition to the expenditure projections which will be outlined below. The projection of future per capita spend for County Laois have been based upon an assumed increase which ranges between 0% and 4.2% per annum for both convenience and comparison goods from 2013 onwards. The per capita growth percentages have been set upon the latest available historic figures for the change in the retail economy (CSO Retail Sales Index) up until the year 2015 with the ESRI's predictions for change in GDP for the period 2016-2025 (ESRI Medium-Term Review 2013-2030 - Issue Number 12). This growth rate is in line with the latest term economic outlook, and has been detailed in Table 4.2 below.

Table 4.2: Projections of the available per capita convenience and comparison retail spend for County Laois.

Determination of Per Capita Spend on Convenience and Comparison Retail Goods				
Year	Annual Growth Rate (%)		Per Capita Spend (€)	
	Convenience	Comparison	Convenience	Comparison
2012	90.37	90.37	3,248	3,481
2013	0.00	0.00	3,248	3,481
2014	1.51	1.51	3,297	3,534
2015	2.48	2.48	3,378	3,620
2016	4.10	4.10	3,516	3,768
2017	4.20	4.20	3,664	3,927
2018	3.70	3.70	3,800	4,072
2019	3.70	3.70	3,940	4,223
2020	4.00	4.00	4,098	4,392
2021	2.20	2.20	4,188	4,488
2022	2.20	2.20	4,280	4,587
2023	2.20	2.20	4,374	4,688
2024	2.20	2.20	4,471	4,791
2025	2.00	2.00	4,560	4,887

This table also illustrates an adjustment in the per capita spend for County Laois to account for lower average income levels when compared to the national average. The national per capita spend has been calculated based upon the total retail spend (inclusive of VAT) per capita in 2012. The Dublin Region has a higher level of disposable income (1.23 in 2012), which has the effect of inflating the national average. The available disposable income in the majority of counties is less than 100, with CSO's County Incomes and Regional GDP 2016 report indicating that disposable income in County Laois was 9.63 index points lower than the national average. Therefore, the available per capita retail spend in County Laois in 2012 (base year) for convenience goods was €3,248 and for comparison goods was €3,481. Using these per capita retail spend projection figures, the total available spend for convenience, comparison and bulky goods, as calculated, is presented in Table 4.3.

[14] To include the remaining 2 years of the existing plan, the 6 year operational period of this strategy, plus three additional years, as specified within the Retail Planning Guidelines 2012.

Table 4.3: Projections of the total available expenditure for each of the three retail categories from 2012 to 2025.

Total Available Expenditure - Convenience and Comparison Goods							
Laois County - Population Scenario [High] (M2F1 Recent)							
Year	Population	Convenience Per Capita Spend (€)	Comparison Per Capita Spend (€)	Convenience Total Available Spend (€)	Comparison Total Available Spend (€)	Comparison Total Available Spend - Excluding Bulky Goods(€)	Comparison Total Available Spend - Bulky Goods Only (€)
2012	81,046	3,248	3,481	263,267,207	282,137,382	225,709,906	56,427,476
2013	81,573	3,248	3,481	264,978,555	283,971,394	227,177,115	56,794,279
2014	82,188	3,297	3,534	271,006,869	290,431,798	232,345,438	58,086,360
2015	82,886	3,378	3,620	279,980,109	300,048,212	240,038,570	60,009,642
2016	83,656	3,516	3,768	294,165,832	315,250,724	252,200,579	63,050,145
2017	84,465	3,664	3,927	309,484,349	331,667,224	265,333,779	66,333,445
2018	85,331	3,800	4,072	324,225,265	347,464,723	277,971,779	69,492,945
2019	86,210	3,940	4,223	339,684,551	364,032,083	291,225,667	72,806,417
2020	87,102	4,098	4,392	356,927,389	382,510,834	306,008,667	76,502,167
2021	88,010	4,188	4,488	368,585,927	395,005,020	316,004,016	79,001,004
2022	88,906	4,280	4,587	380,529,043	407,804,181	326,243,345	81,560,836
2023	89,790	4,374	4,688	392,766,837	420,919,142	336,735,314	84,183,828
2024	90,678	4,471	4,791	405,377,289	434,433,472	347,546,777	86,886,694
2025	91,574	4,560	4,887	417,569,862	447,499,971	357,999,976	89,499,994

Table 4.3 illustrates the projected increases in population, per capita spend in both convenience and comparison goods, and total available spend in all three retail categories from 2012 to 2025. This includes the complete operational lifecycle of the Retail Strategy, from 2017 to 2023, and the requirement for an additional 2 years, up to 2025. This shows the total available spend for all retail goods growing from approximately €545m in 2012 to a projected €814m at the end of this retail strategy period in 2023, and to approximately €865m in 2025. This projected level of increase within the total available spend of the County represents projected growth rates of approximately 33% and 37% respectively.

Table 4.4: Projections of the total available convenience retail spend, as adjusted to account for inflow and outflow.

Adjusted Total Available Expenditure for Convenience and Comparison Goods														
Laois County - Population Scenario [High] (M2F1 Recent)														
Total Available Expenditure - Convenience					Total Available Expenditure - Comparison Non-Bulky Goods					Total Available Expenditure - Comparison Bulky Goods				
Year	Convenience Total Available Spend (€)	Convenience Total Available Spend Outflow (%)	Convenience Total Available Spend Inflow (%)	Adjusted Convenience Total Available Spend (€)	Year	Comparison Total Available Spend - Excluding Bulky Goods (€)	Comparison Total Available Spend Outflow (%)	Comparison Total Available Spend Inflow (%)	Adjusted Convenience Total Available Spend (€)	Year	Comparison Total Available Spend - Bulky Goods (€)	Comparison Total Available Spend Outflow (%)	Comparison Total Available Spend Inflow (%)	Adjusted Convenience Total Available Spend (€)
2012	263,267,207	15.00%	5.00%	236,940,487	2012	225,709,906	10.00%	2.00%	207,653,113	2012	56,427,476	20.00%	1.50%	45,988,393
2013	264,978,555	15.00%	5.00%	238,480,700	2013	227,177,115	10.00%	2.00%	209,002,946	2013	56,794,279	20.00%	1.50%	46,287,337
2014	271,006,869	15.00%	5.00%	243,906,182	2014	232,345,438	10.00%	2.00%	213,757,803	2014	58,086,360	20.00%	1.50%	47,340,383
2015	279,980,109	15.00%	5.00%	251,982,098	2015	240,038,570	10.00%	2.00%	220,835,484	2015	60,009,642	20.00%	1.50%	48,907,859
2016	294,165,832	15.00%	5.00%	264,749,249	2016	252,200,579	10.00%	2.00%	232,024,533	2016	63,050,145	20.00%	1.50%	51,385,868
2017	309,484,349	15.00%	5.00%	278,535,914	2017	265,333,779	10.00%	2.00%	244,107,077	2017	66,333,445	20.00%	1.50%	54,061,758
2018	324,225,265	15.00%	5.00%	291,802,738	2018	277,971,779	10.00%	2.00%	255,734,036	2018	69,492,945	20.00%	1.50%	56,636,750
2019	339,684,551	15.00%	5.00%	305,716,096	2019	291,225,667	10.00%	2.00%	267,927,613	2019	72,806,417	20.00%	1.50%	59,337,230
2020	356,927,389	15.00%	5.00%	321,234,650	2020	306,008,667	10.00%	2.00%	281,527,974	2020	76,502,167	20.00%	1.50%	62,349,266
2021	368,585,927	15.00%	5.00%	331,727,335	2021	316,004,016	10.00%	2.00%	290,723,695	2021	79,001,004	20.00%	1.50%	64,385,818
2022	380,529,043	15.00%	5.00%	342,476,139	2022	326,243,345	10.00%	2.00%	300,143,877	2022	81,560,836	20.00%	1.50%	66,472,081
2023	392,766,837	15.00%	5.00%	353,490,153	2023	336,735,314	10.00%	2.00%	309,796,489	2023	84,183,828	20.00%	1.50%	68,609,820
2024	405,377,289	15.00%	5.00%	364,839,560	2024	347,546,777	10.00%	2.00%	319,743,035	2024	86,886,694	20.00%	1.50%	70,812,656
2025	417,569,862	15.00%	5.00%	375,812,876	2025	357,999,976	10.00%	2.00%	329,359,978	2025	89,499,994	20.00%	1.50%	72,942,495

Table 4.4 illustrates the adjusted retail spend for County Laois from 2012 to 2025. In adjusting the total available convenience retail spend, it has been projected that approximately 15% of the total annual available spend on convenience goods within the County will be lost to competing centres. In addition to the outflow referred to above, it has been projected that there will also be an inflow of retail spend. This has been estimated to be equivalent to 5% of the total annual available spend on convenience goods in County Laois. This inflow is primarily accounted for by passing trade and the use of the retail offering of the County by residents of neighbouring counties.

As with the total available convenience retail spend, the total available comparison and bulky goods retail spend must also be adjusted. In doing so it has been projected that 10% of the total comparison retail spend will be lost to competing centres, but that the inflow of spend will also be much lower, at just 2%. In adjusting the total available bulky retail spend, the outflow lost to competing centres has been projected to be more substantial, at 20%, while the inflow of retail spend has been projected as being just 1.5%.

4.4 Turnover and Floorspace Capacity

This section identifies the turnover and floorspace capacity which will be used to calculate the subsequent minimum additional floorspace requirements over the lifetime of this retail strategy. The defined average turnover rate per square metre of floorspace in each of the three categories has been illustrated in Table 4.6. This methodology uses the total expenditure available within the County for each category and divides it by the amount of existing floorspace within that category. The resulting figure has been used as the basis for the projection of future floorspace requirements, through a comparison exercise against the projected disposable income which is available within the specific category. The overall 2016 baseline figures indicate that 30.21% of all retail floorspace in the County is of the bulky goods retail category, while convenience and comparison retail floorspace account for 42.95% and 26.84% respectively.

Table 4.5: Current retail floorspace per retail category and estimated turnover per square metre for County Laois.

Retail Floorspace for Convenience and Comparison Goods and Turnover							
Laois County - Population Scenario [High] (M2F1 Recent)							
	Retail Floorspace Analysis					Retail Type Turnover	
	2016					2016	
Retail Goods Types	Gross Floor Area	Net Floor Area	Net Area as a % of Gross Area	Net Area as a % of Overall Total Net Area	Adjusted Total Available Spend (€)	Net Floor Area	Turnover Per M^2 (€)
Convenience	32,695	26,156	80.00%	42.95%	264,749,249	26,156	10,122
Comparison - Non-Bulky	20,429	16,343	80.00%	26.84%	232,024,533	16,343	14,197
Comparison - Bulky	23,000	18,400	80.00%	30.21%	51,385,868	18,400	2,793
Overall Total	76,124	60,899	-	100.00%	548,159,650	-	-

4.5 Additional Retail Floorspace Requirements

Table 4.6: Outline of the cumulative projected additional retail floorspace requirements per annum, as adjusted for vacancy, from 2016 to 2025.

Additional Retail Floorspace Requirements for Convenience and Comparison Goods - Adjusted for Vacancy												
Laois County - Population Scenario [High] (M2F1 Recent)												
Additional Floorspace Requirements Adjusted for Vacancy Rates												
	Convenience				**Comparison - Non-Bulky**				**Comparison -Bulky**			
Year	Total Annual Cumulative Floorspace Requirement	Additional Annual Floorspace Requirement	Vacant Floorspace	Additional Floorspace Development Requirement	Total Annual Cumulative Floorspace Requirement	Additional Annual Floorspace Requirement	Vacant Floorspace	Additional Floorspace Development Requirement	Total Annual Cumulative Floorspace Requirement	Additional Annual Floorspace Requirement	Vacant Floorspace	Additional Floorspace Development Requirement
2012	-	-	-	-	-	-	-	-	-	-	-	-
2013	-	-	-	-	-	-	-	-	-	-	-	-
2014	-	-	-	-	-	-	-	-	-	-	-	-
2015	-	-	-	-	-	-	-	-	-	-	-	-
2016	26,156	-	3,453	-	16,343	-	2,157	-	18,400	-	2,429	-
2017	27,518	1,362	2,091	-2,091	17,194	851	1,306	-1,306	19,358	958	1,471	-1,471
2018	28,829	1,311	780	-780	18,013	819	487	-487	20,280	922	549	-549
2019	30,203	1,375	-595	595	18,872	859	-372	372	21,247	967	-418	418
2020	31,736	1,533	-2,128	2,128	19,830	958	-1,330	1,330	22,326	1,079	-1,497	1,497
2021	32,773	1,037	-3,165	3,165	20,478	648	-1,977	1,977	23,055	729	-2,226	2,226
2022	33,835	1,062	-4,226	4,226	21,141	664	-2,641	2,641	23,802	747	-2,973	2,973
2023	34,923	1,088	-5,315	5,315	21,821	680	-3,321	3,321	24,567	765	-3,739	3,739
2024	36,044	1,121	-6,436	6,436	22,522	701	-4,021	4,021	25,356	789	-4,527	4,527
2025	37,129	1,084	-7,520	7,520	23,199	677	-4,699	4,699	26,119	763	-5,290	5,290

The methodology used to identify the future requirements for additional retail floorspace takes account of the existing baseline floorspace figure, including actual vacancy and an additional frictional vacancy, the calculated turnover per sq.m of retail floorspace, and the projected available retail spend. This is replicated across each of the three retail categories. The key steps taken include the following:

- The total cumulative floorspace requirements are calculated for each year using the turnover per sq.m and the available retail spend for each retail category;

- The baseline floorspace figure from the preceding year is subtracted from the total cumulative floorspace requirement to produce the additional annual floorspace requirement;
- The vacancy rate (as adjusted to allow for a 13.2%[15] frictional vacancy requirement) is deducted from the additional annual floorspace requirement to define the additional floorspace development requirement, which is the final output of the exercise.

[15] A vacancy rate of 13.2% was applied to each of the retail goods type categories, in line with the latest available figures from GeoView Q4, 2015 (GeoDirectory 2016)

4.6 Additional Retail Floorspace Requirement Summary

The initial baseline projections for floorspace requirements for the period to 2025 are set out in Table 4.7 above. These projections have been formulated to include adjustments for existing vacancy levels, as well as a frictional vacancy rate of 13.2% to ensure vital choice and competition in the market. Having regard to calculated demand, and identified vacancy, including the need to maintain a frictional vacancy rate, there is a requirement to plan for additional retail floorspace over the plan period.

The Retail Planning Guidelines advise that Retail Strategies should "*assess the broad requirement for additional development over the plan period… these assessments of future retail requirements are intended to provide* ***broad guidance*** *as to the additional quantum of convenience and comparison floorspace provision. They should not be treated in an* ***overly prescriptive*** *manner, nor should they serve to inhibit competition*". For this purpose, it is not the intention of this strategy to present figures as some form of cap on retail permissions in the County, but rather to guide the general scale of overall retail provision.

Significant consideration has also been given to the quality of existing vacant retail floorspace, including the prospective suitability of available floorspace to meet the future needs of retailers in the County. A summary of additional floorspace requirements over the period 2017-2023 for the convenience, comparison non-bulky and comparison bulky categories is set out in table 4.7.

Table 4.7: Summary of additional floorspace requirements over the 2017-2023 period

Total Additional Retail Floorspace Requirements - 2017-2023	
Retail Category	**Floorspace (m2)**
Convenience	8,767
Comparision - Non-Bulky	5,478
Comparison - Bulky	6,167

5.0 Retail Strategy and Policy Guidance

5.1 Retail Objectives and Policy Recommendations

This section of the strategy contains key retail objectives to encourage and accommodate future retail development in County Laois. It also sets out criteria for the assessment of future retail proposals, in accordance with the overall aims of the Development Plan and the requirements of the Retail Planning Guidelines (DoECLG) 2012.

5.2 Retail Strategy Overview

It is considered that the majority of future retail floorspace requirements will be provided within the commercial core of Portlaoise, taking account of its role as the Principal Centre in the County. The focus of providing new retail floorspace within Portlaoise underpins the 'town centre first' approach of the Retail Planning Guidelines and will also strengthen the competiveness of the County as a whole relative to other competing centres, reducing outward revenue leakage.

The spatial distribution of new floorspace in Laois will be guided by the County Retail Hierarchy. Issues of location and scale are of paramount importance to the assessment of future retail proposals in the County. An overtly prescriptive approach in defining the scale acceptable in different areas could inhibit potential improvements to the vitality and viability of smaller centres. Providing a broad framework for assessment purposes, the guidance in Table 5.1 provides a suitably broad framework for assessment purposes, while allowing sufficient flexibility to be applied on a case specific basis.

Table 5.1: County Retail Hierarchy

Hierarchy	Settlement Type	County Centre	Appropriate Retail Type
Tier I	Principal Town	Portlaoise	Major convenience and comparison
Tier II	Key Service Town	Portarlington	Large to Medium scale convenience and medium scale comparison
Tier III	Service Town	Abbeyleix, Mountrath, Stradbally, Graiguecullen, Mountmellick	Medium scale convenience along with small to medium scale comparison
Tier IV	Local Service Towns	Rathdowney, Durrow	Medium to small scale convenience, along with some limited comparison, including tourism related comparison
Tier V	Villages, Rural Serviced Settlements and Hinterlands	Villages, small settlements and the open country side of County Laois	Predominantly lower order convenience, but not excluding tourism related comparison

5.3 Strategies being implemented to address Specific Objectives

A number of strategies have been implemented or are currently being developed to address a number of the strategic objectives as outlined in the Laois County Retail Strategy 2011-2017. The strategic objectives of the previous Strategy sought to:

- *To reinforce and extend the high order retail functioning of Portlaoise as the Principal town enabling it to effectively reduce retail expenditure exported from the county to other centres;*
- *To support the role identified for Portarlington as Key service town by encouraging retail floorspace provision commensurate with its existing and anticipated growth;*
- *To sustain and enhance the vitality and viability of the central parts of settlements;*
- *To encourage an efficient, competitive and innovative retail sector;*

- *To promote a balanced spread of retail development opportunities across the County so that the wider shopping public in both urban and rural locations have convenient access to retail facilities;*
- *to seek to focus retail development in locations where the proximity of businesses facilitates competition from which all consumers are able to benefit and which maximises the opportunity to use a means of transport other than the car;*
- *To enhance the retail appeal and competitiveness of the County at the regional level by attracting retailers with national appeal and facilitating appropriate retail development;*
- *To manage the scale of retail proposals associated with new housing developments so that they will not, singularly or cumulatively, undermine the vitality and viability of central parts of settlements;*
- *To develop a joint retail strategy in consultation with Carlow Local Authorities for the Carlow Environs Area;*
- *To promote development in the older established parts of settlements and to explore the role of town centre management in assisting these areas.*

In an attempt to bolster the core retail function of Portlaoise town centre, Laois County Council is currently developing a Public Realm Strategy for Portlaoise (PPRS). The PPRS will develop and deliver the most effective presentation, management and development of the town's public realm, with particular reference to its historic town core and how it relates to new areas developed outside of it and to provide recommendations in relation to its future public realm.

This strategy will define in broad terms, the role of the public realm including:

- A 'Shared Vision' for Portlaoise's public realm consisting of public spaces, public buildings, parks, walkways, etc.
- Key urban spaces designated for enhancement,
- Pedestrian priority linkages between the old and new areas and
- The nature of restraint in remaining trafficked areas (speed reduction, space sharing, calming, lane restrictions, vehicle restrictions).

In addition to this, Laois County Council have adopted a revised Development Contribution Scheme in 2013 for the period 2013-2017. This has **significantly** reduced the charges payable by would-be commercial (including retail) developments in Portlaoise town centre and the town centres of all other main settlements in the county including Portarlington, Mountmellick, and Graiguecullen. For example, a 33% reduction is applied to charges if the development site is in the retail core of these towns, or if 5 new jobs are resulting from the project. In addition, a project (retail included) involving refurbishment of a derelict site is exempt from charges.

The Scheme has also introduced significant reductions relating to car-parking deficits. A car-parking shortfall charge is €5,000 if the development site is in a greenfield location, for example in the suburbs. However, this is reduced by 80% to €1,000 for a town centre location. Moreover, if the project has a shortfall of 1-5 spaces, no charge at all is applicable whereas if the shortfall is from 5-10 spaces, the charge is reduced by 50%.

A significant impediment to the potential growth of the many service and local service towns was the lack of appropriate infrastructure to facilitate future development. This impediment has been removed with the completion of major public foul drainage upgrades since 2011. The upgrades to towns such as Abbeyleix, Clonaslee, Durrow, Mountrath, Stradbally and Rathdowney will increase their attractiveness and capability to facilitate future residential, commercial (retail) and development.

In response to the objective which seeks to promote development in the older established parts of settlements, Laois County Council in association with the Durrow local development association (Durrow Development Forum) has recently completed a major overhaul of the Durrow town Square including various landscaping, amenity, traffic management and traffic calming works. This project will enhance the overall environment of the town and make it more attractive for residents, visitors and shoppers alike.

5.4 Retail Objectives

Having regard to the information presented above in relation to the health check analysis of the main urban settlements of Laois, the strategic objectives of the previous Retail Strategy and the additional floorspace requirements of the County between 2017 and 2023, a series of retail objectives have been devised. The primary purpose of these objectives will be to inform the development of policies which will protect and reinforce existing retail offering and look to develop additional retail services, in keeping with the role of the settlements of Laois as prescribed within the Laois Core Strategy and the Midland Regional Planning Guidelines.

Specifically, these objectives will look to inform policies that will:

I. Ensure that the retail needs of the County's residents are met as fully as possible within the County, taking due cognisance of the Regional Retail and Settlement Hierarchy;
II. Ensure that Laois possesses a clear policy framework that will inform both the conception and assessment of retail development proposals and help to guarantee that the strategic and local convenience and comparison retailing needs of the County are met;
III. To ensure the orderly development of future retail developments in County Laois, to keep the Retail Strategy under review, having regard to changes in the retail sector, and have regard to any such review in determining applications for retail development;
IV. Maintain, and where possible, enhance the existing competitiveness of the County's main centres by facilitating the development of additional retail floorspace where it can be clearly established that such development will result in tangible improvements to the retail offering of the County;
V. To acknowledge the importance of the principal, key service and service towns in providing a wide range of both convenience and comparison shopping in locations close to centres of population and larger, more remote rural hinterlands.
VI. To acknowledge the importance of local service towns, villages, rural serviced settlements and hinterlands in suburban and rural locations in meeting local shopping needs. To encourage the improvement to the designs of local retail centres in suburban areas and rural villages, including the provision of facilities in the public realm.
VII. Encourage reductions in floorspace vacancy, taking account of suitability, obsolescence, and the identification of alternative uses for existing vacant floorspace within the urban centres of the County;
VIII. To encourage and facilitate the re-use and regeneration of derelict land and buildings for retail uses, with due cognisance to the Sequential Approach as indicated in the Regional Planning Guidelines;
IX. To address leakage of retail expenditure from the County to competing centres by providing the means to strengthen the range and quality of its retail offer; and,
X. Engage with the relevant stakeholders and incentivise to ensure that the environmental attractiveness of town/local centres is enhanced.

In following these objectives, the goal of the Laois County Retail Strategy 2017-2023 will be to encourage the development of a healthy, vibrant and sustainable retail environment within the urban centres of Laois.

5.5 Retail Policies

Having regard to the objectives which have been outlined above, the following retail policies have been created. In formulating and adhering to these policies, Laois County Council will look to ensure that the development of all future retail floorspace is carried out in accordance with the requirements of the Retail Planning Guidelines. In addition, these policies, as part of the overall Laois County Development Plan 2017-2023, can be seen to form a single integrated and coherent strategic policy framework which will ensure that all development within the County is carried out in keeping with the ideals of sustainable development.

The policies outlined below have built on the policies of the preceding Retail Strategy and have been created with the aim of supporting the expansion of the retail offering of Laois in a sustainable manner. Therefore, these policies have been designed to encourage the reuse of vacant floorspace where possible. However, where the reuse or adaptation of vacant floorspace would have a negative impact upon a retailer's ability to compete, the construction of new retail floorspace would be permissible. Any application for the development of additional retail floorspace would require a detailed assessment to ensure that it is in keeping with the proper planning

and sustainable development of the area within which it is proposed and provided that it can satisfy the relevant criteria as established within this retail strategy and the Retail Planning Guidelines.

Policy 1: It will be Council policy to ensure that all retail development permitted accords with the relevant requirements and criteria as established within **the Retail Planning Guidelines for Planning Authorities 2012** and the Laois County Retail Strategy 2017-2023.

Policy 2: To ensure that the retail needs of the County's residents are met as fully as possible within the County, taking due cognisance of the Regional Retail and Settlement Hierarchy.

Policy 3: It is the policy of the Council to acknowledge the importance of town centres in providing a wide range of both convenience and comparison shopping close to significant centres of population.

Policy 4: It will be Council policy to permit retail development of a **size and scale which is appropriate** to the level of the town/settlement area, including its population, as defined within the County retail hierarchy. This policy will aim to consolidate and reinforce all existing retail enterprises within the County, and permit the development of additional retail floorspace where such development is deemed to be appropriate by Laois County Council.

Policy 5: When bringing forward proposals for the creation of new retail floorspace, the Council will require applicants to undertake **an assessment of the quality and suitability of existing and available floorspace** in the County relative to the circumstances of their proposals.

Policy 6: It will be Council policy to discourage new retail development if they would either by themselves or cumulatively in conjunction with other developments seriously damage the **vitality and viability of existing retail centres** within the County. This policy is aimed at protecting the existing vitality and service provision of the towns, and particularly the town centres, of Laois by preventing the development of retail enterprises in inappropriate locations or at a scale which would have a negative impact on retail competition within the County.

Policy 7: When assessing retail planning applications, it will be Council policy to **have regard to the findings of the capacity assessment** contained in the Laois County Retail Strategy 2017-2023, including the ability to counteract expenditure leakage. The onus will be on any applicant to demonstrate in a Retail Impact Assessment that the proposed floorspace is appropriate having regard to the quantum of floorspace required within that specific urban centre or settlement, in addition to evidencing all other relevant variables, as specified within the Retail Planning Guidelines.

Policy 8: It will be the policy of the Council to acknowledge **the role of Portlaoise as the primary retail centre** in the County and the focus for comparison retail development, subject to the criteria of the Retail Planning Guidelines 2012. In principle, this will not preclude the consideration of proposals in locations where mitigating and robustly justified special circumstances apply.

Policy 9: To ensure an equitable, efficient and sustainable spatial distribution of main centres across the County.

Policy 10: To encourage and facilitate the preservation and enhancement of the retail role of smaller villages and centres around the County.

Policy 11: In order to address the high vacancy levels recorded in settlements throughout the county, it will be Council policy to promote the **reuse of vacant retail floorspace**. Where no viable retail use can be sustained, alternative uses will be assessed on their own merits against the requirements of the proper planning and sustainable development of the areas within which they are located. This policy will be used to ensure that all proposals for the reuse of existing retail floorspace can be evaluated and the **proportion of vacancy can be reduced**. In addition, the identification and introduction of alternative uses for vacant retail floorspace will reduce the possibility of such floorspace falling derelict.

As a measure to address the associated negative impact of vacant properties, it will be condition of the grant of permission for any new or extended / refurbished units that at all times that the retail unit is not in active use,

the street front display area will be required to be provided with an attractive temporary display or professionally designed artwork affixed to the glass frontage. The temporary use of the retail space during such times for creative, cultural or community purposes will be encouraged; however, such change of use may require planning permission, and advice will be provided by the Council on a case by case basis in this regard.

Policy 12: It will be Council policy to look to encourage the **consolidation of other non retail based services within the town centres** of the County utilising existing vacant retail floorspace where necessary. This policy will aid in enhancing the vitality of town centres, encouraging them to maintain their role as employment locations in addition to reducing the proportion of vacant retail floorspace and recognising the value which non retail uses can contribute to the local economy through the provision of employment and general economic benefit.

Policy 13: It will be Council policy to continue to **improve the public realm of town centres** through the encouragement of high quality civic design, including but not limited to the provision of attractive street furniture, lighting and effective street cleaning. In addition, the introduction of business improvement district type initiatives to the principal settlements of Laois will be evaluated to establish the contribution that such proposals could make to the viability and vitality of town centres within the County.

Policy 14: It will be Council policy to undertake measures to **improve the accessibility of town centres** by developing a pedestrian and cyclist friendly environment, which improves safety and limits traffic congestion where possible. A particular focus of this policy will be the development of additional pedestrian crossings where necessary within Portlaoise Town centre, as well as other settlements within the County where high volumes of vehicular traffic can be seen to inhibit pedestrian movement.

Policy 15: It will be Council policy to **encourage and facilitate retail innovation**, where appropriate, to help diversify the County's retail profile and offer. Where possible, this retail innovation should be directed towards existing urban centres and settlements in the first instance, but will not preclude the development of retail enterprises in other locations, where the retail innovation in question cannot be sustained within any alternative location. Such development proposals will be assessed on their own merits, and must satisfy the assessment criteria of the Retail Planning Guidelines.

Policy 16: It will be Council policy to **require a Retail Impact Assessment** to be carried out for development proposals in the following general circumstances:

a) Proposals featuring greater than 1,000sqm of net floorspace for both convenience and comparison type developments in the Principal Town of Portlaoise;
b) Proposals featuring greater than 500sqm of net retail floorspace for both convenience and comparison type developments in all other settlements;
c) Or where the Planning Authority considers the development may impact on the vitality and viability of a town centre.

The Retail Impact Assessment shall include, at minimum, the criteria set out in the Retail Planning Guidelines 2012, and should demonstrate how it;

- Supports the overall strategy for town centres as set out in the development plan and not materially diminish the prospect of attracting private sector investment into one or more town centres;
- Does not cause an adverse impact on one or more town centres, either singly or cumulatively with recent developments or other outstanding planning permissions, sufficient to undermine the quality of the centre or its role in the economic and social life of the community;
- Does not diminish the range of activities and services that a town centre can support;
- Does not cause an increase in the number of vacant properties in the primary retail area that is likely to persist in the long term; and,
- Ensures a high standard of access both by public transport, foot and private car so that the proposal is easily accessible by all sections of society.

There may also be instances when the Council will require the assessment of proposals that fall below the floorspace thresholds stated above. In particular, this may apply to retail floorspace applied for as part of

residential schemes. In such cases, the Council may request the submission of a Retail Supporting Statement. Retail Supporting Statement should seek to demonstrate the capacity to build the new retail floor area, when viewed against the level of provision in the locality. For example, the assessment may reveal that there is a similar proposal nearby which would cater for the retail needs of the new residential population.

Policy 17: It will be Council policy to ensure that all proposed retailing projects and any associated improvement works or associated infrastructure such as parking facilities, individually or in combination with other plans and projects, are **subject to Appropriate Assessment** to ensure there are no likely significant effects on the integrity of any Natura 2000 sites[16] in the County.

5.6 Criteria for the Assessment of Future Retail Development

All applications for significant retail development should be assessed against a range of relevant criteria.

The Sequential Test

All applications for retail developments at edge-of-centre or out-of-centre locations will be subject to the sequential test, where the following applies:

The Retail Planning Guidelines state *that the order of priority for the sequential approach is to locate retail development in the city/town centre (and district centre if appropriate), and only to allow retail development in edge-of-centre or out-of-centre locations where all other options have been exhausted. Where retail development in an edge-of-centre site is being proposed, only where the applicant can demonstrate **and** the planning authority is satisfied that there are no sites or potential sites including vacant units within a city or town centre or within a designated district centre that are (a) **suitable** (b) **available** and (c) **viable**, can that edge-of-centre site be considered.*

*Where retail development on an out-of-centre site is being proposed, only in exceptional circumstances where the applicant can demonstrate **and** the planning authority is satisfied that there are no sites or potential sites either within the centre of a city, town or designated district centre or on the edge of the city/town/district centre that are (a) **suitable** (b) **available** and (c) **viable,** can that out-of-centre site be considered.*

Retail Impact Assessments

Retail Impact Assessments will be required for significant retail development where, due to its scale and/or location, it may impact on the vitality and viability of centres. These assessments will be prepared in accordance with the current Retail Planning Guidelines, which requires an applicant to address the following criteria and demonstrate whether or not the proposal would:

- Support the long-term strategy for city/town centres as established in the development plan, and not materially diminish the prospect of attracting private sector investment into one or more such centres;
- Have the potential to Increase employment opportunities and promote economic regeneration;
- Have the potential to increase competition within the area and thereby attract further consumers to the area;
- Respond to consumer demand for its retail offering and not diminish the range of activities and services that a centre can support;
- Cause an adverse impact on one or more centres, either singly or cumulatively with recent developments or other outstanding planning permissions (which have a realistic prospect of implementation) sufficient to undermine the quality of the centre or its wider function in the promotion and encouragement of the arts, culture, leisure, public realm function of the town centre critical to the economic and social life of the community;
- Cause an increase in the number of vacant properties in the primary retail area that is likely to persist in the long term;
- Ensure a high standard of access both by public transport, foot and private car so that the proposal is easily accessible by all sections of society; and/or

[16] In accordance with requirements under Article 6(3) and 6(4) of the EU Habitats Directive.

- Link effectively with an existing city/town centre so that there is likely to be commercial synergy.

Traffic and Transport Assessments

A Traffic and Transport Assessment (TTA) may be required for retail developments over a particular threshold (100sqm), as set out in the Traffic Management Guidelines 2003, and the Traffic Transport Assessment Guidelines 2007.

A TTA must examine the transport impacts of a proposed development, incorporating any subsequent measures necessary to ensure roads, junctions and other transport infrastructure in the vicinity of the development are adequate to accommodate the proposed development without causing additional delays to existing and future road based traffic. More importantly, TTA is important in demonstrating how to encourage a shift towards sustainable travel modes by those using the retail development in question.

5.7 Criteria for the Assessment of Different Development Types

Large Convenience Stores

The Retail Planning Guidelines set a 3,000sqm retail floorspace cap on food store development outside the four Dublin Authority areas, and the cities of Cork, Limerick/Shannon, Galway and Waterford. This strategy absorbs this requirement, which applies to new stores as well as to extensions to existing retail premises.

Retail Parks and Retail Warehouses

Retail warehouse complexes generally comprise an agglomeration of retail warehouses grouped around a common car park selling mainly bulky household goods. There is an expectation that most of the goods purchased can be transported off-site by the customer and because of this they are generally located on the edge or outside of the built-up urban area.

The key consideration in determining the distribution of floorspace is defining the appropriate and sustainable location for such retail activities. In accordance with the Retail Planning Guidelines there should be a presumption against the further development of out of town retail parks and a preference for sites in or adjacent to town centres to ensure the potential for linked trips and commercial synergy. Key criteria for the assessment of retail warehouse applications include scale and design of the development, appropriate vehicular access and the quantative need for such development. The Retail Planning Guidelines state that individual retail units should not be less than 700sq.m and not more than 6,000sq.m in size. These figures are gross floor area, including storage and garden centres. It is essential that the range of goods sold is restricted by planning condition to bulky household items as those defined within the RPGs such as household appliances, furniture and furnishings. The proportion of non-bulky goods should be limited to 20% of the not truly 'bulky' goods and should be clearly delineated on the planning application drawings.

Local Shops

Local shops play a vital role in catering for the daily or causal needs of nearby residents or of those passing by. Primarily convenience outlets, they provide a readily accessible service for basic goods, especially for the less mobile members of communities.

Where appropriate, local shops shall be recognised in the relevant parts of the Development Plan, with ample provision for the establishment of other neighbourhood shops and services made in the zoning of additional land for residential development, where necessary.

Retailing and Motor Fuel Stations

Local shops attached to petrol filling stations are a growing sector of the retail market. However, the size of the shop associated with any petrol filling station should take account of the fact that large shops can attract additional custom, large numbers of cars can cause disruption and the preferred location for retailing is in town

centres. The Retail Planning Guidelines state that when the size of such retail units is in excess of 100sqm the sequential approach should apply.

5.8 Monitoring and Review

The Retail Planning Guidelines advise planning authorities to regularly monitor trends in their areas, and update retail policies as appropriate. Recognising that the retail sector is one of the most dynamic sectors in the economy and that related trends, influences and information can change over time, the Council is committed to monitoring the contents of this strategy to ensure that:

I. The Retail Strategy and its baseline data are kept as up to date as possible;
II. Mechanisms that are in place to monitor the progress of the strategy are appropriate and fit for purposes; and
III. The Council can intervene in a positive and timely manner to address changing circumstances, as necessary.

6.0 Conclusion

The Laois County Retail Strategy 2017-2023 has been prepared for the Laois County Council in accordance with the requirements of the Retail Planning Guidelines, 2012. The policies which have been formulated as part of this Retail Strategy will be implemented as part of the Laois County Development Plan 2017-2023.

In compiling this Retail Strategy, due regard has been had to the most up to date information regarding population growth projections, the prevailing economic outlook and retail sales information. This has been used to provide a firm basis on which to inform future policy direction with the aim of enhancing and developing the retail offering of County Laois and the settlements therein.