Laois County Council
Comhairle Chontae Laoise

APPENDIX 4 :
Retail Strategy 2011-2017

Laois County Development Plan
2011-2017

Adopted 11th October 2011

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EXECUTIVE SUMMARY

This document sets out the Retail Strategy for County Laois. In accordance with the Retail Planning Guidelines for Planning Authorities 2005, local authorities are required to prepare retail strategies for their functional areas. The guidelines were issued as Ministerial Guidelines under Section 28 of the Planning and Development Act, 2000. Section 28 provides that planning authorities and An Bord Pleanala shall have regard to Ministerial guidelines in the performance of their duties.

The Retail Planning Guidelines [RPG's] were introduced in response to the ever increasing pressure for retail development in Ireland throughout the last decade in particular. In essence, they seek to create a policy framework to enable future retail development be accommodated in such a manner as is efficient, equitable and sustainable.

This Retail Strategy sets out the general strategic retail intentions and future retail land use policies of Laois County Council for the period of the current County Development Plan [2006-2012] and beyond to 2018. It reviews and updates the findings of the previous [2003] Retail Strategy which was carried out in the form of a variation to the then County Development Plan and follows on from the conclusions of the review of that strategy dating from 2006.

In summary, the Strategy consists of four main elements:

- *firstly, it presents an overview of all relevant baseline information as well as the statutory and strategic context governing retailing in County Laois,*
- *secondly, it examines the state of existing retailing provision throughout the county,*
- *thirdly, it quantifies how this level of provision is likely to change over the coming years and the demographic, expenditure and turnover context to such change,*
- *fourthly, it offers recommendations as to how this local authority can best deal with and manage the evolving retail environment in the interests of the proper planning and sustainable development of County Laois.*

A number of key statistics and trends have been identified in the course of preparing the Strategy.

Principally, there has been an estimated **45%** increase in the amount of net retail floorspace in County Laois since 2002. Moreover, if approved planning applications from 2006 onwards are included, there is the potential for a further **62%** increase in the retail quantum of the county. These statistics are **exclusive** of retail warehousing which has also witnessed substantial floorspace expansion especially in Portlaoise and Carlow Environs where it has been the predominant form of recent retail activity.

In general there is a fundamental link between retail activity and demographic growth. As expected, the county town of Portlaoise, which has the largest population, continues to dominate the Laois retail hierarchy, accounting for approximately **89%** of all approved retail floorspace including an additional shopping centre. Outside of Portlaoise, the level of approved retail floorspace in the county has been greatest in Portarlington, Mountmellick and Ballylynan. In this regard, retail supply is largely a market response to increased retail demand. Clearly, therefore, despite the retail strategy's laudable objective of seeking to provide a balanced spread of retail opportunities across the county, it would seem that the emerging retail environment and pattern of new build is driven mainly by demographics.

Conversely, for a variety of possible reasons, retail activity in centres like Mountrath, Rathdowney, Stradbally and Durrow has been virtually negligible since 2006.

An Bord Pleanala has refused pemission on appeal for a t**hird** [20,085 sq, metres] of all approved net retail floorspace in County Laois since 2006, including the Tesco Stores in Abbeyleix and Portarlington and the GAA site and another site on Old Knockmay Road in Portlaoise.

The recession is having major implications in terms of retail spending and the roll-out of approved retail space in County Laois.

For 2018, it is estimated that the net retail capacity for County Laois will be in the order of c. 20,903 square metres.

SECTION 1: INTRODUCTION

1.0 INTRODUCTION

1.0.1 The Forward Planning Section of Laois County Council has undertaken a review of the Retail Strategy 2003 as part of the preparatory process for the review of the Laois County Development Plan 2010. This Retail Strategy is informed by a report prepared by Braniff Consultants in 2006 which comprised of an update and review of the 2003 County Retail Strategy (see quote from plan).

1.0.2 Ideally, in order to allow for a degree of continuity in strategy formulation, the 2005 National Retail Planning Guidelines recommend that a review of the retail strategy should take place no less than every 6 years (see quote below).

'*Counties and Cities should regularly monitor trends and events in their area and update their policies accordingly at intervals of not less than six years*.' (paragraph 45, page 16, 2005 RPG).

'*Laois County Council commissioned consultants to prepare the Laois Retail Strategy in 2003. The Retail Strategy forms the basis on which the Planning Authority will formulate appropriate development plan objectives and policies for retail development in its area and will be used in the determination of applications for planning permission. A review of the strategy will be completed as part of the preparation of the Local Area Plans for Portlaoise, Portarlington, Mountmellick and Graiguecullen.*'

Para 4.26, page 37, Laois County Development Plan 2006-2012

1.1 BASELINE INFORMATION

1.1.1 As part of the review of the 2003 Retail Strategy and preparation of the 2009 Retail Strategy, the following baseline information was examined:

- Strategic and statutory planning policies influencing development.
- Existing population and population growth trends as provided in the Housing Strategy
- Existing and emerging retail floorspace
- Function, vibrancy and vitality of existing centres
- Statistical sources used to inform the future retail capacity within the county

1.2 STRATEGIC AND STATUTORY PLANNING POLICY

1.2.1 The following publications set the policy context for retail development and the preparation of a Retail Strategy:

I. Retail Planning Guidelines for Planning Authorities 2005
II. National Spatial Strategy
III. National Development Plan 2007-2012
IV. Regional Policy Review
V. Midland Regional Planning Guidelines 2004
VI. County Policy Review
VII. Laois County Development Plan 2006-2012
VIII. Laois County Retail Strategy 2003
IX. Portlaoise LAP 2006-2012
X. Portarlington LAP 2007-2013
XI. Mountmellick LAP 2007-2013
XII. Graiguecullen LAP 2007-2013

1.2.2 Since the 2003 retail strategy was prepared, more up to date statistics have become available . These include:

- Results of the 2006 Census
- National and Regional Population Targets

1.3 EXISTING AND EMERGING RETAIL FLOORSPACE

1.3.1 In order to establish the quantum of existing and emerging floorspace with planning consent in the county, a review of significant retail planning applications granted in Laois since the 2003 strategy was undertaken. Floorspace data has been updated through incorporating new floorspace that has been built and which is granted since the 2003 strategy was adopted.

1.4 HEALTH CHECKS OF EXISTING CENTRES

1.4.1 Health checks were carried out for all the major population centres in the county to determine the function, vibrancy and vitality of the existing centres within the county. An examination of the main competing centres and their respective county retail strategies also informed the direction of the strategy.

1.5 STATISTICAL SOURCES

1.5.1 The following statistical sources were used to provide a broad capacity assessment of the requirement for additional convenience and comparison retail floorspace:

- County Incomes and Regional GDP 2005 February 2008
- National Income and Expenditure – Annual Results for 2006, August 2007
- ESRI Midterm Review 2008 – 2015 May 2008
- Annual Services Inquiry 2005 , Oct 2007

1.6 OVERALL AIMS

1.6.1 In many respects, the issues to be addressed under this review relate to those matters identified in paragraph 36 of the 2005 National Retail Planning Guidelines. These are:

a) *Confirmation of the retail hierarchy, the role of centres and the size of the main town centres.*
b) *Definition in the development plan of the boundaries of the core shopping area of the town centres.*
c) *A broad assessment of the requirement for additional retail floorspace.*
d) *Strategic guidance on the location and scale of retail development.*
e) *Preparation of policies and action initiatives to encourage the improvement of town centres.*
f) *Identification of criteria for the assessment of retail developments.*

1.7 STRUCTURE OF REPORT

1.7.1 The structure of the remainder of the Retail Strategy reflects the overall objectives and is as follows:

Section 2: encompasses a review of strategic and statutory policies which have an influence on the development of County Laois.
Section 3: outlines the population trends and forecasts for the County and Region.
Section 4: presents a Health Check of main town centres and supporting local centres in Laois.
Section 5: provides an overview of competing centres and their retail strategies.
Section 6: quantifies the floorspace capacity in the County based on population and expenditure growth estimates, turnover ratio estimates, gross additional expenditure and future sources of retail sales.
Section 7: sets out the retail strategy, policies and objectives for Laois.

SECTION 2: POLICY CONTEXT

2.0 INTRODUCTION

2.0.1 This section examines how Portlaoise and County Laois are expected to perform in terms of development, settlement growth and retail provision within the strategic and statutory policy documents at the national, regional, county and sub county levels. This policy context is set out in the paragraphs below.

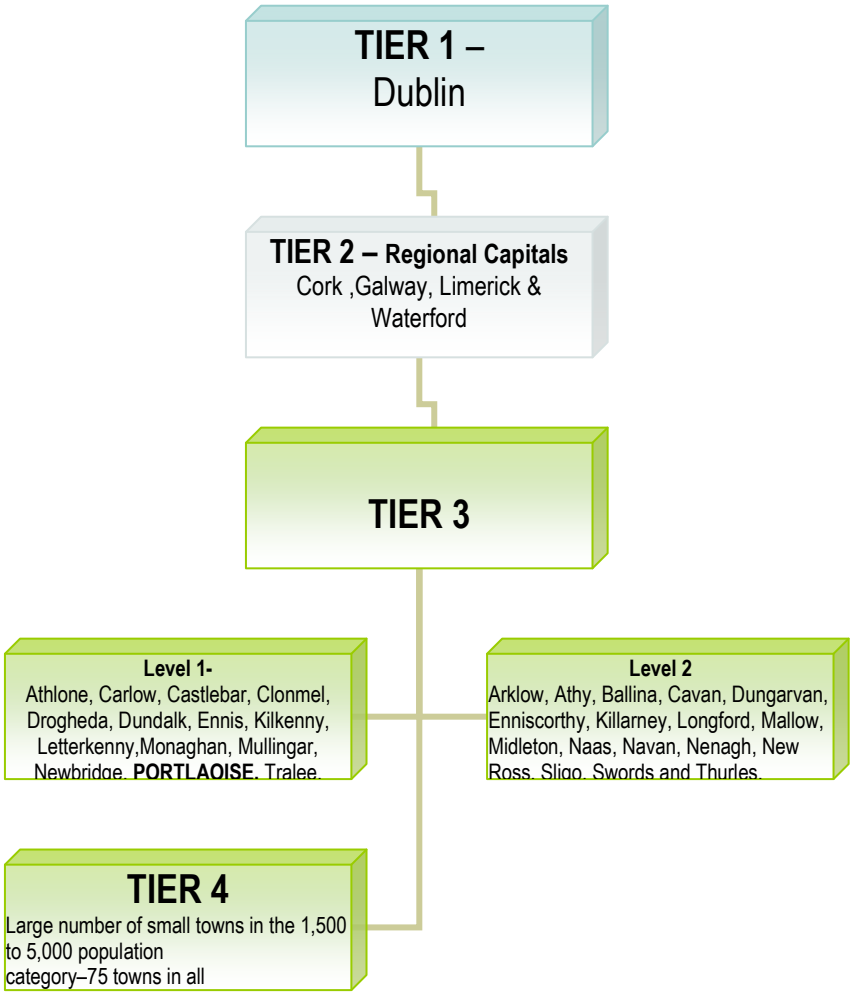
2.1 NATIONAL CONTEXT

2.1.1 This section outlines the relevant national planning and retail policies which will influence the preparation of the 2009 Retail Strategy. The relevant policy documents include:

- Retail Planning Guidelines for Planning Authorities 2005
- National Spatial Strategy
- National Development Plan 2007-2012

Retail Planning Guidelines for Planning Authorities 2005

Retail Hierarchy



Sequential Approach

2.1.2 The fourth objective of the Retail Planning Guidelines (para 2.9) is to support the continuing role of town and district centres. *This will assist in reinforcing the investment in urban renewal which has been made already. These established centres should be the preferred locations for developments that attract many trips. This policy will also support their role as centres of social and business interaction in the community. In order to achieve this objective the preferred location for retail development, should be within town centres, consistent with the requirement to achieve good access especially by public transport. If there are no development sites available within a town centre then the next preference should be a location on the edge of the town centre.*

2.1.3 *Only where there are no sites, or potential sites, within a town centre or on its edge, or satisfactory transport accessibility (including park and ride) realistically cannot be ensured within a reasonable period of time, should out of centre development be contemplated.*

Convenience Assessment

2.1.4 Large foodstores comprising supermarkets, superstores or hypermarkets are an accepted component of the retail hierarchy. They serve mainly the large weekly convenience goods shopping requirements of families. They require large clear areas of floorspace together with adjacent car parking as the majority (but not all) of families undertake their weekly bulk convenience shopping by car. The RPG's state that "*a floorspace cap of 3,500 square metres is to be applied in the Greater Dublin Area and 3,000 square metres elsewhere in the State". This cap will apply to the total net retail sales space of superstores and the convenience goods net retail sales space of hypermarkets delineated on application drawings.*

2.1.5 New developments can have an adverse impact on the vitality and viability of established town centres. This is a consequence of the competitive environment in which retailing operates. Though it is not the purpose of the planning system to prevent competition, proper planning and sustainable development includes promoting healthy town centres, in the public interest. Where new developments compromise this planning goal, they should be rejected.

2.1.6 In making an application for planning permission for retail development which local authorities consider to be large scale in relation to existing town centres, the onus is on the applicant to demonstrate compliance with the development plan and to show that there will not be a material adverse impact on the vitality and viability of any existing town centre. In submitting evidence in relation to retail impact the applicant shall address the following criteria and demonstrate whether or not the proposal would:

Table 1: Criteria to assess retail impact

- ✓ Support the long term strategy for town centres as established in the development plan and not materially diminish the prospect of attracting private sector investment into one or more town centres.
- ✓ 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.
- ✓ Diminish the range of activities and services that a town centre can support.
- ✓ 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.
- ✓ Link effectively with an existing town centre so that there is likely to be commercial synergy.

Development Plans

2.1.7 While Laois is not identified as a county requiring a detailed retail strategy nevertheless this Retail Strategy has had regard to the guidance provided in Para 36 of the Retail Planning Guidelines. This is outlined as the aims in Para 1.9 above of this proposed strategy.

2.2 NATIONAL SPATIAL STRATEGY

"Developing the full potential of each area to contribute to the optimal performance of the State as a whole — economically, socially and environmentally".

2.2.1 The National Spatial Strategy (NSS) sets out the vision and strategic framework for achieving sustainable and balanced regional development in Ireland. The NSS was launched in 2002 and embodies a 20-year spatial framework to achieve more balanced regional development in Ireland. The vision underlying the NSS is a better balance of social, economic, physical development and population growth between regions.

2.2.2 The NSS envisages thriving Gateway centres driving the development of their wider regions, including surrounding towns, villages and rural areas. The NSS summarises balanced regional development as:

2.2.3 Accordingly, this Plan will particularly focus investment around the NSS, especially around the network of the nine Gateways identified in the Strategy. The Plan will also support the concept of an urban-rural partnership by linking the focus on the Gateways with support for other urban centres and rural areas

2.2.4 Under the National Spatial Strategy, Portlaoise was designated a 'local capital' and a 'Key Transport Node' and' National Inland Port', providing a complementary role to the designated 'Gateway' Towns and Hubs and with the potential of creating a range of services and opportunities for employment. This 'designation' accorded Portlaoise a 'special status' and presented Laois County Council with an opportunity for economic expansion based on logistics activities, enterprise, commercial and retail activity.

2.3 NATIONAL DEVELOPMENT PLAN 2007-2012

2.3.1 The National Development Plan 2007-2012 also states that *"strategically positioned county towns and other large towns whose continued development must be facilitated so that they play an important role in ensuring that balanced development takes place within, as well as between, Regions. The further development of these and other similar locations will be encouraged through effective local planning and leveraging wider public and private investment".*

2.3.2 The regional policy approach will also embrace the role of other smaller towns, villages and rural areas with investment in improvements to access via the non-national roads network and rural public transport initiative, investment in water services, rural broadband, community services, housing etc. so that they can attract development and investment.

2.3.4 Towns, villages and rural areas need to be supported in the development of new areas of economic activity such as: local value added enterprise activities; tourism; local enterprise; services; and renewable energy to both complement the surviving elements of a restructured agri-business/natural resource sector and provide new employment opportunities.

2.4 REGIONAL CONTEXT

2.4.1 The regional authorities were established to implement the NSS at a regional level. Laois is located within the Midlands Region.

2.5 MIDLAND REGIONAL PLANNING GUIDELINES 2004

2.5.1 The Regional Planning Guidelines (RPG) for the Midlands (adopted in May 2004) provides planning policy guidance for the Midlands region, covering Counties Westmeath, Offaly, Laois and Longford.

2.5.2 The RPG provides population projections for the Midlands Region, based on data from CSO, 2001, along with the NSS regional projections used to stabilise inter-regional migration pattern derived from historically observed trends up to the year 1996. Assuming the adoption of a 'medium' variant in this Regional Planning Guidelines the estimated population for the Midland region by the year 2020 would grow to some 250,000. However, the accelerated growth envisaged by the National Spatial Strategy (for the Midlands Gateway) suggests an additional 50,000 people, representing a total estimated population of 300,000 in the Region by 2020. The RPG identifies a realistic achievable target population of 325,000, equivalent to 100,000 new additional residents by 2020. This has now been reduced to 321,450 having regard to recent socio-economic trends as explained in paragraph 3.2.9.

2.5.3 The RPG identifies the linked gateway of Athlone-Mullingar-Tullamore (along with principal towns of Longford and Portlaoise) as the focal point for attracting population as well as business/employment to the region. As these are established towns with existing infrastructure provision, and a range of functions, they are identified as being the most suitable to accommodate further levels of development and growth.

2.5.4 To provide for the anticipated future development and growth of the Midlands the RPG outlines three alternative development scenarios, as a means of accommodating the significant growth in population envisaged by year 2020.The three different scenarios include:

- **Continuation of current trends**–population growth will continue more predominantly in the eastern part of the region with settlement dispersal along the main transport routes from Dublin, in an east-west direction.
- **Emphasis on gateways**–concentration of the region's projected growth towards the linked gateway of Athlone-Mullingar-Tullamore.
- **Spatial distribution throughout Region**–assumption that population growth and economic development will be distributed widely across the settlement hierarchy.

2.5.5 The RPG adopts a development strategy based on the creation of five spatial interrelated development areas:

- **Central**– focusing on Midland gateway towns which have approximately one third of the region's current population.
- **Eastern –** areas closest to Greater Dublin Area and the associated road and rail corridors, who are experiencing greatest population growth.
- **Western –** parts of the region linked with Birr and close ties with the Mid-west.
- **Northern–** Longford and those areas associated with the wider North-west and Borders regions.
- **Southern –** including parts situated along the N7/N8 road and rail corridors and thus associated with Portlaoise.

2.5.6 The overall strategy for achieving RPG objectives aims to develop the urban structure and settlement hierarchy by promoting the growth of a range of distinct settlements. The hierarchy will be as follows:

- **Linked Gateway –** Athlone, Mullingar and Tullamore.
- **Principal towns** of Portlaoise (to south) and Longford (to north).
- **Key Service towns** – Birr, Edenberry, Granard and Portarlington – closely linked to the development of the gateway and principal towns.
- **Service towns** – serving a mainly local hinterland whilst supporting nearby gateway and principal towns, through consolidating growth.
- **Local service towns and villages** – provision of services for rural communities.

2.5.7 In relation to the current retail study, the 'central' development area concentrates on the linked gateway, and suggests that the population of this area will require growth of between 55,000 and 60,000 in the years leading up to 2020.

2.6 LOCAL CONTEXT

Laois County Retail Strategy 2003

2.6.1 Further to the recommendations of the Retail Planning Guidelines for Planning Authorities 2000, the Laois Retail Strategy 2003 sets out the general strategic retail intentions and future retail land use policy of the County Council for the duration of the prevailing County Development Plan in 2000. Having regard to the amount of existing retail provision, together with estimates of population increase, real growth in consumer expenditure and anticipated turnover levels of shops, the capacity to add to the retail base of County Laois was examined.

2.6.2 Based principally on a significant increase in population, which could see the population of County Laois swell from 53,000 in 1996 to almost 80,000 by 2008, it was estimated that retail floorspace provision in the County could more than double from its existing 40,000 net sq. m. to 88,000 net sq. m. As was evidenced by retail applications at that time, approximately half of that capacity for additional floorspace could have been consumed by the large retail warehouse proposals in Portlaoise.

2.6.3 Nevertheless, even assuming that all of those permitted and pending applications were to be built, it was estimated that County Laois would have still retained the capacity to develop an additional 7,500 net sq. m. of grocery floorspace and 16,500 net sq. m. of durable floorspace up to year 2008. Bearing the above capacity in mind and having regard to the requirement to provide strategic guidance on the location and scale of new retail build, the report made the following recommendations.

2.6.4 In terms of the grocery sector, the findings demonstrate that Portlaoise possesses the capacity to accommodate another superstore and that grocery provision in the smaller settlements should be reinforced in order to counteract the abnormal level of leakage to competing centres outside the County. This has been achieved through the construction and occupation of the Dunnes Stores Kyle Shopping Centre, a new Dunnes store in Rathdowney and a new Lidl store in Portarlingto*n.*In terms of durable shopping, the analysis demonstrates that there is scope to consolidate and expand durable provision in the small and large centres and to allow for the consideration of a degree of additional new build.

2.6.5 Within the context of the above, the Retail Strategy places an emphasis on achieving a balanced spread of retail opportunities within the settlements and on encouraging new retail developments to locate within and close to town centres.

Laois County Development Plan 2006-2012

2.6.6 The Laois County Development Plan was adopted on January 4th 2006. Chapter 7, the Enterprise and Employment chapter of the plan contains the council's aims and objectives relating to sustainable economic development and employment within the county. The following policies are set out in Chapter 7.

Table 2: Retail Policies Laois CDP 2006-2012

EE4 Retailing	***It is the policy of the Council to have regard to the Retail Strategy adopted by Laois County Council in 2003 and any subsequent review and the Retail Planning Guidelines for Planning Authorities, in determining planning applications for retail development.***
EE5 Primary Retail Centre	*It is 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.*
EE6 Town Centre	*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.*
EE7 Local Shops	*It is the policy of the Council to acknowledge the importance of the local shop in meeting the local shopping needs.*
EE8 Retail Warehousing	*Laois County Council will seek to achieve the following:* *• Make provision for new retail warehouse development in accordance with the scale of provision as envisaged in the Retail Strategy 2003;* *• Planning permission will be restricted to the range of goods referred to E436* *• Subdivision of units less than 700 sq. m. will not be permitted;*
New Neighbourhood centres	*Portlaoise and Portarlington have experienced considerable growth over the past 10 years. The town centres have not been able to accommodate the needs of the substantial population increases resulting in congestion and overtrading.*
EE9 District and Neighbourhood Centres	*It is the Councils policy:* *• To encourage and facilitate the development of appropriately located new district and neighbourhood centres to meet the needs of new centres of population;* *• To identify and zone, in Local Area Plans, appropriate locations for new district and neighbourhood centres within large established residential areas and where large scale residential development is planned.*
Discount Food store	*These are defined as single level self-service store normally between 1,000 and 1,500 sq. m. of gross floor space selling a limited range of goods at competitive prices, with adjacent car parking. Discount food stores provide an alternative choice of retailing to the community. Their customer catchments and retail offer is different to the mainstream superstores and supermarkets and their trade draw will be different.*

Portlaoise LAP 2006-2012

2.6.7 In relation to retail provision, the LAP outlines that It is the policy of Laois County Council to guide retail development, in accordance with the Sequential Approach, to enable the vitality and viability of the Town centre and neighbourhood centres be sustained and strengthened. The LAP contains a number of policies relating to transportation and traffic management in Portlaoise which seeks to enhance car parking and reserve corridors for relief roads to improve accessibility into the town centre. These are important prerequisites for the further development of the role of Portlaoise as the County Town.

Table 3: Retail Policies Portlaoise LAP 2006-2012

Core Retail Area	**It is the policy of Laois County Council to define the Core Retail Area of Portlaoise Town Centre to provide guidance on the application of the Sequential Approach. The Core Retail Area of Portlaoise Town Centre is illustrated as in Map 7.1**
Town Centre Zoning	The development of the Town centre is vital to the economic growth of Portlaoise. A new 'Town Centre' zoning is introduced in this plan. The Town centre zoning is introduced to help promote beneficial development into the Town core. It is the policy of Laois County Council to: - encourage new retail development to locate in the Town centre area; - encourage innovative development in the Town centre; - encourage the development of neighbourhood centres at the locations indicated on Map No 9.1; - encourage the redevelopment of derelict and 'Brownfield' sites within the Town; - ensure a good quality design in the development of new buildings; - encourage Retail Warehousing in the National Transport Node and Inland Port. The Planning Authority recognises the critical importance of maintaining and enhancing the vitality and viability of the urban core of Portlaoise and will promote an urban framework plan which will guide the redevelopment of the town centre core of Portlaoise and enhance the urban landscape of the town to create a vibrant place for people to work, shop, live and socialise. The guiding principles of this urban framework plan include the following: - reinvention of the physical environment of the town centre by investment in the public realm; - foster a sense of place by reinforcing the historical character and natural amenities of the area; - enhance urban integration of area north of Main Street with Main Street and south of James Fintan Lalor Avenue; - improvement of pedestrian linkages; - develop and enhance landmark nodes at the edge of the urban core to attract passing trade; - ensure that any development within the centre core contributes to the urban character of the town; - facilitating a mix of land uses – residential, retail, office, recreational/amenity, community, which will compliment and enhance the existing functions of the town centre; - relocation of the existing educational establishments from the urban core presents the opportunity to redevelop and reinvigorate the centre and achieves many of the principles of the urban framework plan;
Town Centre/ Core Retail Area	To protect and enhance the special physical and social character of the existing Town centre and to provide for new and improved Town centre facilities and uses. The purpose of this zone is to protect and enhance the special character of Portlaoise Town centre and to provide for and improve retailing, residential, commercial, office, cultural, public facilities and other uses appropriate to the centre of a developing Town. It will be an objective of the Council to encourage the use of buildings and backlands and especially the full use of upper floors, preferably for residential purposes. Warehousing and other industrial uses will not generally be permitted in the Town centre.

Portarlington LAP 2007-2013

2.6.8 In relation to retail provision, the LAP outlines that It is the policy of Laois County Council to guide retail development, in accordance with the Sequential Approach, to enable the vitality and viability of the Town centre and neighbourhood centres be sustained and strengthened.

2.6.9 The LAP contains a number of policies relating to transportation and traffic management in Portarlington which seeks to enhance car parking and reserve corridors for relief roads to improve accessibility into the town centre. These are important prerequisites for the further development of the role of Portarlington within the county retail hierarchy.

Table 4: Retail Policies Portarlington LAP 2007-2013

Retailing Policy	**It is the policy of Laois County Council to:** • **encourage and enhance the role of Portarlington as a retail and commercial centre serving a wide catchment area;** • **encourage consolidation of commercial development in the town centre area;** • **ensure that commercial development should compliment the function of the town centre and have regard to the existing town centre in terms of design, siting, heritage value and environmental character;** • **all applications for large retail development will be examined in the context of the Laois Retail Strategy 2003 and any subsequent revisions, and the Retail Planning Guidelines for Planning Authorities 2005;** • **the use of upper floors of commercial premises for residential purposes will be encouraged;** • **to protect the towns built heritage by;** • **provision of safe pedestrian ways;** • **appropriate landscaping schemes;** • **high standards of design;** • **quality material finishes.**
Town Centre Objectives	It is the objective of Laois County Council to: - prepare a master plan or enter into pre-planning discussions for the various back lands of the town; - centre where proposals for such sites emerge and where overarching master plan for the town centre and its back lands is not available in the life time of the plan; - consolidate the existing retail and commercial function of the town centre area; - encourage the opening up of the backlands to the east and west of the Main Street;

Mountmellick LAP 2007-2013

2.6.10 In relation to retail provision, the LAP outlines that It is the policy of Laois County Council to guide retail development, in accordance with the Sequential Approach, to enable the vitality and viability of the Town centre and neighbourhood centres be sustained and strengthened. The LAP contains a number of policies relating to transportation and traffic management in Mountmellick which seeks to enhance car parking and reserve corridors for relief roads to improve accessibility into the town centre.These are important prerequisites for the further development of the role of Mountmellick within the county retail hierarchy.

Table 5: Retail Policies Mountmellick LAP 2007-2013

Retail/ Commercial/Town Centre	**It is the policy of Laois County Council to:-** • **encourage and enhance the role of Mountmellick as a retail and commercial centre serving a wide catchment area;** • **encourage consolidation of commercial development in the town centre area;** • **ensure that commercial development compliments the existing town centre in terms of design, siting and function and does not prejudice the heritage value and environmental character of the town;** • **ensure that all applications for large retail development will be examined in the context of the Laois Retail Strategy 2003 and any subsequent revisions, and the Retail Planning Guidelines for Planning Authorities 2000-2006;** • **ensure the use of upper floors in commercial premises for residential purposes will be encouraged;** • **Enforce the overall objective of safeguarding the towns built heritage by encouraging environmental improvements in the town centre shopping area. The provision of convenient and safe pedestrian facilities through the town will be a priority (including disabled access) as will landscaping developments, and the requirement of high standards of design and finish of commercial development.**

Graiguecullen LAP 2007-2013

2.6.11 In relation to retail provision, the LAP outlines that It is the policy of Laois County Council to guide retail development, in accordance with the Sequential Approach, to enable the vitality and viability of the Town centre and neighbourhood centres be sustained and strengthened.

2.6.12 The LAP contains a number of policies relating to transportation and traffic management in Graiguecullen which seeks to enhance car parking and reserve corridors for relief roads to improve accessibility into the town centre. These are important prerequisites for the further development of the role of Graiguecullen within the county retail hierarchy.

Table 6: Retail Policies Graiguecullen LAP 2007-2013

Retailing Policy	It is the policy of Laois County Council:- • that all applications for large retail development will be examined in the context of the Laois Retail Strategy 2003 and any subsequent revisions, and the Retail Planning Guidelines for Planning Authorities 2005 and Carlow Retail Strategy; • to encourage and facilitate the development of the new district and neighbourhood centres in performing an important retail function for the local community subject to the protection of the residents amenities of the surrounding area; • to ensure the use of upper floors of commercial premises for residential purposes will be encouraged where possible; • to produce a joint co-ordinated Retail Strategy for Graiguecullen and Carlow Town within the lifetime of the plan.

2.7 ADJOINING COUNTY CONTEXT

2.7.1 Further to the review of the planning frameworks within County Laois it is also recognised that the relevant planning retail frameworks for Carlow Town Council (adjoining Graiguecullen) and Portarlington, Co Offaly should be considered given their proximity to two of the main population and retail centres within the county. The relevant documents examined are

- Offaly County Development Plan and Retail Strategy 2009
- Carlow County Development Plan and Retail Strategy 2009

SECTION 3:

POPULATION TRENDS AND FORECASTS

3.0 Introduction

3.0.1 The future demand for retail floorspace in County Laois is influenced to a large extent by projected population and personal income growth and therefore understanding national, regional and local population trends is important. This section examines the population considerations governing the preparation of the Retail Strategy in the light of the publication of the 2006 census findings as well as recent updates from the Midland Regional Authority and the Dept. of the Environment, Heritage and Local Government. The accompanying analysis will provide an important input to the capacity assessment of the requirement for additional retail floorspace in the County.

3.1 Population trends 1991-2006

3.1.1 The trend for the 2002-2006 period (see **Table 7**) reveals that population growth in County Laois (14 per cent) exceeded by almost 30% that for the midlands[1] region (11.6per cent) and by almost 50% that for the State as a whole (8.2 per cent).

Table 7: Latest population trends[2]

	County	%		%	Midlands	%		%
Year	**Laois**	**Change**	**Portlaoise**	**Change**	**Region ***	**Change**	**State**	**Change**
1991	52,314		8,360		202,984		3,525,719	
1996	52,945	1.2%	9,474	13.3%	205,542	1.0%	3,626,087	2.7%
2002	58,774	11.0%	12,127	28.0%	225,363	8.4%	3,919,203	8.2%
2006	67,059	14%	14,613	17.7%	251,664	11.6	4,239,848	8.2 %

Inter-Regional Population Change 1996-2006

3.1.2 According to **Table 8** growth occurred in all regions in all periods, with the rates of growth increasing in each of the three census periods from 1991 to 2006. There has however been considerable differences between the rates of growth between regions. In the 1991-96 period, the Dublin region grew faster than the State but since then its growth has been significantly below the national level. In fact, in the 2002-06 period, this region has the slowest growth rate in the country. The relative slowdown in the regions growth rate is highlighted by the fact that, between 1991 and 1996, it accommodated 32.8% of the national population growth but in the next inter-censal period of 1996-02 this had declined to 19.9%.

3.1.3 At the broadest level, the impact of Dublin has spread, most strongly, into the Mid-East region but also into surrounding regions, notably the Midlands and to a lesser extent, the South–East. The Midlands has shown the **most** significant change in its growth pattern, from being second to slowest in the 1991-96 period to being the **fastest** growing region over the 2002-06 period. The Midlands growth factor has been substantially above the State rate for the 1996 to 2006 period, although its rate of increase has been declining in relation to the State rate.

[1] ***Midlands Region: Counties Laois, Offaly, Longford, Westmeath.***

[2] ***County Laois, Portlaoise, Midlands Region & State 1991-2002***

3.1.4 Analysis at county level of the population growth data between 1991 and 2006 highlights that the eight counties adjacent to the GDA[3] [Louth, Monaghan, Cavan, Westmeath, Offaly, Laois, Carlow and Wexford] have witnessed particularly strong growth rates. For the 15 year period in question, these eight counties accounted for 7.3% of the overall national population increase. However, in the 2002-06 period, the eight counties accounted for almost a fifth [19.5%] of the national increase, a proportion only marginally below that of the Dublin region at 19.9%.

3.1.5 One conclusion to be drawn from these figures is the establishment, well beyond its traditional confines, of a commuter belt focused on Dublin. However, while commuting has played a major part in the recent expansion of Co. Laois, in the long term this is not considered sustainable for a variety of social and economic reasons Including congestion, time and energy cost, pollution and disruption of family and community life.

Table 8: Population growth rates 1991 to 2006 [% compound per annum]

Region	1991-96	1996 02	2002-06
Border	0.21	1.01	1.95
Dublin	0.63	0.99	1.38
Mid-East	1.32	2.91	3.58
Midlands	0.25	1.55	2.77
Mid-West	0.40	1.15	1.52
South-East	0.43	1.32	2.11
South-West	0.53	1.00	1.69
West	0.54	1.28	2.11
State	0.56	1.30	1.97

3.1.6 The above patterns of growth have been reflected in the percentage shares of the State population which have occurred in each of the regions. **Table 9** refers.

Table 9: Regional Shares [%] of State Poupulation-1991 to 2006

Region	1991	1996	2002	2006
Border	11.42	11.23	11.04	11.04
Dublin	29.08	29.18	28.66	28.01
Mid-East	9.23	9.58	10.5	11.22
Midlands	5.76	5.67	5.75	5.94
Mid-West	8.81	8.74	8.67	8.51
South-East	10.87	10.80	10.81	10.87
South-West	15.10	15.08	14.82	14.65
West	9.73	9.72	9.71	9.76
State	100.00	100.00	100.00	100.00

3.1.7 A notable feature of the data in Table 9 is that the GDA's* share of the State population increased up to 2002 but has effectively remained constant in the intervening period up to 2006. Nonetheless the impact of Dublin has

[3] Dublin and Mid-East regions combined

extended beyond the GDA into counties such as Laois and therefore one can conclude that the GDA data understate the consolidation of population growth which is focussed on the capital city. **Table 10** illustrates the percentage of regional population increase due to net in-migration during the most recent inter-censal period.

Table 10: Regional Population Increase due to net in-migration

Region	2006 population	Increase since 2002	% of increase due to net in-migration
Border	467,327	34,793	69%
Dublin	1,186,159	63,338	28.66%
Mid-East	475,026	62,401	65%
Midlands	251,380	26,017	70%
Mid-West	360,651	21,060	8.67%
South-East	460,474	36,858	63%
South-West	620,525	40,169	60%
West	413,383	33,086	72%

3.1.8 While the population increased in all of the regional authority areas between 2002 and 2006, the influence of net migration on overall regional growth varied, being greatest in the West followed closely by the Midlands.

Inter-County Population Change 2002-2006

3.1.9 **Table 11** indicates that the 14 per cent population growth in the county from 2002-2006 was the second highest in Leinster with County Laois, for the first time in recent decades, outperforming counties such as Dublin, Kildare and Wicklow, the traditional leaders in this regard. A number of factors are at play here. Spectacular economic growth, particularly in the construction industry, forms the main backdrop to the demographic trends occurring at county level over the last decade. Also significant from the Co. Laois perspective is the increasing influence of the greater Dublin commuter belt resulting from major upgrades to the inter-connecting road and rail links and the specific characteristics, most notably its high cost base, of the housing market in the capital.

3.1.10 This phenomenon has been responsible for a significant proportion of the population increase which has taken place in Portarlington, Portlaoise, Mountmellick and in the rural hinterlands of these towns. Moreover, the county has, until recently, been the favoured destination of much in-migration by foreign nationals many of whom found employment in the building sector. The table also includes the population data for North Tipperary covering the same inter-censal period on the basis that evidence is emerging of leakage from the western part of the county to centres like Thurles, Roscrea and Templemore.

Table 11 Population change by County in Leinster 2002-2006[4]

	Number of persons		
Location	**2002**	**2006**	**Percentage change**
Meath	134,005	162,831	21.5%
Laois	**58,774**	**67,059**	**14.0%**
Kildare	163,944	186,335	13.6%
Wexford	116,596	131,749	13.0%
Offaly	63,663	70,868	11.3%

[4] **ranked in terms of percentage growth rates**

Longford	31,068	34,391	10.7%
Westmeath	71,858	79,346	10.4%
Wicklow	114,676	126,194	10.0%
Carlow	46,014	50,349	9.4%
Louth	101,821	111,267	9.3%
Kilkenny	80,339	87,558	9.0%
Dublin	1,122,821	1,187,176	5.7%
Nth. Tipperary	61,010	66,023	8.2%
Province	**2,105,579**	**2,295,123**	**9.0%**
State	**3,917,336**	**4,239,848**	**8.2%**

Intra-County Population Change 2002-2006

3.1.11 Notwithstanding the overall upward trend, growth in population has not been evenly spread throughout the county. Portlaoise (which comprises a fifth of the county population) continues to maintain its position of primacy in the settlement hierarchy, growing by over 20% in the space of 4 years (see **Table 12**). However, this rate of increase was exceeded by other centres, albeit from relatively small bases to start with. For example, the population of Carlow environs grew by 110% and those of Ballylynan, Portarlington and Mountmellick increased by 75%, 59% and 21% respectively.

Table 12: Population growth of retail centres in County Laois 2002-2006[5],

Town	2002	2006	Percentage Change 2002-2006
Portlaoise	12,127	14,613	20.5%
Portarlington	2,756	4,395	59.5%
Mountmellick	3,361	4,069	21.0%
Environs of Carlow	1,199	2520	110.2%
Abbeyleix	1,383	1568	13.4%
Mountrath	1,331	1,435	7.8%
Rathdowney	1,111	1,212	9.1%
Stradbally	1,178	1,056	-10.4%
Durrow	717	811	13.1%
Ballylynan	430	754	75.3%
Clonaslee	538	501	-6.9%

3.1.12 By contrast, the rates of increase in other settlements are much smaller; Rathdowney recording an increase of 9%, and Mountrath 7.8% while Stradbally and Clonaslee both experienced actual population declines in the order of 10.4% and 6.9%.With the exception of the Stradbally figures, what is becoming apparent, in general terms at least, is a major divergence between the north and east of the county where the fastest growth rates are occurring and the west and south of the county which is experiencing much more modest growth if at all.

3.1.13 Focusing on the Rural Areas (of which there are five in Co. Laois), as the base unit for examining demographic change, a similar pattern unfolds. The population of Mountmellick Rural Area which contains the three

[5] **ranked by size of population in 2006**

largest towns in Co. Laois (Portlaoise, Portarlington and Mountmellick) increased by 16.4%, followed by Athy No. 2 Rural Area, which contains Ballylynan by 8.4%, while Slievemargy Rural Area, in which, Graiguecullen is located, saw its population grow by 28.5%. On the other hand, the most western/southern Rural Areas i.e. Roscrea No. 3 Rural Area and Abbeyleix Rural Area saw growth rates of only 7.6% and 5.7% each. In addition, within Roscrea No 3 Rural Area, 44.5% of its constituent townlands recorded population declines during this period.

3.1.14 Conversely the townlands exhibiting greatest population increase are almost exclusively in Mountmellick, Athy No. 2 and Slievemargy Rural Areas. Examples include Borris- population increase of 131%, Graigue Rural 71.5%, Portarlington South–54.9%, Graigue Rural-71.5%, Portlaoise (Maryborough) Rural–24% all of which are situated in close proximity to the largest urban centres in the county

3.1.15 While still an overwhelmingly rural county, the aggregate urban population is increasing. According to the 1996 census, 30.8% of the population lived in urban areas. By 2002 this had risen to 33.1% and reached 40.5% in 2006, representing an overall increase of 30% in 10 years. In the context of a declining agricultural base and net rural outward migration, the trend towards increased urbanisation is likely to continue, notwithstanding the recent downturn in the economy.

3.1.16 Within the town of Portlaoise, it can be seen from **Table 13** that all of the population increase has taken place in its environs a trend also evident in other similar sized centres both regionally and nationally and likely to continue for the foreseeable future.

Table 13: Population change within Portlaoise 2002-2006

Area	2002	2006	Percentage (%) change
Portlaoise Urban	3,482	3,281	-5.8%
Environs of Portlaoise	8,645	11,332	31.1%
Total	12,127	14,613	

3.2 Population Growth Forecast 2020: -Three Alternative Scenarios

3.2.1 Population forecasts are an intrinsic element of any medium to long term planning for Co. Laois. They indicate the estimated population of the county at a future point in time. By extension they will act as a guide regarding the amount of new infrastructural investment including retail facilities required to service that estimated future population.

3.2.2 By its nature, population forecasting is a difficult undertaking given the uncertainty of underlying factors such as general economic conditions, migration patterns and population mobility. This uncertainty has been greatly exacerbated as a result of the recent onset of a severe global and national economic recession which is predicted to last for the medium term at least. In the near future, Ireland faces negative to [at best] very low positive economic growth rates and relatively high levels of unemployment compared with the levels recorded since the mid 1990's. When and to what extent the national and wider global economies will return to a more favourable growth path in the future cannot be predicted with any reasonable degree of uncertainty though recent commentary from the ESRI and European Central Bank is encouraging.

3.2.3 The estimation of future population levels in the county can be based on either of [or an amalgam] of three different scenarios. These are:

- **Scenario 1:** a detailed analysis of recent demographics;
- **Scenario 2:** proceeding on the basis of the projections contained in a study specifically prepared to project future population levels carried out by consultants BSM;
- **Scenario 3:** accepting the most uptodate projections carried out by both the MRPG's and DoEHLG.

Scenario 1- A detailed analysis of recent demographics;

3.2.4 Based on the latest growth trends (see **Table 14**) the county could be expected to comprise a population of 72,571 by the year 20l2, 76,547 by 2016 and **80,741** by 2020. These projections are based on a per annum increase of 1.37% from the 2002 base population. The per annum percentage increase rate is derived from an examination of population trends during the six inter-censal periods since 1971.

3.2.5 Over the 35 year period between 1971 and 2006, the population of the county increased by 48.16% from 45,259 to 67,059-an annual rate of increase of 1.37%. Within this overall scenario, a number of diverging trends were evident. The largest proportion of the population growth took place during two periods: between 1971 and 1979 [4,677 persons, 10.3% overall, 1.28% per annum] and between 1996 and 2006 [14,114 persons, 26.65% overall, 2.66% per annum]. However growth rates for the 15 year period from 1981 to 1996 were negligible by comparison [1,774 persons, 3.46% overall, 0.23% per annum].

Table 14: Population trends for County Laois 1971-2006

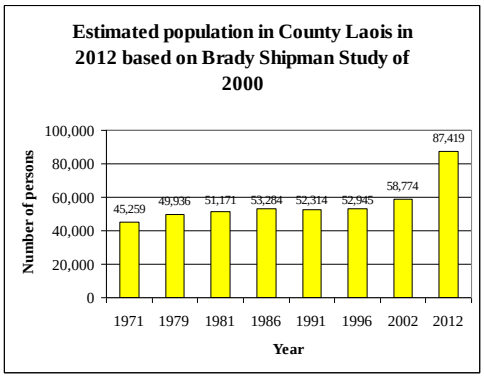
Year	County Laois	Numerical Change	Percentage Change
1971	45,259		
1979	49,936	4,677	10.3%
1981	51,171	1,235	2.47%
1986	53,284	2,113	4.1%
1991	52,314	-970	-1.8%
1996	52,945	631	1.2%
2002	58,774	5,827	11.0%
2006	67,059	8,285	14.0%

Scenario 2-Population Projections to 2020 based on BSM report

3.2.6 This refers to population projections estimated for the year 2020 in a report entitled '*Strategic Study on Population Expansion'*, prepared by Brady Shipman Martin for Laois County Council. In paragraph 4.5 of this document it states that '*the most prudent approach is to plan for a total population of 87,419 by the year 2012 and about 120,000 by around 2020.*' See Chart 1.

3.2.7 These estimates are now considered to be excessively optimistic bearing in mind the vastly changed socio-economic circumstances facing the country and which have already filtered down to county level. As far as County Laois is concerned, this is most manifest in the virtual collapse of the house construction sector to which much of the population growth in the county was linked and a consequential fall-off of in in-migration and its replacement by net out-migration. Accordingly it is virtually certain that the BSM projected population figure of 87,419 will not be attained by 2012 which is only 3 years away and very unlikely that the second figure will be reached by 2020 either. To do so would necessitate an increase in the order of 52,941 [78.9%] over 11 years-a per annum rise of 4,812 from the 2006 Census population of 67,059.

Chart **1**



Scenario 3-Population Projections to 2020 based on MRPG's and revised DoEHLG Projections, January 2009

3.2.8 A third option in estimating the future population for the county is to carry out a critique of recent projections from the Midland Regional Authority and the DoEHLG, the latter of which are virtually right up to date. The MRPG's published in 2004 provided a figure of 325,00 for the region by 2020. The working paper of January 2007 uses a figure of 340,000. This revised figure was taken from "Table 6 – Regional NSS Projections – High" of "Discussion Paper: The 2006 Census and the Regional Planning Guidelines, DoEHLG, Sept. 2006" which projected a population of 339,272 by 2020. This was rounded in the working paper to 340,000. In February 2007 the DOEHLG issued Circular letter SP1/07 'Revised National and Regional Population Targets to 2020'. This included a figure of 333,000 for the Midlands Region, 8,093 in excess of the original MRPG's total. Following on from discussions with the DoEHLG, it was considered acceptable to leave 340,000 as the 2020 target figure of which the share for County Laois was set at 85,133.

Table 15: DoEHLG Revised Regional Population Targets[6]

Region	2008	2010	2016	2022-Low/High Range
Border	492,500	511,000	552,700	595,000-611,400
Dublin	1,217,800	1,256,900	1,361,200	1,464,200-1,504,500
Mid-East	514,500	540,000	594,600	639,700-657,200
Midlands	266,800	275,600	297,300	317,100-325,00
Mid-West	371,900	383,800	427,200	462,300-475,000
South-East	487,800	507,900	542,200	580,500-596,500
South-West	644,600	667,500	737,100	795,000-816,900
West	426,100	442,200	484,700	521,400-535,700
State	4,422,000	4,584,900	4,997,000	5,375,200-5,523,000

3.2.9 As illustrated in **Table 15**, the deteriorating socio-economic climate has led to further revisions of the regional figures and by extension the individual County tallies. In January 2009, the DoEHLG pulled back on its 2007 projections-it now sets a 2022 low/high population range for the Midlands at 317,100-325,800 or a median figure of 321,450. This is more or less in line with the original MRPG's prediction of 2004 and represents a drop in percentage terms of 5.45%. Applying this to the initial County Laois 2020 population projection of 85,133 gives an amended figure of **80,494**, This is a variation of just 247 from the trends-based population projection of 80,741 as set out in section 2.5. A 2020 population projection of **80,000** is therefore set.

[6] *These projections relate to the following years : 2008, 2010, 2016 and 2022, January 2009*

3.3 Population Projections

3.3.1 For the purposes of this exercise, urban centres in County Laois are taken to include all settlements with a base population of in excess of 200 persons in 2006. There are 16 such settlements in County Laois and the population projections for each are set out hereunder. The settlements are ranked in terms of size of base population in 2006 with the county town Portlaoise in first place and Newtown-Doonane placed sixteenth.

Table 16: Population Projection

Table 7: Population Projection 2008, 2012, 2016, 2020						
Region	**2002**	**2006**	**2008**	**2012**	**2016**	**2020**
Portlaoise	12,127	14,613	15,013	15,835	16,702	17,617
Portarlington	2,756	4,395	4,515	4,762	5,023	5,298
Mountmellick	3,361	4,069	4,169	4,397	4,638	4,892
Graiguecullen	1,199	2,520	2,589	2,731	2,881	3,039
Abbeyleix	1,383	1,568	1,611	1,699	1,792	1,890
Mountrath	1,331	1,435	1,474	1,555	1,640	1,730
Rathdowney	1,111	1,212	1,246	1,315	1,387	1,463
Stradbally	1,178	1,056	1,085	1,145	1,208	1,274
Durrow	717	811	834	880	929	980
Ballylynan	430	754	775	818	863	911
Clonaslee	538	501	515	544	574	606
Borris-in-Ossory	379	488	502	530	559	590
Ballinakill	328	430	442	467	493	520
Castletown	289	314	323	341	360	380
Emo	220	225	232	245	259	274
Newtown-Doonane	245	222	229	242	256	271
TOTAL	**27,592**	**34,613**	**35,154**	**37,206**	**39,564**	**41,735**

3.3.2 As with the county population projections, the urban settlement projections are based on a per annum increase of **1.37%** from the 2006 base population. The per annum percentage increase rate is derived from an examination of population trends during the six inter-censal periods for County Laois since 1971. This approach is considered sufficiently robust based on the following assumption. For the base years of 2002 and 2006, Portlaoise makes up approx. 21.2% of the total county population. Assuming this correlation remains the same would result in a town population of 16,960 by 2020 which is just 657 different to the projection based on the 1.37% increase medium. Basing the projection solely on the average per annum increase throughout the most recent inter-censal period of 2002-06 [this represented the height of the Celtic Tiger era during which the population grew by 17.7%] it is felt be overly optimistic and skew the figures accordingly. In general, the projections indicate that the population for each urban settlement will grow by approx. 20% over the 15 year period between 2006 and 2020.

SECTION 4:

QUALITATIVE ASSESSMENT

4.0 INTRODUCTION

4.0.1 This section provides a county-wide account of retail activity since the preparation of the last Retail Strategy in 2003. The concept of vitality and viability is central to sustaining and enhancing town centres. As defined in the RPG:

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

4.0.2 Vitality and Viability highlight the relative strength and success in the retail hierarchy. This will depend on many factors, including the range and quality of activities in a centre, its mix of uses, its accessibility to people living and working in the area and its general amenity, appearance and safety. These indicators are used to determine the health of a town or village centre. As part of the Retail Strategy 2009, a series of health checks were undertaken for each of the main urban centres within the county. These include:

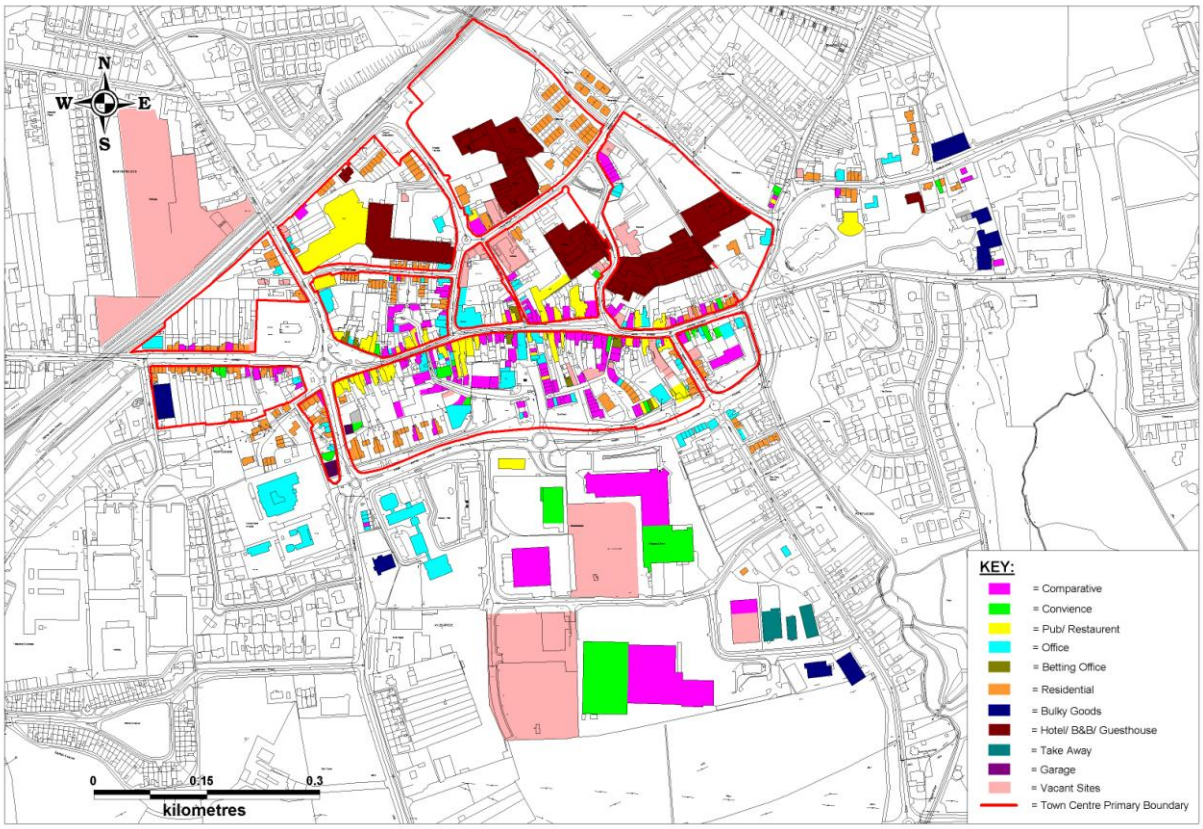
Table 17: County Retail Hierarchy

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

4.0.3 A health check assessment essentially analyses the strengths and weaknesses of town centres. The retail planning guidelines give indication as to the factors that should be considered when assessing their state of health. In summary these include

I. Diversity of uses
II. Accessibility
III. Environmental Quality
IV. Level of vacancy
V. Action programmes

4.1 PORTLAOISE TOWN



Diversity of Uses

4.1.0 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 hectic 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%. While all parts of the town have witnessed new residential development, it has been particularly concentrated north of the town centre along Ridge 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 [up to recently] 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.

4.1.1 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, Telecom Eireann, 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. 3,000 people registered as unemployed on the live register.

4.1.2 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 appointment of an Arts Officer and Tourism Officer to further develop this niche market.

Accessibility

4.1.3 Portlaoise is located at the intersection of the Dublin-Cork/Limerick National Primary Routes [N7/N8] and the cross-country Mayo/Longford/Wexford National Secondary Route [N80]. In addition, the M7 Motorway now extends from the Portlaoise By-Pass to Dublin resulting in a journey time to the capital [and by extension Dublin Port and Dublin Airport] of approx. 1 hour. Completion of the outstanding sections of the M7 and M8 schemes will further improve the accessibility of both Portlaoise and County Laois from the west, south and north.

4.1.4 In terms of rail communications, three strategic rail corridors converge at Portlaoise though early morning commuter services to Dublin are too infrequent according to passengers. In addition, the town was chosen by Iarnrod Eireann as the location for its national maintenance and service centre situated in the southeastern 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.

4.1.5 The Portlaoise By-Pass which opened in 1997 has been of major benefit to the town. Not alone has there been a 65% reduction in through traffic on what were already severely congested streets, the improved accessibility from both a regional and national perspective has also boosted the overall business environment of the town. However, congestion is still a feature of the town centre area as well as the Dublin Road, Ridge Road and Stradbally Road and will remain so pending full delivery of a planned orbital route around the town.

4.1.6 The unique centrality 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.

Environmental Quality

4.1.7 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.

4.1.8 The town is relatively free from litter having finished 12TH in the IBAL anti litter league in 2008. 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 recent 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 the main streets.

Current Retail Trends

4.1.9 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 to a large extent 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 contributary factors. The Laois Shopping Centre containing Penneys and Tesco as its anchor in addition to newly opened Dunnes, Lidl and Aldi Stores and retail warehousing are all based in Kylekiproe.

4.1.10 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 an overhead bridge and a pedestrian crossing, navigating James Fintan Lalor Avenue continues to be a major issue for would be shoppers going from Kylekiproe back to Lyster Square and Main Street or vice versa. Ultimately, it is hoped that with the imminent departure of the schools [with their extensive curtilages] from Tower Hill and Fitzmaurice Place to the new campus planned for Borris Road, extensive development opportunities will arise in the traditional town centre, thereby redressing the balance to some extent at least.

Table 18: Major Retailers in Portlaoise and their locations

PORTLAOISE TOWN CENTRE				
Main Street				
Gerry Browne Jewellers	*All Flowers*	*Shaws*	*Black Jack Clothing*	***Nationwide Cellular***
The Clothes Line	*J Bergin Jewellers*	*OLoughlins Medical Hall*	*All Occassions Flowers*	***The Office Centre***
Shaws Dept Store		*News Link*	*Streetwise - Clothes*	***Budget Travel Shop***
Doyles Shoes	*Donohoes Plumbing Centre*	*Jolita Clothing*	*Decos Clothing*	***Kearns and Cuddy Clothing***
M Dunne Grocer	*Tom Tailor - Clothing*	*Hughes Pharmacy*	*Erre esse - Clothing*	***Gannons Pharmacy***
Flynns Clothing	*Tree of Life Gifts*	*Tresures Gifts*	*Empire Records*	***Herb House***
Smaointe	*Anthem Music*	*Adams Chemist*	*Frames and Art*	***Sivan Gifts***
Alo Donovans electrical	*Donovans Grocers*			
Lyster Square				
Mulhalls	*Millers Hardware*	*Extravision*	*Browne Vegetable Shop*	***Brownes Jewellers***
Easons	*Heatons*	*Euro Shop*	*All Books*	***Grahams Toymaster***
New Faze	*Sports shop*	*Blossomtime*	*Shoe Fabulous*	***The Hogan Stand Butchers***
Fruit and Nut Shop	*Laois Pharmacy*	*Travel Shop*	*Blinds Shop*	
Hinds Square				
Sweater Shop	*Design options*	*Billi G*	*Goodwins*	
PORTLAOISE REMAINING TOWN CENTRE				
Portlaoise Shopping Centre				
Pennys	*Tesco*	*Lifestyle*	*Jeanscene*	***poundshop***
Planet Auto	*Cribben Butchers*	*photoshop*	*Trax Records*	***Unicare pharmacy***
The Kyle Centre				
Dunnes Stores	*Argos*	*Elverys*		
Kylekiproe				
Lidl, Aldi				
PORTLAOISE EDGE OF TOWN CENTRE				
Parkside				
Superquinn				
Centre Point Mountrath Road				
Gings Hardware				
Lismard – Timahoe Road				
Homebase	*Heatons*	*Petmania*	*Mothercare*	***Halfords***
PORTLAOISE – OUT OF TOWN				
Mountmellick Road				
Eurospar				
Kilminchy				
Spar				

4.1.11 The town's total floorspace at the time of the Laois County Retail Strategy 2003 was estimated at 22,363 sq. metres. Since then, the 2006 Retail Strategy Review notes that a significant quantum of retail floorspace has been given planning consent. New retail floorspace has been accommodated/approved at the following places:

- Kyle Shopping Centre, Kylekiproe (approximately 8,185 sq. ms net) anchored by Dunnes Stores;
- The Minch Norton Maltings site adjacent to the rail line and the N80 Mountmellick Road (9,965 sq. ms. net);
- Laois Shopping Centre redevelopment off James Fintan Lalor Avenue [18,840 sq. ms. net initially but reduced in subsequent application by 842 sq. ms. to 17,998 sq. ms. net],
- The former Tretorne Factory, Kylekiproe (11,214 sq. ms. gross) anchored by Aldi;
- Togher Interchange (10,194 sq. ms.gross) for retail warehousing (bulky goods);
- Parkside Shopping Centre, Abbeyleix Road anchored by Superquinn with approximately 5,500 sq. ms. net retail floorspace; and
- a new neighbourhood shopping centre at the Fairgreen on the N80 Mountmellick Road and in Summerhill.
-

4.1.12 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 19 – Recent Retail Planning History 2004-2010 (Portlaoise)

Ref No	Applicant	Description	Floor Area sq. (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	Under Construction
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
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
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	Under Construction

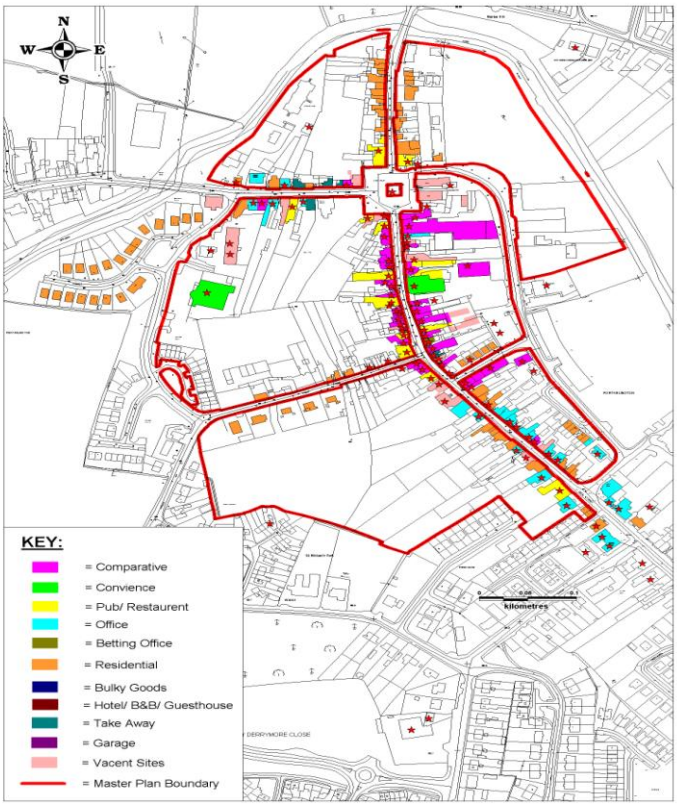
Vacancy Levels

4.1.13 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 vacancy levels in the town centre are relatively low.

Health Check Conclusion

4.1.14 The Health Check assessment indicates that Portlaoise is, by far, the chief shopping destination in County Laois. It has a wide range of convenience and comparison retailing, financial institutions and service providers, signifying that it is a healthy, vibrant and vital town centre. Going forward, attention needs to be focused on combating the declining fortunes of the traditional high street shopping area.

4.2 PORTARLINGTON



Diversity of Uses

4.2.0 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 start of this decade. In 2002, the County Laois part of the town had a population of 2,756. By 2006 this had reached 4,395 representing an increase of nearly 60% or 15% per annum. 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.

4.2.1 The main employment sources in the town are the Odlums milling plant on Station Road, SIAC Butler Engineering on Lea Road, the enterprise park at Clanmaliere 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. 2035.

Accessibility

4.2.2 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.

4.2.3 Regarding rail linkages, Portarlington is on the intercity network serving Cork, Kerry, Limerick, Galway and Dublin. As a result, daily commuter services to Dublin are far more frequent than in Portlaoise. A major expansion of its carparking facility adjoining the local station has recently been carried out by Iarnrod Eireann. 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.

Environmental Quality

4.2.4 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.

4.2.5 The new Leisure Complex on Link Road is a welcome addition to the town as are the Derryonce 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.

Current Retail Trends

4.2.6 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, Goodwins, Mullaneys Pharmacy, McConvilles Supervalue, Centra., Brackens and Mooneys. The immediately adjacent Inner Relief Road is also being developed for retail space provision including Honans Pharmacy and Matthews while a Lidl store and another Centra store were opened in suburban locations on Canal Road/Station Road in 2006.

4.2.7 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 i.e Sandy Lane development.

Table 20– Recent Retail Planning History 2004-2010 (Portarlington)

Planning Ref No	Development	Floor area–net sq. ms.	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**
05/804	Retail unit [same as in 04/1186]	129	No
04/788	McConville Super Valu	31	No
04/794	McConville Super Valu	240	No
06/405 supersedes	McConville Super Valu	794	Yes

both 2004 files on same site.			
07/1014	Tesco store	2,180	No-**Refused**
07/1515	Retail element of large office development	336	No
07/2382	Household/clothes retail sales area-amendment of 03/1684	1,608	No

Vacancy Levels

4.2.8 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 are relatively low at present.

Health Check Conclusion

4.2.9 The Health Check assessment indicates that Portarlington is trading well. It has a mix of convenience and comparison retailing, financial institutions and service providers, signifying that it is healthy, vibrant and vital town centre. For the most part, retailing activity is concentrated in the town centre though there are a number of approved developments [not yet developed] in outlying areas such as Ballymorris.

4.3 MOUNTMELLICK

Diversity of Uses

4.3.0 Mountmellick is the third town of County Laois and saw a 21% increase in its population from 3,361 in 2002 to 4,069 in 2006. 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.

4.3.1 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 haemhorraged a large amount of jobs. The town accommodates primary and secondary schools providing educational and community uses for the town and its hinterland. Mountmellick is the only urban centre outside Portlaoise to have Town Council status. In this regard, 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.

Accessibility

4.3.2 Mountmellick is located in the northwest of the county at the intersection of the R423, R422 and the N80 approximately 13 km south of Tullamore and 7 km northwest 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 development] were refused by An Bord Pleanala in 2004.

Environmental Quality

4.3.3 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.

Current Retail Trends

4.3.4 The convenience retail offer within the town of Mountmellick is largely provided by a number of independent stores such as Costcutters. Mountmellick is also serviced with a number of comparison shops of which the biggest is Shaws located on the main street. However given the limited offer it is assumed that much of the population's middle and higher order comparison shopping is met by Tullamore and Portlaoise. The following table indicates the retail planning history for the town of Mountmellick since 2004.

Table 21: – Recent Retail Planning History 2004-2010 (Mountmellick)

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

Vacancy Levels

4.3.5 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.

Health Check Conclusion

4.3.6 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.

4.4 RATHDOWNEY

Diversity of Uses

4.4.0 Rathdowney is located in the southwest of the county approximately 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 Protestant Church, and the River Erkina. The town of Rathdowney is classified as a Secondary Settlement under the County Development Plan 2006-2012 with a population of 1,212 in 2006, an increase of 9% since 2002 which reflects the west/east divide in population growth rates in County Laois.

4.4.1 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.

4.4.2 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 has established a strong retail and commercial presence serving a wide hinterland and attracting consumers from outside Laois.

4.4.3 The main employers in Rathdowney include Meadow Meats, Dunne's Stores, Brand Central, Supervalu, Midland Hardware and Local Banks. There are also a range of Services in situ including Solicitors, Accountants, Doctors, Beauticians, Hairdressers, Public Houses and Small Shops providing employment in the town.

Accessibility

4.4.4 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 recently opened 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.

Environmental quality

4.4.5 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 which was prepared and endorsed by the elected members in 2009 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.

Current Retail Trends

4.4.6 Rathdowney has experienced considerable retail development for a town of its size since the last retail strategy. The opening of a Dunnes Stores and expansion of Super Valu in the town centre has increased the offer of both convenience and comparison shopping. Some smaller comparison shops also exist within the town centre. In addition, the town has the benefit of a Retail Outlet Centre which offers a large range of comparison goods. At the same, a number of traditional retail outlets on Lower Main Street have closed and this is a matter of concern for the local authority. The following table summarises the retail planning history of the town over the past 6 years

Table 22– Recent Retail Planning History 2004-2010 (Rathdowney)

Planning Ref No	Development	Floor Area
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

Vacancy Levels

4.4.7 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. With regard to vacancy within Rathdowney, there are a number of vacant units located within the town centre, mostly along Main Street. The Council is actively pursuing these sites under the derelict site legislation.

Health Check Conclusion

4.4.8 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 ands strengthened in order to further support the surrounding population in the provision of top up shopping need and local services.

4.5 MOUNTRATH

Diversity of Uses

4.5.0 Mountrath is classified as a County Town Centre in the Retail Hierarchy of the Laois Retail Strategy 2003. 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 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. There are also a range of Services including Doctors, Beauticians, Hairdressers, Public Houses, Garages and Small Shops providing employment in Mountrath. Small commercial areas have developed on the Roscrea Road and Portlaoise Road outskirts of the town.

Accessibility

4.5.1 Mountrath is located on the 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.

Environmental Quality

4.5.2 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, landscaped area beside Seamus Burke's, the planted bed at Anything Goes and the Failte sign in box hedging on the Dublin Road. Additional landscaping has been carried out in the Quaker Park. There are many new individual houses and estates in the town and these are generally well finished. Existing estates are also generally well maintained in particular St. 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.

Current Retail Trends

4.5.3 The majority of the towns 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.

Vacancy Levels

4.5.4 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.

Health Check Assessment

4.5.5 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.

4.6 ABBEYLEIX

Diversity of Uses

4.6.0 The town of Abbeyleix is classified as a Secondary Settlement under the County Development Plan 2006-2012, with a population of 1568 in 2006. 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. There are a number of major employers in Abbeyleix, these include the Supervalue, Clelands, First Ireland Spirits, District Hospital, Banks and Credit Union. There are also a range of Services including Solicitors, Accountants, Doctors, Beauticians, Hairdressers, Publican Houses and Small Shops providing employment in Abbeyleix.

Accessibility

4.6.1 Abbeyleix is located approximately 14 kilometres from Portlaoise on the 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.

Environmental Quality

4.6.2 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, Fr Breen Park and the sensory gardens are available in the town centre.

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

Current Retail Trends

4.6.4 The majority of the town's convenience shopping on offer is mainly provided by Costcutters and a large Supervalue 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 for much of their convenience and comparison shopping needs. The following table indicates the retail planning history for the town of Abbeyleix.

Table 23 – Recent Retail Planning History 2004-2010 (Abbeyleix)

Planning Ref No	Development	Floor Area	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

Vacancy Levels

4.6.5 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. However there is a low level of vacancies prevailing in the town centre at present. .

Health Check Conclusion

4.6.6 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 ands strengthened in order to further support the surrounding population in the provision of top up shopping need and local services.

4.7 DURROW

Diversity of Uses

4.7.0 There are a number of major employers in Durrow, these include the Durrow Castle, Dunnes Garden Nurseries, The Castle Arms Hotel. There are also a range of Services including Doctors, Beauticians, Hairdressers, Publican Houses Garages and Small Shops providing employment in Durrow. The town also has its own credit union and Bank of Ireland which provides financial services for both the town and the surrounding hinterland.

Accessibility

4.7.1 Durrow is located at the intersection of the 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 recent 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.

Environmental Quality

4.7.2 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 been in-use as a 24-bed Country House Hotel. The traditional townscape character is well maintained and the majority of the retailers have retained the traditional shopfronts. However, new residential developments – at various scales, on the south (N8 to Cork) and eastern (N77 to Kilkenny) approach roads- have 'extended' the influence of the village out into its rural surrounds. However these developments to date remain reasonably contained and no loss of the village's focus has resulted. The new estates such as Seandoire and Derrywood Estates are also well maintained

4.7.3 On approach to the town from Dublin, 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.

Current Retail Trends

4.7.4 The majority of the town convenience shopping is mainly provided by The Stores and the Gala shop in the village. Comparision shopping floorspace is quite limited, therefore local residents travel to nearby Abbeyleix, Portlaoise and Kilkenny city for their shopping requirements.

Vacancy Levels

4.7.5 There is currently some vacancy within the village centre.

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 ands strengthened in order to further support the surrounding population in the provision of top up shopping need and local services.

4.8 STRADBALLY

Diversity of Uses

4.8.0 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 Stradbally stretches from the sixth century when a monastery was established close to the town. 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.

4.8.1 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 an annual music festival since 2004 which the promoters aim to continue given the appropriate nature of the venue at their disposal. This will contribute to the economic and social growth of the village and promote its location as both a tourist and events venue.

Accessibility

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

Environmental Quality

4.8.3 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. Renovation work is proposed for the Market House and Court house, as these are very important and significant buildings in the town. It is the wide market street which gives the town its uniqueness.

4.8.4 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.

4.8.5 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.

Current Retail Trends

4.8.6 The majority of the towns convenience shopping ion offer is mainly provided by a newly opened Super Valu on the Main street. There is no comparison shopping within the town centre. Given the limited retail offer it is assumed that many residents currently travel to Portlaoise or Carlow for much of their convenience and comparison shopping needs.

Table 24 – Recent Retail Planning History 2004-2010 (Stradbally)

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

Vacancy Levels

4.8.7 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. However there is a low level of vacancies prevailing in the town centre.

Health Check Assessment

4.8.8 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.

4.9 GRAIGUECULLEN - CARLOW ENVIRONS

Diversity of Uses

4.9.0. Graiguecullen forms the western environs of Carlow Town, across 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) are currently being constructed and occupied.

Accessibility

4.9.1 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.

Environmental Quality

4.9.2 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.

4.9.3 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.

Current Retail Trends

4.9.4 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 25: – Recent Retail Planning History 2004-2010 (Graiguecullen)

Ref No	Surname	Description	Floor Area - sq.m. (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
08/1474	Redhill Properties	Extend previously approved warehouse development to be used for clothes retailing	**1,474**	Off Carlow Northern Relief Road

Vacancy Levels

4.9.5 Recently a number of units have become vacant e.g. 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.

Health Check Assessment

4.9.6 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 have a negative impact on the Carlow town core retail area.

4.10 BALLYLINAN

Diversity of Uses

4.10.0 Ballylynan village is located in south-east County Laois in close proximity to the Carlow/Kildare border, approximately 24 kms from Portlaoise on the N78 National Secondary Route between Athy and Castlecomer. It is the fastest growing village in County Laois based on CSO data from 2002-2006 when its population grew from 430 to 754, an increase of 75%. With the exception of Carlow Environs this represents the highest percentage growth rate of any settlement in Co. Laois. 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 including retail outlets and public houses is found.

4.10.1 Today the village consists of both long established and more recently developed residential areas, three convenience retail outlets, petrol station, four public houses, Post Office, takeaway, Roman Catholic church and cemetery, national school, amenity area, Garda Station, community hall, health centre, with a limited library facility and a GAA pitch. A Centra store has recently opened for business in the village while there are valid planning permissions for additional retail units as well.

Accessibility

4.10.2 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.

Environmental Quality

4.10.3 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. 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.

Current Retail Trends

4.10.4 A total of 1,318 sq. m's. of net retail space has been permitted in Ballylynan since 2006 of which a Centra store of 512 sq. m's. 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 26 – Recent Retail Planning History 2004-2010 (Ballylynan)

Planning Ref No	Development	Floor Area Sq. Ms.	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

Vacancy Levels

4.10.5 At present, the vacancy level is generally low. This however may change when [and if] the approved retail units are developed and come to the market.

Health Check Assessment

4.10.6 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 assuming that the majority of the approved retail space [which includes a substantial amount of comparison type] will actually be developed.

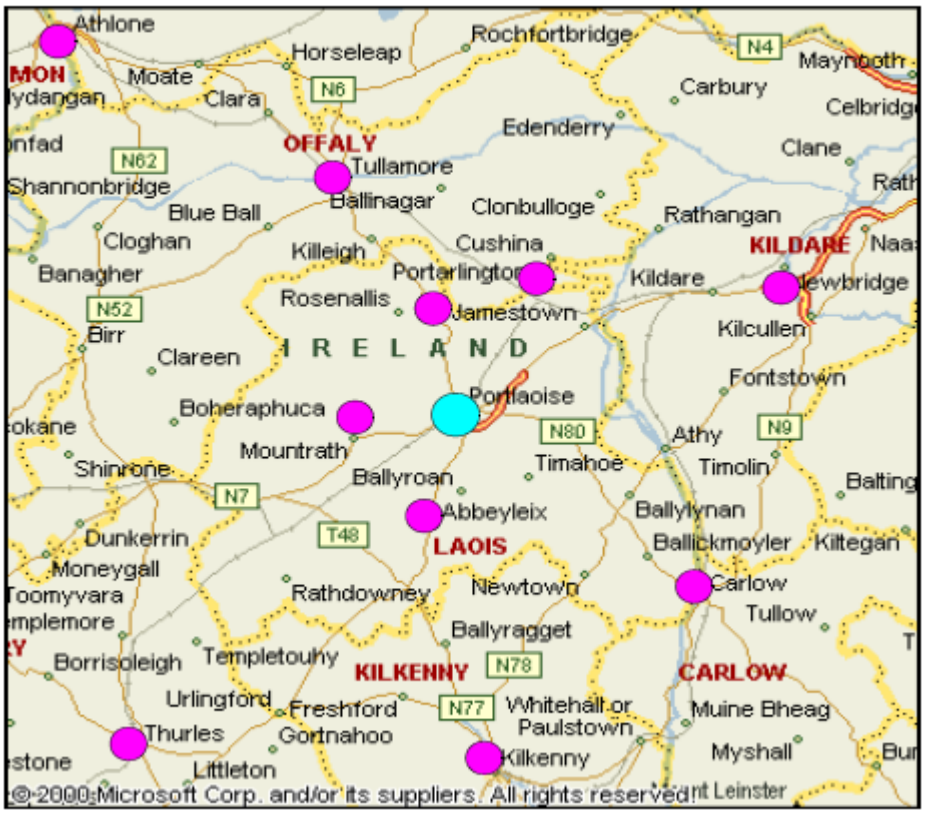
SECTION 5:
QUANTITATIVE ASSESSMENT OF COMPETING CENTRES

5.0 INTRODUCTION

5.0.1 As retail centres become stronger they tend to attract more expenditure from each others catchment. It is therefore necessary to ensure that policies and objectives are tailored to strengthen and protect the function of Co. Laois in order to sustain its competitiveness and attractiveness as a key shopping destination. The following paragraphs provide an overview of the centres that are likely to compete with Co. Laois These overviews are based on information provided for each centres retail strategy.

- Athlone;
- Thurles;
- Tullamore;
- Carlow ;
- Kilkenny City & Environs;
- Newbridge
- Grater Dublin Area

SETTLEMENT CONTEXT MAP – COMPETING CENTRES



5.1 ATHLONE

5.1.1 Athlone town centre functions as the main retail centre serving County Westmeath as well as parts of neighbouring Counties Roscommon, Galway and Longford. Along with the other principle town of Mullingar, it dominates the Westmeath retail hierarchy.

5.1.2 Athlone has good provision of main convenience goods shopping, with Tesco supermarkets at the Golden Island and Athlone Shopping Centres. There is also the Dunnes supermarket, and discount food stores operated by Aldi and Lidl (on Dublin Road). This existing convenience provision will be supplemented by the new major town centre development currently under construction.

5.1.3 There is modern quality comparison retailing on offer in Athlone, with large multiples such as Dunnes, Texas, Argos, Penney's, Eason and others (primarily in the Golden Island Shopping Centre). Local independent traders remain in the town, such as the Burgess department store and other small specialist stores. There is an IMC multiplex cinema situated adjacent to the Golden Island centre. The new Athlone town centre scheme (Gallico) will offer significant opportunites for large multiples to enter Athlone, through provision of four major department store anchor units.

5.1.4 The distribution of the majority of bulky goods shopping floorspace is more towards the periphery of the town to the north and east, with Woodies DIY and others trading from the N6 Kilmartin Centre (on Dublin Road) as well as B&Q at the Arcadia Retail Park. In addition, Ganly's of Athlone hardware warehouse is located on Roscommon Road to the west of the town. Athlone town contains over 46% of the retail floorspace of County Westmeath. At present the town accommodates some 47,764 sq m of gross retail floorspace of which 17,588 sq m is comparison (37%), 10,582 sq m is bulky goods shopping (22%) and 12,030 sq m is convenience goods (25%). There is further 7,614 sq m of floorspace (16%) noted as vacant at this time.

5.2 THURLES

5.2.0 Thurles Town is the second of the County's **Level 2 Tier 2 Major Town Centres** in the Regional Hierarchy**,** under the North Tipperary County Retail Strategy 2003. Thurles is a relatively self contained Centre and has an extensive catchment area, largely as a result of its distance from the Limerick Metropolitan Area. The town is performing well in terms of its retail offer but there is leakage to centres in South Tipperary such as Cashel and Clonmel. The town provides a wide range of shops, particularly convenience shops, to meet the needs of the residents, workers and visitors. The town centre also provides an important sense of place and community identity, and in addition to shopping facilities, the town hosts a mixture of services, tourist and leisure facilities.

5.2.1 The emphasis of the Draft Thurles Town and Environs Development Plan 2009-2015 is to protect and reinforce the role and viability of the town centre. Liberty Square, Cathedral Street and Friar Street contain the main historic properties, which are the focal point for the development of the commercial product in Thurles

5.2.3 Despite general improvement in shop-fronts, there has been a gradual increase in unsightly advertising, erection of unauthorised shutters, some examples of street clutter and the removal of architectural details (such as sash windows) which are important to the historic character of the town. The accumulation of a number of small breaches of planning can have a detrimental effect on the character and appearance of the town centre.

5.2.4 Under the Retail Strategy for North Tipperary, it is the policy of the Council to promote and encourage major enhancement of retail provision in Thurles. In accordance with the *Retail Planning Guidelines for Planning Authorities 2000,* North Tipperary County Council produced a County Retail Strategy (CSR) in December 2003. Arising out of that study Thurles Town Council has produced Town Centre Strategy for Thurles town that puts forward a clear vision for the town, identifies the issues/weaknesses in current town centre policy, and presents a clear strategy towards achieving the stated vision.

5.3 TULLAMORE

5.3.0 Tullamore, with Mullingar and Athlone, is part of the Midlands Linked Gateway. It attracts considerable trade from within County Offaly and parts of adjoining counties, while also attracting visitors, some of whom visit the town's various tourist attractions. Tullamore occupies a prime geographical location that is further enhanced by its setting on the Tullamore River and the Grand Canal. The town may be considered to have tourism potential, which is yet to be realised. While there have been improvements in recent years, the appearance of the town to the visitor is affected by some prominent areas of poor environmental quality and appearance, including empty properties, building fabric and aspects of dereliction.

5.3.1 The growing significance of conference and related business to Tullamore is noted with facilities such as those at Tullamore Court and Bridge House increasing their role in this regard.Tullamore is increasingly capitalising on its central location, focusing on events such as Fleadh Ceoil na hEireann, the Tullamore Show and the National Ploughing Championship.

5.3.2 Despite the prominence of the Tullamore River and Grand Canal, and signs of (mainly residential) riverside development, the redevelopment potential of this area has still to be fulfilled. This would be assisted through improved linkages between these areas and key focal points in the core town centre and shopping area.

5.3.4 The traditional shopping area is concentrated along Columcille Street, with further activity in O'Connor Square, High Street and Bridge Street area (including the Bridge Centre). This area also extends to Patrick Street, Main Street and parts of Harbour Street, Kilbride Street and Church Street. The Grand Canal and Tullamore River are important physical features and form the boundary of central Tullamore. This area has a traditional streetscape that is much in keeping with other market towns of a similar scale. There are a number of multiple retailers in the town centre, including Dunnes Stores and Lidl, which are key anchors. The town also has a cinema complex (Omniplex) within the Bridge Shopping Centre. There is additional retail and commercial activity at the Tullamore Shopping Centre. (Dunnes Stores) on Church Road, and along the Portarlington Road at Cloncollog, where the town's retail park and adjacent units are home to retailers such as Tesco Ireland, Aldi Ireland, Atlantic Homecare, DID Electrical, Harry Corry, Argos Extra and others.

5.3.5 The main thoroughfares through the town centre are frequently congested, with Harbour Street, Henry St./O'Carroll St and Church Street being particularly affected. This also includes circular traffic movement along the town's Western Relief Road. The town centre offers a pedestrian-friendly environment in which to undertake shopping and leisure activities and trips. A major upgrade of footpaths in the town centre was completed in 2007.

5.3.6 Car parks can be found throughout central Tullamore with ample provision through an estimated 500 off-street and 850 on-street parking spaces. Off-street car parking is of varied quality and some facilities, such as the multi-storey car park on Main Street remain under-used. In terms of service provision, public transport accessibility to Tullamore is reasonable.

5.3.7 The town is designated as a principal location served by a choice of national and regional services run by Bus Eireann linking to major destinations such as Dublin, Galway, Sligo, Limerick and Waterford, as well as intervening towns in the Midlands and beyond, including Athlone, Edenderry, Birr, Ferbane, and Daingean etc. There are also a number of taxi operators trading locally in Tullamore and the town environs. Tullamore is also served by an Irish Rail station to the south-west of the town centre, on the Western Relief Road. Tullamore offers a daily passenger service to Athlone, Clara, Portarlington and Kildare, with onward services to Dublin, Galway, Roscommon, Castlebar and Westport. However, bus services in particular do not appear to be well developed.

5.3.8 In Tullamore, the future vitality and viability of the town centre will be linked to its ability to adapt to changing consumer trends and needs, no more so than in the identification of a range of sites to be brought forward and made available for retail and associated mixed use development. This will be critical for Tullamore to grow as part of the NSS 'Linked Gateway' and help meet the needs of its increasing population. At the same time, there needs to be continuing

improvement in the centre of Tullamore, where there are some signs of trade deterioration and where heavy traffic congestion, movement and parking may be hindering its retail prosperity. The ongoing rejuvenation and vitality of the town centre is seen by many consultees as being vitally important in securing its longer term future.

Table 27: Net Retail Floor space in Tullamore [7]

Convenience (sq.m.)	Comparison (Sq.m.)	Retail Warehousing (sq.m)	Total
12,467	14,606	8,915	35,988

5.3.9 The quality and offer of both convenience and comparison retailing is below what would normally be associated with a town the size of Tullamore. Market share was estimated to be 94% in the catchment and 6% leakage from the catchment for convenience goods. While for comparison goods market share within the catachement was estimated at 79% retention in the catchment and 21% leakage from the catchment.

5.4 CARLOW

5.4.0. Carlow is designated as a **Level 1 Tier 3** centre in the RPG national retail hierarchy and is a County Town. At 2006, the town and environs had a population of 20,724. It experienced significant population increases of 23% between 1996 – 2002 and 12.1% between 2002 – 2006 which were well above the national and regional averages over both of these timescales. The higher population growth is a reflection of Carlow's closer proximity and accessibility to Dublin and the town's location on both national road and rail corridors. The SERPG indicate in its settlement strategy that Carlow has the potential to accommodate a population of at least 28,000 by 2020.

5.4.1 The Carlow Town Retail Study, published in February 2005, indicates that total floorspace in Carlow Town was 32,873m2. The total comparison floorspace (mainstream comparison and retail warehousing), which is critical in terms of competitiveness, was approximately 40% that of the City and Environs. Large new developments that have helped to increase the competitiveness of Carlow in recent years include Hanover Retail Park (or Carlow Retail Park) (12,635m2 gross) anchored by Woodies DIY (6,016m2 gross) and the Fairgreen Shopping Centre (14,000m2 gross). The latter is anchored by Tesco and has outlets such as Heatons, Pamela Scott, Barretts, Best Menswear, A-wear with Phase 2 of the centre including large format Next and River Island stores. Additionally, since the 2004 Review, other developments have opened around the town which further serve to enhance its attraction and competitiveness. These include the Dunnes Stores and Aldi developments in Graiguecullen.

5.4.2 The Carlow Retail Strategy estimates that the current comparison expenditure leakage from Carlow catchment area to competing centres is 20% (€22.9m per annum). Although it does not provide an estimate of convenience expenditure leakage, the strategy does promote the provision of additional retail space in Carlow Town to counter the leakage which occurs. Other recent and emerging retail developments which will assist in retaining expenditure and attracting additional expenditure from competing centres include:

- **Shamrock Business Park**: there are units for rent or sale in the park, which includes the relocated Doyle Builder Merchants from Shamrock Square. These sites may be used for retail uses.
- **Sleaty Road Retail Park:** includes 6,000m2 in eight units available for mixed use which includes retail uses. The new Dunnes Stores is located here and has been trading since mid 2006.
- **Barrowside Business Park:** has three units totalling 2,300m2 which can accommodate mixed use including retail uses. There is already a Zokia furniture store on the business park.
- **Hanover Shopping Centre Redevelopment:** a planning application has been submitted for demolition of the existing shopping centre and the construction of a mixed use development in the town centre comprising 1,661m2 net convenience floorspace and 11,652m2 net comparison floorspace.

[7] ***Source: Offaly Retail Strategy 2009***

- **Barrow Track:** permission has been granted for a mixed use development on the former Minch Norton site which incorporates some 3,000m2 of net convenience floorspace and 5,547m2 of comparison.

5.4.3 The granted and emerging schemes indicate that the predominant new floorspace is retail warehousing. It is generally recognised that there is a saturation of retail warehousing floorspace market and much of what has been granted will not actually be delivered. Additionally, the quantum of retail floorspace which has been granted is acknowledged as having the potential to undermine the scope for new comparison floorspace in the town centre.

5.4.4 Given both the fact that not all the retail warehousing will be delivered and the policy objective of focusing new comparison floorspace in the town centre, the Town and County Councils have accepted the principle of retail warehousing being excluded from consideration of the expenditure/floorspace capacity for the regeneration of the Hanover Shopping Centre. Rental levels in Carlow have improved substantially since 2001 when locations in the prime retail area yielded €380 per m2. They now range between €538 – €603 per m2.

5.5 KILKENNY

5.5.0. Kilkenny City and Environs (22,179 population Census 2006) offers a wide diversity of functions reflecting its role as the administrative centre and key centre of the County. Within the national retail hierarchy Kilkenny is located on the same level as Carlow but is confirmed as a Hub in the national settlement strategy. Its role and function is also strengthened by being one of the top visitor destinations in the country.

5.5.1 Kilkenny has a strong retail base with a large variety of national and international retail brands located in and around the prime shopping area and a considerable selection of independent retailers. According to the 2007 Retail Strategy there was 11,307sqm net convenience, 39,656sqm net comparison and 17,659 sqm net retail warehousing retail floorspace in Kilkenny City and Environs. Convenience shopping is largely provided by Dunnes Stores on Bateman Quay/Kieran Street and Superquinn, located in the Market Cross Shopping Centre. Additional convenience floorspace is also provided through a variety of independent retailers throughout the town and around the suburbs with Lidl and Supervalu at Loughboy.

5.5.2 Comparison retailing is dominant in the town centre with many businesses being family owned and responding to market demand such as Winston's on Kieran Street, Good's on High Street and Paul's also on High Street. Several multiple stores also offer comparison retailing, such as Barratts, Monsoon, Jack and Jones, Adams, Penny's, Heatons, Paco, Holland and Barret and L'Occtaine within the Market Cross Shopping Centre and Oasis, Coast, Wardrobe, Principles, Dorothy Perkins and Kaliko concessions within Good's on High Street. It is also noteworthy that Kilkenny accommodates a number of high end ladies clothes and shoe boutiques which add to the quality of the town's retail floorspace. The retail offer and attraction has recently been enhanced with the opening of McDonagh Station, the first expansion of the town centre since the development of Market Cross in the early 1990s. McDonagh Station is anchored by a second Dunnes Stores and also accommodates retailers River Island and Next.

5.5.3 The Kilkenny Retail Strategy lists recent additions to the retail offer which have occurred on the outskirts of the city. There are two retail warehouse parks in Kilkenny offering a good range of bulky goods retailing. Kilkenny Retail Park, adjacent to Loughboy Industrial Estate at Smithland on the ring road. This park is occupied by Woodies DIY & Garden Centre, Carpet Right and DID Electrical. Ormonde Retail Park at Purcellsinch on the Dublin Road accommodates Chadwick's Builder-providers, Electrocity and Furniture Depot.

5.5.4 Accessibility around Kilkenny improved considerably in late 2007 with the opening of the next link on the ring road connecting the N77/78 Castlecomer/ Durrow Road with the N10 Carlow Road. The Retail Strategy states that the county experiences some leakage to Carlow however strong market interest in retail development of Kilkenny has been demonstrated by proposals for the redevelopment of the livestock mart site. It is anticipated that as infrastructure and access is improved proposals to redevelop this site and others will be delivered in the short to medium term.

5.6 NEWBRIDGE

5.6.0 Newbridge (18,520 population 2006 Census) is a Level 1 Tier 3 Centre in the national retail hierarchy. It forms part of the Primary Dynamic Cluster defined by the RPGGDA and is the Large Growth Town II in the County. Newbridge also forms part of the County Town Centre along with Naas and Kilcullen in the regional retail hierarchy and part of the Twin County Town Centre along with Naas in the county retail hierarchy.

5.6.1 Newbridge has an extensive range of convenience and comparison shopping and as a result has significant trade draw from the surrounding towns and hinterland whereby people travel there to carry out the majority of their retailing needs. According to the Draft Retail Strategy 2005 Newbridge accommodated 4,347sq.m net convenience, 8,751sq.m net comparison and 8,437sq.m net bulky goods retail floorspace. The most significant addition to the retail make up of Newbridge since these figures were recorded has been the opening of the Whitewater Centre which accommodates some 22,000sq.m of net retail floorspace.

5.6.2 Newbridge has developed in a linear fashion, with Edward Street/Main Street as the backbone of the historical grid pattern that makes up the town centre. There is a more traditional urban structure on the western side of Main Street while more modern buildings are located on the eastern side of the street as major civic and industrial uses are replaced and relocated. The wide Main Street is complemented by narrow side streets and laneways. The Whitewater Centre provides the main focal point of the town and has greatly enhanced the vitality and viability of the town and despite its designation has become the largest retail centre in Kildare. It comprises of a major retail element, a multiplex cinema, other commercial leisure, offices and apartments. Currently, Marks and Spencer is the primary anchor unit, and comprises a wide range of both comparison and convenience goods but is primarily comparison retailing.

5.6.3 The scheme has enabled high street and brand name national/international multiples to locate in Newbridge, examples include Coast, Monsoon, Hilfiger, H&M, Zara, Dune and Easons. Car parking is provided at basement level and within an adjacent multi-storey car park. The Whitewater Centre has also provided the opportunity for independent stall traders to sell their produce and goods in the new pedestrian plaza, which comprises of both convenience and comparison goods.

5.6.4 The Courtyard Shopping Centre also located within the town centre accommodates some high street retailers including Benetton and Lifestyle Sports. It is located adjacent to the Whitewater Centre and comprises of a Lidl discount foodstore and a number of units shops also accommodating restaurants and retail services. With respect to bulky goods floorspace, Newbridge Retail Park on the Athgarvan Road provides bulky goods floorspace and accommodates operators such as Woodies, World of Wonder and DID.

5.6.5 Convenience provision in the town is well represented by Dunnes Stores within the Newbridge Shopping Centre and a standalone Tesco Supermarket, both of which are located out of town on the Kildare Road. Both supermarkets benefit from a modern layout and are served by large areas of surface car parking facilitating the larger weekly shopping experience. These stores are complemented by a number of other convenience stores such as Spar within the Ballymany Shopping Centre, Aldi within the Courtyard Shopping Centre and local convenience stores throughout the town as well as a limited range of more specialised and smaller convenience stores that include greengrocers, delicatessens, butchers and off-licences. The town also has a number of financial institutions including banks, building societies, and a credit union within the core of the retail area, which indicates the strength and vitality of the town centre and conveys the importance that Newbridge plays in the overall economy of Kildare and its wider catchment.

5.6.7 In terms of accessibility Newbridge is located in the centre of County Kildare, 40 km from Dublin at junction 10 of the of the M7 motorway. Newbridge is on both the main road and train line between Cork and Dublin and a comprehensive bus service is also available. It is connected to Naas via the R445, while the southern end of the town is connected to the M7. At present the town is served by Bus Eireann provincial bus service, Rapid Town Links between Naas and Kilcullen and Iarnrod Eireann commuter and mainline train service. The Arrow train service stops at Newbridge train station and this takes approximately 30 minutes from Dublin city centre.

5.7 GREATER DUBLIN AREA

5.7.0 Although Dublin is located 74 kilometres from Portlaoise, improvements to the M7 and the railways services from Portarlington, Portlaoise and Ballybrophy and Carlow Town have made it much more accessible to the residents of County Laois. The City with its broad range and vibrant mix of retail facilities, specialist boutiques and purpose built shopping centres is an attractive retail destination. The Greater Dublin Area comprises of several major retail areas including, Dublin City Centre, Blanchardstown, Dundrum Town Centre, Liffey Valley, Swords and Tallaght. Three retail areas that are of significant note – Dublin City Centre, Dundrum and Liffey Valley.

Dublin City Centre

5.7.1 Dublin City Centre is the principal retail centre of the Country. It is the only **Level 1 centre** in the National Retail Hierarchy defined by the Retail Planning Guidelines for planning authorities. The city centre is the largest retail centre in the country and is long established as a principal centre for higher order comparison goods and speciality shopping.

5.7.2 There are two focal points for retailing in the city centre, namely the Grafton Street and Henry Street area. The largest focal point is the Henry Street area which is located in the north of the city and includes adjacent streets such as Mary Street and O'Connell Street. Henry Street has a high quality public realm, upgraded in the recent past. O'Connell Street has also benefited from a recently completed new public realm scheme of high quality. Grafton Street is a pedestrianised street. The principal anchors are Brown Thomas Department Store, Marks and Spencers and Dunnes Stores, which is situated in the Stephen's Green Shopping Centre at the southern end of the Street.

Liffey Valley

5.7.3 Liffey Valley is located at the intersection of the M50 and the N4. The development is the third regional scale centre in the expanding towns to the west of Dublin and is anchored by Marks and Spencers first out of town store in the Republic. Recent development of the centre includes the introduction of Next as a fourth anchor and the construction of extra large units for H & M and New Look. The centre opened in 1998 and accommodates 97 retail units. It has a gross floor space of 47,000 sq. metres and is served by over 3,500 car parking spaces. The centre also accommodates a Dunnes Stores and a large Boots Chemist. Liffey Valley is designated as Town Centre and it is envisaged that the centre will continue to expand and develop further retail activity over the forthcoming years.

Dundrum Town Centre, Dun Laoghaire Rathdown

5.7.4 Dundrum has been designated as a Level 2, Major Town Centre in the Retail Hierarchy for the Greater Dublin Area (Greater Dublin Area Retail Planning Strategy). These centres are the most important centres in the Metropolitan area of the city outside of Dublin City Centre. It is stated that:

"They will tend to serve catchment areas well beyond their immediate locality, they should have the potential for significant comparison floorspace and some already have, including some higher order shopping, and offer a wide range of non-retail services."

5.7.5 Major new retail development has been undertaken in Dundrum in recent years. Phase 1 of Dundrum Town Centre Scheme opened in March 2005. The centre is situated between Dundrum Bypass and Dundrum Main St. This contains 35,000 sq. m. of gross retail floorspace, with 120 shops distributed over three levels. At the time of the opening, and to date, the centre contains many retailers which did not have any other outlets in Ireland, including House of Fraser, Harvey Nichols and Hugo Boss. The centre also contains a substantial element of leisure uses, which include a twelve-screen cinema, theatre, restaurants and cafes.

5.7.6 Phase 2 of the scheme is anticipated to open in 2014 and will be located on the site of the existing Dundrum Shopping Centre. The retail component of this phase includes a further 3 anchor stores, 76 retail units and one

convenience foodstore, restaurants, café, hotel, leisure use, class two services and community facilities. A total of 30,517 sq. metres gross retail floor area is provided in the scheme.

5.7.7 The completion of the Dundrum Town Centre scheme will provide a comprehensive shopping centre, with a wide variety in retail offer. Due to the wide range of retailers, which include specialist services, and retailers unique to the centre, there is a potential for the scheme to draw trade from a wide area. Given the accessibility from both private and public transport, it is envisaged that shoppers from County Laois will continue to visit Dublin City Centre and specific retail destinations such as Liffey Valley and Dundrum occasionally for comparison shopping and specialist retail facilities not readily available in Laois.

5.8 CONCLUSION

5.8.0 Examination of recent retail developments in competing towns would indicate that the general approach to retail development has been one of creating retail warehouse parks and new shopping centres. The following table illustrates how much retail warehousing has been provided to date within the competing centres

Table 28: Level of Retail Development in Competing Centres

LOCATION		CONVENIENCE	COMPARISON	RETAIL WAREHOUSING	TOTAL
Athlone		12030	17588	10582	40200
Thurles					
Tullamore		12467	14606	8915	35988
Carlow				12635	32873
Kilkenny		11307	39656	17659	68622
New Bridge		4347	30751	8437	43535
Dublin	***Dublin City Centre***				
	Liffey Valley				***47000***
	Drundrum Town Centre – Phase I				***35000***
PORTLAOISE		20,000	16,000	12,000	48,000

5.8.1 From this high level overview it is evident that there are a number of centres with good quality shopping facilities within 30 minutes – 1 hour of Portlaoise. As the retail offer of these centres is further enhanced and improved their attraction will increase the competition with Portlaoise.

5.8.2 It is also important to note that market interest in these centres remains strong. Proposals in the pipeline for additional floorspace will improve their retail offer, enhance their attractiveness and offer scope to reduce the extent of current and future expenditure leakage from the County.

5.8.3 Policy and objectives addressing retail development will contribute towards stemming the outward flow of expenditure and achieve the type of retail development necessary to serve the needs of the county.

SECTION 6:

QUANTITATIVE ANALYSIS

6.0 INTRODUCTION

6.0.1 As set out in the Retail Panning Guidelines, a key element to be included in development plans is a broad assessment of the additional retail floorspace required over their lifetime. Accordingly, this section of the Retail Strategy will provide a broad floorspace capacity assessment which will assist the Council in making the necessary provision to facilitate new retail floorspace throughout County Laois. The primary purpose of the capacity assessment is to indicate the quantum of additional floorspace that can be absorbed by the projected additional expenditure available within the county. The assessment is based on a number of factors including existing county population as at 2006 and population forecasts up to 2020. It also takes account of turnover estimates, updated retail floorspace information and retail planning consents which have not yet been delivered but are still valid. In addition, it will examine various data provided and assumptions made by the 2003 Laois County Retail Strategy and the follow-up review of 2006.

6.0.2 How much of that spend remains within the confines of County Laois is dictated by a myriad of factors such as location and scale of existing floorspace, nature of goods on offer, turnover efficiency, distribution of the population, travel times, accessibility, communications and location of similar competing centres in other counties.

6.0.3 There are a number of key factors to be considered when undertaking a broad supply and demand analysis of future retail provision within County Laois. These are:-

a) Population of the county,
b) expenditure per person in the county and gross additional expenditure potential,
c) turnover of shops in the county,
d) amount of existing floorspace in the county,
e) future capacity potential.

Each of these factors will now be addressed in turn.

6.1 POPULATION OF COUNTY LAOIS

6.1.0 Although it is recognised that administrative boundaries do not usually correspond with shopper catchments, it is asserted that County Laois is entitled to compete for that share of shopping expenditure generated by its own Council population. As outlined in section 3, estimates of future population growth within the county can be based on three different scenarios: the findings of the BSM report, or alternatively on an analysis of historical trends since 1971 coupled with recent guidance from the Midland Regional Authority and DoEHLG.

6.1.1 It is now accepted that the recommendations of the former which predict that the county population would reach 87,000 by 2012, 101,094 by 2016 and 117,471 by 2020, at an annual growth rate of 4.05% per annum, are practically unattainable. These projections were carried out in 2000 at a time of vastly different socio-economic conditions compared to those currently prevailing and which are exerting a considerable downward influence on population growth rates in County Laois. This changed environment, much of which has followed on from the almost total collapse of the local house construction sector and a significant fall-off in net in-migration, is predicted to last up to and including 2010 at least.

6.1.2 The second scenario, focusing on demographic trends over each inter-censal period since 1971 and comparing these to the most recent advice from both central and regional government bodies concludes that population growth rates will be far more moderate with the respective figures for the three target dates being 72,571, 76,547 and 80,741 respectively.

6.1.3 It is on these figures, as set out in **Table 29** that the critical retailing projection in terms of per capita expenditure will be based. There will also be an allowance made for the growing trend towards smaller household formation which has been a major factor underpinning the increase in bulky white goods expenditure and, as a consequence, expansion of the retail warehouse sector. For a variety of socio-economic reasons, household size in Ireland has been in consistent decline since 1966. In that census year, the average household size was 4.01 whereas in the most recent census year of 2006 the figure was 2.81 representing a fall of 30%.

Table 29: County Laois Population Projections

Existing population as at 2006	2012	2016	2020
67,059	72,571	76,547	80,741

6.2 EXPENDITURE PER PERSON OF POPULATION IN THE COUNTY.

6.2.0 The next step of the Strategy is to calculate the total amount of expenditure on convenience and comparison goods by the resident population of County Laois up to 2020. To derive this, the estimated per capita levels of expenditure are multiplied by the population projections. The per capita expenditure estimates for comparison and convenience goods are derived from the CSO's *Retail Sales Indices 2003-2009*, *Household Budget Surveys 2005, National Income and Expenditure Report 2007 and County Incomes and Regional GDP 2006.* The stated years are the most recent for which this data is available.

6.2.1 Per capita expenditure estimates for both convenience and comparison goods are projected forward based on recent personal growth estimates. Data from the period 2003-2007 reflect the rapid growth in individual spending over recent years although this has now changed dramatically particularly since the third quarter of 2008 as a consequence of the severe national economic decline with a diminution of the comparison spend being most noticeable. The analysis of retail expenditure is only concerned with expenditure that occurs within retail outlets ie expenditure related to retail floorspace only. Accordingly, the per capita expenditure figures exclude expenditure that occurs outside of retail outlets mainly through the medium of the internet. In Ireland at least, recent growth in internet shopping has been served by existing retail floorspace rather than the provision of dedicated distribution facilities which focus exclusively on this niche market.

Retail Sales Indices 2003-2009

6.2.2 The retail sales index is a measurement of all goods sold by retailers and is based on a sampling of retail stores of different types and sizes. The retail sales index is often taken as a barometer of consumer confidence. The index does not include money spent on services and generally represents less than half of total consumption for the monthly measuring period. Nonetheless, even with this limitation, the figures are closely monitored as an indicator of the overall health of the economy.

6.2.3 Seasonally adjusted [to take account of price inflation] retail sales volume indices for a number of key convenience and comparison retail business types, that are relevant to the analysis presented in this study, are shown in **Table 30.**

Table 30: Average percentage change in the Volume Sales of Retail Goods[8]

Category	Description	Percentage change
Convenience Goods	Food, Beverage,Tobacco	1.15%
Comparison Goods	Books,Newspapers, Stationery	0.62%
	Textiles, Clothing	10.30%
	Footwear, Leather	8.73%

[8] *according to the Retail Sales Index, 2003-2007.*

	Furniture, Lighting	4.64%
	Electrical Goods	3.38%
	Hardware, Paints, Glass	**8.8%**

6.2.4 Over the 5 year period 2003-2007, volume sales of comparison goods were particularly high, averaging 6.07% in total and reaching as high as 10.3% for the sale of textiles and clothing. By comparison, the volume sales of convenience goods rose by only by 1.15% per annum over the same period. However, a dramatic reversal of these growth trends has now become evident, coinciding with the unprecedented contraction of both the Irish and global economies. Since the first quarter of 2008, both the overall volume and value of retail sales nationwide have undergone major declines in both relative and absolute terms. For example, the volume of retail sales [excluding price effects] decreased by 8.3% in December 2008 compared to December 2007. If the Motor Trade sector was excluded, there was an annual decrease of 8.2% and the monthly change was minus 0.2%. Similarly, the value of retail sales decreased by 7.6% in December 2008 compared to December 2007. However, if the Motor Trade sector was excluded, the annual decrease was 6.2% and the monthly change was minus 0.4%.

Table 31: Seasonally adjusted indices of total retail sales since Jan. 2008 [9] (Value)

Period	Value of Sales Index	Annual % change
January 2008	143.4	4.9%
February 2008	141.2	3.1%
March 2008	140.5	1.4%
April 2008	139.2	-0.1%
May 2008	138.5	-1.6%
June 2008	138.0	-1.6%
July 2008	139.7	-1.1%
August 2008	134.9	-3.8%
September 2008	135.8	-3.7 %
October 2008	134.2	-5.8%
November 2008	132.3	-7.0%
December 2008	132.4	-7.6%
January 2009	116.9	-19.9%

Table 32: Seasonally adjusted indices of total retail sales since Jan 2008[10] (Volume)

Period	Value of Sales Index	Annual % change
January 2008	123.2	1.9%
February 2008	120.8	-0.2%
March 2008	119.6	-2.0%
April 2008	118.3	-3.3%
May 2008	117.1	-4.9%
June 2008	116.3	-5.0%
July 2008	118.3	-4.1%

[9] *expressed in terms of value of sales (Base year: 2000=100)*
[10] ***expressed in terms of volume of sales (Base year: 2000=100)***

August 2008	114.6	-6.4%
September 2008	115.2	-6.2 %
October 2008	114.3	-7.5%
November 2008	112.7	-8.3%
December 2008	113.2	-8.3%
January 2009	**101.0**	**-20.4%**

6.2.5 Overall, the volume of retail sales decreased by 8.0% in the final quarter of 2008 compared to the final quarter of 2007. The year on year decline in the 2008 Q4 volume figures represents the largest quarterly decrease since Q3 1982. If the Motor Trade sector was excluded, there was a decrease of 7.6% in the figures for the final quarter of 2008 compared to the equivalent period for 2007. The year on year decline in the 2008 Q4 retail sales [excluding Motor Trade] volume figures is the largest decrease on record. In total the volume of retail sales for the year 2008 decreased by 4.5% when compared to 2007. This year on year decline in the 2008 retail sales volume figures represents the largest decrease also since 1982. The volume of retail sales [excluding Motor Trade] decreased by 3.6% in 2008 compared to 2007. The year on year decline in the 2008 retail sales [excluding Motor Trade] volume figures is the largest decrease on record.

6.2.6 The figures for January and February 2009 show the downward spiral accelerating further. Retail sales declined at the fastest pace on record in the 12 months to January 2009 due primarily to a collapse in new car sales. The volume of goods bought by consumers declined by a fifth [20.4%] in January 2009 compared to January 2008, the sharpest decline since records began in 1974. In the month of January 2009 alone the volume of retail sales declined by 9.4%. The chief contributor is a 42.2% drop in the number of new car sales sold in January 2009 compared with the same month in 2008. {These are CSO figures. Car sales data collected by the CSO includes sales of petrol and other items on garage forecourts. Figures from the Society of the Irish Motor Industry indicate new car sales fell 67% in annual terms in January 2009 and by 63 per cent in February 2009].

6.2.7 The value of retail sales decreased by 19.9% in January 2009 compared to January 2008 and decreased by 10.0% for the month itself. The year on year decrease in the value of retail sales for January 2009 is the largest since value records commenced in 1962.

6.2.8 The volume of retail sales fell by 20.9% in February 2009 compared to February 2008. There was a monthly increase of 5.7%. The large year on year sales decrease in February 2009 is primarily due to the continuing contraction associated with the motor industry which in February 2009 saw its sales figures decrease by 53% on the same period last year. In pre-recessionary times, February Motor Trade figures usually account for over one third of all retail sales in terms of value. If the Motor Trade is excluded, the volume of retail sales decreased by 6.7% in February 2009 compared to February 2008 and the monthly change was +1.3%. All the evidence points to consumer spending remaining extremely muted, at least in the short to medium term. Although declining interest rates and lower inflation should boost disposable income to some extent, these positive factors will be more than offset by the negative impacts of rising unemployment, negligible pay awards, public sector levies, an increase in direct and indirect taxation and weakened consumer sentiment.

Household Budget Survey

6.2.9 Information revealed by the 2005 Household Budget Survey also provides an insight into trends in retail expenditure. The figures disclosed in this Survey must be viewed independently of population change and inflation [by reference to the Census of Population and Consumer Price Index]. The main purpose of the Survey is to determine in detail the current pattern of household expenditure [eg average household spend on *Food, Drink, Tobacco, Transport* etc] and this information is also used to update the weighting basis of the Consumer Price Index.

6.2.10 The principal features include an average weekly expenditure of €787 per week for all households in the state, 36% higher than the €577 recorded for the previous survey in 1999-2000. **Table 33** shows that the highest

increase in expenditure as a proportion of total expenditure was recorded for *Housing* [70.6%] and *Services and other Expenditure* [54.8%], while the lowest was for *Drink and Tobacco* at 7%. Other notable features were that the proportion spent on *Food* fell from 20.4% to 18.1% and that of *Transport* fell from 16.4% to 15.6%. Conversely, the proportion spent on *Services and other Expenditure* increased from 25.7% to 29.2% and *Housing* was up from 9.6% to 12.0%.

Table 33: Average Weekly household expenditure

Commodity Groups	1999-2000		2004-2005		% Change
	€	%	€	%	
Food	117.67	20.4%	142.74	18.1%	+ 21.3%
Alcoholic Drink, Tobacco	44.10	7.6%	47.18	6.0%	+7.0%
Clothing, Footwear	35.11	6.1%	42.67	5.4.%	+21.5%
Fuel, Light	21.68	3.7%	30.65	3.9%	+41.4%
Housing	55.41	9.6%	94.51	12.0%	+70.6%
Household non-durables	14.41	2.5%	17.42	2.2%	+20.9%
Household durables	26.86	4.6%	35.55	4.5%	+32.4%
Miscellaneous goods	19.08	3.4%	23.78	3.0%	+24.6
Transport	94.92	16.4%	122.74	15.6%	+29.3
Services	148.48	25.7%	229.83	29.2%	+54.8
Total	**€577.72**	**100**	**€787.12**	**100**	**+36.2%**

National Income and Expenditure Report 2007

6.2.11

The key findings of the National Income and Expenditure Reports, 2002-2007 confirm the growing divergence between convenience and comparison spending.

Table 34: Annual Percentage Change in Consumption of Personal Income[11]

Category	Description	Percentage
Convenience Goods	Food	3.3%
	Non-Alcoholic Beverages	1.7%
	Alcoholic Beverages	0.6%
	Tobacco	-5.2%
Average rate of real growth in expenditure on convenience goods.		**0.08%**
Comparison Goods	Clothing & Footwear*	7.3%
	Household Equipment [Durable Goods]	7.4%
Average rate of real growth in expenditure on comparison goods.		**7.35%**

Source [12]

6.2.12 In summary, having regard to the main conclusions of three of the most recognised sources on per capita expenditure estimates for both comparison and convenience goods, namely the Retail Sales Indices, Household Budget Survey and National Income and Expenditure Report, it is apparent that whereas convenience spend has experienced barely marginal growth during the study period, comparison spend levels have been at least five times greater. The main reasons for this include the availability of greater personal disposable income during the Celtic Tiger boom era, population growth, increasing female participation in the labour force, ever improving advertising, communications and infrastructure and declining household size. However, the deteriorating economy has distorted these trends. The data from the Retail Sales Indices for 2008 and early 2009 confirms that comparison spend has been most affected by the downturn with convenience spend remaining relatively stable. An allowance for this will be made in the section on projected expenditure.

[11] *This refers to Convenience and Comparison Goods 2002-2007*

[12] *Table 16, National Income and Expenditure Report 2007, CSO.* Clothing and Footwear Spend increased by 12.7% in 2005 alone.*

County Incomes and Regional GDP-2006

6.2.13 Statistics from the CSO's County Income and Regional GDP are another key variant governing expenditure. At the level of the eight Regional Authority areas, the Dublin region had the highest disposable income per person, being 12.3% above the state average in 2006; the comparable figure in 2000 was 16.4%. At the other end of the scale, the disposable income per person of the Midland region in which Co. Laois is located was the lowest, being 9.4% below the State average. The figures are summarised in **Table 35.**

Table 35: Indices of Disposable Income per person-2006 by Region[13]

Region	2005	2006
Border	90.3	91.1
Dublin	112.3	112.3
Mid-East	102.3	102.6
Midland	91.8	90.6
Mid-West	98.3	97.0
South-East	92.1	93.2
South-West	97.0	96.4
West	92.9	93.0
State	100	100

6.2.14 Extending the focus to county level, disposable income per person in County Laois is below that again of the Midland Region and of the State. This has been a characteristic over the seven year period from 2000 as shown in **Table 36.**

Table 36: Indices of Disposable Income per person by Region, County, State 2000-2006[14]

Location	2000	2001	2002	2003	2004	2005	2006
Midland	88.8	88.2	90.2	91.5	91.5	91.8	90.6
Laois	86.9	85.8	86.8	88.4	89.9	89.8	89.5
State	100	100	100	100	100	100	100

6.3 TURNOVER CONSIDERATIONS

6.3.0 Turnover considerations are of crucial importance in the assessment of floorspace requirements.

6.3.1 Apart from the obvious influence of retail sales on turnover ratios, there are other factors to be considered when estimating turnover to sales space ratios, including:

- the retailer's need for larger and more spacious floor areas;
- the trend towards self-selection and the corresponding need for wider shopping

"The relationship of turnover or sales to retail floorspace is of critical importance in the retail planning process. It is a measure of the efficiency of retail premises and is used in the conversion of projected retail expenditure into new floorspace requirements."

Section 6.1, page 38, *The Demand for Retail Space, Development Plan* Manual 3, An Foras Forbartha, 1984

[13] *[Base:State=100]*
[14] *[Base:State=100]*

aisles;
- the growth in the number and range of goods for sale;
- changes in stock control with the emphasis on just-in-time and farm fresh deliveries and
- the growth of multiple retail organisations.

6.3.2 In general, recent trends would suggest that increased efficiency in the use of retail floorspace, which ordinarily should result in higher turnover per sq. m. ratios, is counter-balanced by the need to provide for a spacious and attractive shopping environment for the consumer. The net result of these influences is that turnover ratios have remained relatively stable over the past number of years.

6.3.4 Within this context, the Working Paper that accompanied the Retail Planning Guidelines made the following modest forecasts for turnover ratios for both convenience goods and comparison goods. These will be used in conjunction with the population and expenditure figures already outlined, to estimate future floorspace demand in County Laois.

6.3.5 In relation to turnover ratios, the 1999 Working Paper accompanying the Retail Planning Guidelines estimated that the average convenience and comparison turnover per square metre in the state in 1996 approximated to €4,636 and €2,921 respectively. It estimated that the efficiency of existing convenience floorspace would initially rise by 1% per annum up to 2002 and fall thereafter to 0.5% per annum. Likewise for comparison turnover, efficiency levels are predicted to grow by 2% per annum up to 2002 before declining to 1.5% per annum thereafter. Based on these indices, the projected average floorspace turnover ratio for both convenience and comparison units up to 2020 are as indicated in **Table 37.**

Table 37: Turnover per net Retail Square Metre Estimates-1996-2020

Year	Turnover per net retail sq.m. for convenience goods	Turnover per net retail sq.m. for comparison goods
1996	€5,888	€3,710
1998	€5,946	€3,860
2000	€6,126	€4,016
2002	€6,250	€4,177
2004	€6,312	€4,304
2006	€6,375	€4,434
2008	€6,439	4,567
2010	€6,504	€4,705
2012	€6,570	€4,848
2014	€6,634	€4,994
2016	€6,702	€5,145
2018	€6,768	€5,300
2020	€6,836	€5,460

Turnover per net retail square metre

6.3.6 In terms of turnover ratios of retail floorspace, it can be estimated that in 2018 the average turnover ratio for convenience goods and comparison goods will be **€6,768** per net sq. metre and **€5,300** per net sq. metre respectively.

Expenditure per head of population [per capita].

6.3.7 Table 38 outlines the state expenditure figures per person for both convenience and comparison goods from 1996 to 2020. Projections are independent of inflation and have been extrapolated from the findings of the Working Paper accompanying the Retail Planning Guidelines, while also having regard to recent trends in expenditure. It recommended a real growth rate in convenience expenditure of 3.3 per cent per annum up to the year 2002**,** falling to

1.12 per cent per annum thereafter. Likewise, for expenditure on comparison goods, it recommended a real growth rate of 6.89 per cent per annum up to the year 2002, falling to 3.15 per cent per annum thereafter. In the mid-term review of the Retail Strategy in 2006, Braniff Consultants argued that in the light of the then recent trends in comparison spend (averaging 13 per cent growth per annum), the RPG recommended annual growth rate of 3.15 per cent may be slightly pessimistic. For this reason, a higher annual rate of 9.95 per cent was adopted for projection purposes, representing the median point between the Guidelines' 6.89 per cent figure and the more recent 13 per cent figure. However given the complete turnaround in the economy since the mid-term review was completed, it is considered that this compromise figure is now too optimistic and that a more realistic figure would be in the order of **7%** which is only marginally above the RPG recommended figure of 6.69%. Bearing this in mind, Table 9 reveals that the anticipated level of spend per person on convenience goods and comparison goods in the year **2018** will approximate to **€2,718** and **€5,566** respectively.

Table 38: Expenditure Per Capita on Convenience and Comparison Goods Estimate To 2020.

Year	Expenditure per capita on convenience goods	Expenditure per capita on comparison goods
1996	€1,872	€1,265
1998	€1,998	€1,445
2000	€2,142	€1,651
2002	€2,275	€1,887
2004	€2,325	€2,160
2006	€2,379	€2,473
2008	€2,432	€2,831
2010	€2,487	€3,241
2012	€2,543	€3,710
2014	€2,600	€4,247
2016	€2,658	€4,862
2018	**€2,718**	**€5,566**

6.4 AMOUNT OF EXISTING FLOORSPACE IN THE COUNTY

6.4.0 In 2010, it is estimated that there are a total of **58,127 sq. metres** of **existing** net retail floorspace in County Laois. This represents an increase of 17% compared to the 2006 total of 49,525 sq. metres and an increase of over 47% on 2002 when the net available floorspace stood at 39,467 sq. metres. Therefore, in little over six years, the available net retail floorspace in the county has grown by almost a half. **Table 39** refers.

6.4.1 The vast bulk of the increase since 2006 has occurred in Portlaoise courtesy of the opening of the Dunnes Stores Kyle Centre [Pl Ref 04/449-6,116 net sq, metres] and Millers [Pl Ref 06/555-786 net sq. metres] thereby reinforcing the county towns pre-eminence in terms of the retail hierarchy of the county. The 2010 statistic does **not** include the 17,998 net sq. metres of retail space provided for in the permission for the redevelopment of Portlaoise Shopping Centre [parent permission Pl Ref 06/480 subsequently amended in Pl Ref 09/699]. However, the permission is valid up to 2015 and is included in the calculations in the permitted development category in section 6.44 below. The next best performing locations were Portarlington which saw the redevelopment of the Super Valu store among others and Ballylynan where a 512 net sq. metres Centra retail unit on Upper Main Street {Pl Ref 07/1830], part of a large residential scheme initially permitted under Pl Ref 04/1577, has opened for business.

6.4.2 If retail warehousing was factored in, both the level and rate of increase would be even higher again. For example, the Lismard Centre, Portlaoise [Pl Ref 06/1440] development which has a net floor area of 12,811 sq. metres has recently opened for business as have similar type units in Carlow environs.

Table 39: Growth in Net Retail Space Quantum in Co. Laois 2002-2010

Year	Net Retail Space Quantum in County Laois	Percentage Change
2002	39,467 sq. ms.	
2006	49,525 sq. ms.	25.2%
2010	58,127 sq. ms.	17%

6.4.2 The amount of net retail floorspace permitted by Laois County Council since the review of the current strategy was completed in 2006 is estimated at **34,730 sq. metres** comprising:

Table 40: Net Retail Floorspace permitted since 2006

LOCATION	DEVELOPMENT	FLOOR AREA (SQ.M.)	Net retail space	% share of overall amount
Portlaoise	Laois Shopping Centre, Pl Ref 06/480 parent permission subsequently amended in Pl Ref 09/699.	**17,998sq. m**		
	Aldi, Kylekiproe, Pl Ref 07/1556	**8,058 sq. m**		
	Summerhill Neighbourhood Centre	**2,436 sq.m.**		
	Clonminan and Dunnes, Kyle Centre, Pl Ref 07/1241	**85 sq. m**		
	Boghlone, Mountrath Road, Pl Ref 09/69 Pl Ref 09/120	**1,400 sq. m** **750 sq. m**	**30,727**	**89%**
Portarlington	Sandy Lane, Pl Ref 07/2382	**1,608 sq. m**		
	Station Road, Pl Ref 07/1515	**336 sq. m**	**1,944**	**5%**
Mountmellick	Connolly Street/Davitt Road, Pl Ref 07/2029	**1,033 sq. m**		
	Connolly Street/Davitt Road Pl Ref 10/245	**164**	**1,197**	**4%**
Carlow Suburbs	Pl Ref 07/2062	**36**	**36**	**0.1%**
Ballylynan	Castlecomer Road, Pl Ref 05/1296 [approved in 2007]	**307 sq. m**		
	Upper Main Street, part of Pl Ref 07/1830	**299 sq. m**		
	Upper Main Street, Pl Ref 08/31	**90 sq. m**		
	Off Main Street, part of Pl Ref 07/695	**130 sq. m**	**826**	**2%**
TOTAL			**34,730**	**100%**

6.4.3 Once more, as illustrated in **Table 40**, the concentration of retail activity in the largest towns of the county is readily evident with Portlaoise by far the predominant location followed by Portarlington and Mountmellick. Also notable is the absence of any recent meaningful retail activity in the remaining urban centres of Abbeyleix, Rathdowney, Mountrath, Durrow and Stradbally. The relatively high level of retail activity in Ballylynan is primarily a by-product of the massive population growth [75%] there since 2002. If all of this approved retail space is developed an additional **61**% of net retail floorspace will become available throughout the county. However, this is very unlikely to happen due to the severe economic slump which has led to a major curtailment of retail expansion plans for the short term at least. The potential retail footprint of the county could even be appreciably higher considering that An Bord Pleanala has recently refused permission for 4 no. initially approved developments namely the Tesco stores in Portarlington and Abbeyleix, and the Abbeyleix Road/Fr. Brown Avenue and Clonminan sites in Portlaoise. Combined these projects involved a net retail floorspace of **20,085** sq. metres or 58% of the total approved since 2006. It is likely that revised planning applications will be made at some stage in the future for at least some of these projects.

6.4.4 If retail warehousing is included, this figure increases yet again bearing in mind that some locations, in particular Carlow Environs, have been the recipient of substantial applications for this type of activity since 2006. An additional **11,341** sq. metres of retail warehousing has been permitted [though there have been 3 no. permissions granted in late

2008 to convert 4,979 sq. metres of this space to leisure related use giving a revised figure of 6,362 sq. metres] in Carlow Environs making this place the most important location for this type of activity outside of Portlaoise. **No** allowance in the calculations is made for permitted retail development which has expired or is about to do so in the near future and which to date has not been commenced. Chief among this category is the **3,278** net sq. metres of the Sandy Lane site in Portarlington [Pl Ref 03/1684] and **10,588** net sq. metres of the Minch Norton Maltings site in Portlaoise [Pl Ref 04/1029] whose permissions withered in September 2009 and December 2009 respectively.

6.5 FUTURE RETAIL CAPACITY

6.5.0 Elaborating on the various data presented above, the following statistical analysis for the future floorspace requirements of County Laois can be tabulated as follows. By multiplying the future population estimates by the expenditure per capita indices and then dividing the product by the turnover ratios, some indication of the retail floorspace uptake in County Laois can be arrived at. This exercise is carried out for both convenience and comparison shopping. The base and target years for this analysis are 2008 and 2018. The year 2012 which is the final year of the current County development Plan is regarded as being too close for projection purposes.

6.5.1 Based strictly on the above statistical analysis, County Laois has **sufficient** capacity to continue to attract substantial developer interest in providing new retail facilities especially of comparison type.

Table 41: Projected selling space requirements for both Convenience & Comparison Goods[15]

Year	Convenience	Comparison	Total
Catchment population	78,279	78,279	
Expenditure per capita	€2,718	€5,566	
Total expenditure in catchment	€212,759,600	€435,700,910	€648,460,510
Turnover per net retail sq. m.	€6,768	€5,300	
Floorspace capacity for net retail sq. ms. up to **2018** (A)	31,436	82,207	113,643
Existing net retail sq. m. (B)	26,696	31,431	58,127
Capacity less existing net retail sq. ms. (C=A-B)	**5,534**	50,777	56,311
Approved net retail sq. ms. (D)	9205*	26203*	35,408
Additional net retail sq. m. required by 2018 (C-D-E)	-3671	24574	**20,903**

**Based on 4:1 ratio breakdown comparison: convenience in the Laois Shopping Centre Planning 06/480 as amended by 09/699.*

Year	Convenience	Comparison	Total
Catchment population	78,279	78,279	
Expenditure per capita	€2,718	€5,566	
Total expenditure in catchment	€212,759,600	€435,700,910	€648,460,510
Turnover per net retail sq. m.	€6,768	€5,300	
Floorspace capacity for net retail sq. ms. up to **2018** (A)	31,436	82,207	113,643
Existing net retail sq. m. (B)	26,696	31,431	58,127
Capacity less existing net retail sq. ms. (C=A-B)	**5,534**	50,777	56,311
Approved net retail sq. ms. (D)	14857*	20561*	35,408
Additional net retail sq. m. required by 2018 (C-D-E)	-9323	30216	**20,903**

[15] *This is the projected additional retail space required in County Laois up to 2018 (Constant 1990 prices in punts, converted to euros)*

**Based on 1:1 ratio breakdown comparison: convenience in the Laois Shopping Centre Planning 06/480 as amended by 09/699.*

Year	Convenience	Comparison	Total
Catchment population	78,279	78,279	
Expenditure per capita	€3,050*	€5,566	
Total expenditure in catchment	€238,750,950	€435,700,910	€648,460,510
Turnover per net retail sq. m.	€6768	€5,300	
Floorspace capacity for net retail sq. ms. up to **2018** (A)	35,276	82,207	113,643
Existing net retail sq. m. (B)	25,902	31,430	57,333
Capacity less existing net retail sq. ms. (C=A-B)	**9,374**	50,777	56,311
Approved net retail sq. ms. (D)	9,205	20561	35,408
Additional net retail sq. m. required by 2018 (C-D-E)	169	30216	**20903**

**Based on 0.5% per annum increase in convenience goods expenditure from €3,026 in 2012*

ECONOMIC OUTLOOK

6.5.2 Future retailing trends are inextricably linked to the fortunes of the national and international economies.. The Irish economy is facing extremely challenging times. It is in the throes of a deep recession, unemployment is rising rapidly and the Irish banking system is facing serious funding difficulties. As a consequence, by the end of 2010 output per head will have fallen back to its 2001 level. Nonetheless, analysis by the ESRI suggests that the potential growth rate of the economy is around 3 per cent a year. Given the very severe recession that Ireland is currently experiencing, this means that when the world economy eventually recovers the Irish economy can be expected to experience a period of above average growth. On this basis, output per head could be restored to its 2007 level by the middle of the next decade. Consistent with this forecast, ESRI estimates suggest that there will be a permanent loss of output of 10 per cent compared to where the economy might have been.

6.5.3 According to the ESRI, if the world economy recovers significant momentum by 2011, the Irish economy, as long as it regains competitiveness, can be expected to grow quite rapidly in the 2011-2015 period, recovering some of the lost ground of the current recession. Under these circumstances the economy could temporarily grow at an average of over 5 per cent a year to 2015. If this happened, the unemployment rate would be reduced from a peak of around 17 per cent in 2010 to between 6 and 7 per cent by 2015. On the other hand, if the world recovery were delayed a year to 2012, the ESRI estimates that the permanent loss of output and income could be closer to 15 per cent, the turnaround in the unemployment rate would be further delayed and there would be higher emigration. This would also lead to a higher structural budget deficit in which case further tough budgetary action from 2011 onwards would be likely.

SHOPPING PATTERNS

6.5.4. This section profiles the contemporary shopping behaviour of residents of County Laois. It is based on an examination of all relevant national, regional and county literature as well as the findings of a Shopper Survey conducted by Laois County Council Forward Planning Dept. in February, 2010.

6.5.5 The overall purpose of the survey was to establish the shopping patterns of the resident population for the three main categories of retailing namely convenience, non- bulky comparison and bulky goods and to analyse the extent to which the findings of the survey corroborated the main conclusions in terms of the future retail capacity of County Laois as summarised in **Table 41** above.

6.5.6 Another key objective of the survey was to quantify the extent of leakage of retail expenditure from the county [**Questions 2 and 7**]. By its nature, leakage of expenditure from a county is constantly evolving and extremely difficult

to accurately quantify. It depends on a number of inter-linked factors including the nature and extent of retail infrastructure on offer in the home county, choice [both real and perceived], inter and intra-county accessibility and commuting patterns. It is a subject for which there is little hard data available. The most accurate sources of information are the 1977 Census of Distribution and the 1988 Census of Services both of which are well dated at this stage. The survey also examined the main leakage destinations [**Question no. 8**], the underlying causes of the leakage from the county [**Question no. 9**] and the measures necessary to counteract this trend {**Question no. 10**].

6.5.7 Annex One of the Retail Planning Guidelines provides clear guidance on how to classify **convenience** and **comparison** goods. The survey categorised the different retail units as follows:

Convenience:-primarily

- food,
- alcohol and non-alcoholic beverages,
- tobacco,
- non-durable household goods

All supermarkets, newsagents and food outlets [excluding fast food takeaways, restaurants and cafes] were included in this category.

Comparison:-primarily

- clothing and footwear,
- furniture, furnishings and household equipment [excluding non-durable household goods],
- medical and pharmaceutical products,
- therapeutic appliances and equipment,
- educational and recreational equipment and accessories,
- goods not classified elsewhere.

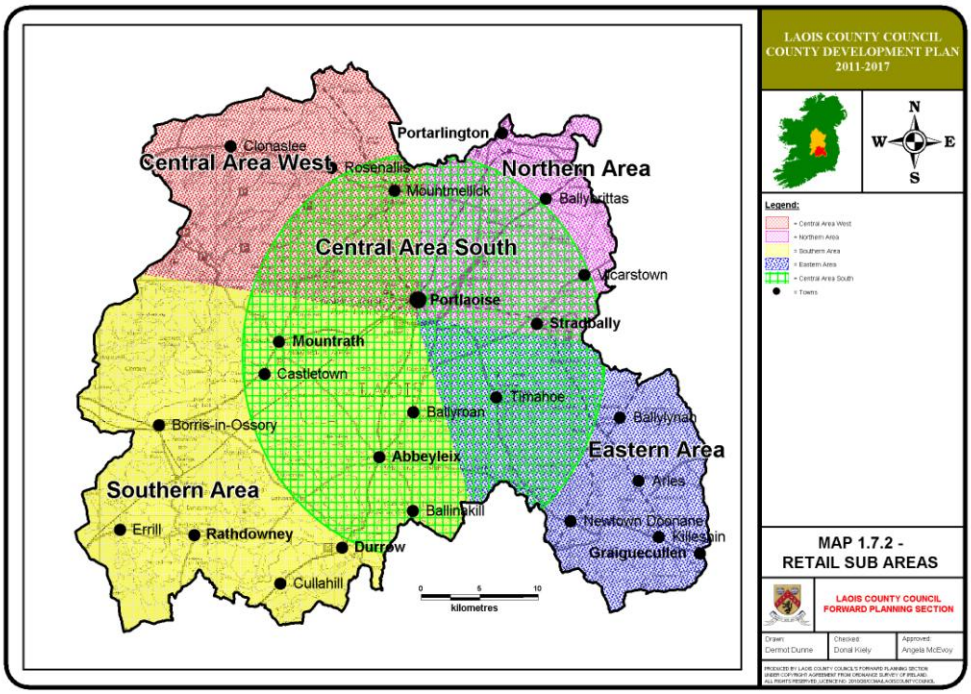
6.5.8 The survey did **not** include retail services many of which are found in town centres. The following service and food and drink establishments were therefore excluded from the survey:

- banks,
- beauty salons,
- building societies,
- cafes,
- dentists and doctors surgeries,
- dry cleaners,
- estate agents,
- funeral homes,
- financial institutions,
- hairdressers,
- hot food takeaways,
- insurance companies, offices,
- pubs,
- restaurants,
- shoe repairs,
- travel agents.

6.5.9. For survey purposes, the county was divided into five geographical sub-areas centring on

- Portlaoise [Central Area-South],

- Clonaslee/Mountmellick [Central Area-West],
- Rathdowney/Durrow/Abbeyleix/Mountrath [Southern Area],
- Portarlington [Northern Area] and
- Stradbally/Ballylynan/Graiguecullen [Eastern Area].



6.6.0 Convenience Shopping

For convenience shopping, the survey established that the vast majority [**90%**] of County Laois shoppers stay local and patronise convenience outlets within the county. There is some movement between the five county sub-areas but for the most part, a high degree of patronage stays within the local sub-area of the resident. In other words, people living in the Southern Area shop primarily in Rathdowney with those in Central Area –South and Northern Area doing the bulk of their convenience shopping in Portlaoise and Portarlington respectively.

6.6.1 In terms of leakage of convenience retail expenditure from the county, the overall amount was in the order of **10%**. [This is a reduction from the leakage figure of **18%** presented in the 1988 Census of Services-this reduction is explained by the amount of new convenience build that came to the market from the late 1990's onwards]. Leakage was most evident in Central Area West and Eastern Area, both of which lie in close proximity to major competing centres in adjoining counties-Tullamore and Carlow respectively.

6.6.2 Non-Bulky Comparison Shopping

In complete contrast to the convenience category, the shopper survey found a very high degree of leakage [**60%**] in the County Laois comparison sector. While this was a phenomenon in all of the five sub-areas of the county, it was particularly noticeable in Central Area-West, Southern Area, Northern Area-East and Eastern Area. The least affected sub-area was Central Area-South [containing Portlaoise] in which the majority of the comparison floorspace of County Laois is located.

6.6.3 When asked to identify the outside county locations visited for comparison retailing, the following places were nominated in order of importance:

- Newbridge [**38%**]
- GDA [**26%**]
- Carlow [**13%**]
- Kilkenny [**10%**]
- Tullamore [**10%**]
- Others [**3%**]

6.6.4. The main reasons for the leakage of non-bulky comparison expenditure were:

- range and quantity of goods on offer,
- quality,
- price,
- parking and
- layout and convenience of store.

Conversely, these were also the main answers put forward by shoppers to the survey question [**No. 10**] as to what improvements to the County Laois retail base would encourage more local shopping and, by extension, less leakage.

6.6.5 Other key factors in explaining the leakage issue are the relatively small size of County Laois and above all the excellent road and good rail communications between the county and some of the competing centres, especially Dublin. For example the shopping centres in the southern and western parts of the GDA are all reachable from most of the northern half of County Laois within 75 minutes approx.

6.6.6 Bulky Comparison Shopping

Similar to the non-bulky sector; a high number [**47%**] of respondents purchase their bulky comparison goods in retail destinations outside of County Laois. The preferred outside locations are:

- Tullamore [**38%**],
- Newbridge [**18%**],
- Kilkenny [**18%**],
- GDA [**16%**],
- Carlow [**10%**]

6.6.7 The main reasons for the leakage of bulky comparison expenditure were similar to **Sections 6.6.3** and **6.6.4** above as were the responses in relation to what changes in the retail environment are necessary in order to make centres in the county more attractive for this type of retailing.

6.6.8 Conclusions

In general terms at least, the main conclusions of the shopper survey are consistent with those of the analyses of the existing and predicted future retail capacity of the county as set out in **Sections 6.4** and **6.5** above. In particular, there is only limited potential for expansion of the **convenience** sector in County Laois. According to the retail survey, **10%** of this expenditure is lost to the county. However, this does not automatically convert to **10%** potential additional retail convenience floorspace having regard to the following considerations:

- the retail strategies of adjoining counties [Carlow, Offaly, North Tipperary, Kildare and Kilkenny] point to leakage of some their convenience expenditure to County Laois thereby creating a balancing effect,
- leakage by its very nature is impossible to completely curtail in an open economy. While there is no set industry threshold, it is quite likely that anything less than 10% is practically unattainable.

On the other hand, the survey fully endorses the argument that there is ample room for substantial expansion of the comparison floorspace in County Laois as 30,216

SECTION 7:
RETAIL STRATEGY
– POLICIES AND OBJECTIVES

7.0 INTRODUCTION

7.0.1 This section of the report is structured as follows: -

- Evaluation of recommendations from Laois County Retail Strategy 2003
- Proposed strategic retail policies and objectives
- Proposed Strategic Guidance on the location and scale of new retail development

7.0.2 Portlaoise continues to hold a position of retail primacy within the county, accounting for approximately three quarters of all new retail floorspace sought within the county. Outside of Portlaoise, the level of retail floorspace sought has been greatest in Portarlington (5 per cent) Ballylynan (3.9%)Mountmellick (3.6%) and the Carlow Environs (2.5 %).

7.0.3 In terms of development to have actually taken place on the ground, the largest new retail build includes the development of the Kyle Centre in Portlaoise (with anchor tenant Dunnes Stores), Lismard Retail warehousing park in Portlaoise, Parkside, Portlaoise – anchor tenant Superquinn, a Lidl discount store in Portarlington and a new Dunnes store next to the Designer Outlet Centre in Rathdowney. Planning permission exists for the redevelopment of Portlaoise Shopping Centre, the development of an Aldi Store at Kylekiproe, the Malting site on the Mountmellick Road (due for expiration in 2009) and 10,000 sq.m. of retail warehousing in the Togher Inland Port. The central retail areas in the larger towns and villages have attracted little retail activity and most applications relate to change of use proposals to convert shops to non-retail use.

7.0.4 Within Portlaoise, most major retail applications have been submitted outside the retail core on **edge of centre locations**.

Retail Hierarchy

The retail hierarchy as identified in the 2003 Retail Strategy still largely applies in this Retail Strategy. The tier category of village centres has been broadened to include smaller settlements which were included in the Laois County Development Plan 2006-2012.

This is in recognition of the fast changing circumstances affecting the built environment in these settlements, brought about by substantial housing applications.

The hierarchy continues to be dominated by Portlaoise, which is identified as a Major Town Centre in recognition of its status as a principal shopping town in the Midlands Region.

7.0.5 The main **out-of-centre proposals** in Portlaoise include the retail component of a mixed use scheme at O'Moore Park, a retail warehouse park proposal at the Togher Interchange.

7.0.6 In those other towns that have been the subject of sizeable retail proposals (Mountmellick, Rathdowney and the Environs of Carlow) most applications have been targeted for out-of-centre locations and are linked to large residential proposals. Outside of the locations mentioned above, retail proposals in the towns and villages largely involve redevelopment schemes and small-scale new build associated with housing proposals.

7.1 EVALUATION OF LAOIS COUNTY RETAIL STRATEGY 2003

7.1.0 It is necessary to evaluate the above findings against the recommendations of the first retail strategy. It pointed to

- ***the possibility of accommodating another key grocery multiple in Portlaoise by the year 2008.*** This was achieved with the opening of the Kyle shopping centre off the Kylekiproe Road and a Superquinn Store in 2008.

- ***Floorspace projection for the comparison sector, it is envisaged that most of this additional floorspace will be given over to retail warehousing*** - Although little development has taken place on the ground, it must be noted that planning permission has been granted for two large retail warehouse parks (circa 10,000-11,000 gross sq. m.) – one at the Kylekiproe Road and one close to the Togher Interchange. New retail floorspace for the sale of comparison goods also forms the major floorspace element of permissions for shopping centre development (Kyle Centre and the Laois Shopping Centre). Together with other outstanding planning permissions, these proposals account for a considerable amount of the future floorspace capacity in the comparison goods sector.

- ***'…grocery provision in the smaller settlements should be reinforced in order to counteract the abnormal level of leakage to competing centres outside the County.'*** The development of a new Dunnes store in Rathdowney (circa 2,000 gross sq. m.) and a new Lidl store in Portarlington (circa 1,600 gross sq. m.) fulfils this recommendation.

- ***Districts Centes –*** Graiguecullen - Carlow Environs has developed a supermarket and 5 retail units (totalling over 6,500 net sq. m.) at the junction of the Sleaty Road and Northern Relief Road. This has been designated as a District Centre in the Graiguecullen LAP 2007-2013. Paragraph 71 of the 2005 Retail Planning Guidelines states that '*There is no clear size threshold for a district centre although, depending on the density of population in the catchment area, they are likely to comprise about 10,000 square metres in or adjacent to the main towns…*'

- ***Neighbourhood Centres -*** The Retail Planning Guidelines defines these as follows: -"*Small groups of shops, typically comprising a newsagent, small supermarket/general grocery store, sub-post office and other small shops of a local nature serving a small, localised catchment population*." Page 43, 2005 RPG These have been developed mostly in Portlaoise as part of large scale residential planning development schemes, namely at The Fairgreen, Mountmellick Road and Kilminchy Dublin Road. Also permission has just been granted for a similar facility at Boghlone, Mountrath Road, Summerhill, Stradbally Road.

- **Redefining the retail core of Portlaoise :** .The 2003 Retail Strategy identified a retail core and a concentric edge of centre boundary for Portlaoise, the latter of which covered an area measuring approximately 300m from the edge of the retail core. The new Portlaoise Local Area Plan 2006-2012 has designated a town centre, which encapsulates the retail core of large tracts of land within this edge of centre boundary but does not extend beyond it. The retail core is usually found within the town centre boundary and encapsulates those areas primarily dedicated to retail use.

- **Edge of centre locations within Portlaoise:** The Retail Planning Guidelines state that the term 'edge-of-centre' can be used to describe locations found within 300 to 400 metres from the edge of the core retail area.

7.2 PROPOSED RETAIL POLICIES AND OBJECTIVES

7.2.0 Having regard to this updated review of retail within County Laois and the current economic climate, the following strategic objectives and policies for retail development in County Laois have been formulated to ensure that

i. County Laois possess a clear policy framework which will help guarantee that its strategic and local retailing needs are achieved;
ii. The competitIveness of the County's main centres are protected and enhanced;
iii. Existing and emerging issues within the county's retail profile can be adequately addressed by a coherent and easily implementable policy framework;
iv. The expenditure capacity for additional retail floorspace is harnessed over the life of the strategy.

7.2.1. The reviewed strategy policy of the County Retail Strategy and the actions required are outlined in the following sections

- **SPECIFIC OBJECTIVES;**
- **GENERAL POLICY;**
- **PROPOSED STRATEGIC GUIDANCE ON THE LOCATION AND SACLE OF NEW RETAIL DEVELOPMENT.**

7.2.2 The following Strategic objectives are important in realising the retail potential of County Laois:

SPECIIFIC OBJECTIVES

- 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.

7.2.3 On the whole, the findings of this strategy shall reinforce and strengthen the statements and policies made in the Laois County Development Plan 2006-2012. For ease of reference the main retail policies stated in the Plan will be recounted below and the main departures or expansions to these policies will be highlighted: -

Table 42: County Development Plan 2006-2012 – Policy Changes

Policy EE4	It is the policy of the Council to have regard to the Retail Strategy adopted by Laois County Council in 2003 and any subsequent review and the Retail Planning Guidelines for Planning Authorities, in determining planning applications for retail development.	*No change However, as outlined above, a new retail hierarchy has been defined to include new village centres.*
Policy EE5	It is 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.	*No change*
Policy EE6	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.	*No change*
Policy EE7	It is the policy of the Council to acknowledge the importance of the local shop in meeting the local shopping needs.	*No change*
Policy EE8	Laois County Council will seek to achieve the following: • Make provision for new retail warehouse development in accordance with the scale of provision as envisaged in the Retail Strategy 2003; • Planning permission will be restricted to the range of goods referred to E436 • Subdivision of units less than 700 sq. m. will not be permitted;	*add the following words to the first bullet point '….and its subsequent review'*
Policy EE9	It is the Councils policy: • To encourage and facilitate the development of appropriately located new district and neighbourhood centres to meet the needs of new centres of population; • To identify and zone, in Local Area Plans, appropriate locations for new district and neighbourhood centres within large established residential areas and where large scale residential development is planned.	*delete the second bullet point and replace with: -* *'to assess district and neighbourhood proposals on the basis of quantitative need, having regard to the size of the housing development and to the desire to avoid adverse retail impact on the town centre and established retail centres.'*

7.2.4 Strategic guidance for the location, nature and scale of new retail development can be approached at a County level and at a town level. The existing retail hierarchy will be both retained and strengthened. The table below shows the proposed actions necessary to reflect this.

Strategic Guidance on a County basis

7.2.5 Apart from a few exceptions, most large scale retail proposals have been attracted to Portlaoise. In all probability, this trend will continue, irrespective of the ideal to decentralise facilities throughout the County. Market realities dictate that shopping for comparison goods is most economically viable and sustainable when conducted within large settlements. Accordingly, it is contended that the best prospects for enhancing the retail appeal of the County as a whole rest significantly on firstly strengthening the retail fortunes of Portlaoise.

Table 43: County Laois Retail Hierarchy Proposed

RETAIL FUNCTION	LOCATION	ACTION PROPOSED
Major Town Centre	Portlaoise	Principal Town Designation to be further reinforced with particular emphasis on the traditional retail core
County Town Centre (Eastern Area RPG's)	Portarlington	Key Service Town Designation to be further reinforced with particular emphasis on the traditional retail core
County Town Centre (Southern Area RPG's)	Mountmellick Rathdowney Mountrath Stradbally Durrow Abbeyleix	Sustain and enhance the vitality and viability of the central parts of the town in conjunction with the utilisation of strategic backland areas
District Centre	Graiguecullen (Carlow Environs)	Develop a joint strategy between Carlow and Laois Local Authorities which would focus on complimentary retailing policies
Neighbourhood Centres	Existing in Portlaoise i. Fairgreen, Mountmellick Rd, ii. Kilminchy, Dublin Road,	Additional Neighbourhood Centres to be developed in Portlaoise - i. Summerhill, ii. Boghlone, Mountrath Road, iii. Portlaoise Northern Environs iv.
		Additional Neighbourhood Centres to be developed in Portarlington – i. Sandy Lane ii. Canal Road
Villages	Arles, Ballinakill, Ballylynan, Ballyroan, Ballybrittas, Ballyfin , Borris in Ossory, Camross, Coolrain, Cullahill, Castletown, Emo, Errill, Killenard , Newtown Doonane, Timahoe, and Swan, Shanahoe	Retain provision of essential shopping facilities

7.2.6 As recognised in the 2003 Retail Strategy, the scope to reinforce the existing durable sectors of the smaller towns in County Laois is linked to the reinforcement of their grocery sectors and the increased pedestrian footfall levels that would ensue. improving the level of grocery provision in these towns will help to retain a greater proportion of convenience expenditure within the county and stem leakage to competing towns in neighbouring counties.

7.2.7 Outside of Portlaoise and the other towns, the Strategy recommends that the County Council should pursue a supportive role aimed at achieving a balanced level of retailing in the Villages. Although it is acknowledged that such settlements lack the necessary catchment and infrastructural resources from which to sustain large amounts of retail

development, there is still a requirement to retain a degree of provision for essential shopping supplies (especially now that some of these settlements such as Ballylynan, Ballyroan, Ballybrittas and Swan are accommodating sizeable new residential developments).

STRATEGIC GUIDANCE WITHIN TOWNS

PORTLAOISE

7.2.8 Within Portlaoise, having regard to the above, the retail strategy will seek to firstly to promote retail development as follows within the following zones as indicated on the attached map:

i. Core Retail Area
ii. Town Centre Secondary
iii. Edge of Centre
iv. Neighbourhood centres
v. General Business
vi. Enterprise and Employment

i. CORE RETAIL AREA (The traditional shopping area of Portlaoise Town)

7.2.9 It is commonly the case that retailing in the older parts of settlements struggle to compete with new developments on edge of centre and out of centre locations. The reasons for this are self evident and are largely a product of locational factors at the micro level, coupled with the impact of broad overarching forces at the macro level. Retail development in established town centres is encumbered by the following obstacles to progress: -

- The multiplicity of land ownership means that parcels of land are small and difficult to assemble for the creation of a large site capable of accommodating modern retail provision.
- High land values ensure that customers have to pay for car parking.
- The nature of the road infrastructure, in terms of its layout and dimensions, is often at variance with the geometry of modern road design. Shopping streets evolved from the days of non-motorised transport and are often narrow, uniquely configured and ill-suited to heavy traffic flows. As a result, they are therefore vulnerable to congestion, which does little to promote the appeal of town centres.
- traditional shopping streets are often exposed to inclement weather conditions and are not able to benefit from the sheltered comfort of enclosed centres.

7.2.10 In contrast, the appeal of out of centre locations mirrors the difficulties confronting town centre shops. Out of centre locations possess the following advantages:

- Plots of land tend to be bigger and land is easier to assemble for site development.
- Car parking is free.
- A less congested road network and increased accessibility make it a convenient option for car-borne shoppers.
- Because sites are more commodious, unit sizes can be larger and more spacious, which can appreciably enhance the quality of the environment for the shopper.
- Shoppers can avail of a large range of outlets under one roof with direct access from an adjacent car park.

7.2.11 Against this background, the development of retailing in the northern part of Portlaoise town centre is hampered by problems of land assembly associated with the multiplicity of plot ownership in this area. The congested street network is also not conducive for the safe and convenient access needed for bulk-buy shopping. Experience has shown that reviving the retail fortunes of these areas rests with undertaking major mixed use redevelopment schemes, which often require vesting land through protracted compulsory purchase procedures. It is in recognition of this state of affairs that the lands owned by the Presentation Sisters and the parish have been included within the

newly expanded retail core. Their inclusion is specifically designed to stimulate interest in developing these lands to provide an integrated mixed use development.

7.2.12 Notwithstanding the difficulties outlined above in respect of encouraging retail development in town centres, the development of the Heritage Hotel and multi-storey car park provides an indication of the other land use possibilities that can take place in the older parts of Portlaoise town centre. Indeed, it could be argued that the public and private bodies concerned with promoting the vitality and viability of town centres should accept that a degree of change is inevitable and should correspondingly explore other complementing strategies and policies for the town centre. On this matter, the 2003 retail strategy pointed to the incorporation of town centre management (TCM).

7.2.13 There are largely three mutually inclusive aims of town centre management: to develop the town centre by enhancing the physical environment; to manage the town centre for the purpose of efficiency; and, to promote the town centre as a place to visit and do business. From a planning perspective, the overriding theme to TCM is the emphasis placed on environmental upgrading. Indeed, environmental improvement is now synonymous with TCM and is perceived as being instrumental to the restoration of town centre confidence and the reinforcement of a town centre's distinctiveness and spirit of place.

7.2.14 Environmental improvement embraces the concepts of pedestrianisation, traffic calming, physical upgrading (especially shopfronts) and street maintenance involving both hard landscaping (paving, street furniture, signage, lighting, wirescape) and soft landscaping (tree planting and planters). Within this context, the Chamber of Commerce highlights the potential for a 'plaza' type development at Lyster Square and the opportunity this area possesses to create a distinctive urban space within the town centre. However, in order to implement such laudable schemes, the car parking problem would need to be resolved.

7.2.15 Overall, the aim of environmental improvement schemes is to cultivate a distinctive sense of urban space in the traditional part of Portlaoise town centre. This will enhance its appeal for the development of new service, entertainment, leisure and residential uses (apartment living). It will also boost its attraction as a focal location for the congregation and interaction of the town's inhabitants.

POLICY RECOMMENDATION:
The following policy is therefore recommended in relation to the Core Retail Area : To protect and enhance the special physical and social character of the existing Town centre and to provide for and improve retailing and commercial activities.

The purpose of this zone is to protect and enhance the special character of Portlaoise Town centre and to provide for and improve retailing, residential, commercial, office, cultural, public facilities and other uses appropriate to the centre of a developing Town. It will be an objective of the Council to encourage the use of buildings and backlands and especially the full use of upper floors, preferably for residential purposes. Warehousing and other industrial uses will not generally be permitted in the Town centre.

ii. **Town Centre Secondary**

***POLICY RECOMMENDATION*:**
The following policy is therefore recommended in relation to the Town Centre Secondary: : *To provide for and improve retailing and commercial activities.*

The purpose of this zone is to provide for and improve retailing and commercial activities and acknowledge the existing/permitted retailing and commercial activity. Any specific development proposal must have due regard to the location of the site within the wider Town context, submit a retail impact assessment where applicable and be in accordance with the proper planning and sustainable development of the area.

7.2.16 Town Centre Secondary zoning is introduced to recognise the significant level of retail development which has occurred within 400m of the Town Centre.
The purpose of this zone is to provide for and improve retailing and commercial activities and acknowledge the existing/permitted retailing and commercial activity. Any specific development proposal must have due regard to the location of the site within the wider Town context, submit a retail impact assessment where applicable and be in accordance with the proper planning and sustainable development of the area.

iii. Edge of Centre

***POLICY RECOMMENDATION*:**
The following policy is therefore recommended in relation to the Edge of Centre :
To provide for retail warehousing in accordance with the adopted Retail Strategy and in support of the town centre.

Retail Warehousing, defined as large stores specialising in the sale of bulky household goods such as carpets, furniture, electrical goods and bulky DIY items, which generally, cannot be located in the town centre due to their requirements for space and parking facilities. Retail warehousing will be permitted in principle, depending on its scale and nature, provided that such development does not detract from the town centre's retailing function and provided that it is in accordance with the Council's adopted Retail Strategy.

7.2.17 Edge of Centre zoning is introdued in line with the sequential approach as outlined in the Retail Planning Guidelines 2005 . Edge of Centre locations are over 400m from the Town Centre. It is considered that these sites are ideally suited for Retail Warehousing, defined as large stores specialising in the sale of bulky household goods such as carpets, furniture, electrical goods and bulky DIY items, which generally, cannot be located in the town centre due to their requirements for space and parking facilities. Retail warehousing will be permitted in principle, depending on its scale and nature, provided that such development does not detract from the town centre's retailing function and provided that it is in accordance with the Council's adopted Retail Strategy.

iv. Neighbourhood centre (New retail development linked to housing proposals)

7.2.18 Given the number and scale of new housing proposals across the County and the pressure that this is exerting on the planning authority, it is appropriate to consider the application of a broad-brush ratio of retail floorspace to population index so as to attempt to manage this form of retail development.

7.2.19 This is especially warranted in the light of the number and size of residential applications with retail components to their layout. In some cases, the level of retail floorspace applied for would appear to be entirely arbitrary in its conception and ill-fitting when viewed within the context of the existing level of shopping provision.

Bearing this in mind, it is proposed to index new neighbourhood retail floorspace levels to anticipated levels of additional population growth. Based on the observed level of retail floorspace per capita in County Laois, it would seem reasonable to apply a general requirement ratio of 1 gross retail sq. m. for every person. Hence, if a housing development is anticipated to accommodate a population of 1,000 people, then there may be scope to develop a new neighbourhood shopping facility of approximately 1,000 gross sq. m. Typically, such retail provision would include a small convenience store and a number of retail service units, such as a hairdressers, hot food outlet, video store, etc. In the interest of protecting the business of shops that line the town centre it is recommended that the sale of comparison goods be precluded from operating at these centres.

7.2.20 Furthermore, in the interest of preserving the residential amenity of the inhabitants and given the propensity of such developments to attract antisocial gatherings, retail provision of this type should preferably be located on the main priority road from which access to housing is achieved. Roadside prominence of this type will also allow for a greater degree of passive surveillance. Using this ratio of floorspace to population index as a guide, the onus should then be placed on the developer to provide a Retail Supporting Statement. This 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. Similarly, it could also reveal that an existing retail development has permission to expand, which would likewise meet the needs of the incoming population. In order to effectively carry out this retail capacity analysis it will be necessary to define a realistic catchment area. When it is considered that the attraction of these local facilities is based primarily on their convenience for shoppers, it may be appropriate to demarcate the catchment on the basis of walking isochrones from the centre of the proposed housing development (such as a 5 to 10 minute walk from the proposed development).

7.2.21 Five Neighbourhood Centres are shown in the Portlaoise Local Area Plan. Dunes Stores on the Mountmellick Road, Portlaoise is an established neighbourhood centre and needs to be formally recognised as such. The purpose of these Neighbourhood Centres is to serve the local community through the provision of retail facilities and other services. Ideally these should be within walking distance of the area they are intended to serve. The retail element of these local centres will be controlled so as not to negatively impact on the existing town centre. These controls will usually take the form of setting a maximum retail floor area for the shop units to be provided in these neighbourhood centres. The larges size of a convenience store shall be restricted to no more than 800 sq.m in a Neighbourhood Centre.

POLICY RECOMMENDATION:
The following policy is therefore recommended with respect to neighbourhood centres **To provide for the development of a new/existing neighbourhood centre to serve the needs of new/existing residential areas.**

A mix of retail, community and recreational development will be sought in this zone. Only limited residential development will be considered in new developments sufficient to ensure the satisfactory working of the neighbourhood centre. Neighbourhood Centres are intended to serve the immediate needs of the local working and residential population and complement, rather than compete with the established town centre.

v. General Business

7.2.22 Many areas were zoned general business in the previous County Development Plan and Local Area Plans. This allowed for a variety of uses which included retail uses. This use zone now will only allow for retail warehousing type uses and limited small scale convenience, particularly those associated with petrol stations, etc.

POLICY RECOMMENDATION
The following policy is therefore recommended in relation to the level of retail to be provided within areas zoned for general business :

General Business Areas are intended to provide for additional commercial activities and to recognize existing retail/permitted retailing. New retail developments within these areas shall be limited to small scale convenience (<100sqm) stores in order not to detract from the town centre or from neighbourhood centres,

vi. Enterprise and Employment

7.2.23 In recognition of its status as an Inland Port under the National Spatial Strategy the County Council is keen to promote the development fortunes of land designated for commercial development at the Togher Interchange. While conscious of the need to safeguard the interests of existing shops lining traditional thoroughfares in Portlaoise and to minimise adverse retail impact on these existing retailers, the principal emphasis will be placed on advancing the sale of bulky durables from retail warehouses developed at Togher.

7.2.24 With this in mind, retail development will be restricted to retail warehousing and the sale of bulky durable goods as recognised in the Retail Planning Guidelines and as agreed in writing with the County Council.

7.2.25 In facilitating these end-users, the emphasis will be placed on accommodating retailers with national appeal. Suitable tenants could include those retailers that sell discounted merchandise. Because of the size of the units allowed there is a tendency for such operators to allocate an increasing proportion of their floorspace to the sale of general household items that are often associated with trade from retail warehouses.

'Land was identified during the period of the 2000 Laois County Development Plan for such development in the Togher area of Portlaoise. Zoning within this area caters for distribution, a limited amount of retail warehousing for bulky durable goods [as defined in Para 4.36 in Chapter 4 Enterprise and Employment], factory warehousing, showrooms, bus and coach stops, heliport, motorway services and industrial development, innovative/services park, opportunity sites and event centre. No development of a retail nature which would impact adversely on the town centre will be allowed.'

Para 4.24, Portlaoise Local Area Plan 2006 - 2012

7.2.26 Given the proximity of this area to the Togher Interchange, Para 26 of the Retail Planning Guidelines 2005 should also be taken into account.

POLICY RECOMMENDATION:
The following policy is therefore recommended in relation to the level of retail to be provided within areas zoned for enterprise and employment :

To provide for Enterprise and Employment at Strategic Locations.

The Enterprise and Employment land – zoning incorporates the Togher area to the South West of Portlaoise. It is an objective in this area to develop a flagship Togher ***National Enterprise*** Park which has the potential to be a major boost to the economy of Portlaoise and to contribute to the growth of the County and the Region as a whole and by realising the objectives of the NSS and the MRPG.

It is the policy of the Council to ensure that there is adequate land available to facilitate opportunities for employment creation, and the council will accommodate commercial and enterprise uses that are incapable of being situated in a town centre location, provided that such development does not detract from the town centre's commercial function. Warehousing, commercial, enterprise and ancillary services should be provided in high Quality landscaped campus style environments, incorporating a range of amenities.

The uses in this zone are likely to generate a considerable amount of traffic by both employees and service traffic. Sites should therefore have good vehicular and public transport access. The implementation of mobility management plans will provide important means of managing accessibility to these sites.

"Para 26. - The fifth, and final objective is a presumption against large retail centres located adjacent or close to existing, new or planned national roads/motorways. Such centres can lead to an inefficient use of costly and valuable infrastructure and may have the potential to undermine the regional/national transport role of the roads concerned. However, as a limited exception, large retail warehouses may be considered for locations close to such road networks where the proposed development would be situated in an Integrated Area Plan area in a Gateway (designated by the National Spatial Strategy) and where the road network has sufficient capacity to cater for the scale of development proposed (See also paragraphs 84a – 84e)".

Retail Planning Guidelines 2005

SECTION 8:

IMPLEMENTATION AND MONITORING

8.0 INTRODUCTION

8.0.1 In order to allow the County Council to effectively assess future retail proposals it is necessary to highlight the relevant retail policy and safeguards that have to be satisfied and to identify certain technical requirements that have to be met. Only by doing so, will the Council be in a position to manage the growth of retail development in the interest of both the wider shopping public and existing retail businesses.

Retail Impact Assessments and Retail Supporting Statements

8.0.2 In order to assist the Council with the determination of significant retail applications, retail impact assessments (RIAs) will be required from developers for the following size of proposals:

- Portlaoise - A retail proposal equal to or in excess of 1,000 gross retail sq.m.
- All other settlements in the County– a retail proposal equal to or in excess of 500 gross retail sq.m.

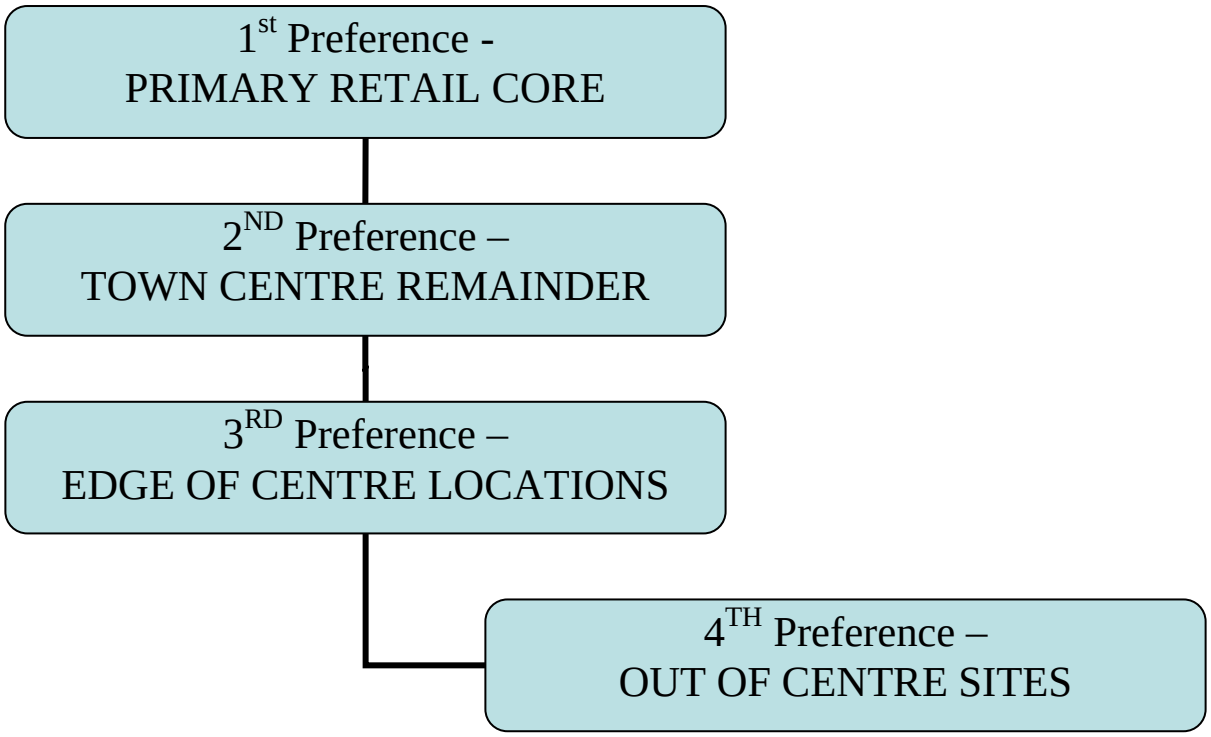
8.0.3 In both of the above cases, the contents of the RIA for major retail proposals should have regard to the guidance provided in Annexes 2, 3 and 4 of the 2005 Retail Planning Guidelines. In other words, the RIA should seek to quantitatively and qualitatively examine the capacity for the proposal and to estimate its impact on existing retailers.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 (see strategy for neighbourhood shopping provision in preceding section of this Review). The primary requirement of this Retail Supporting Statement will be to demonstrate the need for the proposal (as outlined in Annex 3 of the 2005 Retail Planning Guidelines).

8.0.4 In addition to the submission of the above technical information, the following policy tests will have to be addressed in order to demonstrate how the proposal: -

- complements or meets existing deficiencies in the overall shopping provision;
- will not cause an adverse impact on one or more town centres, either singly or cumulatively with recent developments or other outstanding planning permission, sufficient to undermine the quality of the centre or its role in the economic and social life of the community;
- will not diminish the range of activities and services that a town centre can support;
- will not materially diminish the prospect of attracting private sector investment into one or more town centres;
- 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, especially the disabled;
- will not lead to an unreasonable or detrimental impact on amenity, traffic movements or road safety;
- will link effectively with an existing town centre so that there is likely to be commercial synergy;
- is to a standard of design, of both the buildings and the spaces around the buildings, which contributes positively to townscape and is sensitive to the surrounding area.

Sequential approach

8.0.5 For all major retail proposals in excess of the thresholds identified above the applicant will have to demonstrate compliance with the sequential test. This stipulates that the locational preference for all new major retail developments, where practicable and viable, shall be in the primary retail core. If no such site exists, consideration will be given to other sites located within the remaining town centre. Only after demonstrating that suitable sites within the town centre do not exist, will consideration be afforded to edge of centre locations, which can be described as locations within 300 metres of the primary retail core. Similarly, only after having first assessed town centre and edge of centre sites and premises, on the basis of their size, availability, accessibility and feasibility for development, will consideration be afforded to the development of alternative out of centre sites (see diagram)



8.1 FLOORSPACE LIMITIATIONS

8.1.0 In line with the recommendations of the 2005 Retail Planning Guidelines it is also reasonable to apply floorspace caps to certain types of retail development. As stated in the Guidelines and explained in the 2001 Goodbody Report, the introduction of these caps is aimed at preventing the creation of localised monopolies. The caps as they apply to certain types of development are outlined below: -

Convenience stores and comparison stores - imposition of 3,000 sales sq. m. cap (net retail floor area).

Hypermarkets – imposition of 3,000 sales sq. m. cap on net floor area devoted to the sale of convenience goods only.

Retail warehousing – retail warehouse units of a size less than 700 gross sq. m. will not normally be permitted in edge of centre of out of centre locations because they can often be accommodated in town centres.

Retail warehousing - mindful of concerns for creating traffic problems, maximum retail warehouse unit size will be restricted to a floor area of 8,000 gross sq. m.

Filling stations – in relation to those applications aimed at developing retail facilities of greater than 100 sq. m. of net retail sales space, the sequential approach will apply and compliance with the assessment criteria outlined above will also have to be demonstrated. The need to show compliance with the sequential approach is not required for filling stations linked to motorway service areas.

8.2 REVIEW OF THE STRATEGY

8.2.0 The guidelines and policy outlined in this strategy are not intended to be treated inflexibly. It is essential that in the context of changing market conditions that the retail strategy is reviewed constantly and updated where applicable.

8.2.1 This Strategy should be read alongside the criteria outlined in the Retail Planning Guidelines.

8.3 COLLATION OF RETAIL DATA

8.3.0 A GIS based system for retailing should be established in the Council to report and capture relevant data, such as floorspace and land uses for all individual properties across the town centre's. This system would be helpful in ensuring regular and efficient updating of town centre floorspace data, in particular that from planning applications and permissions, as well as less frequent details on change of uses. A retail GIS system would perform as a data storage, information management and analysis tool that would be beneficial for the continuing development of the retail strategy and other planning matters.

8.4 IMPLEMENTATION

8.4.0 It is envisaged that the GIS dataset would comprise a range of information. The most recent survey undertaken in 2005 would form the basis of such a system. The data to be captured would typically comprise:

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

8.5 MONTIORING AND REVIEW

8.5.0 It is essential that:

i. The retail strategy and its baseline information are kept as up to date as possible;
ii. There are mechanisms in place to monitor progress in the implementation of policies; and
iii. There is a mechanism that can facilitate change which is responsive to emerging trends and opportunities.

The above can be achieved by establishing a framework for regular monitoring of expenditure and population forecasts.

GLOSSARY

Convenience Goods
Food, alcoholic and non-alcoholic beverages, tobacco, non-durable household goods.

Small Convenience Stores
Small Convenience Stores are small stores, such as forecourt shops and small supermarkets, with a wide food and non-food product range. They are often part of a Symbol Group and sometimes offer a range of own-brand products. These stores are characterised by convenient town, city or suburban locations, generally have extended opening hours and are used mainly for 'top-up' shopping.

Symbol Groups
Symbol Groups are a group of outlets, that are generally independently owned, operating under a symbol name and co-operating to gain purchase cost savings and, in some instances, develop own-label products. Symbol groups are essentially managed or grouped around a wholesaler.

Large Convenience Stores
Large Convenience Stores are substantially larger than small convenience stores and sell a wider range of convenience goods along with some non-food goods. They can be located either in or on the edge of an urban centre. Unlike small convenience stores they are generally owned and operated by national or multinational companies. Examples of operators in Ireland include Tescos, SuperValu and Dunnes Stores.

Comparison Stores
Comparison Stores are small stores, such as forecourt shops and small supermarkets, with a wide food and non-food product range. They are often part of a Symbol Group and sometimes offer a range of own-brand products. These stores are characterised by convenient town, city or suburban locations, generally have extended opening hours and are used mainly for 'top-up' shopping.

Comparison Goods
Clothing & footwear; furniture, furnishings & household equipment; medical & pharmaceutical products; therapeutic appliances & equipment; educational & recreation equipment & accessories; books, newspapers & magazines; goods for personal care; goods not elsewhere classified.

Independent Stores
These include specialists such as greengrocers, bakers, delicatessen as well as general grocery stores such as family owned Spar, Mace, SuperValu or Londis stores, and are typically owner-managed.

Shopping Centre
A central location (generally roofed) where shops, restaurants as well as service companies and leisure operators are grouped together to serve a local wider population.

Bulky Household Goods
Range of goods not normally sold in convenience or comparison retail units, including but not limited to, carpets, furniture, automotive products, white electrical goods and DIY items, garden materials, office and industrial plant.

Discount Stores
These are retail outlets that offer a range of goods while focusing on offering substantial discounts over other retailers. Own-label products and dry goods often feature significantly in these outlets. Some bulky household goods are sold. Examples of operators in Ireland include Aldi and Lidl.

Retail Warehouse/Park
A single level retail store selling non-food, bulky household goods, occupying a warehouse, (purpose-build or industrial-type) building with substantial car parking facilities. Examples of operators in Ireland include Atlantic Homecare, Homebase and Argos.

Factory Outlets
These are outlets selling the products of a factory at discounted prices, typically branded goods such as clothing. Examples of operators in Ireland include the Killarney Outlet Centre.

Non-Store Retailing
This sector traditionally includes mail order, door-to-door, and internet sales. However, the boundary between this sector and store retailing is becoming blurred as store retailers develop into non-store selling via the Internet, telephone selling and TV shopping.

Floorspace Efficiency
Improvements that enable retailers to sell more goods from the same amount of net retail sales area.

Net Retail Sales Area
The area of a shop or store which is devoted to the sales of retail goods; also referred to as "net retail area" and "net retail floorspace".

Gross Floor Area
Net lettable area i.e. sales space, plus storage space, offices, toilets, canteen and circulation space.

Inflow
Turnover that is due to expenditure from persons living outside the county; typically expressed as a percentage of total expenditure.

Outflow/Leakage
Potential turnover that is lost to centres outside the county; typically expressed as a percentage of total expenditure.

Turnover
Gross sales, stated in €; also used to refer to "turnover ratio".

Turnover Ratio
Gross sales (€) per sq m of net retail sales area; also referred to as "turnover level" or "turnover".

Vitality
How active and buoyant a centre is (RPGs, Para. 30, p. 6).

Viability
Commercial well-being of a centre (RPGs, Para. 30, p. 6).

Consumer Price Index
A price index that tracks the prices of a specified basket of consumer goods and services, thereby providing a measure of inflation.

Gross Domestic Product (GDP)
The total market value of all the goods and services produced within the borders of a nation during a specified period.

Gross Domestic Product Per Capita
GDP per capita is the GDP of a nation divided evenly among its population.

Personable Disposable Income
The income households receive from firms, plus transfer payments received from the government, minus direct taxes paid to the government. It is the income that households have available for spending or saving.