4.0 INTRODUCTION

The key baseline information underpinning the 2004-2009 County Retail Strategy has been reviewed and revised to ensure that the most up to date information is taken due account of and responded to in the review. This section sets out and examines the key baseline information in respect of:

i. Population projections

ii. Retail floorspace; and

iii. Shopping patterns.

4.1 POPULATION TRENDS AND PROJECTIONS

4.1.1 National Trends

Ireland's population, as indicated in The Preliminary Census Results of 2006, is the highest it has been since the census of 1861 when the population was 4.4 million. The census total is a count of the number of persons actually in the State on census night. The change in population between two censuses reflects the effect of births and deaths and of movements of persons into and out of the State during the relevant period. Since the number of births and deaths are known from the vital statistics registration system, the resulting residual is taken as a measure of net migration (i.e. the difference between the inward and outward flows). Just over 245,000 births were registered in the four-year period which ended in March 2006. Taken in conjunction with the 114,000 deaths which were registered during the same period, this resulted in a natural increase in population of 131,000. Deducting this from the population increase of 318,000 gives a derived net immigration figure of 186,000[1] for the 2002-2006 period.

Table 4.1: Average annual births, deaths, natural increase and estimated net migration for each inter-censal period, 1926-2006 (Source: Preliminary Census Results: 2006)

Period	Total births	Total deaths	Natural increase	Change in population	Estimated net migration
			Thousands		
1926 - 1936	58	42	16	0	-17
1936 - 1946	60	43	17	-1	-19
1946 - 1951	66	40	26	1	-24
1951 - 1956	63	36	27	-12	-39
1956 - 1961	61	34	26	-16	-42
1961 - 1966	63	33	29	13	-16
1966 - 1971	63	33	30	19	-11
1971 - 1979	69	33	35	49	14
1979 - 1981	73	33	40	38	-3
1981 - 1986	67	33	34	19	-14
1986 - 1991	56	32	24	-3	-27
1991 - 1996	50	31	18	20	2
1996 - 2002	54	31	23	49	26
2002 - 2006	61	28	33	79	46

[1] The number of non-Irish nationals enumerated as part of the 2002 census was 222,000, representing 5.8 per cent of the usually resident population. While the corresponding figure for 2006 will have to await the publication of the Principal Demographic Results in April 2007, it can be tentatively estimated from the derived flow data on migration that the stock of non-Irish nationals is likely to be about 400,000.

To put the recent phenomenal changes in the nation's demographics in an historical context, Table 4.1 shows the components of population change, expressed in the form of average annual figures for each inter-censal period since 1926.

The decline in births which occurred between 1980 and 1994 was mainly responsible for the natural increase reducing to an average of 18,000 per annum between 1991 and 1996. Rising numbers of births and declining numbers of deaths have since resulted in the natural increase resuming its upward path with the recent inter-censal period recording an average annual figure of 33,000 person's net annual increase.

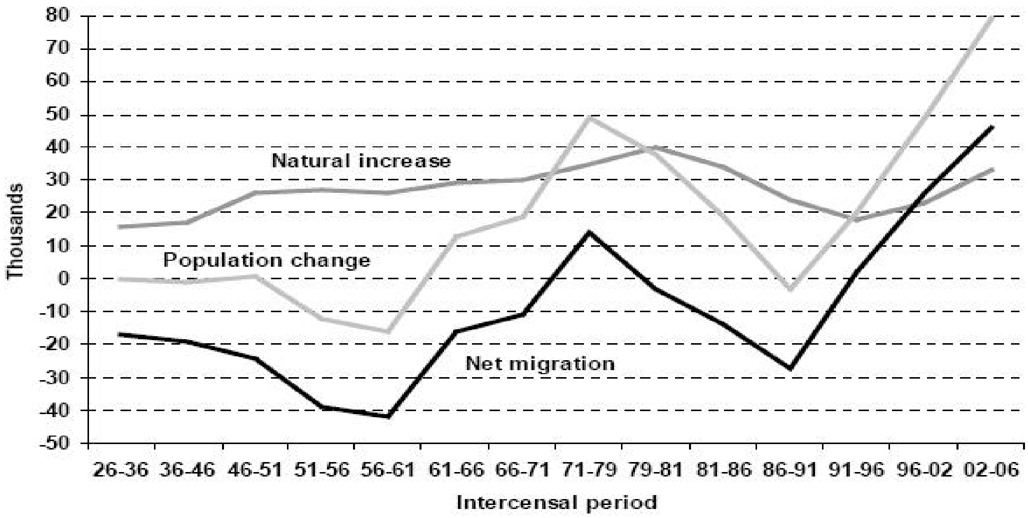


Figure 4.1
Components of population changes, 1926-2006
(Source: Preliminary Census Results: 2006)

During the 1980s outward migration led to a moderation in the nation's population growth and ultimately to a decline between 1986 and 1991. The direction of net migration has been inward since then with the magnitude of the flows strengthening to reach a record level of 46,000 during the recent inter-censal period.

Figure 4.2 shows the average annual population change, natural increase and net migration for each of the inter-censal periods during 1926 to 2006. The key influence which migration plays in determining population change can be clearly seen.

4.1.2 Regional Trends and Predictions

As detailed on Table 4.2 all provinces experienced population growth between 2002 and 2006. The Mid-East region, comprising the counties of Kildare, Meath and Wicklow had the highest population growth (+13.1%) between 2002 and 2006, while the Midland region, comprising, Laois, Longford, Offaly and Westmeath also experienced significant growth (+10.5%), comfortably exceeded the national average rate of increase of 7.5 per cent.

Table 4.2
Population Change at National and Regional Levels
1991 to 2006

Region	1991	Change* 91-96 (%)	1996	Change* 96-02 (%)	2002	Change* 02-06 (%)	2006	Actual Change 02-06
Midland	202,984	1.3	205,542	9.6	225,363	10.4**	251,380	26,017
Mid East	325,291	6.8	347,407	18.8	412,625	13.1	475,026	62,401
Border	402,987	1.1	407,295	6.2	432,534	7.5	467,327	34,793
Mid West	310,728	2.0	317,069	7.1	339,591	5.8	360,651	21,060
Dublin	1,025,304	3.2	1,058,264	6.1	1,122,821	5.3	1,186,159	63,338
West	342,974	2.7	352,353	7.9	380,297	8.0	413,383	33,086
South West	532,263	2.7	546,640	6.2	580,356	6.5	620,525	40,169
South East	383,188	2.2	391,517	8.2	423,616	8.0	460,474	36,858
State	3,525,719	2.8	3,626,087	8.0	3,917,203	7.5	4,234,925	317,722

Source: Central Statistics Office (CSO), Census of Population, (1991, 1996 & 2002) and Preliminary Results of 2006 Census.
*Measured as a percentage against the later date.
**11.5% if measured against the earlier date (2002).

Approximately 70% of the significant population increase in the Midlands Region between the 2002-2006 inter-censal period was due to net immigration to the region. Indeed, while the population increased in all of the regional authority areas between 2002 and 2006, the influence of net migration (in-migration less out-migration) on overall growth was greatest in the West and Midlands, and least in Dublin. An overview of the demographic profile of the state over the decade spanning the 1996 to the 2006 census, illustrates that the Midlands has shown the most significant change in it growth pattern, from being second slowest in the 1991-1996 period to being the fastest growing region over the 2002-2006 period.

Table 4.3
Regional Share of State Population: 1991-2006

Region	1991	1996	2002	2006
Border	11.43	11.23	11.04	11.04
Dublin	29.08	29.18	28.66	28.01
Mid-East	9.23	9.68	10.53	11.22
GDA	38.31	38.77	39.20	39.23
Midlands	5.76	5.57	5.75	6.94
Mid-West	8.81	8.74	8.67	8.52
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**
Source: CSO; February 2007				

Indeed, it is partly because of this high level of population growth attributable to unforeseeable net in-migration that has necessitated the Central Statistics Office revising its regional populations predictions; these revised projections are presented in Table 4.4 below. It is interesting to note that in the case of the Midlands Region, the revised CSO population projections at 2020 differ significantly from the current projections issued in the Midlands Regional Planning Guidelines by an additional increase of 8,088 persons. Indeed, in all cases the revised CSO population projections exceed those of the relevant Regional Planning Guidelines. This would therefore suggest that the role of Longford Town as an inter-regional link will be enhanced by virtue of the increased level of urbanisation it can expect in line with both the regional settlement strategy presented in the MRPGs and the strategic guidance on settlements outlined in the NSS.

Table 4.4
CSO Revised Regional Population Projections

Region	2006	2011	2016	2020	% Share 2006	% Share 2020	2020 RPGs projections	Difference With RPG 2020
Border	467,327	613,674	559,078	590,369	11.03	11.07	550,000	40,359
Dublin	118,6159	128,7504	139,0558	146,4366	28.01	27.46	-	-
Mid-East	475,026	537,033	575,598	601,920	11.22	11.29	-	-
GDA	1,661,185	1,824,537	1,966,156	2,066,287	39.23	38.75	1,832,000	234,287
Midlands	251,380	284,690	314,208	333,088	5.94	6.25	325,000	8,088
Mid-West	360,651	391,764	426,692	451,758	8.52	8.47	400,000	51,758
South-East	460,474	506,142	549,635	579,862	10.87	10.87	500,000	79,862
South-West	620,525	679,738	741,940	784,343	14.65	14.71	670,000	114,343
West	413,383	454,380	497,217	527,228	9.76	9.89	460,000	67,228
State	4,234,925	4,654,925	5,054,925	5,332,928	100.00	100.00	4,737,000	595,925
Source: CSO; February 2007								

4.1.3 Local Trends and Predictions

The 2002 Census is the most recently published detailed source of population data for Longford Town and County and thus provides the most accurate baseline information for population projections. This has been updated in this review to take into account the 2006 Preliminary Census Results. However, there have been changes in the Electoral Division boundaries between the 2002 and 2006 censuses and the detail of this will not be available until the full results of the 2006 Census are published later in 2007. Noting these qualifications, the population of County Longford grew by 10.6% in the 2002-2006 inter-censal period, just below that of Longford Town and Environs which increased by 11.4% during the same period.

Table 4.5 **Population Change of Longford Town & County: 1996 to 2006**					
Area	**1996**	**2002**	**% Change 96-02**	**2006***	**% Change 02-06**
Longford Town & Environs	6,984	7,557	8.2	7,612	11.4*
Longford County	30,166	31,068	3.0	34,361	10.6
*Based on 2006 Preliminary Census Results					
Source: CSO Censuses 1996, 2002 and 2006 Preliminary Census Results					

In estimating the future population of Longford Town and County, it is necessary to have regard to recent demographic trends as discussed in preceding sections. The projections are informed by, and largely derived from, the following sources of demographic data:

- CSO Census and Demographic Publications
- The NSS
- The MRPGs
- Longford County Development Plan
- Longford Town Council Development Plan
- Longford Housing Strategy
- Longford Retail Strategy

A number of factors will have an influence on how the population of the county is likely to grow over the life of the County Retail Strategy and beyond. It is important to take these into account in the calculation of population projections. Such factors and influences include:

i. The identification of Longford Town in the MRPGs as a Principal Town within a broader polycentric model that incorporates the Midlands Linked Gateway. The MRPGs seeks to prioritise the linked Midlands Gateway and the Principal Towns as the primary foci for development.

ii. Actual and projected levels of Foreign Direct Investment (FDI) in the county. The success in securing Abbot Ireland for Longford Town is evidence of the success of the IDA in attracting FDI into the Midlands Region.

iii. Government decentralisation policies, particularly the fact that Longford Town has been selected as the location for the decentralisation of the Irish Prison Service (IPS) bringing an estimated 158 civil servants to the area. This move is well underway with construction on site nearing completion.

iv. The continuing development of indigenous industries.

v. Infrastructure improvements, specifically the completion of the N4 Kilcock/Kinnegad motorway/bypass in December 2005 alongside ongoing improvements to the N4 and N5 as well as upgrading of the rail infrastructure servicing the county. The latter in particular has greatly reduced travel times to Longford and increased the attractiveness of the county to those priced out of the residential market in the Greater Dublin Area.

vi. The ongoing development of the county's tourism potential.

Table 4.6 below provides population projections for Longford Town, the County and the Midlands Region through the life of the County Retail Strategy (2009) and beyond to 2015 and 2020 respectively.

Table 4.6
Population Projections

Area	2006	2007	2009	2015	2020
Longford County	34,361	35,236	37,056	43,100	48,883
Midlands Region (MRPGs)	251,380	256,031	265,591	296,470	325,000
Midlands Region (CSO)	251,380	258,354	271,194	308,423	333,088

Source: CSO Censuses 1996, 2002 and 2006 Preliminary Census Results; CSO February 07 Revised Regional Population Calculations; MRPGs; CSR Research 2007

Given the aforementioned CSO revised regional population projections, two sets of future population estimates have been calculated for the Midlands Region. The first set is based upon the projections contained in the MRPGs, while the second set is based upon the CSO revised regional projections. As evidenced above, the CSO projections exceed those of the MRPGs by 5,603 or 2% in 2009; 11,953 or 4% in 2015; and 8,088 or 2.5% in 2020. This would give the County a 13.9% share of the region's population in 2009 based on the MRPGs population projections or a 13.7% share of the region's population based on the CSO estimates for 2009.

It is also important to note that these updated population projections closely parallel the future population estimates for the county calculated in the Draft 2004-2009 County

Retail Strategy. In the Draft Strategy the Council estimated Longford County to have a population of 33,955 in 2006. The 2006 Preliminary Census Results placed the actual figure at 34,361. The deviation been the predicted and actual 2006 population was therefore just 406 persons.

4.2 RETAIL FLOORSPACE

The original retail floorspace survey of the County was undertaken in 2003 as part of the preparation of the 2004-2009 County Retail Strategy. In preparing the update and review of the strategy, these floorspace surveys were reviewed for the main centres in the county during the health check assessments. Table 4.7 provides a comparative breakdown of floorspace in the county as a whole for 2003 and 2007 respectively.

Table 4.7
Comparative Breakdown of Floorspace in the County for 2003 and 2007 (m^2 / %)

Retail Type	2003			2007		
	Gross Floor Area	Net Floor Area	% of Total	Gross Floor Area	Net Floor Area	% of Total
Convenience	9,146	7,317	28	15,766	12,613	19
Comparison	9,983	7,986	30	13,970	11,176	17
Bulky Goods	13,899	11,119	42	46,377	41,174	64
Total	33,028	26,422	100	76,113	64,963	100

- Figures sourced from Longford County Council
- In calculating the figures for 2007 it was agreed that a 500m^2 and 1000m^2 threshold for consideration would be used for comparison and convenience/bulky goods floorspace, respectively.
- Net floorspace estimated as 80% of GFA for Convenience/Comparison and 90% of GFA for Bulky Goods.
- Figures for 2007 include extant planning permissions which have not been appealed to An Board Pleanála.
- Motor Sales Showrooms are not included in figures as they are not reflective of 'normal' shopping patterns.

Comparative analysis illustrates that whereas there has been a stable growth in the comparison and convenience retail offer of the county, there has been substantial growth in the retail warehousing sector. A review of the location of the new Retail Warehouse/Bulky Goods floorspace reveals that the majority of such new development is located in and around Longford Town. This is indicative of the regional and inter-regional importance of the town.

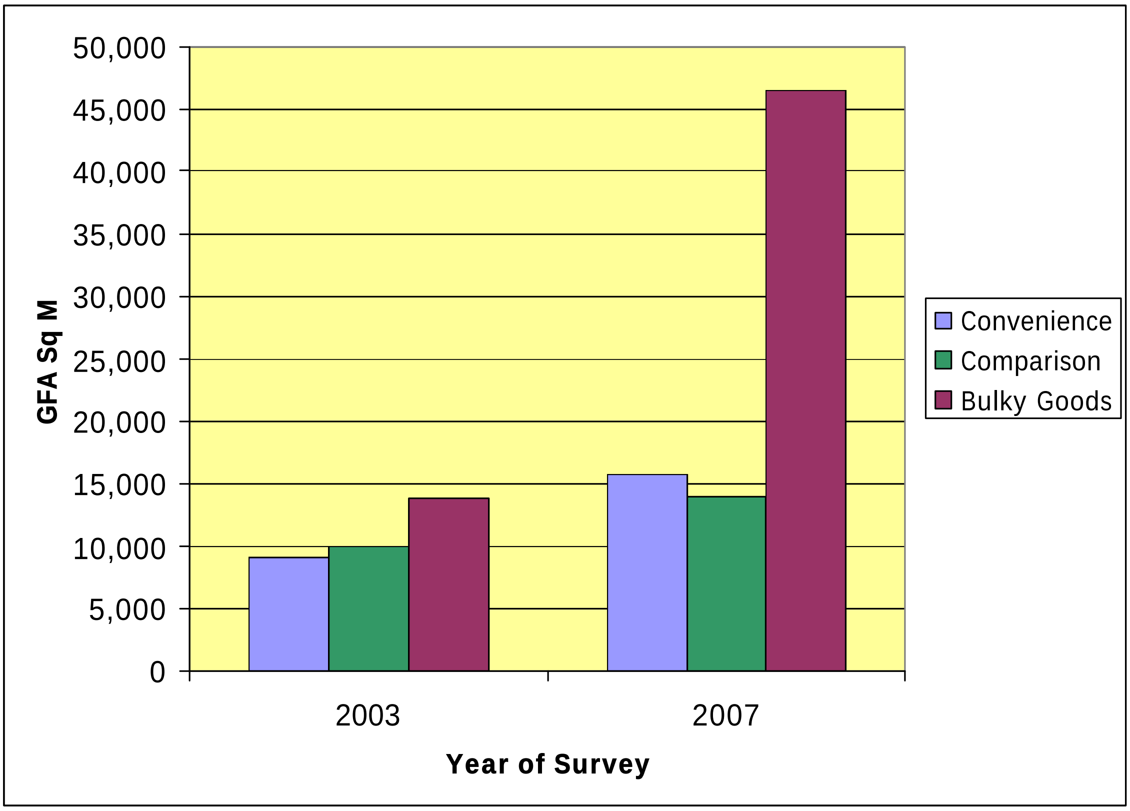


Figure 4.2
Comparative Illustration of Floorspace Breakdown in the County for 2003 and 2007

4.3 SHOPPING PATTERNS

4.3.1 Shopper Survey

An examination of the results of two shopper surveys conducted in Longford Town where are used to inform the review and update of the County Retail Strategy. One of the shopper surveys was undertaken by Mori MRC in June 2004. The second, more recent shopper survey was undertaken by Ipos Mori Market Research in January 2007. The use of two new surveys, in addition to the 2003 shopper survey which informed the formulation of the County Retail Strategy, facilitates a temporal analysis of consumer preference trends in Longford Town since the adoption of the 2004-2009 County Retail Strategy. Random samples of shoppers were requested to partake in an interview from a standardised questionnaire for each of the surveys. This section provides a comparative summary of the key findings of these surveys.

Six thematic areas where studied, with the questions posed directly linked to the following topics:

i. Shopper origin;

ii. Purpose of trip;

iii. Mode of transport;

iv. Frequency of visits to Longford Town;

v. Principal attractions of Longford Town; and,

vi. Principal improvements that might be made to Longford Town.

4.3.1.1 Shopper Origin

At the time of the shopper surveys, respondents originated from a relatively wide geographical area:

- In the 2004 survey, approximately 29% lived in Longford Town, while in the 2007 survey; approximately 41% of respondents lived in Longford Town.
- An additional 52% of those surveyed were from within the county but not from the County Town in the 2004 survey, with the number dropping to 43% in the 2007 survey.
- Almost one-fifth (19%) originated from outside the county in 2004 with the number dropping to 16% in 2007.

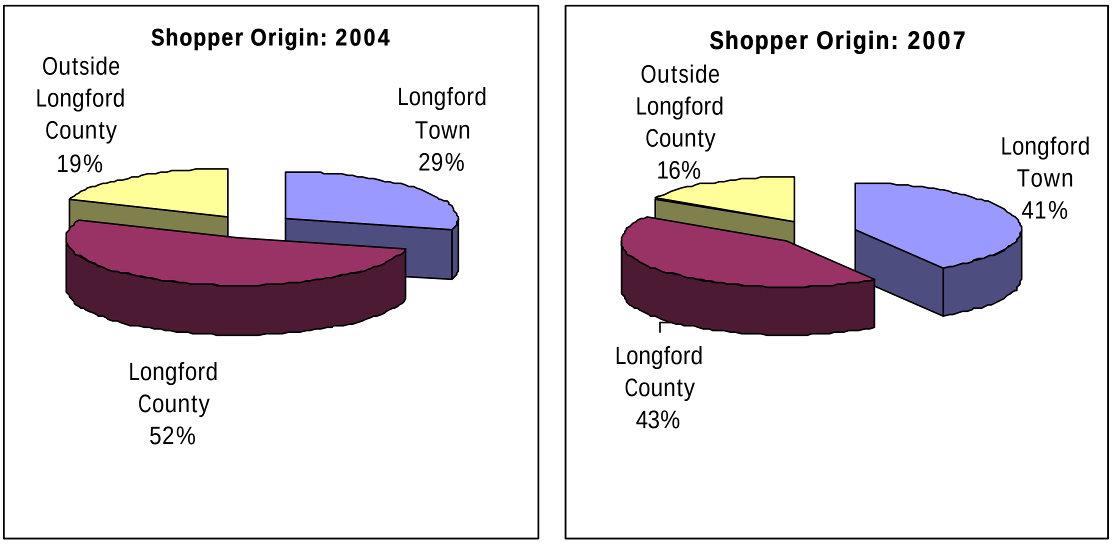


Figure 4.3
Shopper Origin: 2004-2007 (Shopper Survey)

4.3.1.2 Main Purpose of trip

One of the key questions in the surveys was to identify the main purpose of the trip to Longford Town Centre. At the time of the survey, the responses were:

- In both 2004 and 2007, grocery shopping was the foremost reason that respondents chose to go to Longford Town. In 2004, 38% came to the town for their main food shopping. This almost equalled the 2007 study, which indicated that grocery shopping was the main reason that 39% of respondents travelled to Longford Town.

- Just 14% of respondents came to Longford Town for their clothing and footwear shopping. Interestingly, this figure had decreased to just 9% in the 2007 survey.

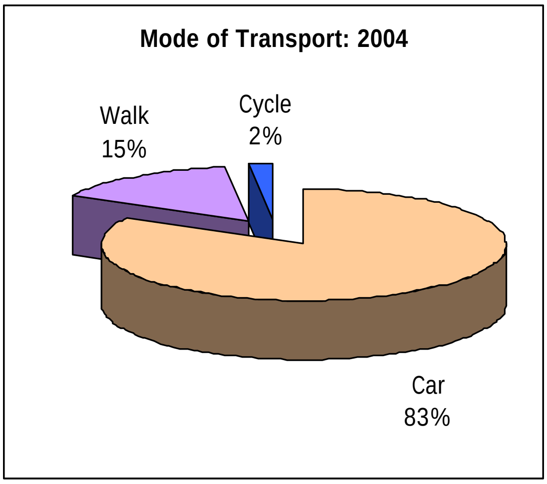
- Less than 5% of respondents came to the town for household and electrical goods in 2004. This figure had further decreased to 2% in 2007.

- In 2004, the first store the majority of respondents visited was either Tesco or SuperValu, which attracted 39% and 36% of respondents respectively. The figure for Tesco had increased to 51% in the 2007 survey. In contrast, SuperValu had dropped considerable in popularity with only 3% of respondents identifying it as the first store visited.

- After these stores, 6% of respondents stated that Penny's would be the first store they would visit in 2004, with a similar number of respondents (8%) indicating it as their first point of call in the 2007 survey.

4.3.1.3 Mode of Transport

In 2004, the vast majority (83%) of respondents indicated that private vehicle (car) was the means by which they travelled to Longford Town. This had moderated to 67% in 2007. Just 15% of respondents indicated that they walked in 2004. However, this number had increased to 26% in the 2007 survey. Just 2% and 3% chose to cycle in 2004 and 2007 respectively. While public transport was not identified as a means of transport in the 2004 survey, approximately 4% of respondents indicated it as their mode of transport in the 2007 survey.



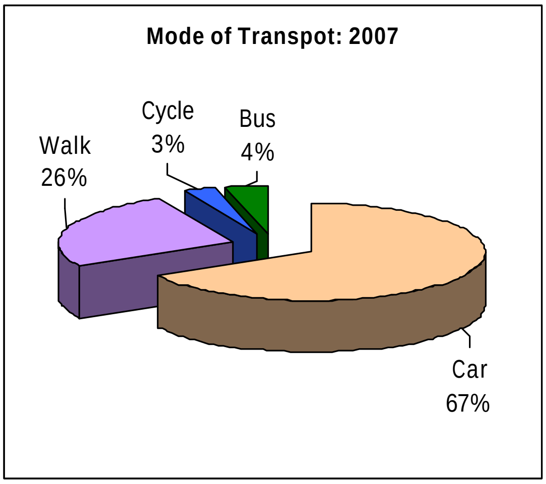


Figure 4.4
Mode of Transport (Shopper Survey)

4.3.1.4 Frequency of visits to Longford Town

At the time of the surveys, the frequency of trips to the town was as follows:

- In 2007, the majority (49%) of respondents travel to Longford Town more than 3 times per week. Combined with those not from the town, the survey highlighted that over two-thirds of respondents (71%) visit Longford Town at least twice a week;
- In the 2004 survey, only a small percentage of respondents (2%) stated that they travelled to Longford Town less often than every two months. This figure only increased marginally to 3% in the 2007 survey.

4.3.1.5 Principal Attractions of Longford Town

At the time of the surveys, respondents indicated that the principal attractions of Longford Town were as follows:

- In 2004, 42% indicated that proximity to home was the main attraction. This figure increased to 49% in the 2007 survey;
- The same number of respondents (18%) identified the good range of shops as the principal attraction of the town in both 2004 and 2007;
- Whereas, ease of access was the next main attraction at 15% in 2004, this figure had dropped to just 4% in 2007;

4.3.1.6 Principal Improvements to Longford Town

Respondents were asked to indicate the principal improvements to Longford Town that would encourage them to shop there more frequently. A summary of the answers given is as follows:

- The key improvement to Longford Town which was identified in both the 2004 and the 2007 surveys was the need for better parking arrangements;

- In respect of shopping, 30% of respondents in 2004 identified that there should be more shops. Interestingly, this figure had significantly decreased to just 8% in 2007. However, the 2007 survey identified that the quality of the shopping offer is an issue, with 9% of respondents expressing a desire for more designer boutiques.

4.3.1.7 Conclusions on Shopper Survey Results

The significant difference between the two surveys is the higher proportion of respondents who where from Longford Town (29%) in the 2004 survey compared to the 2007 survey (41%). Likewise, more respondents were from County Longford in the 2004 survey (52%) than in the 2007 survey (43%). The shoppers surveys confirm that the presence of large convenience stores, such as Tescos and SuperValu, along with two large discount stores – Aldi and Lidl- enhance the attractiveness of the town when compared with other competing centres in the study area. Based on the information obtained from these time lapse shopper surveys, a figure of 6.2% is used to accommodate for county expenditure inflow for convenience goods and 2.2% for comparison goods. Also founded on information derived from the surveys, outflow (leakage) figures have been estimated at approximately 10% for convenience per capita expenditure and 10% comparison per capita expenditure.

The surveys identified scope to improve the retail offer of the town, particularly the comparison offer. Likewise, the surveys also found that issues centred on parking and traffic circulation reduce the attractiveness of the town both in terms of access to retail and the general quality of the shopping environment.