Annex 2: Retail Strategy

Contents

Executive Summary

The Longford County Retail Strategy 2015-2021 has been compiled as part of the review and update of the County Development Plan. It represents a reassessment of the County's previous retail strategy, which was prepared during a period of considerable growth in the national retail market. This strategy has been produced in a very different economic context and while it clearly illustrates the impacts which the recession has had on the retail market in the County, importantly, it also evidences the economic resilience of Longford's retailers and its economy. This report offers plenty of encouragement for the future development of the retail sector in Longford and provides a strong basis for policy development in this area.

The main purpose of the Longford County Retail Strategy 2015-2021 is to ensure that the development of retail floorspace within the County is grounded in an evidence based framework during its six year lifecycle. In this way, the development of additional retail floorspace can be assessed against a set of clearly defined and evidence based criteria. This will allow for the development of a healthy retailing environment within County Longford which reinforces the vitality of its urban centres and facilitates competition in both the County itself and within the wider Midland Region.

The main findings and recommendations of this retail strategy include:

- Longford Town retains the majority of retail floorspace within the County, and remains at the top of the Longford County Retail Hierarchy;
- The findings of healthcheck analysis exercises on each of the main settlements within County Longford indicates that while there has been a decline in economic activity, all have retained their overall functionality and continue to provide the required services to their residents and hinterlands;
- Vacancy, as it manifested itself during the duration of the study (2013), is becoming an emerging problem in peripheral areas of the four main settlements of the County;
- The overall vacancy rate within County Longford is currently 17.73%;
- Of the three retail categories, the level of vacancy is highest in the comparison retail floorspace category, with 19.32% of all such floorspace within the County currently vacant;
- Since 2007, only 697 square metres of additional retail floorspace has been built[1];
- Planning permission for 14,673 square metres of retail floorspace has now expired having not been implemented;
- Planning permission for a further 514 square metres of retail floorspace is due to expire before the 1st of January 2015, if not renewed or implemented prior to expiration;
- There is a requirement for at least an additional 2,000, square metres of convenience, 1,500 square metres comparison and 4,500 square metres of bulky goods retail floorspace between 2015 and 2021.

[1] This excludes the Longford Town Centre development which commenced pre 2007.

1.0 Introduction

1.1 Function of the Updated Longford Retail Strategy

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

The overriding aim of the strategy is to create the appropriate conditions necessary to foster a healthy and vibrant retail environment in County Longford over the Development Plan period of 2015-2021. It does so through retail policy recommendations which are framed in the context of national and regional plans, strategies and guidelines. The strategy provides important information on the quantum, scale and types of retail development required over the period to 2021, with further outlook to 2024.

1.2 Methodology

The County's previous Retail Strategy 2009-2015 was prepared during a period of considerable growth in the national retail market. This strategy has been produced in a very different economic context, both nationally and locally in Longford, with consumer sentiment and activity in the retail sector subdued, comparable with levels of growth previously experienced. High levels of market uncertainty, the changing nature of the retail industry, high vacancy rates and credit considerations are key elements which typify the current retail market and the applied methodology considers these aspects in detail.

The key objectives of this retail strategy are as follows:

- Define the retail hierarchy in the County and related retail core boundaries;
- Undertake a health check appraisal of the key retail centres in Longford, to ascertain the need for interventions in these areas;
- Identify the broad requirement for additional retail floorspace development in the County over the plan period, to support the established settlement hierarchy, and;
- Provide guidance on policy recommendations and criteria for the future assessment of retail development proposals over the Development Plan Period 2015-2021.

A key intention was to produce a succinct and readable strategy document. To avoid duplication with content in the Longford County Development Plan 2015-2021, this document does not include a chapter setting out the background policy context.

1.2.1 Consideration of Vacancy

The preparation of the Longford County Retail Strategy considered retail floorspace vacancy in detail. A survey of existing floorspace in the County was undertaken, which identified a cumulative total of 10,745 square metres of vacancy, across convenience, comparison and bulky retail categories. This equates to 17.73% of total retail floorspace in the County. Based on market insights, a frictional vacancy rate of 10% was held across the respective categories to foster competition in the market and the residual total was fed in the calculated demand model. Identified demand over the plan period was subsequently rationalised on the basis of this vacancy to determine adjusted floorspace requirements. The modelled outputs illustrate that there is no identified need for additional comparison or bulky goods floorspace until 2017, taking account of existing levels of vacancy.

In undertaking the review of the Longford County Retail Strategy 2009-2015, Longford County Council has sought to take a proactive approach to addressing the issue of retail floorspace vacancy, while remaining cognisant of their responsibility to facilitate growth in retail and general economic activity within the county. The Retail Strategy has taken a cumulative approach to depleting vacant floorspace, while accommodating additional floorspace where it is required. The graph below illustrates how the existing vacancy will be absorbed over the lifecycle of the strategy. This graph which is a composite of the three retail categories, illustrates the frictional vacancy level (i.e. 10%) and the cumulative reduction (i.e. for all three retail categories) in vacant retail floorspace, as well as highlighting a potential deficit in retail floorspace which may occur post 2016 period to meet projected demand if there is no additional provision of retail floorspace based on that provided in 2013. This frictional vacancy level is based on market insights and is intended to foster competition, and to enable Longford County Council to accommodate growth and maintain retail functionality and economic activity. It is projected within the Retail Strategy, and as illustrated in the graph, that there will be no requirement for additional retail floorspace in any of the three retail categories prior to 2016, taking account for the maintenance of a 10% frictional vacancy rate".

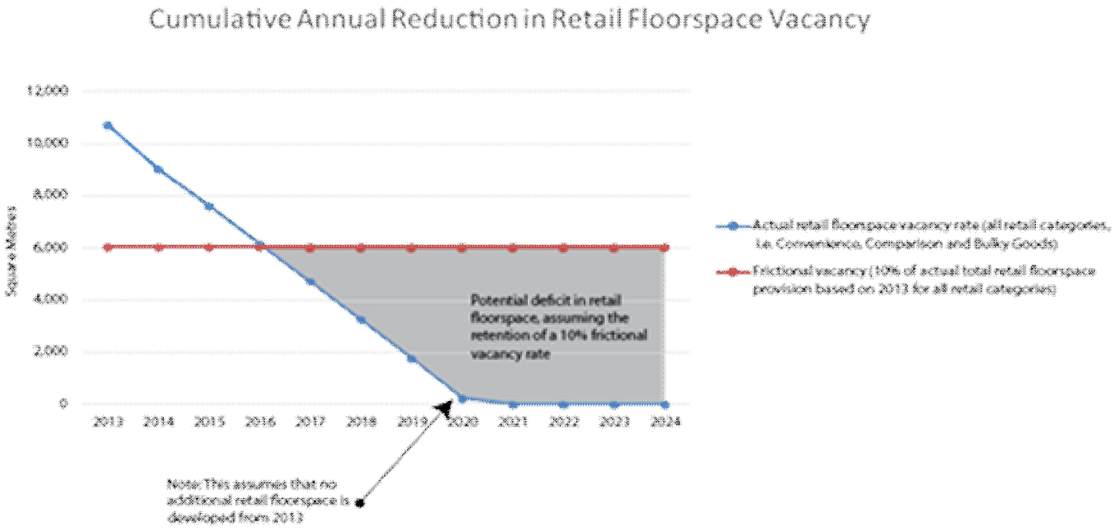

Fig 1.1: Graph illustrating the cumulative annual reduction in retail floorspace over the lifetime of the Longford County Retail Strategy 2015-2021.

1.3 Definition of Retail Typologies

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

Convenience

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

Comparison

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

1.4 Revised Regional Planning Guidelines for the Midland Region Population Projections

The Regional Planning Guidelines for the Midland Region 2010-2022 (RPG) set a 2016 population target of 39,392 people for County Longford. High levels of housing delivery and significant in-migration to the County has resulted in the 2016 target being exceeded in advance of the forecasted period. A revised population target for 2022 of 44,603 people has subsequently been agreed with the Midland Regional Authority Technical Working Group, and this target provides the basis for population modelling carried out in this strategy.

1.5 The Retail Hierarchy

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

1.5.1 National Settlement Hierarchy

The Retail Planning Guidelines for Planning Authorities published by the Department of the Environment, Community and Local Government in April 2012 advocated strict guidance in relation to the sustainable organisation of retail activity in Ireland to reflect the existing national settlement structure. Taking account of historical patterns, in addition to preceding retail planning policies, this retail hierarchy reflected the broad tiers of urban development and recognised that such a system of classification is indicative only, with scope for overlap between the specific retail functions provided in each tier. The Metropolitan level of the retail hierarchy applies to the higher-level settlements of Dublin City, Cork, Limerick/Shannon, Galway and Waterford and provides the broadest range of comparison goods shopping, including higher-order comparison and specialist retail functions. The Regional level of retail provision focuses upon the tier of Gateways, Hub Towns and other large settlements and provides for high-level regional retailing functions in localities including Athlone, Tullamore and Mullingar, Ballina/Castlebar, Kilkenny, Mallow and Clonmel. The Sub-Regional level of the retail hierarchy, which incorporates Longford town, outlines the importance of such settlements in the provision of retail functions at the level of individual counties and how they will frequently feature many key comparison and convenience multiples. The District Centre level incorporates the designated urban growth centres of the Gateways, Hubs and large towns providing them with essential services, in addition to an appropriate level of retailing and amenities to serve their population catchments. The Small Towns and Rural Areas level of the hierarchy is characterised by basic convenience shopping functions and some limited incidences of comparison shopping. The final Local Shopping level tier applies to neighbourhood and suburban village stores, post-offices, casual trading and farmers' markets.

1.5.2 Longford Retail Hierarchy

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

The Longford County Retail Strategy 2009-2015, which was itself an update of the preceding retail strategy, established a three tier retail hierarchy, and was based on what was then the extant retail policy framework that existed within the County (2004). The adoption in 2012 of the Longford Core Strategy introduced a new and much revised settlement hierarchy, which is illustrated in Fig 1.1, below.

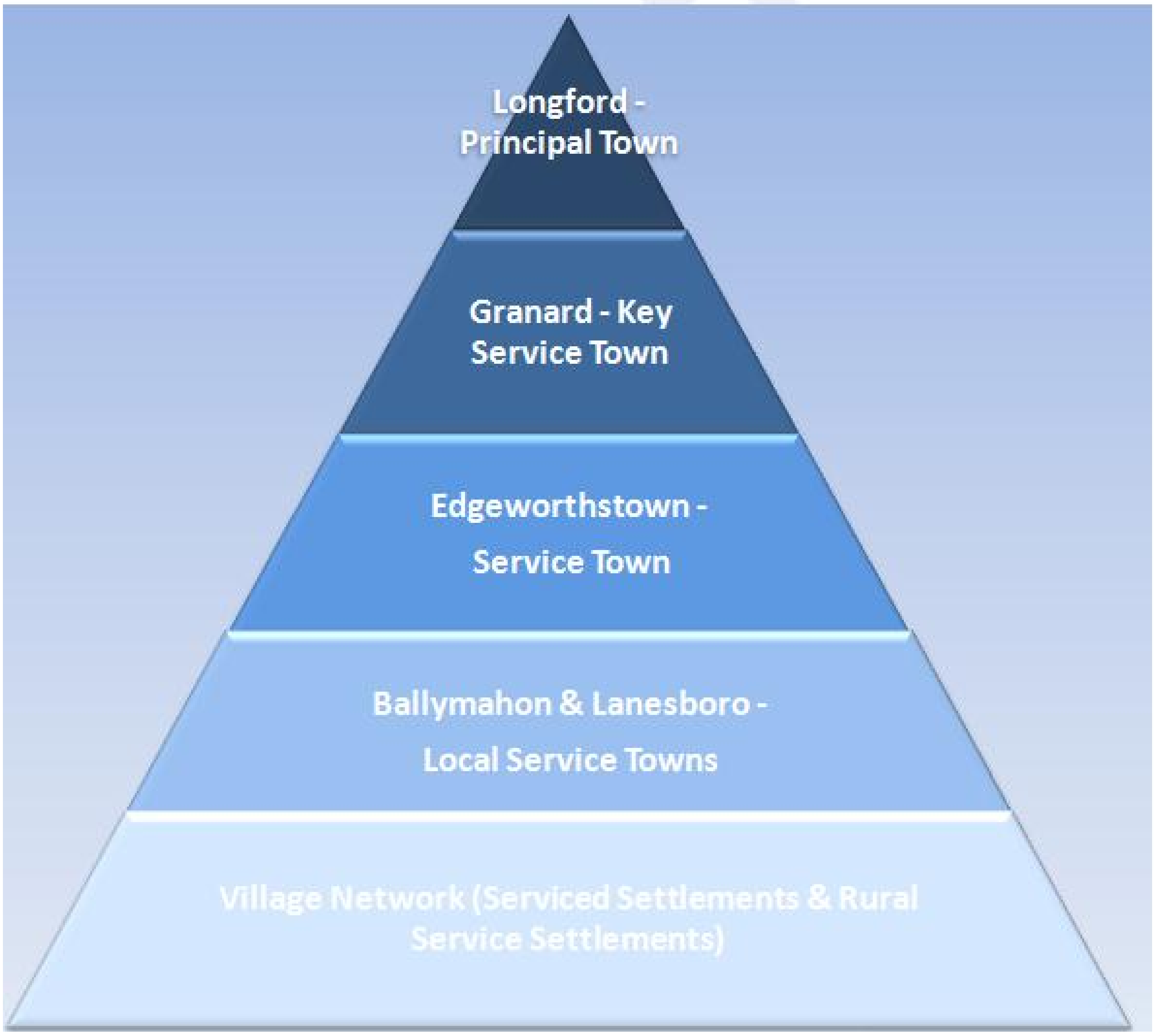

Fig 1.2: Longford Settlement Hierarchy, as taken from Longford Core Strategy

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

Hierarchy Level	Retail Hierarchy Settlement Designation	Settlements
Tier I	Principal Town	Longford
Tier II	Key Service Town	Granard
Tier III	Service Town	Edgeworthstown
Tier IV	Local Service Towns	Ballymahon, Lanesboro
Tier V	Villages, Rural Serviced Settlements and Hinterlands	Villages, small settlements and the Open Country side of County Longford

Table 1.1: Updated Longford County Retail Hierarchy

1.6 Core Retail Areas

A key policy objective of the Retail Planning Guidelines is the promotion of greater vitality in town centres through the implementation of a sequential approach to the location of all subsequent retail development. This sequential approach prioritises development within city and town centres or 'core areas' at the expense of more peripheral edge-of-centre or out-of-centre locations, which traditionally have poorer functional and spatial linkages with the core. This approach recognises the importance of core areas as the most suitable locations for higher order fashion and comparison goods, as they are easily accessible for the majority of the catchment population and also provide a compact and sustainable critical mass of commercial activity and public amenities, thereby reducing the need to travel.

The assessment of the County's retail centres carried out under the previous Longford Retail Strategy Review made significant changes to the retail morphology of Longford Town by identifying a much larger Core Retail Area than had existed in previous strategies. This had been justified due to the unprecedented growth in the local population, retail offer and economic growth, which was seen as having necessitated a significant expansion of the core shopping area.

However, the economic downturn and rising levels of commercial vacancy in the intervening period, has effectively halted the advance of retail activity outwards from the commercial core and has reversed this trend, with such activity once again becoming predominantly clustered around the historic commercial core which has traditionally centred on Main Street. This trend has necessitated a rethink in policy terms and, as such, in this Retail Strategy the Council has sought to respond by redefining and resetting the Core Retail Area of Longford Town.

This revised Core Retail Area reflects the dense clustering of key commercial activities and is bounded by the primary thoroughfares of Main Street to the West and Dublin Street to the South, and by the secondary thoroughfare of Ballymahon Street to the South West. In accordance with the guidance on the location of all new retail activity set out in the Retail Planning Guidelines, Longford Town's Core Retail Area is to be the focus and preferred location for retail development during the plan period.

Fig 1.2: Redefined Retail Areas of Longford Town

2.0 Retail Trend Analysis and Assessment of Competing Centres

2.1 Current Retail Trends

The Retail Economy

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

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

Assessment of the most recent Retail Sales Index, published by the Central Statistics Office (CSO)[2] for July 2013, indicates that there had been an increase in the value of national retail sales, both in comparison with the previous months and with July 2012. In July 2013, the retail sales value index stood at 91.0[3], compared with 85.8 in June 2013 and 87.2 twelve months earlier in July 2012. However, it is worth noting that the overall retail sales index figures illustrate that there has been a continuous decline in the values of retail sales since 2008, falling from a peak of 110.8 in 2008. This decline has become less marked since 2010, but there was still an annual decrease of approximately one index point between 2010 and 2012. The fourth quarter of 2012 saw a slight recovery to 88.7 over the preceding quarters, but the first quarter of 2013 coincided with the third consecutive quarter of negative economic growth, as the country slipped back into a recession[4]. It is within this context that these figures represent some of the most substantial increases in the retail sales index since 2009, and only the second month since October 2010 that the index has been in excess of 90.

These increases have been attributed to a number of factors such as the good weather experienced over the summer months[5], and the reform of the motor vehicle registration system to break the year into two separate periods for the purposes of registering new vehicles. However, irrespective of the underlying reasons for this increase, it is hoped that this could mark the beginning of a sustained period of gradual economic growth.

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

[2] CSO, 'Retail Sales Index', July 2013, 29/08/2013.
[3] These figures represent the value of all sales, inclusive of the Motor Trades. The base year for the index is 2005, when the value of retail sales was set at 100. The value of retail sales increased in both 2006 and 2007 before declining substantially in 2009 (from 110.8 in 2008 to 90.9 in 2009).
[4] O'Brien, D., 'Ireland's economy lurches back into recession', Irish Times, 27/06/2013.
[5] Anderson, N., 'Good weather brings out the sun for shops as food sales get a boost', Irish Independent, 29/06/2013, and Newenham, P, 'Retailers report boost in sales of garden furniture, barbecues and ice cream', Irish Times, 12/07/2013.

The Changing Nature of Retail Services in Ireland

The challenges the sector faces also goes beyond economic contractions and weakened domestic demand, due to the changing nature of shopping habits. The continued growth of online shopping is mirroring a shift in consumption patterns. A number of factors driving growth in this sector include customers' appetite for value for money and greater variety, the increased usage of mobile devices, improved security and convenience, as well as increased marketing and use of social media promoting online campaigns. In Ireland, an estimated 43% of people between the ages of 16 and 74 made purchases on the internet in 2011[6]. With an average expenditure in excess of €1,000[7], the most popular online purchases for Irish households in 2011 were 'other travel arrangements' (30%) and 'holiday accommodation (28%). 20% of online purchases in Ireland were for 'clothes or sports goods' and 14% were in 'films/music'.

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

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

In the case of the larger scale multiples, this move towards the provision of comparison goods is a reflection of the policy of increasing diversification which many are pursuing in an attempt to obtain a greater market share. These multiples are continuing to broaden the range of comparison goods which are available from their stores. Tesco in particular, who have the majority share of the national convenience trade within Ireland have become increasingly involved in the comparison market over the last decade. In addition they are also increasing their presence in the small and medium scale convenience market as emphasised by a recent announcement of five new stores in the cities of Dublin and Cork[8].

Retailer	Market Share (%)
Tesco	27.7
Dunnes Stores	21.9
Super Valu	19.7
Lidl	7.1
Aldi	6.7
Superquinn	5.5

Table 2.1: Multiple share of the Irish convenience market[9].

The anticipated increase in online sales may have a significant impact on the future demand for retail floorspace in the medium to longer term. Some industry experts predict that the need for larger convenience/comparison stores will subside as an upward trend in home deliveries gathers pace. At present, a large proportion of the main high street comparison retailers and three of the six major convenience retailers offer online shopping with home delivery as an alternative to in-store shopping, with many multiple retail chains giving increasing priority to online aspects of their offer[10]. It remains to be seen if future trends in this area will provide for increased demand for storage and distribution facilities.

[6] CSO, 2012
[7] IMR Smart Knowledge Base, 2011)
[8] McCabe, S., 'Tesco Jobs boost with 7 new stores', Irish Independent, 17/09/2013.
[9] Mulligan, J., 'Aldi and Lidl boost market share as Tesco loses ground', Irish Independent, 25/06/2013.
[10] Kelpie, C., 'Anxious time for workers as some Argos stores to close', Irish Independent, 25/10/2012.

2.2 Assessment of Competing Retail Centres

Accessibility

The retail industry market is highly competitive and Longford's location relative to national transport linkages is a primary consideration in this regard. Two National Primary Routes, the N4 and the N5, which connect the West and East Coasts, converge on the County, in addition to the rail line linking Sligo to Dublin. The presence of these infrastructural links, which have undergone significant upgrades in the last decade, has made the urban centres of the Greater Dublin Area much more accessible than was previously the case. It is now possible to travel between Longford Town and Dublin City Centre in 82 minutes by car and 110 minutes by train, while the travel times from Longford to retail centres such as the Liffey Valley Centre or the Blanchardstown Centre by car can be as little as 74 minutes. A summary table of the various distances and travel times between the main urban centres of Longford and those which they compete with is presented below.

		Longford	Granard	Edgeworthstown	Ballymahon
Athlone Town Centre	Distance	46km	54km	41km	22km
	Time	43 minutes	48 minutes	37 minutes	22 minutes
Blanchardstown Centre	Distance	116km	115km	102km	106km
	Time	1 hour 16 minutes	1 hour 14 minutes	1 hour 3 minutes	1hour 12 minutes
Cavan Town Centre	Distance	56km	29km	42km	61km
	Time	52 minutes	28 minutes	40 minutes	55 minutes
Dublin City Centre	Distance	119km	118km	105km	109km
	Time	1 hour, 24 minutes	1 hour 22 minutes	1 hour 11 minutes	1 hour 21 minutes
Dundrum Town Centre	Distance	127km	127km	114km	118km
	Time	1 hour 24 minutes	1 hour, 31 minutes	1 hour 11 minutes	1 hour 21 minutes
Liffey Valley Retail Park	Distance	109km	109km	96km	99km
	Time	1 hour, 14 minutes	1 hour, 12 minutes	1 hour	1 hour 11 minutes
Mullingar	Distance	43km	43km	26km	30km
	Time	37 minutes	35 minutes	24 minutes	26 minutes
Sligo Town Centre	Distance	90km	109km	103km	111km
	Time	1 hour 14 minutes	1 hour 32 minutes	1 hour 24 minutes	1 hour 34 minutes

Figure 2.2: Summary table of distances and travel times by road between the main urban centres of County Longford and the main urban and retail centres with which they compete[11].

	Longford	Edgeworthstown
Dublin City Centre	1 hour 50 minutes	1 hour 35 minutes
Mullingar	30 minutes	18 minutes
Sligo	1 hour 25 minutes	1 hour 35 minutes

Figure 2.3: Summary table of the travel times between the urban centres of County Longford which feature rail links and the available competing centres served by the same rail lines[12].

[11] Travel times and distances taken from Google Maps.
[12] Time table and rail travel time information current as of 22/10/2013, as obtained from Irish Rail website.

Competing Centres

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

Liffey Valley Shopping Centre

The Liffey Valley Shopping Centre and Retail Park (illustrated below) is a principal alternative destination owing to its convenient location and ease of access from the N4, in addition to its sizeable retail offering. The shopping centre itself offers a range of national multiples, including Carraig Donn, Dunnes, Easons and Lifestyle Sports, as well as large international comparison multiples such as Coast, H&M, HMV, Oasis, River Island and Topshop. The adjacent retail park includes Argos, B&Q, Carpet Right and Halfords, all of which would be classified as being within the bulky goods retail category. In addition to the retail offering, there are also other leisure amenities available, including a large multi-screen cinema as well as numerous restaurants and eateries. Unlike many of the more recent out of town retail parks which have been developed in the last number of years, there are no large convenience multiples located within this complex.

Blanchardstown Centre

The Blanchardstown Centre is recognised as one of the primary retail locations in the wider Dublin Region, and due to its location only a short distance from the M50, is easily accessible to people travelling from County Longford. As with Liffey Valley, the Blanchardstown Centre offers an abundance of free parking spaces within an extensive shopping centre and retail park complex.

The shopping centre offers a number of the large multiples, both Irish and international, and includes some of the largest department stores within the country such as Penneys, Debenhams and Marks & Spencers. As with the Liffey Valley Centre, it also plays host to a range of both Irish (including Dunnes, Easons, Lifestyle Sports and Newbridge Silverware) and internationally (French Connection, Oasis, River Island and Zara) based multiples. In addition, within the retail park there are a variety of convenience, comparison and bulky goods category retailers, including Atlantic Homecare, Harvey Norman, Mothercare, Next, Tesco and Mr. Price. This substantial retail offering is further reinforced by a wide range of other amenities including a multi screen cinema, bowling facilities, restaurants and eateries, a hotel and a library.

Dublin City Centre

The retail offering of Dublin City Centre, in keeping with its position at the top of the national retail hierarchy (as set out within the Retail Planning Guidelines 2012[13]) is the largest within the country. As with both Liffey Valley and the Blanchardstown Centre, the improvements in infrastructural linkages have enhanced the attraction of the city as a shopping destination to wider catchments across the country. The retail offering, which is located throughout a number of large shopping centres (including the Ilac Centre, the Jervis Centre and the Stephen's Green Shopping Centre), as well as shopping districts (such as the Grafton Street, illustrated left, and Henry Street areas) features a number of large department stores as well as flagship stores of many national and international comparison retailers.

Unlike the free parking provided in competing out-of-centre or suburban centres such as the Liffey Valley Shopping Centre and the Blanchardstown Centre, parking is not free and can be relatively expensive. However, critically this does not undermine its attraction as there are significant alternative modes of transport available, with regular train services available from both Longford Town and Edgeworthstown to and from Dublin City Centre to Connolly or Pearce Street Stations, as well as direct bus links from Longford Town to Dublin by both public and private operators.

Athlone

The town of Athlone is considered to be one of the primary shopping destinations within the Midland Region. Boasting a healthy and vibrant town centre, Athlone offers significant competition to retailers operating in the urban centres of County Longford. The opening of a substantial shopping centre within the town centre in 2007 supplemented the strong retail offer already in existence at Golden Island Shopping Centre. In addition, there is a sizeable retail park located on the periphery of the town on the Old Dublin Road which serves as a location to support a number of retail warehouse type operations providing a range of goods from convenience, comparison and bulky retail categories. The town offers a mixture of free and pay parking facilities, which offer substantial choice for those travelling by car, and there is a dedicated bus route which operates between Longford Town and the centre of Athlone on a daily basis[14]. The retail offer of the town itself is located within quite a compact area, with both shopping centres located within or close to the commercial core of the town. Amongst the retailers who operate from the town are comparison retailers Barratts, Clarks, Easons, and Oasis, with most of the main convenience retailers also having a substantive presence within the town.

Mullingar

Mullingar, like Athlone, is easily accessible from County Longford, due to the presence of the N4. As with many of the large regional towns over the last decade, both the retail offering and available floorspace of Mullingar has increased substantially. New shopping centres, such as the Fairgreen Shopping Centre located on the edge of the town centre, have improved choice significantly.

[13] Retail Planning Guidelines, Section 2.2.1, page 11.
[14] Time table and bus travel time information for Bus Éireann route no. 466 current as of 22/10/2013, as obtained from Bus Éireann website.

Mullingar, in spite of having a slightly smaller retail offering than that of Athlone, still represents a substantial alternative to shopping in County Longford. There are a number of the large scale comparison multiples, including Marks & Spencers, and Pennys, as well as a sizeable number or smaller multiples and independent comparison retailers operating within the town.

Other Competing Centres
The Dundrum Town Centre, a more recent addition to the retail landscape of Dublin which first opened in 2005, is one of the largest shopping centres in the country. Unlike its competitors, the Liffey Valley or Blanchardstown Shopping Centres, Dundrum is slightly less accessible from County Longford, owing to its location approximately 1.5km from the Ballinteer exit off the M50. The shopping centre itself features in excess of 70,000sqm of retail floorspace, spread over 100 stores, which provides a wide ranging and diverse retail offer that includes high-end department stores alongside large convenience multiples.

Cavan Town also offers competition to retailers located in the North of County Longford, such as Granard. In addition to the substantial retail offering of the town centre itself, there are a number of retail parks which accommodate a number of large scale comparison and bulky goods retailers, with most of the main convenience multiples also having a presence in the town.

Sligo Town's location relative to centres in Longford means that retail competition only really extends itself to those people who are travelling to Sligo for other purposes, who may subsequently conduct their retail business there. Sligo town currently features two shopping centres, both of which are centrally located within the town. There are also a number of retail parks, located on the edge of the town at Carraroe and Cleveragh.

3.0 Health Check Analysis

3.1 Retail Health Check Analysis of County Longford

Retailing and the provision of retail services is one of the primary functions of any urban settlement. This healthcheck analysis has been undertaken to evaluate the retail functions of the main urban settlements of County Longford, assessing the attraction, accessibility and amenity of each centre with the aim of making evidence-based recommendations regarding future actions for their improvement. These actions will be formulated to reinforce the existing retail offering within each of the towns, and where possible expand it, through the suggestion of issues to be addressed or measures to be continued or extended.

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

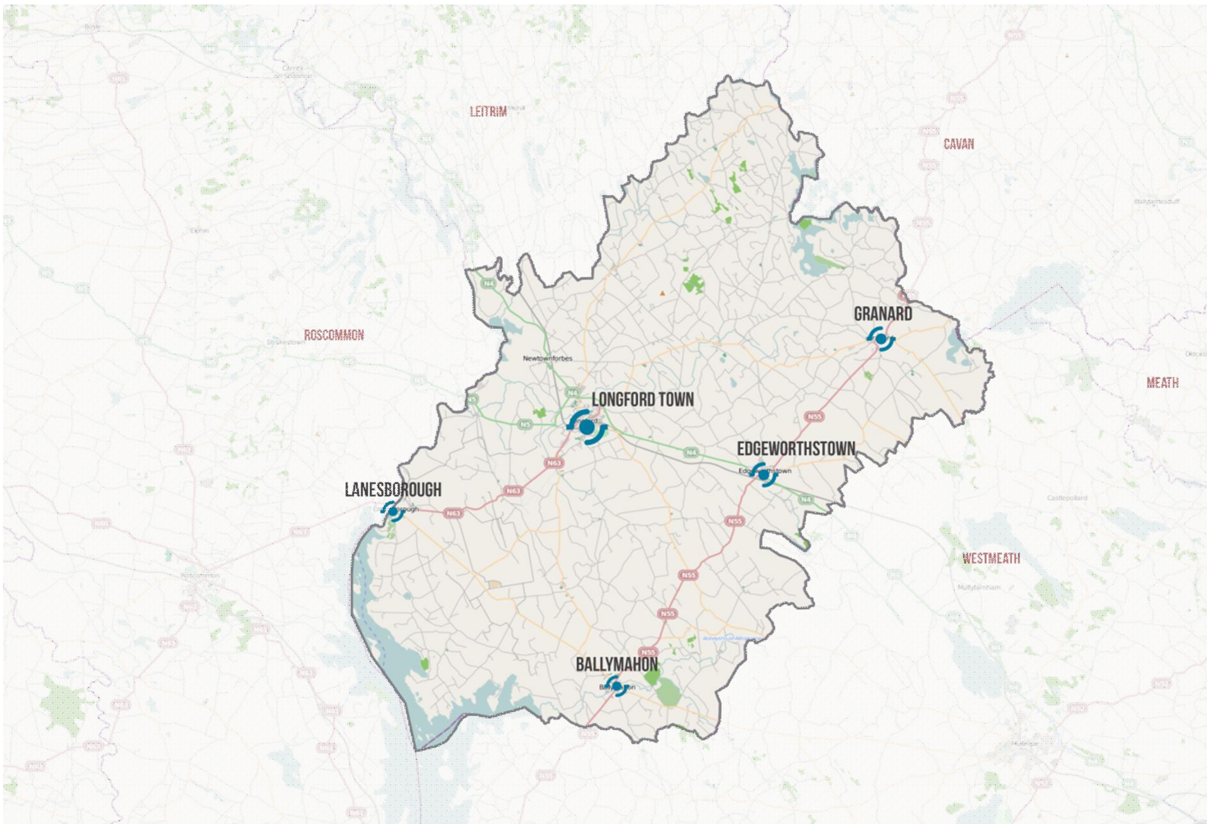

Fig 3.1: Illustration of the main settlements within County Longford.

3.2 Longford Town

Longford Town is the primary settlement and largest population centre within County Longford. Centrally located within the County, and having the advantage of excellent quality local, regional and national linkages, the town has become a settlement of regional importance.

The value of the town and the support function which it provides to its residents as well as those of its hinterland has been recognised within both a national and regional context. The most recent Retail Planning Guidelines, as published in April 2012, have defined the town as a Level 3 settlement, assigning it the role of providing retail support at a sub-regional level[15]. The importance of the town within a local and regional context has also been recognised by the Midland Regional Planning Guidelines, which has defined the town as being a principal town, while the Longford Core Strategy has also adopted this definition[16].

Attraction

In defining the attraction of Longford Town, its location is a key strength, both within the context of the County and in terms of its infrastructural linkages beyond the County. Due to its location within the national infrastructure network, there is a high volume of passing traffic, which brings with it vital retail expenditure inflow. The variety and diversity of the retail offer is much greater than that available in other settlements in the County across convenience, comparison and bulky goods retail categories.

Each of the main convenience multiples has a presence within the town. Since the completion of the previous Longford Retail Strategy, Dunnes Stores has developed a substantial new complex just on the edge of the town centre along the Dublin Road. This replaced a much smaller store within the town centre, with the new complex now featuring separate convenience and comparison units. Tesco operates from a location within the commercial core of the town, within the Longford Centre shopping centre. Planning permission was granted for a substantial redevelopment of this site in 2010, but it is unclear if this permission will ever be implemented. In addition, Super Valu, Lidl and Aldi all operate stores on the periphery of the town centre, while a number of small and medium scale convenience retailers operate from stores in and around the town.

Comparison retailers within Longford Town are, for the most part, clustered into two main areas, namely the commercial core of the town and within the N4 Axis Retail Park, on the northern edge of the town. A wide variety of independent comparison retailers operate within the commercial core of the town alongside a number of the multiples including Easons, Heatons, and a newly opened Shaws Department Store. The N4 Axis Retail Park features a variety of retailers in both comparison and bulky goods categories in addition to a number of restaurants. The remaining comparison retail floorspace within the town is located within a series of small district centres within the periphery of the town.

Accessibility

Strategically located within the national transportation network, Longford Town forms an important interchange on the East West road network, giving excellent quality access to the town from the immediate hinterland and adjoining regions.

Accessibility within the town itself has been improved in recent years with the opening of the N5 Longford Bypass, which now diverts all through traffic directly onto the N4 to the North West of the town. This has seen the removal of a substantial amount of traffic congestion, and has eased both vehicular access and pedestrian permeability throughout the main commercial core of the town. This easing of congestion has been very beneficial to the town centre and the retailers who operate within it.

The provision of car parking within the town is good, with a number of both public and private car parks located at various locations in and around the town centre and periphery, all of which operate an hourly tariff system. There is also on street parking available throughout, and which is also subject to hourly tariffs. Free car parking is available at a number of car parks located in more peripheral locations within the town.

[15] Retail Planning Guidelines, Section 2.2.3, page 11.
[16] As defined within the Core Strategy of the Longford County Development Plan, 2009-2015, Page 25.

There remain some problems which can impact on the accessibility of the town and cause periodic congestion. Delivery and service vehicles accessing the various premises within the town only have access to a small number of loading bays, which can result in issues of double parking on occasion and can cause congestion.

Amenity

Longford is an attractive town, with a mature streetscape which features a variety of buildings of differing size, age and character. The amenity of its commercial core has benefited from the completion of the N5 Longford Bypass, which removed a lot of the heavy traffic from the town centre. The streetscape of the town has retained its local character, with a range of traditional shopfronts serving to maintain the town's distinctive identity. The recently completed Longford Town Centre, which remains vacant, has added to the streetscape, with the glass tower adjoining it providing a new and unique focal point to the Northern end of the Main Street.

Pedestrian linkages within the commercial core of the town have been improved substantially by the reduction in traffic flows and traffic congestion, but more benefit could be derived from further developments in this key area. There is a healthy diversity of uses within the commercial core, with a mixture uses between retail services and other service providers throughout the town centre.

Assessment

In summary, the retail offering within Longford Town appears to be reasonably healthy, particularly in the area of convenience retailing, with convenience multiples being well represented. However, comparison retailing in the town appears to have demonstrated the most sizeable decline since 2007, with a substantial rise in vacancy, especially in the more peripheral parts of the town and on Main Street North, where the issue of such vacancy has become particularly problematic.

In terms of redevelopment opportunities within the town itself, the sequential and sustainable redevelopment of brownfield sites should take precedence. The Longford Town Centre shopping mall for example, which has remained unopened since its completion a number of years ago has the potential to be brought on-stream or given an alternative temporary use in the medium to long-term. In addition, there is significant scope to redevelop the brownfield 'Townspark Area' which features a high proportion of commercial vacancy, as an employment growth centre for the town. However, it is the redevelopment of the existing Tesco site in the town centre (having the benefit of an existing planning permission) which would be of more immediate benefit to the town, given the central location of the site and its existing linkages with the Core Retail Area to the West. In accordance with the provisions of the Longford Core Strategy and the Regional Planning Guidelines, district centres will be considered in Longford Town and its environs.

The general quality of the public realm and streetscape within the town centre is good, although the trend toward increased vacancy rates does raise the possibility of dereliction becoming an issue in some areas. Similarly, while the overall amenity of the town remains good, there is still capacity for improvement, especially in the provision of pedestrian linkages and related infrastructure.

A brief assessment of rental asking prices for retail units within the town illustrates that location is a key factor with asking prices varying from €127.40 to €200.20 per square metre per annum for shop units. The sale price varies from between €2,400 and €2,600 per square metre. A similar assessment of the rental asking prices for retail warehousing units show that prices can vary from €24.39 to €53.71 per square metre[17].

Action

This health check has identified a number of key areas which require action:

- Identify and develop a sustainable use for the vacant Longford Town Centre shopping centre and former Connolly Army Barracks adjacent to the site;
- Develop an integrated complex or complimentary functionality between these two sites;
- Address vacancy levels at the Northern end of Main Street, reintegrating this part of the town into the commercial core;
- Promote the redevelopment of the current Longford Centre (Tesco) shopping centre which is within the commercial core of the town; and

[17] Information taken from analysis of published retail property prices available on Daft.ie on 04/10/2013.

- Engage in the revitalisation of the Townspark area, which was originally developed as an important out of town commercial driver on the South West of the town. This area should retain its focus on the generation of employment but its development should not be prioritised over that of town centre sites.

3.3 Granard

Located in the North East of the County, Granard is the second largest urban settlement in Longford, with a good range of shops, pubs, community facilities and services. The Longford Core Strategy identifies Granard as the '*Key Service Town*' in the County's revised settlement hierarchy. This County growth centre, which possesses key economic, administrative and social functions, supports the principal town of Longford, in addition to acting as an important driver for the local economies in its rural hinterland.

Attraction

In order to establish the attraction of Granard, it is necessary to examine its key defining characteristics. Having a traditional linear townscape, Granard's Main Street is defined by its terraces of 19th -20th century mixed commercial premises. In this context, vernacular-style shop frontages add a distinct sense of character and ambience at street level. This simple urban morphology is further complemented by a rich built and archaeological heritage. However, due to its location on the N55 national secondary route and its strategic role as a local and regional connector, Granard's attractive urban character is undermined by large volumes of heavy vehicular through traffic, which significantly impacts upon both local vehicular and pedestrian circulation, and public safety. This traffic congestion, in addition to high levels of haphazard on-street parking, negatively impacts on the quality, capacity and character of the town's core public realm, which has recently been regenerated as part of an Urban and Village Renewal Scheme.

Granard possesses a dynamic and diverse selection of local shops, cafes, pubs and leisure facilities to attract people into the town centre. The settlement's retail offer is clustered around the commercial core of Main Street and is typically dominated by retail service provision, such as cafes and pubs, convenience retail in the form of local grocery shops and specialist retail, including florists and hardware stores. There are few instances of the comparison or bulky goods retail categories in Granard and a limited offer of convenience multiples, with only the Super-Valu supermarket chain having a presence on Main Street within the town core. A cursory examination of the commercial retail unit market in Granard has revealed that there is availability in the market throughout the settlement with concentrated levels of unit availability in streets adjacent to the commercial core, such as Barrack Street.

Accessibility

Granard benefits significantly from its strategic location on national road infrastructure, with the N55 that passes through the town forming an important link in the north-south transportation network as it passes through the midlands. This has allowed the town to develop as a gateway between the north midlands and the north-west, connecting Longford to the settlements of Cavan and Dundalk as well as the wider road network of Northern Ireland. The road connections between Granard and its surrounding hinterland are also relatively good, enabling it to fulfil its role as a key service town, enhancing the growth of its rural hinterland. However, it is also inadequately served by public transport, and as it is car dominated, does not cater to more vulnerable road users, including cyclists.

Amenity

While Granard possesses an attractive town centre in terms of its improved environmental quality and vernacular urban character, its amenity to potential customers and service users is greatly undermined by its congested core, lack of permeability, pedestrian safety issues and poor provision of amenity related infrastructure such of pedestrian crossings, high quality street furniture and passive recreation space.

Assessment

The retail offering of Granard remains in keeping with its position within the Longford County Retail Hierarchy, with a diverse mixture of retail outlets and general service provision. The accessibility and amenity of the town continues to be impacted upon by the presence of high volumes of vehicular traffic passing through the town.

An evaluation of the asking prices for retail property in the town indicates that they vary from between €52.62 to €92.86 per square metre, with differing sums relating to factors of location and quality of available floorspace[18].

Action

This health check has identified a number of key areas which require action:

- Implement a system to better manage and control traffic circulation and street parking; and
- Put in place improved pedestrian crossings and infrastructure

3.4 Edgeworthstown

The location of Edgeworthstown, on the eastern side of the County, along with the presence of two important national road linkages have long defined the town's attraction, accessibility and amenity. As a result, the town itself has developed to become a strategic interchange in the national road network, and serves as a gateway to County Longford for those travelling from the east. Edgeworthstown has been defined as a '*Service Town*' within the Longford County Development Plan 2009-2015.

Attraction

As with Longford Town, the location of Edgeworthstown is a key strength, with the N4 national primary and N55 national secondary routes both passing through the town. This has allowed it to take advantage of the high volume of passing trade, and to offer a mixture of services which have become tailored to the needs of both local residents and those who are just passing through. The layout of the town is dominated by the Main Street which is oriented primarily on an East West axis, and was formally part of the N4 national primary route.

There is a diverse mixture of convenience and comparison retail units located within the town in addition to a small amount of retail warehousing, located on the western periphery of the town. The retail offer of the town is complimented by a range of other services including pubs, cafes, hairdressers and restaurants. There is a heavy concentration of retail activities within the core of the town, located along Dublin Street, Main Street and Pound Street, while there is a small concentration of bulky goods retail units located along the Longford Road. The majority of the retail premises within the town appear to be well kept, although vacancy does appear to be higher in more peripheral areas.

Accessibility

Edgeworthstown is very accessible, located as it is on an important interchange between the N4 national primary route, which links Dublin and the east of the country with the counties of Leitrim, Mayo, Sligo and Roscommon, and the N55, which connects the midlands to the North West. As well as this road linkage, there is also a rail service which operates between Dublin and Sligo, and which is located just to the south of the town. Car parking within the town centre is restricted to on-street parking.

Amenity

The amenity of Edgeworthstown is dominated by its location within the national road network, with the town forming an important interchange between the N4 and the N55. The N55, which links Cavan town to Athlone, carries a high volume of HGV traffic, all of which passes through the centre of the town, with negative impacts on amenity.

The streetscape of the town is attractive, and is dominated by a largely traditional urban fabric and built form, which includes a mixture of stone front and plaster rendered buildings of various ages and functions. Many recent additions to the building stock of the town have taken place on the western periphery of the town. An example includes the terrace of stone fronted commercial and retail units, with first floor apartments, located on Pound Street and which has integrated very well into the existing streetscape.

Assessment

The retail offering which currently exists in Edgeworthstown is of sufficient quality and variety to continue to satisfy the role of a Service Town, as designated by the revised settlement hierarchy of the County Longford. There is also potential for further retail growth within the town, which would reduce the vacancy rates within the more peripheral parts of the town. While the presence of the N55 does create some problems, it is also a

[18] Information taken from analysis of published retail property prices available on Daft.ie on 04/10/2013.

key strength for the town. Enhancements to the pedestrian linkages and general amenity of the town could bring about substantial benefits and alleviate the negative impacts of the N55 while retaining its benefits.

Action

This health check has identified a number of key areas which require action:

- Take measures to enhance the public realm and pedestrian linkages in town centre; and
- Look to minimise the impact of the N55 on the amenity of the town.

3.5 Ballymahon

Located to the South of the County, Ballymahon is situated between the larger settlements of Athlone and Longford Town. In this context, the urban centre provides for important local residential, retail, social and leisure functions. The Longford Core Strategy identifies Ballymahon as a '*Local Service Town*' within its settlement hierarchy.

Attraction

Ballymahon exhibits a traditional linear market town structure, with its commercial activity being predominantly clustered around a compact urban core centred on Main Street. The broad width of this central thoroughfare, relative to the height of the mixed commercial buildings which front onto it, combine to give Main Street a distinctive and spacious character. The quality of the streetscape and the associated public realm in Ballymahon is also good, with many traditional shopfronts still intact. There is also a generous provision of pedestrian infrastructure such as crossings and street furniture. The settlement is situated adjacent to the River Inny to the East of Lough Ree, which gives the locality its unique topographical character.

Ballymahon possesses a good range of retail outlets and services relative to its size, with a variety of small local cafes, pubs, grocery and specialist shops. There appears to be very few incidences of national or international retail multiples within the settlement, which consists generally of independent retailers.

Accessibility

Ballymahon is served by a relatively good road network which includes the N55 national secondary route from Athlone to Cavan and the R392 regional route. However, the town is relatively poorly served by public transport facilities and is heavily reliant on car-based access in comparison to some of the other settlements within the County. Car parking in the town centre is well managed and easily accessible, and does not pose a risk to pedestrian safety, detract significantly from the public realm or generate congestion in the town centre.

Amenity

Overall, Ballymahon exhibits relatively high levels of public amenity and a high quality townscape, and is able to provide a good mixture of retail services to residents and passers-by alike. It also features a good quality and well maintained public realm, in addition to high standards of vehicular management and pedestrian infrastructure.

Assessment

The compact nature of the urban core of Ballymahon, and the presence of the N55, which passes through a substantial part of the town core, has been a key economic strength for the town, and has helped to sustain retail activity. In terms of the dynamism of its commercial market at present, there are a number of retail units currently available for rent particularly in the town's Main Street, with rental prices ranging between €94 and €200 per square meter per annum.

Action

This health check has identified a number of key areas which require action:

- Continue to proactively manage car parking, circulation and public realm in the town centre;
- Proactive approach to maintaining/improving the built stock in the retail core; and
- Improve access to the town core by non-vehicular modes of transport.

3.6 Lanesborough

Lanesborough which is defined as a *'Local Service Town'* within the Longford Core Strategy, functions to provide important local level retail, social, leisure and service functions to its wider rural.

Attractiveness

Located on the eastern bank of the River Shannon at the Northern perimeter of Lough Ree, the settlement of Lanesborough is characterised by a linear core urban form, known locally as 'Main Street', which had developed perpendicular to the adjacent river, rising gradually away from it. The townscape is defined predominantly by a non-uniform building line. The Main Street also features a high percentage of residential structures. Lanesborough offers its community a limited mix of retail services such as convenience retail, along with some limited comparison retail, cafes, pubs and other commercial services, distributed intermittently along Main Street. A second key defining feature is its narrow and inconsistent public realm, which is dominated by car parking, heavy traffic flows and a poor quality hard landscaping, features which all conspire to make this urban centre inhospitable to pedestrians. Lanesborough offers its community a limited mix of retail services such as limited convenience retail, pubs, specialist shops and service retail, which are often not clustered together and distributed intermittently along Main Street.

Accessibility

Lanesborough, which is located adjacent to one of the main bridging points on the River Shannon, is well connected to its wider region by the N63 national secondary route which links Longford to Roscommon and also to the R392 regional road which links the town to Mullingar. As a result, the town is subject to regular traffic congestion, impacting on poor circulation within its commercial core.

Amenity

The existence of high levels of poorly managed on-street car parking, heavy vehicular congestion, poor sight lines and access/egress arrangements and the poor provision of pedestrian facilities, all conspire to significantly undermine the amenity of this settlement for the local community. In addition, the townscape possesses a very poor relationship with the River Shannon, with the buildings located on the lower reaches of Main Street failing to adequately utilise or respond to this an important local amenity.

Assessment

As with the example of Ballymahon, the presence of a high volume of passing traffic is an important strength for Lanesborough. The town itself has retained its functionality, and continues to support a range of important support services which can be availed of by the residents of Lanesborough and its surrounding rural hinterland.

Action:

This health check has identified a number of key areas which require action:

- Implement polices to improve public realm, pedestrian infrastructure and quality of streetscape;
- Improve quality and mix of retail provision; and
- Manage traffic congestion and implement traffic calming.

3.7 Other Settlements

Newtownforbes

Newtownforbes is designated as being part of the '*Village Network*' within the Longford Core Strategy. Located to the north west of Longford Town, Newtownforbes plays a critical role in sustaining the viability of local rural communities by providing essential services such as housing, lower level retail and important social facilities that allow for local growth. Located along the N4 national primary route, the settlement is well connected to the wider region and also to its immediate rural environs via the local route L1005. Newtownforbes has a distinctive rural village character with good quality public realm and limited provision of local services and convenience retail. It also possesses good provision of car parking, a general lack of vehicular congestion and safe pedestrian access. In terms of its amenity, Newtownforbes' Main Street features a number of intermittent green spaces attached to institutional and community buildings.

Action:

This health check has identified a number of key areas which require action:

- Continue to proactively manage car parking, circulation and public realm in the town centre; and
- Ensure a good provision of convenience and local service retail is maintained going forward.

Drumlish

Drumlish is identified as being a part of the '*Village Network*' in the Longford Core Strategy and provides housing, local level retail and social facilities to its dependant rural communities, thereby acting as a local growth centre for the rural economy. The settlement of Drumlish is clustered around a central crossroads and is served by the R198 regional route which links it to Longford Town to the South. This rural village has retained much of its charm and is characterised by high-quality public realm and the limited provision of local convenience and service retail. It also possesses good provision of well managed on-street car parking, a general lack of vehicular congestion and a safe pedestrian environment.

Action:

This health check has identified one key area which requires action:

- Continue to proactively manage car parking, circulation and public realm in the town centre.

3.7 Summary of Commercial Floorspace Activity Since 2007

The last Longford County Retail Strategy was prepared in 2007 and reflected an overtly positive market outlook at that time. It identified an additional convenience floorspace need of between 3,000–7,000sqm and an additional comparison floorspace requirement of between 7,000–16,000sqm for 2007-2015. At the time, this estimate was considered conservative; however the pronounced nature of the economic downturn that followed ultimately meant that the quantum of envisaged floorspace was not delivered by the market.

In line with national trends, Longford has experienced a sizeable decline in retail floorspace construction activity since 2007. The scale of this slow down is evident in the analysis of the quantity of planning applications permitted and subsequently advanced in the intervening period, which is set out in Table 3.1 below. While a significant amount of new floorspace was permitted across the different retail categories, very few of these applications were subsequently progressed beyond the planning stage. It is worth noting that the majority of retail floorspace which has been delivered within County Longford since 2007 has been in the convenience category. As a result of this there has been very little change in the baseline figure for total retail floorspace within the County over and above that which was used in the formulation of the existing retail strategy for the County. Since 2007, some 14,673.40sqm of net retail floorspace has also lapsed through expired planning permissions in the County. A further 514sqm will also expire if not renewed or implemented by 1st January 2015.

Granted and Commenced Retail Developments since 2007				
Retail Category	Permitted	Commenced	Expired or considered to be expired	Due to Expire by 01/01/2015
Total Convenience	2,277.00	626.40	2,267.20	514.40
Total Comparison	13,410.00	71.20	1,165.20	0.00
Total Bulky	2,227.50	0.00	11,241.00	0.00
Total	17,914.50	697.60	14,673.40	514.40

Table 3.1: Outline of all permitted, commenced and outstanding retail development planning permissions since 2007.

In addition to the limited growth in retail floorspace, activity since 2007 has also been characterised by an increase in vacancy rates in the County. Again, this mirrors national trends over this period. As illustrated in Table 3.2, a total of 10,745 sqm of retail floorspace is currently vacant across the County (17.73% of total). Table 3.3 summarises existing levels of retail floorspace in Longford, taking account of development activity and existing levels of recorded vacancy across the County.

Total Vacancy by Retail Category	
Floorspace Category	m^2
Total Vacant Convenience Floorspace	2,274.99
Total Vacant Comparison Floorspace	2,172.46
Total Vacant Bulky Floorspace	6,298.27
Total Vacant Floorspace	10,745.72

Table 3.2: Summary of all existing vacancy (2013) by retail category.

Baseline Assessment of Retail Floorspace 2013						
	2007 Baseline (m^2)	Development Activity 2008-2013 (m^2)	2013 Baseline (m^2)	Total Vacancy (m^2)	Floorspace in use (m^2)	Available Floorspace in use (%)
Convenience	12,613.00	626.40	13,239.40	2,274.99	10,964.41	82.82
Comparison	11,176.00	71.20	11,247.20	2,172.46	9,074.74	80.68
Bulky	36,130.00	0.00	36,130.00	6,298.27	29,831.73	82.57
Total	59,919.00	697.60	60,616.60	10,745.72	49,870.88	82.27

Table 3.3: Summary of all existing retail floorspace, including 2007 and 2013 baseline figures and the vacancy rate for 2013, by retail category.

3.8 Healthcheck Conclusions

Overall, the results of the healthcheck analysis appear to indicate that, in spite of obvious and substantial difficulties in the retail sector over the last 5 years, the main settlements in County Longford continue to provide the necessary retail services required by their communities. Longford Town remains the most important retail centre within the County, and is the location for the majority of the retail floorspace within both the comparison and bulky goods retail categories. It is also the chosen location for the larger convenience multiples, who, with the exception of Super Valu, have chosen the town as their sole operations within the County. All of the other settlements within the County continue to fulfil their ancillary roles to the primary centre, supporting their local communities and surrounding hinterlands, in keeping with their respective positions within both the settlement and retail hierarchies.

Vacancy levels account for just over 17% of the total retail floorspace within centres across Longford. Significantly, the rate of occupancy within all three retail categories is between 80 and 83%. Retail vacancies were not a concern under previous health check appraisals carried out for the County. It is imperative that those retail units which are vacant at present are not allowed to become derelict. The use of windows for display and appropriate advertising can improve the environmental quality of areas. Going forward, there are a number of opportunity sites within the main towns which would improve and enhance the retail provision. The supporting towns provide a range of services to their surrounding areas. The development of these towns should not have a negative impact on the primacy of Longford Towns and should be in keeping with the existing scale and character of individual settlements.

4.0 Projected Floorspace Requirements

4.1 Introduction

This section establishes the future retail floorspace requirements for County Longford within the convenience, comparison and bulky goods retail categories, as specified within the Retail Planning Guidelines 2012. The assessment below has been produced having regard to existing floorspace capacity and projections[19] on the future demand for retail services within the County, and takes account of identified levels of vacancy detailed in Section 3. This will ensure that future development requirements will absorb existing vacancy which may otherwise hamper the vitality and viability of centres.

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

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

4.2 Population

The population of Longford has demonstrated substantial growth since 1996, with the most sizeable increases occurring since 2002. An analysis of census figures between 2002 and 2011 reveals that the population of the County expanded from 31,068 to 39,000, representing an increase of some 25.31% in nine years.

This growth rate ultimately meant that County Longford had all but achieved its 2016 population projection by 2011. Revised figures are set out in table 4.1 below[20].

2006	2011	2016 (Updated projection)	2021 (Updated Projection)	2024 (Updated Projection)
34,391	39,000	41,547	44,084	45,670

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

The starting point in any assessment of future floorspace requirements is projected population growth over the plan period. In accordance with the revised RPG population forecasts, the population of the County is projected to increase by 6,670 people between 2011 and 2024, which reflects 17% increase over that period. Importantly, the majority of that growth will be accommodated within Longford town, with the population forecast to increase from 8,002 to approximately 13,235 persons over this timeframe. The level of envisaged population growth within Longford Town means that it should also be the primary location for the majority of additional retail floorspace which is forecast to come forward in the County over the plan period.

[19] Some figures in this section may not sum due to rounding.
[20] The 2016 Original RPG Projection figures have been taken from the Midland Regional Planning Guidelines 2010-2022.

4.3 Expenditure Estimates

The expenditure analysis, upon which the subsequent floorspace turnover calculations are formulated, have been projected using figures derived from a number of Central Statistics Office (CSO) sources including the National Services Inquiry, the County Incomes and Regional GDP 2010[21] and the Retail Sales Index[22].

Per capita spend on an annual basis from 2013 to 2024[23] has been established using the population projections outlined above in addition to the expenditure projections which will be outlined below. The projection of future per capita spend for County Longford have been based upon an assumed increase of 1% per annum for both convenience and comparison goods from 2013 onwards. This growth rate is in line with the latest term economic outlook, and has been detailed in Table 4.2 below.

Determination of Per Capita Spend on Convenience and Comparison Retail Sales Figures based on National Population, Disposalable Income Indices					
		Annual Growth Rate (%)		Per Capita Spend (€)	
		Convenience	Comparison	Convenience	Comparison
2010	Per Capita Spend - Nationally	-	-	3,474	3,799
2010	Per Capita Spend - Adjusted for Longford County (national index = 100, Longford index = 89.1)	89.10	89.10	3,095	3,385
2011	Per Capita Spend - Longford County	-1.80	-1.80	3,039	3,324
2012	Per Capita Spend - Longford County	0.40	0.40	3,052	3,337
2013	Per Capita Spend - Longford County	1.00	1.00	3,070	3,357
2014	Per Capita Spend - Longford County	1.00	1.00	3,101	3,391
2015	Per Capita Spend - Longford County	1.00	1.00	3,132	3,424
2016	Per Capita Spend - Longford County	1.00	1.00	3,163	3,459
2017	Per Capita Spend - Longford County	1.00	1.00	3,194	3,493
2018	Per Capita Spend - Longford County	1.00	1.00	3,226	3,528
2019	Per Capita Spend - Longford County	1.00	1.00	3,259	3,564
2020	Per Capita Spend - Longford County	1.00	1.00	3,291	3,599
2021	Per Capita Spend - Longford County	1.00	1.00	3,324	3,635
2022	Per Capita Spend - Longford County	1.00	1.00	3,357	3,672
2023	Per Capita Spend - Longford County	1.00	1.00	3,391	3,708
2024	Per Capita Spend - Longford County	1.00	1.00	3,425	3,745

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

This table also illustrates an adjustment in the per capita spend for County Longford to account for lower average income levels when compared to the national average. The national per capita spend has been calculated based upon the total retail spend (inclusive of VAT) per capita in 2010. The Dublin Region has a higher level of disposable income (111.4 in 2010), which has the effect of inflating the national average. The available disposable income in the majority of counties is less than 100, with CSO's County Incomes and Regional GDP 2010 report[24] indicating that disposable income in County Longford was 10.9 index points lower than the national average. Therefore, the available per capita retail spend in County Longford in 2010 (base year) for convenience goods was €3,474 and for comparison goods was €3,799. Using these per capita retail spend projection figures, the total available spend for convenience, comparison and bulky goods, as calculated, is presented in Table 4.3.

[21] CSO, 'County Incomes and Regional GDP', 13/02/2013.
[22] CSO, 'Retail Sales Index', July 2013, 29/08/2013.
[23] To include the remaining 2 years of the existing plan, the 6 year operational period of this strategy, plus three additional years, as specified within the Retail Planning Guidelines 2012.
[24] CSO, 'County Incomes and Regional GDP', 13/02/2013.

Total Available Expenditure - Convenience/Comparison/Bulky Goods							
Year	Population	Convenience Per Capita Spend (€)	Comparison Per Capita Spend (€)	Convenience Total Available Spend (€)	Comparison Total Available Spend (€)	Convenience Total Available Spend - Excluding Bulky Goods(€)	Comparison Total Available Spend - Bulky Goods Only (€)
2011	39,000	3,039	3,324	118,538,813	129,627,138	103,701,711	25,925,428
2012	39,497	3,052	3,337	120,528,375	131,802,807	105,442,246	26,360,561
2013	40,000	3,070	3,357	122,792,538	134,278,763	107,423,011	26,855,753
2014	40,509	3,101	3,391	125,599,630	137,348,436	109,878,749	27,469,687
2015	41,025	3,132	3,424	128,470,894	140,488,283	112,390,627	28,097,657
2016	41,547	3,163	3,459	131,407,797	143,699,909	114,959,927	28,739,982
2017	42,042	3,194	3,493	134,304,382	146,867,445	117,493,956	29,373,489
2018	42,544	3,226	3,528	137,264,815	150,104,803	120,083,843	30,020,961
2019	43,051	3,259	3,564	140,290,505	153,413,521	122,730,817	30,682,704
2020	43,564	3,291	3,599	143,382,889	156,795,172	125,436,138	31,359,034
2021	44,084	3,324	3,635	146,543,438	160,251,364	128,201,091	32,050,273
2022	44,603	3,357	3,672	149,752,395	163,760,492	131,008,394	32,752,098
2023	45,135	3,391	3,708	153,053,944	167,370,874	133,896,700	33,474,175
2024	45,670	3,425	3,745	156,416,825	171,048,324	136,838,659	34,209,665

Table 4.3: Projections of the total available expenditure for each of the three retail categories from 2011 to 2024.

Table 4.3 illustrates the projected increases in population, per capita spend in both convenience and comparison goods, and total available spend in all three retail categories from 2011 to 2024. This includes the complete operational lifecycle of the Retail Strategy, from 2015 to 2021, and the requirement for an additional 3 years, up to 2024. This shows the total available spend for all retail goods growing from approximately €248m in 2011 to a projected €306m at the end of this retail strategy period in 2021, and to almost €327.5m in 2024. This projected level of increase within the total available spend of the County represents projected growth rates of approximately 19.12% and 24.22% respectively.

Total Available Expenditure - Convenience				
Year	Convenience Total Available Spend (€)	Convenience Total Available Spend Outflow (%)	Convenience Total Available Spend Inflow (%)	Adjusted Convenience Total Available Spend (€)
2011	118,538,813	15.00%	5.00%	106,684,932
2012	120,528,375	15.00%	5.00%	108,475,537
2013	122,792,538	15.00%	5.00%	110,513,284
2014	125,599,630	15.00%	5.00%	113,039,667
2015	128,470,894	15.00%	5.00%	115,623,805
2016	131,407,797	15.00%	5.00%	118,267,017
2017	134,304,382	15.00%	5.00%	120,873,944
2018	137,264,815	15.00%	5.00%	123,538,334
2019	140,290,505	15.00%	5.00%	126,261,455
2020	143,382,889	15.00%	5.00%	129,044,600
2021	146,543,438	15.00%	5.00%	131,889,094
2022	149,752,395	15.00%	5.00%	134,777,155
2023	153,053,944	15.00%	5.00%	137,748,550
2024	156,416,825	15.00%	5.00%	140,775,142

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

Table 4.4 illustrates the adjusted retail spend for County Longford from 2011 to 2024. In adjusting the total available convenience retail spend, it has been projected that approximately 15% of the total annual available spend on convenience goods within the County will be lost to competing centres.

In addition to the outflow referred to above, it has been projected that there will also be an inflow of retail spend. This has been estimated to be equivalent to 5% of the total annual available spend on convenience goods in County Longford. This inflow is primarily accounted for by passing trade and the use of the retail offering of the County by residents of neighbouring counties.

Total Available Expenditure - Comparison Non-Bulky Goods				
Year	Comparison Total Available Spend - Excluding Bulky Goods (€)	Comparison Total Available Spend Outflow (%)	Comparison Total Available Spend Inflow (%)	Adjusted Convenience Total Available Spend (€)
2011	103,701,711	10.00%	2.00%	95,405,574
2012	105,442,246	10.00%	2.00%	97,006,866
2013	107,423,011	10.00%	2.00%	98,829,170
2014	109,878,749	10.00%	2.00%	101,088,449
2015	112,390,627	10.00%	2.00%	103,399,376
2016	114,959,927	10.00%	2.00%	105,763,133
2017	117,493,956	10.00%	2.00%	108,094,440
2018	120,083,843	10.00%	2.00%	110,477,135
2019	122,730,817	10.00%	2.00%	112,912,352
2020	125,436,138	10.00%	2.00%	115,401,247
2021	128,201,091	10.00%	2.00%	117,945,004
2022	131,008,394	10.00%	2.00%	120,527,722
2023	133,896,700	10.00%	2.00%	123,184,964
2024	136,838,659	10.00%	2.00%	125,891,567

Total Available Expenditure - Comparison Bulky Goods				
Year	Comparison Total Available Spend - Bulky Goods (€)	Comparison Total Available Spend Outflow (%)	Comparison Total Available Spend Inflow (%)	Adjusted Convenience Total Available Spend (€)
2011	25,925,428	20.00%	1.50%	21,129,224
2012	26,360,561	20.00%	1.50%	21,483,858
2013	26,855,753	20.00%	1.50%	21,887,438
2014	27,469,687	20.00%	1.50%	22,387,795
2015	28,097,657	20.00%	1.50%	22,899,590
2016	28,739,982	20.00%	1.50%	23,423,085
2017	29,373,489	20.00%	1.50%	23,939,394
2018	30,020,961	20.00%	1.50%	24,467,083
2019	30,682,704	20.00%	1.50%	25,006,404
2020	31,359,034	20.00%	1.50%	25,557,613
2021	32,050,273	20.00%	1.50%	26,120,972
2022	32,752,098	20.00%	1.50%	26,692,960
2023	33,474,175	20.00%	1.50%	27,281,453
2024	34,209,665	20.00%	1.50%	27,880,877

Table 4.5: projections of the total available comparison and bulky retail spend, as adjusted to account for inflow and outflow.

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

4.4 Turnover and Floorspace Capacity

This section identifies the turnover and floorspace capacity which will be used to calculate the subsequent minimum additional floorspace requirements over the lifetime of this retail strategy. The defined average turnover rate per square metre of floorspace in each of the three categories has been illustrated in Table 4.6. This methodology uses the total expenditure available within the County for each category and divides it by the amount of existing floorspace within that category. The resulting figure has been used as the basis for the projection of future floorspace requirements, through a comparison exercise against the projected disposable income which is available within the specific category. The overall 2013 baseline figures indicate that 59.60% of all retail floorspace in the County is of the bulky goods retail category, while convenience and comparison retail floorspace account for 21.84% and 18.55% respectively.

Retail Floorspace Analysis				
Retail Category	2013			
	Gross Floor Area (m^2)	Net Floor Area (m^2)	Net Area as a % of Gross Area	Net Area as a % of Overall Total Net Area
Convenience	16,549	13,239	80.00%	21.84%
Comparison - Non-Bulky	14,059	11,247	80.00%	18.55%
Comparison - Bulky	40,144	36,130	90.00%	59.60%
Overall Total	70,752	60,616	-	100.00%

Retail Category Turnover		
2013		
Adjusted Total Available Spend (€)	Net Floor Area (m^2)	Turnover Per M^2 (€)
110,513,284	13,239	8,347
98,829,170	11,247	8,787
21,887,438	36,130	606
231,229,892	-	-

Table 4.6: Current retail floorspace per retail category and estimated turnover per square metre for County Longford.

4.5 Additional Retail Floorspace Requirements

Additional Floorspace Requirements Adjusted for Vacancy Rates												
	Convenience				Comparison - Non-Bulky				Comparison -Bulky			
Year	Total Annual Cumulative Floorspace Requirement (m^2)	Additional Annual Floorspace Requirement (m^2)	Vacant Floorspace (m^2)	Additional Floorspace Development Requirement (m^2)	Total Annual Cumulative Floorspace Requirement (m^2)	Additional Annual Floorspace Requirement (m^2)	Vacant Floorspace (m^2)	Additional Floorspace Development Requirement (m^2)	Total Annual Cumulative Floorspace Requirement (m^2)	Additional Annual Floorspace Requirement (m^2)	Vacant Floorspace (m^2)	Additional Floorspace Development Requirement (m^2)
2011												
2012												
2013	13,239		951.05		11,247		1047.74		36,130		2685.27	
2014	13,845	605	346	0	11,504	257	791	0	36,956	826	1,859	0
2015	14,161	316	29	0	11,767	263	528	0	37,801	845	1,014	0
2016	14,485	324	0	294	12,036	269	259	0	38,665	864	150	0
2017	14,793	308	0	602	12,301	265	0	7	39,517	852	0	702
2018	15,119	326	0	929	12,573	271	0	278	40,388	871	0	1,573
2019	15,452	333	0	1,262	12,850	277	0	555	41,279	890	0	2,463
2020	15,793	341	0	1,602	13,133	283	0	838	42,188	910	0	3,373
2021	16,141	348	0	1,951	13,422	289	0	1,128	43,118	930	0	4,303
2022	16,492	351	0	2,302	13,716	294	0	1,422	44,063	944	0	5,247
2023	16,858	366	0	2,668	14,019	302	0	1,724	45,034	971	0	6,219
2024	17,227	369	0	3,037	14,327	308	0	2,032	46,023	989	0	7,208

Table 4.7: Outline of the cumulative projected additional retail floorspace requirements per annum, as adjusted for vacancy, from 2013 to 2024.

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

- The total cumulative floorspace requirements are calculated for each year using the turnover per sqm and the available retail spend for each retail category;
- The baseline floorspace figure from the preceding year is subtracted from the total cumulative floorspace requirement to produce the additional annual floorspace requirement;
- The vacancy rate (as adjusted to allow for a 10% frictional vacancy requirement) is deducted from the additional annual floorspace requirement to define the additional floorspace development requirement, which is the final output of the exercise.

4.6 Additional Retail Floorspace Requirement Summary

The initial baseline projections for floorspace requirements for the period to 2024 are set out in Table 4.7 above. These projections have been formulated to include adjustments for existing vacancy levels, as well as a frictional vacancy rate of 10% to ensure vital choice and competition in the market. Having regard to calculated demand, and identified vacancy, including the need to maintain a frictional vacancy rate, there is a requirement to plan for additional retail floorspace over the plan period.

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

Significant consideration has also been given to the quality of existing vacant retail floorspace, including the prospective suitability of available floorspace to meet the future needs of retailers in the County. To negate prospective barriers to future activity and foster appropriate conditions to promote competition, growth and innovation in the retail sector locally, an additional allowance has been included within the identified range of future floorspace requirements. Following consultation with the Longford Local Authorities, consensus was reached that an additional floorspace minima of between 500 and 1,000sqm should be incorporated across the three retail categories. A summary of additional floorspace requirements over the period 2015-2021 is set out in table 4.8.

Additional Floorspace Requirements 2015-2021	
Retail Category	Floorspace (m^2)
Additional Convenience	2,000 - 3,000
Additional Comparison	1,500 - 2,500
Additional Bulky	4,500 - 5,500

Table 4.8: Summary of additional floorspace requirements over the 2015-2021 period

5.0 Retail Strategy and Policy Guidance

5.1 Retail Objectives and Policy Recommendations

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

5.2 Retail Strategy Overview

It is considered that the majority of future retail floorspace requirements will be provided within the commercial core of Longford Town, taking account of its role as the Principal Centre in the County and the fact that 88% of envisaged population growth over the period to 2022[25] is expected to take place within the town environment itself. As detailed in Section 4.2, the latter should precipitate an uplift in demand for convenience, comparison and bulky goods floorspace as the plan period progresses.

The focus of providing new retail floorspace within Longford Town underpins the 'town centre first' approach of the Retail Planning Guidelines and will also strengthen the competiveness of the County as a whole relative to other competing centres, reducing outward revenue leakage.

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

Hierarchy	Settlement Type	County Centre	Appropriate Retail Type
Tier I	Principal Town	Longford	Major convenience and comparison
Tier II	Key Service Town	Granard	Large to Medium scale convenience and medium scale comparison
Tier III	Service Town	Edgeworthstown	Medium scale convenience along with small to medium scale comparison
Tier IV	Local Service Towns	Ballymahon Lanesboro	Medium to small scale convenience, along with some limited comparison, including tourism related comparison
Tier V	Villages, Rural Serviced Settlements and Hinterlands	Villages, small settlements and the Open Country side of County Longford	Predominantly lower order convenience, but not excluding tourism related comparison

Table 5.1: County Retail Hierarchy

[25] The population of County Longford is expected to increase to 44,603.

5.3 Retail Objectives

Having regard to the information presented above in relation to the healthcheck analysis of the main urban settlements of County Longford and the additional floorspace requirements of the County between 2015 and 2024, a series of retail objectives have been devised. The primary purpose of these objectives will be to inform the development of policies which will protect and reinforce existing retail offering and look to develop additional retail services, in keeping with the role of the settlements of County Longford as prescribed within the Longford Core Strategy and the Midland Regional Planning Guidelines.

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

I. Ensure that County Longford possesses a clear policy framework that will inform both the conception and assessment of retail development proposals and help to guarantee that the strategic and local convenience and comparison retailing needs of the County are met;
II. Maintain, and where possible, enhance the existing competitiveness of the County's main centres by facilitating the development of additional retail floorspace where it can be clearly established that such development will result in tangible improvements to the retail offering of the County;
III. Encourage reductions in floorspace vacancy, taking account of suitability, obsolescence, and the identification of alternative uses for existing vacant floorspace within the urban centres of the County;
IV. Facilitate the regeneration of areas with scope for improvement or where there may be a high level of vacancy, obsolescence or emerging issues of dereliction, subject to the provisions of the Sequential Test;
V. Engage with the relevant stakeholders and incentivise to ensure that the environmental attractiveness of town/local centres is enhanced; and
VI. Address the issue of retail expenditure leakage out of the County to competing centres by looking to develop the retail offering in the County within key retail sectors where this leakage occurs.

In following these objectives, the goal of the Longford County Retail Strategy 2015-2021 will be to encourage the development of a healthy, vibrant and sustainable retail environment within the urban centres of County Longford.

5.4 Retail Policies

Having regard to the objectives which have been outlined above the following retail policies have been created. In formulating and adhering to these policies, Longford County Council will look to ensure that the development of all future retail floorspace is carried out in accordance with the requirements of the Retail Planning Guidelines. In addition, these policies, as part of the overall Longford County Development Plan 2015-2021, can be seen to form a single integrated and coherent strategic policy framework which will ensure that all development within the County is carried out in keeping with the ideals of sustainable development.

The policies outlined below have been created with the aim of supporting the expansion of the retail offering of County Longford in a sustainable manner. Therefore, these policies have been designed to encourage the reuse of vacant floorspace where possible. However, where the reuse or adaptation of vacant floorspace would have a negative impact upon a retailer's ability to compete, the construction of new retail floorspace would be permissible. Any application for the development of additional retail floorspace would require a detailed assessment to ensure that it is in keeping with the proper planning and sustainable development of the area within which it is proposed and provided that it can satisfy the relevant criteria as established within this retail strategy and the Retail Planning Guidelines.

Policy 1: It will be Council policy to ensure that all retail development permitted accords with the relevant requirements and criteria as established within the Retail Planning Guidelines for Planning Authorities 2012 and the Longford County Retail Strategy 2015-2021.

Policy 2: It will be Council policy to permit retail development of a size and scale which is appropriate to the level of the town/settlement area, including its population, as defined within the County retail hierarchy. This policy will aim to consolidate and reinforce all existing retail enterprises within the County, and permit the development of additional retail floorspace where such development is deemed to be appropriate by Longford County Council.

Policy 3: When bringing forward proposals for the creation of new retail floorspace, the Council will require applicants to undertake an assessment of the quality and suitability of existing and available floorspace in the County relative to the circumstances of their proposals.

Policy 4: It will be Council policy to discourage new retail development if they would either by themselves or cumulatively in conjunction with other developments seriously damage the vitality and viability of existing retail centres within the County. This policy is aimed at protecting the existing vitality and service provision of the towns, and particularly the town centres, of County Longford by preventing the development of retail enterprises in inappropriate locations or at a scale which would have a negative impact on retail competition within the County.

Policy 5: When assessing retail planning applications, it will be Council policy to have regard to the findings of the capacity assessment contained in the Longford County Retail Strategy 2015-2021, including the ability to counteract expenditure leakage. The onus will be on any applicant to demonstrate in a Retail Impact Assessment that the proposed floorspace is appropriate having regard to the quantum of floorspace required within that specific urban centre or settlement, in addition to evidencing all other relevant variables, as specified within the Retail Planning Guidelines.

Policy 6: It will be Council policy to encourage, in the first instance, developments which promote and protect the Longford Town Core Shopping Area as the primary location for high order comparison and large scale convenience retail development in the County, subject to the criteria of the Retail Planning Guidelines 2012. In principle, this will not preclude the consideration of proposals in locations where mitigating and robustly justified special circumstances apply.

Policy 7: It will be Council policy to promote the reuse of vacant retail floorspace. Where no viable retail use can be sustained, alternative uses will be assessed on their own merits against the requirements of the proper planning and sustainable development of the areas within which they are located. This policy will be used to ensure that all proposals for the reuse of existing retail floorspace can be evaluated and the proportion of vacancy can be reduced. In addition the identification and introduction of alternative uses for vacant retail floorspace will reduce the possibility of such floorspace falling derelict.

Policy 8: It will be Council policy to look to encourage the consolidation of other non retail based services within the town centres of the County utilising existing vacant retail floorspace where necessary. This policy will aid in enhancing the vitality of town centres, encouraging them to maintain their role as employment locations in addition to reducing the proportion of vacant retail floorspace and recognising the value which non retail uses can contribute to the local economy through the provision of employment and general economic benefit.

Policy 9: It will be Council policy to continue to improve the public realm of urban centres through the encouragement of high quality civic design, including but not limited to the provision of attractive street furniture, lighting and effective street cleaning. In addition, the introduction of business improvement district type initiatives to the principal settlements of County Longford will be evaluated to establish the contribution that such proposals could make to the viability and vitality of town centres within the County.

Policy 10: It will be Council policy to undertake measures to improve the accessibility of town centres by developing a pedestrian and cyclist friendly environment, which improves safety and limits traffic congestion where possible. A particular focus of this policy will be the development of additional pedestrian crossings where necessary within Longford Town centre, as well as other settlements within the County where high volumes of vehicular traffic can be seen to inhibit pedestrian movement.

Policy 11: It will be Council policy to encourage and facilitate retail innovation, where appropriate, to help diversify the County's retail profile and offer. Where possible, this retail innovation should be directed towards existing urban centres and settlements in the first instance, but will not preclude the development of retail enterprises in other locations, where the retail innovation in question cannot be sustained within any alternative location. Such development proposals will be assessed on their own merits, and must satisfy the assessment criteria of the Retail Planning Guidelines.

Policy 12: It will be Council policy to require a Retail Impact Assessment to be carried out for development proposals in the following general circumstances:

a) Proposals featuring greater than 1000sqm of net floorspace for both convenience and comparison type developments in the four main towns;
b) Proposals featuring greater than 500sqm of net retail floorspace for both convenience and comparison type developments in district towns and other settlements;
c) Or where the Planning Authority considers the development may impact on the vitality and viability of a town centre.

The Retail Impact Assessment shall include, at minimum, the criteria set out in the Retail Planning Guidelines 2012.

Policy 13: It will be Council policy to ensure that all proposed retailing projects and any associated improvement works or associated infrastructure such as parking facilities, individually or in combination with other plans and projects, are subject to Appropriate Assessment to ensure there are no likely significant effects on the integrity of any Natura 2000 sites[26] in the County.

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

5.5 Criteria for the Assessment of Future Retail Development

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

The Sequential Test

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

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

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

Retail Impact Assessments

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

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

Traffic and Transport Assessments

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

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

5.6 Criteria for the Assessment of Different Development Types

Large Convenience Stores

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

Retail Parks and Retail Warehouses

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

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

Local Shops

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

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

Retailing and Motor Fuel Stations

Local shops attached to petrol filling stations are a growing sector of the retail market. However, the size of the shop associated with any petrol filling station should take account of the fact that large shops can attract additional custom, large numbers of cars can cause disruption and the preferred location for retailing is in town centres. The Retail Planning Guidelines state that when the size of such retail units is in excess of 100sqm the sequential approach should apply.

5.7 Monitoring and Review

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

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

6.0 Conclusion

The Longford County Retail Strategy 2015-2021 has been prepared for the Longford Local Authorities in accordance with the requirements of the Retail Planning Guidelines, 2012. The policies which have been formulated as part of this Retail Strategy will be implemented as part of the Longford County Development Plan 2015-2021.

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