

COUNTY OFFALY RETAIL STRATEGY TO 2015



Offaly County Council Birr Town Council Tullamore Town Council

OFFALY LOCAL AUTHORITIES

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Executive Summary

Context

The 'Retail Planning: Guidelines for Planning Authorities specify that "Development plans should provide an indication of the general scale and form of retail development that is required in the future." The same paragraphs also identify a town centre based approach - the sequential approach - as the basis for decisions on the location of new retail development and emphasise the need for new development to be appropriately serviced and accessible by different modes of transport.

This Retail Strategy for County Offaly acknowledges the implications of these provisions. It identifies future floorspace requirements to 2015. The retail hierarchy identified is consistent with the Settlement Strategy identified in the County Offaly Development Plan 2009-2015.

Retail expenditure patterns have been identified through an extensive survey of households across the County. While most grocery and convenience expenditure of County residents is made in local centres, a significant proportion of their spending on comparison goods - fashion, furniture, household and electrical goods etc - flows to centres outside the County such as Athlone and further afield.

Shoppers' perceptions of Tullamore as the County Town and main shopping location have been obtained through a shoppers survey.

The Retail Planning: Guidelines for Local Authorities 2005 details the importance of town centre retailing: in meeting the retail requirements of residents and others who use or visit town centres: in contributing to levels of activity and town centre viability and health; and in supporting their general improvement. The guidance notes the considerable investment that has been directed to central areas and the vital role of planning policy in sustaining and enhancing their role. A centre-based approach is therefore adopted consistent with national and regional planning policy.

Retail Hierarchy

The guidelines also require county-level retail strategies to examine the retail hierarchy, the role of the main retail centres and the relevant size of each centre¹. In the context of this updated Strategy, Offaly's retail hierarchy comprises:

- Primary Tier: Tullamore town centre;
- Secondary Tier: Edenderry, Birr and Clara town centres;
- Tertiary Tier: Banagher, Ferbane, Kilcormac and Portarlington. Daingean is also included;
- Fourth Tier: Villages and rural settlements, including all other villages and smaller centres such as sraids, as well as small local shops; and
- Retail warehousing, such as that on the edge of Tullamore town.

Strategy principles

The Strategy reinforces the provisions of the Midlands Regional Planning Guidelines 2004 and the County Offaly Development Plan, outlining an approach which:

- Reinforces and extends the high order retail functioning of Tullamore as a linked Gateway, enabling it to: effectively reduce retail expenditure exported from the County to other centres; and further develop its retail influence in the Midlands consistent with its linked Gateway designation;

¹ 'Retail Planning; Guidelines for Local Authorities' (2005), paragraph 36 (i) -(vi)

- Supports the roles identified for Edenderry, Clara and Birr by encouraging retail floorspace provision commensurate with their anticipated growth; and
- Promotes balanced retail provision throughout the County of a scale appropriate to the size and function of the various settlements.

To further the strengthening and consolidation of Tullamore and the County's main centres, these are the preferred locations for retail development.

The bulk of additional retail floorspace in the future will be directed to Tullamore (in the first instance) and the main existing centres in the retail hierarchy, consistent with Policies P09-01 and P09-03 in the County Offaly Development Plan 2009-2015 and the County Settlement Strategy². Tullamore as a Linked Gateway Town and County Town will be the main focus of retail development activity as identified in Policy 09-03. The role and function of established centres should be consolidated (at all levels in the retail hierarchy) by encouraging the improvement of retail facilities and supporting services appropriate to each of the existing centres. This will include:

- a positive approach to planning applications which reinforce retail roles and functions;
- in principle support for town and other centre improvement initiatives (including for example, public realm and business development initiatives); and
- support for the resolution of traffic and transport-related issues which will require to be considered simultaneously.

Policy P09-08 of the Offaly County Development Plan 2009-2015 provides clear support for the retail sector and its future development as part of the maintenance and improvement of existing centres, stating,

"It is Council policy to encourage retail development, including new forms of shopping which relates to regeneration of existing Town Centres. Proposals which undermine the vitality and viability of core areas of Town Centres, as a whole will not be permitted."

Policy P09-04 of the Offaly County Development Plan 2009-2015 states that retail development should be focused in the existing settlements of the County and the scale and size of such retail development should match that of its location.

"It is Council policy to direct retail development to existing settlements. Retailing in rural areas should be commensurate with the needs of the local population".

Permitted and Committed Development 2002-2007

Since 2002, retail development has continued in Tullamore, increasing the volume of net floorspace by some 75% between 2002 and 2007. Retail warehousing development has been responsible for a large proportion of the uplift.

However, the increase in levels of development outside Tullamore over the same period has been striking. In Edenderry, the volume of retail sales floorspace has increased by nearly 200%. In Birr a 122% increase has been witnessed, while there has been a 96% increase in provision in other towns. Clara has been a notable exception to this growth.

During the period of the previous County Offaly Development Plan 2003-2009, retail facilities became less focused on Tullamore. This pattern is also reflected in the schedule of commitments, where planned retail development in Tullamore accounts for just 18% of development permitted but not yet constructed. Edenderry accounts for 50% of comparison goods pipeline floorspace while Birr and Clara both account for a further 14% of expected comparison retail development. While, experience in the

² Chapter 4, Settlement Strategy, Offaly County Development Plan 2009-2015

County indicates that not all of the proposals with planning permission will be implemented, nevertheless the scale and distribution of proposed development has significant implications for efforts to promote Tullamore as a Gateway retail centre. The Strategy addresses these.

Comparison and convenience³ retail floorspace requirements

A substantial part of the quantitative requirement to 2015 has already been met through a combination of built and committed development, effectively reducing the scope for major retail development over this period. This reflects the high levels of development witnessed between 2002 and 2007 and the large volume of floorspace in the retail development pipeline. Nevertheless, there is a quantitative requirement for some 7,800 sq.m net comparison floorspace to 2015.

In addition, between 2007 and 2015 there is scope for further development to address qualitative deficiencies or identified gaps in provision.

For convenience retail facilities, with the exception of the Linked Gateway town of Tullamore, this should be related to neighbourhood requirements.

In considering comparison retail facilities, all of the secondary centres have either witnessed recent development of major retail facilities or have commitments to its provision approved. The Tullamore Shoppers Survey identified several concerns over the quality of existing provision in the town, including the range and quality of shops. In view of the scale of approved development in other centres in the County up to 2015, proposals for major comparison retail development will mainly be encouraged in Tullamore town.

Tullamore, as a Linked Gateway Town, needs to retain the capacity to cater for major retail development and such development should be directed to Tullamore town in the first instance. Its role, as one of the Midlands Linked Gateway Towns, can be strengthened through securing major retail development which will in turn benefit the county and the wider region. Retail development will be encouraged in Tullamore, particularly those developments passing the Sequential Test.

This will assist in the town's ongoing regeneration and development, simultaneously enhancing its overall status and competitiveness as Offaly County's key shopping centre and destination. This aims to extend the quality of existing facilities while enabling it to retain trade and compete in the face of additional provision in neighbouring counties. Concentration of major comparison retailing provision in Tullamore will assist the development and expansion of the town's regional retail function.

In the Plan period, major retail development in Tullamore will therefore be considered over and above the quantitative requirement of 7,800 sq.m net where it can be demonstrated that proposed developments will have a positive impact:

- In further reducing levels of retail expenditure exported from the County; and
- In generating a significant improvement in Tullamore's regional appeal.

Beyond 2015, there is considerable scope for further development, particularly of comparison retail facilities. The identified requirement to 2020 is 30,530 sq.m (net). As an indicative requirement, Tullamore should accommodate a minimum of 75% of the County's future comparison goods floorspace requirement i.e. a further 22,900 sq.m

³ Experian's Retail Planner briefing note 5.1 (Nov 2007) defines convenience goods as: low-cost everyday items that consumers are unlikely to travel far to purchase. Defined as food and non-alcoholic drinks, tobacco, alcohol, newspapers and 90% of non-durable household goods. Comparison goods are all other retail goods.

net to 2020. The distribution of the remainder should be mainly targeted to Birr, Edenderry and Clara.

For convenience goods, only limited additional provision is required, of the order of 3,300 sq.m (net) to 2020. However, additional provision may be warranted where gaps in local provision can be identified and where qualitative improvements are effected. In meeting convenience shopping needs, the strategy supports the provision of local and accessible facilities, to actively encourage a sustainable approach to shopping activity, through a reduction in distances travelled by motor vehicle, linked to greater opportunities to maximise linked shopping trips. The strategy supports provision of modern supermarket developments of a scale appropriate to the settlement in each of the secondary (and potentially tertiary) town centres.

In local and other centres (including the Settlement strategy's Local Service Towns, Villages and Sraids), minor floorspace increments and new retail developments will be supported where they meet the needs of the local population.

In smaller, local centres there is unlikely to be much increase in retail requirements in the short-to-medium term. Should local population changes require significant additional provision, this position will be reviewed.

A sequential approach to retail development

The preferred location for retail development is within existing town centres. In those instances where development cannot be accommodated in defined centres edge-of-centre locations may require to be identified. Only when these options are exhausted should out-of centre locations be considered providing there is no significant adverse impact on existing centres

The provisions of paragraphs 55 to 65 of the Retail Planning Guidelines outline the main principles for assessing new retail proposals. These should be referred to inform site selection, the scale and form of development, access and servicing arrangements, linkages and support for the maintenance and development of a competitive retail sector throughout Offaly.

1 INTRODUCTION

- 1.1 The Retail Planning Guidelines, as published in December 2000 and amended in 2005, require that local authorities outline relevant policies and address a series of matters to be included in the County Development Plan. These include:
- Confirmation of the retail hierarchy, the role of centres and the size of the main town centres;
 - Broad assessment of the requirement for additional retail floorspace;
 - Strategic guidance on the location and scale of retail development;
 - Preparation of policies and action initiatives to encourage the improvement of town centres; and
 - Identification of criteria for the assessment of retail developments.
- 1.2 Roger Tym & Partners were commissioned by Offaly County Council to review the County Offaly Retail Strategy. The Strategy examines a number of the County's settlements in light of retail capacity and future needs including the Midlands Linked Gateway town of Tullamore and the Large and Medium Towns identified in the Offaly County Development Plan (2009-2015) Settlement Strategy, including Birr, Edenderry and Clara. The future needs of Portarlington are also examined.
- 1.3 This work updates the Retail Strategy for County Offaly adopted in 2002 and parallels the review of the Offaly County Development Plan 2003-2009.

Approach

- 1.4 There have been several key stages in the preparation of this strategy, with the timing of some aspects tapered accordingly to ensure that the findings of the review are made available to input to the review of the County Development Plan.

Demographic Analysis

- 1.5 An analysis of existing and future population and levels of retail expenditure by County Offaly residents has been undertaken to establish the scale of the requirement, which the Retail Strategy needs to address.

Policy Context

- 1.6 A comprehensive assessment of the national and regional policy context has been prepared to ensure a consistent approach in the County Offaly Retail Strategy.

Consultation

- 1.7 The survey work was combined with a focused programme of wider local consultation, including written representations made by the local Chambers of Commerce, retailers, businesses and other interested parties in the county.
- 1.8 The written consultation sought to inform the development of the strategy with specific local views of the performance of each of the town centres, including wider perceptions of the provision of retail and other services.

Town Centre Assessment

- 1.9 Town centre health check assessments were undertaken in Tullamore, Birr, Clara and Edenderry. Along with the survey fieldwork and wider consultation, this has been used to inform the review of the County Offaly retail hierarchy.

Survey

- 1.10 Building on the previous survey and research for the 2002 Retail Strategy, floorspace information for each of the centres was reviewed and updated.
- 1.11 A telephone-based survey of households across County Offaly was completed in August and September 2007 to establish the shopping and expenditure patterns of the resident population for different types of retailing.
- 1.12 Additional information on shopping patterns and perceptions was obtained through a shoppers survey carried out in Tullamore town centre in October 2007.

Capacity Assessment

- 1.13 A capacity assessment has been prepared which maps the findings of the Household and Shoppers Surveys to the existing provision of retail floorspace across the various centres in County Offaly. It identifies existing capacity and projects future requirements to 2020.

Strategy and Policy Recommendations

- 1.14 Strategy and policy recommendations are brought forward to guide future retail development across County Offaly and in its main centres.

Structure of the Report

- 1.15 Following this introduction, the Strategy covers the following elements:
 - Section 2 - Retail trends and Offaly's retail hierarchy;
 - Section 3 - Review of planning policy and strategy context;
 - Section 4 - Town centre assessment and appraisal;
 - Section 5 - Survey findings and retail expenditure patterns;
 - Section 6 - Retail capacity assessment and future requirements; and
 - Section 7 - Broad strategy and policy recommendations.
- 1.16 A series of Technical Appendices provide background information.

2 RETAIL HIERARCHY

National Trends

- 2.1 The Irish economy is one of the fastest growing in the Western world. A boom in the mid-to-late-1990s saw a prolonged period of double-digit growth in Ireland's GDP, ultimately doubling the size of the economy. Economic growth translated to increasing consumer affluence and strong growth in retail sales. High rates of economic growth have resulted mainly from the following:
- A generally benign global (particularly the US economy);
 - Ireland's ability to attract inward investment, particularly from the US;
 - Historic and continuing investment in infrastructure improvements;
 - The emergence of a large, young and relatively well educated labour force which has been fuelled by a number of factors including immigration from overseas; and
 - Income growth and, significantly for the retail sector, increased discretionary spending.
- 2.2 The Irish retail market has also nearly doubled in size since 1995 with retail sales amounting to some €24 billion by 2005. It still remains, however, one of the most fragmented markets in Western Europe with only a small number of multiples presently operating in the country. There remains strong independent operator representation in the smaller towns, although with the development of a number of national chains these retailers are increasingly choosing to align themselves under the banner of a choice of buying/marketing groups.

National Retail Hierarchy

- 2.3 National planning guidance 'Retail Planning: Guidelines for Local Authorities' (2005) defines the national retail hierarchy. It identifies four general tiers of shopping provision, acknowledging overlaps between them.
- Tier 1 - Metropolitan Dublin; with over a quarter of the national population and accounting for a high proportion of all retail turnover (over 30% of convenience expenditure and more than 40% of comparison spending nationally), its critical mass supporting a scale and quality of retail functions not found elsewhere in the State.
 - Tier 2 - Cork, Limerick, Galway & Waterford, providing high order comparison shopping not generally available elsewhere. With Dublin, these centres absorb over half of all total comparison goods turnover.
 - Tier 3 - including towns such as Athlone, Carlow, Castlebar, Clonmel, Drogheda, Dundalk, Ennis, Kilkenny, Letterkenny, Monaghan, Mullingar, Newbridge, Portlaoise, Sligo, Tralee, **Tullamore** and Wexford etc. National planning guidance notes significant recent improvement and increasing vibrancy in such towns, particularly in respect of comparison retail functions.

The guidelines identify a further raft of towns with extensive convenience retail facilities and with supporting comparison retail floorspace provision. These towns are generally smaller than those listed above. In the Offaly context, **Edenderry** may fall within this sub-tier as a result of recent population growth and continuing retail expansion in the town.
 - Tier 4 - this includes a large number of towns, generally with a population of 1,500 to 5,000. Most provide basic convenience shopping, either in small supermarkets

or convenience shops or in some cases, lower order comparison shopping such as hardware and clothes.

- 2.4 In addition the guidelines also note the importance of local shopping facilities (including suburban 'corner' shops, town and village stores, post offices and retail units attached to petrol filling stations etc.) in meeting community needs, particularly in rural and more remote areas.

Offaly Retail Hierarchy

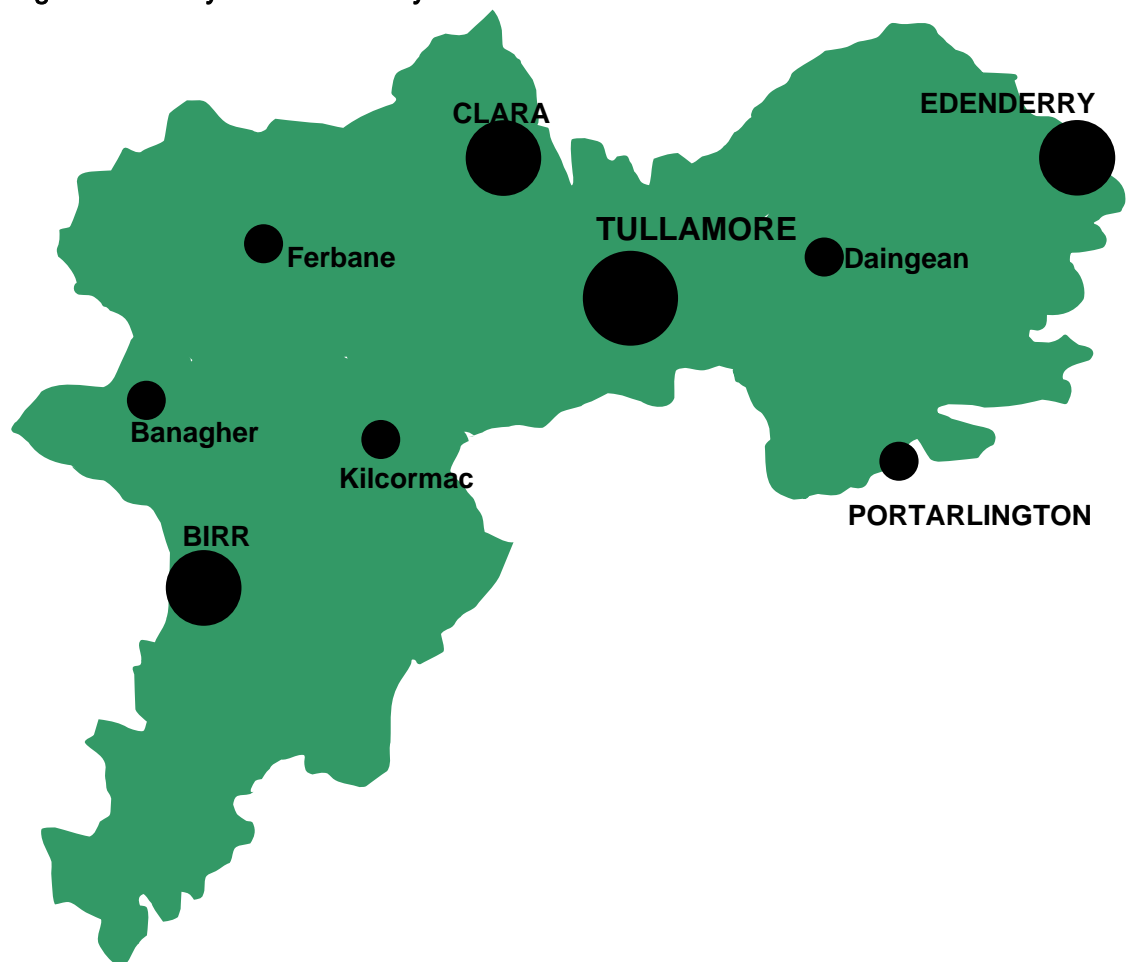
- 2.5 The Retail Planning Guidelines require County-level retail strategies to examine the retail hierarchy, the role of the main retail centres and the relevant size of each centre⁴. In the context of this updated Strategy, Offaly's retail hierarchy comprises:

- Primary Tier: Tullamore town centre;
- Secondary Tier: Edenderry, Birr and Clara town centres;
- Tertiary Tier: Banagher, Ferbane, Kilcormac and Portarlinton⁵. Daingean is also included;
- Fourth Tier: Villages and rural settlements, including all other villages and smaller centres, as well as small local shops; and
- Retail warehousing, such as that on the edge of Tullamore town.

⁴ 'Retail Planning; Guidelines for Local Authorities' (2005), paragraph 36 (i) -(vi)

⁵ Portarlinton's town centre is in County Laois

Figure 2-1 Offaly Retail Hierarchy



- 2.6 In general terms, **Tullamore** town centre functions and performs the role of the main county town and service centre within Offaly, and thus it tends to dominate the County retail hierarchy.
- 2.7 Tullamore has a diverse range of comparison and convenience shopping floorspace selling higher and medium order goods and services that are not generally found elsewhere in Offaly. Tullamore offers entertainment and leisure amenities, and pubs and restaurants etc. In this context, Tullamore will continue to function and be promoted as the key town centre in the retail hierarchy.
- 2.8 **Edenderry, Birr and Clara** are each recognised by the current County Development Plan as having a key role in meeting the County's shopping needs. **Portarlington** is also included although many of the town's shopping facilities are in County Laois.
- 2.9 These towns have an established local and sub-county catchment and defined town centre area and serve a distinct local service role. They generally comprise at least one medium-sized supermarket and/or discount foodstore, a handful of convenience goods shops, as well as a few retailers selling comparison goods (e.g. clothes, etc).
- 2.10 In recent years, however, towns such as Edenderry have experienced population growth and the accompanying development has seen the arrival of major retailers such as Dunnes, Tesco and others.
- 2.11 The third tier of centres includes: **Banagher, Ferbane, Kilcormac (and Daingean)**. These towns are relatively small with limited opportunities for future growth. It is

unlikely that major retail development would be sustainable. Future retail development in these towns should be commensurate with local catchment populations and their anticipated growth, and reflect their position in the retail hierarchy.

- 2.12 **Villages and small settlements, as well as local shops** will normally serve localised residential areas. This includes small shops associated with petrol filling stations, post offices and shops in the smaller villages, which also have an important role in local communities particularly in the more rural and remote parts of the County.

3 POLICY CONTEXT

- 3.1 In this section the planning policy and strategy context in County Offaly is reviewed, including the National Spatial Strategy, Retail Planning Guidelines, the Midlands Regional Planning Guidelines 2004, the County Development Plan and planning policies for Tullamore, Edenderry, Birr, and Clara, and elsewhere in Offaly.
- 3.2 The key policies which need to be addressed and their implications are highlighted. Retail planning policy in neighbouring Laois and Westmeath is also discussed.

National Spatial Strategy

- 3.3 The National Spatial Strategy for Ireland (NSS) is a long term planning framework for the period 2002-2020 designed to achieve a better balance of social, economic, physical development and population growth between regions.
- 3.4 In the NSS context, County Offaly has a strategic location of regional importance in the Midlands, with effective linkages to Athlone-Mullingar within the Midlands Linked Gateway. It notes the vital importance of improvements to the strategic transport network (to other Midlands centres and beyond) in increasing the County's competitiveness and in realising its economic development potential. Clearly, transport infrastructure improvements also improve access to other centres. Supporting policy needs to ensure the strength of Offaly's centres (at different levels in the retail hierarchy) to enable them to benefit fully from the County's enhanced strategic accessibility.
- 3.5 The complementary attractions and resources of the Midland Gateway towns will help to establish a critical mass and scale of development that in turn will drive growth and development in County Offaly. Tullamore (as part of the Midlands Gateway) will act as an economic catalyst, developing infrastructure and critical mass comparable to larger urban centres.
- 3.6 The NSS also emphasises the importance of appropriate development in smaller towns and villages, through strengthening areas in population and employment decline.
- 3.7 The retail sector has a critical role to play in ensuring an appropriate level of provision, which meets the needs of an expanding population, and in boosting the role of the County's town and other centres as economic drivers for growth.

Retail Planning Guidelines

- 3.8 As a result of increasing pressure for retail development, Retail Planning Guidelines were issued in December 2000 and amended in February 2005. The guidelines define the national retail hierarchy (see paragraph 2.3), supporting it with five key policy objectives:
- Facilitating a competitive and healthy environment for the retail industry;
 - Supporting the continuing retail vitality and viability of town and district centres, with established centres being the preferred location for new development (as well as the focus of social, business and community activity);
 - Promoting development which is easily accessible by different modes of transport;
 - A presumption against large-scale retail centres adjacent or in close proximity to existing, new or planned national roads and motorways; and
 - Ensuring that all development plans have clear retail policies and proposals.

- 3.9 In addition, specific policy guidance is provided for retail development of differing scales, with floorspace caps employed to encourage local competition:
- Regional shopping centres - outside Greater Dublin, there is no justification for new large scale regional shopping centres;
 - District centres - development plans will identify any need for new district centres, of up to 10,000 sq.m in the main towns and 20,000 sq.m in Dublin;
 - Large foodstores - a floorspace cap of 3,500 sq.m net is applied in Greater Dublin, reducing to 3,000 sq.m net elsewhere;
 - Discount foodstores - the potential role of stores of up to 1,500 sq.m gross floorspace in extending retailing choice is acknowledged;
 - Retail parks - the guidance notes that while development between 8,000 sq.m and 15,000 sq.m (gross) is not likely to have a material impact on the more important centres in the retail hierarchy, there could be adverse impacts for smaller centres. It strongly advises restrictions on the range of goods sold to bulky household goods only i.e. carpets, furniture, white electrical goods and DIY items;
 - Retail warehousing units - a threshold cap of 6,000 sq.m gross floorspace is applied to single large retail warehouse units. There may similarly wish to be a minimum size condition imposed (700 sq.m) on units in out-of-centre locations to prevent sub-division or smaller stores; and
 - Retail in petrol filling stations - up to 100 sq.m net retail sales area may be allowed.
- 3.10 The February 2005 amendment had the effect of lifting retail warehousing floorspace restrictions (see above) for individual large-scale retail warehousing units in those parts of Dublin and the National Spatial Strategy's Gateway Towns covered by Integrated Area Plans under the Urban Renewal Act, 1998.
- 3.11 In Offaly, the amendment relates primarily to the linked Midlands Gateway (Athlone-Mullingar-Tullamore). The relaxation aims to encourage new retailers into the Irish retail market, while providing competition and wider consumer choice. In considering development of this type, care needs to be taken to protect the health, vitality and future prospects of the County's town centres, and particularly its larger centres.
- 3.12 In this respect, Retail Planning Guidance stipulates that the sequential approach to the location of retail development should be followed in considering the preferred location for new retail development (both when preparing policy and in considering specific applications). Clear preference is given to town centre sites, followed by edge-of-centre sites (defined as within an easy and convenient walking distance from the primary shopping core⁶). Only when these options have been exhausted should alternative out-of-centre locations be considered.

Midlands Regional Planning Guidelines 2004

- 3.13 The Midlands Regional Planning Guidelines (May 2004) cover the four counties of Offaly, Laois, Longford and Westmeath. In planning to 2020, the guidelines identify a target population of 325,000, equivalent to 100,000 additional residents.⁷ This figure has been revised to 340,000 in light of the results of Census 2006 and optimistic government forecasts for national population growth.
- 3.14 The linked gateway of Athlone-Mullingar-Tullamore (along with the principal towns of Longford and Portlaoise) is identified as the focal point for attracting population as well as business and employment to the region. As established towns with existing

⁶ 300 metres - 400 metres

⁷ Recent advice from D0EHLG suggests this may be exceeded

infrastructure provision, and a range of functions, these locations are best equipped to accommodate anticipated development and growth.

- 3.15 The Midlands Regional Planning Guidelines, 2004 promote growth in a range of settlements:
- The NSS 'Midlands Linked Gateway' - Athlone, Mullingar and **Tullamore** is the region's main economic driver. Development of improved transport and communications links within the Gateway and externally is promoted to support future growth and higher order development;
 - The principal towns of Portlaoise and Longford will help drive growth in the southern and northern parts of the region. Targeted investment in improved transport and communications is promoted;
 - Key Service towns will act as key stimulants of growth at a local level providing important economic, administrative and social functions. Growth is closely linked to the development of the Gateway and principal towns. **Birr, Edenderry, Granard and Portarlington** are in this category;
 - Service towns mainly serve a local hinterland while supporting nearby Gateway and principal towns, through consolidating growth. **Clara** and **Ferbane** are in this category; and
 - Local service towns and villages will focus on provision of services to rural communities.
- 3.16 The preferred development strategy is based on the creation of five, inter-related development areas (NB: The population projections quoted below pre-date the 2006 Census findings and the subsequent revision of forecast growth):
- *Central* - focusing on the Linked Gateway towns (which house one third of the region's population). Population growth of between 55,000 and 60,000 is anticipated. While Tullamore will be the main focus of economic growth and development in Offaly, **Clara** will absorb some of the anticipated growth in its role as a Service Town.
 - *Eastern* - including areas closest to the Greater Dublin Area (GDA) and the associated road and rail corridors, which are experiencing greatest population growth. Population expansion of between 7,000 and 9,000 is envisaged to 2020, with **Edenderry** and **Portarlington** seen as absorbing much of the growth.
 - *Western* - the most rural part of the Midlands and furthest from the influence of the GDA. Nonetheless, population growth of between 3,500 and 5,500 is envisaged. **Birr** as a Key Service Town is identified as a key growth area.
 - *Northern* - Longford and those areas associated with the wider North-west and Borders regions.
 - *Southern* - including parts situated along the N7/N8 road and rail corridors and linked to Portlaoise.

Offaly County Development Plan

Offaly County Development Plan 2003-2009

- 3.17 The Offaly County Development Plan 2003-2009 set out an overall strategy, for the administrative area of County Offaly. Tullamore and Birr both have their own statutory development plans.
- 3.18 The plan acknowledged the fundamental importance of the retail sector to the Offaly economy and to its individual communities and recognised the important function in urban areas of local shops located in local centres or neighbourhood centres. The plan

stated that new retail development will also be encouraged at local neighbourhood outlets, which serve areas that are a distance from town or village centres.

- 3.19 All proposals for retail development were assessed against the policies contained in the Offaly Retail Strategy 2002, which was an Appendix to the County Development Plan, and those contained in the Retail Planning Guidelines.

Offaly County Development Plan Review

- 3.20 In April 2007, Offaly County Council announced its intention to begin the preparation of a formal review of the County Development Plan. The plan review will provide an up-to-date planning and development strategy for the County for a six-year period from 2009-2015.

- 3.21 An initial phase of consultation informed by an Issues Booklet ended in May 2007. The section on 'Employment and Economy' raised several important issues for retailing:

- A preference by multiple operators to group together in out-of-town locations, such as retail parks or shopping centres, while smaller traditional shops remain trading within the town centres; and
- A need to reinforce and encourage the continued vitality and viability of traditional town centres.

- 3.22 The County Council considers that the scale and size of most retailing provision should reflect and follow the established size of an individual settlement, and also preferably be located within town centres (thereby following the sequential approach to site selection). This Retail Strategy has been prepared in this context.

- 3.23 The Offaly County Development Plan 2009 - 2015 was adopted by the County Council on January 19th 2009. The Settlement Strategy outlined in the plan is consistent with the direction of regional planning guidance. The roles of the larger settlements in the hierarchy are profiled in Table 3.1.

Table 3-1 County Offaly Development Plan 2009-2015 - Settlement Hierarchy

Area	Role
Linked Gateway Town/County Town Tullamore	Tullamore will continue as the largest settlement in Offaly. It will house the bulk of employment and acts as the County's main engine of growth. Consistent with regional planning targets, the population could increase to 30,000 by 2020.
Large Towns (min. 5,000 persons) Birr, Edenderry, Portarlinton	Large Towns will be self-sustaining, strengthening the County settlement pattern and supporting their immediate hinterland. It is anticipated that the Large Towns will reinforce their role as key centres by providing appropriate employment opportunities, business, industry, education, tourism and infrastructure.
Medium Towns (3,000 - 5,000 persons) Clara [supporting Gateway town]	Clara is a key settlement in the linked Gateway and is also identified for population expansion, employment opportunities, business, industry, tourism and infrastructure development by the 'Strategic Development Framework for the Midlands Gateway'. It will continue to be a development focus as a supporting town to the ATM Gateway.
Local Service Towns (1,000+ persons) Banagher, Ferbane, Kilcormac, Daingean	Local Service Towns are fundamental providers of local services facilities to their rural hinterlands. Local enterprise is encouraged and the location of appropriate industry may be considered in them. Ferbane has an enhanced important strategic role due to its designation in regional planning guidance as a 'key service town'.

Development Plans

- 3.24 In addition to the Offaly County Development Plan, a series of Local Area Plans and town development plans cover different parts of the County. Development plans are in force for the towns of Tullamore and Birr, while there are a series of Local Area Plans, town, village and sraid⁸ plans in force throughout Offaly.

Tullamore Town and Environs Development Plan

- 3.25 Tullamore Town Council and Offaly County Council jointly prepared a statutory development plan for Tullamore and its environs (effective from September 2004). This covers the administrative area of Tullamore Town Council and the town's environs which fall within the remit of Offaly County Council.
- 3.26 The Tullamore Town and Environs Development Plan (TTEDP) covers all the land areas within the development boundary of Tullamore and its environs over the period 2004-2010.
- 3.27 Tullamore is the administrative centre for the County, and acts as the major regional service, retail and commercial centre for its wide surrounding rural hinterland. The town has experienced a high level of population growth in recent years, and this growth pattern is anticipated to continue. The TTEDP recognizes and promotes the town's Gateway status and seeks to make adequate provisions to accommodate this⁹. The plan strategy focuses on consolidating Tullamore as an urban centre of both economic and population growth.
- 3.28 Tullamore has benefited in recent years from growth in its retail and services provision and the town now serves a wide catchment. In accordance with broad policy guidelines, new retail development is encouraged to locate in existing retail and town centres and not in out-of-centre developments, such as retail parks. The Plan also highlights the significance of local and neighbourhood retail provision in urban areas.
- 3.29 The specific retail policies reflect the Offaly Retail Strategy 2002, noting in particular the target to develop floorspace provision and the town's critical mass of retail facilities to a level above that of a State Tier 3 centre. This approach aims to reduce outgoing expenditure and shopping trips while also attracting developer and retailer interest. The Plan aims to enhance the role and function of Tullamore as the leading regional retail and commercial centre in the Midlands.

Birr Town and Environs Development Plan

- 3.30 Birr Town Council and Offaly County Council jointly prepared and adopted a statutory development plan for Birr Town and its environs (adopted May 2004). This covers the administrative area of Birr Town Council and the town's environs which fall within the remit of Offaly County Council. The Birr Town and Environs Development Plan covers the period 2004-2010.
- 3.31 The Birr plan aims to enhance the town as a key centre in Offaly extending its influence into North Tipperary. It promotes continuing development of its role as a shopping and commercial centre for South Offaly and North-Tipperary, and the promotion of the town as a key tourism centre.
- 3.32 The primary objective is to consolidate commercial development in Birr town centre, thereby supporting its function as a key shopping and commercial centre serving the needs of the town and environs, as well as its wider catchment area. This needs to be balanced with environmental, streetscape and accessibility improvements, as well as retention of the town centre's residential population.

⁸ Sraid is a small settlement, which is suitable for moderate population and service provision growth over the medium to long term (Offaly County Council Development Plan 2003-2009, Variation 3, General Policy Document).

⁹ Town Vision, paragraph 1.71

Edenderry Local Area Plan

- 3.33 The Edenderry Local Area Plan was adopted in September 2005 and covers the areas enclosed within the town development boundary. The plan promotes the town's development as a district centre, and aims to raise the town's regional role through improved linkages to Dublin, Tullamore, Mullingar and Kildare.
- 3.34 In retailing, the plan redefines the central area, creating stronger links to the inner relief road whilst encouraging its expansion in a northern and eastern direction to ensure that it continues to develop as an attractive shopping destination. The Local Area Plan emphasises the need for the town to fulfil its key role in absorbing anticipated population growth (as a Key Service Town in the MRPG's Eastern area). It is noted that much of the anticipated population growth has already taken place.

Clara Local Area Plan

- 3.35 The Clara Local Area Plan was adopted in December 2005 and designates Clara as a service centre, promoting it as a commuter town for nearby Tullamore. The plan builds upon Clara's location within the Midlands Linked Gateway to help achieve a balanced and sustainable form of town development.
- 3.36 The Local Area Plan pursues the revitalisation of Clara's shopping function, by encouraging and directing new retail and associated development into the town centre. While recognising that its potential is constrained by its proximity to Tullamore, the plan notes the importance of establishing a level of retail floorspace appropriate to its function as a key local retail and service centre. The town's role in absorbing part of the MRPG's projected growth for the Central Area further emphasises this.

Other Town Plans

Banagher

- 3.37 Banagher is identified in the Banagher Town Plan as a service centre and has particular importance in economic terms by virtue of its location on the River Shannon, and its attractiveness in tourism and historical heritage.
- 3.38 In retailing, the town serves a relatively wide rural catchment providing an important range of key goods and services. The plan's retail policy aims to encourage and enhance the role of Banagher as a retail and commercial centre serving local and tourist based demands

Ferbane

- 3.39 The Ferbane Town Plan recognises the town's designation as a service centre for a wider rural catchment, a role further prioritised by its Midlands regional Planning Guidance 2004 designation as a service town. The plan encourages the centres enhancement as a retail and service centre while acknowledging that traffic and accessibility issues act as development constraints.

Kilcormac

- 3.40 The Kilcormac Town Plan emphasises that Kilcormac, as an identified service centre, has an important and strategic role to play as it sits midway between Birr and Tullamore. On this basis, the plan encourages new development in the town provided it is within the serviced land areas. The plan also supports the protection and development of its retail and service provision and associated function.

Portarlinton

- 3.41 While Portarlinton falls mainly in adjoining County Laois, the town continues to be designated as a service centre for County Offaly. It has a strategic location and the town is anticipated to grow further once road improvements are implemented. With Edenderry, it is highlighted as a key growth centre in the MRPG's Eastern Area.

- 3.42 Portarlington is likely to be further consolidated, increasing its attraction to commuters to the Greater Dublin Area. Although the town centre is in Laois, the significance of its retail role to Counties Offaly and Laois is acknowledged through supporting retail policy.
- 3.43 It is noted that nearly a quarter of Portarlington's population is resident on the Offaly side of the County boundary. While higher order retail development should generally be focussed in the town centre, care should be taken to ensure that neighbourhood and convenience requirements of the Offaly population are met appropriately, particularly as the area grows in the future.

Daingean

- 3.44 Daingean is designated as a local service town by the Midlands Regional Planning Guidelines and therefore serves an important local function in respect of retail, social and leisure - in particular the wider rural hinterland.
- 3.45 The key strategy aim of the plan is to promote the town as a local service centre, and to consolidate and enhance the existing level and diversity of services, retail and other uses maintained in the town. To achieve this and the revitalisation of the town centre, the focus for all new retail, commercial and mixed uses will be the town centre.

Laois Retail Strategy

- 3.46 Given the existing administrative arrangements for parts of the Portarlington area in the south of County Offaly, it is appropriate to examine the approved retail strategy in the County Laois, as approved in 2003.
- 3.47 The Laois Retail Strategy identifies a tiered retail hierarchy, focusing on Portlaoise as the major centre, followed by key centres including Portarlington. The retail strategy identifies Tullamore (outside the County) as having an important role in serving the retail needs of Laois residents.
- 3.48 The strategy estimates future retail requirements for convenience and comparison retail floorspace across County Laois of 7,500 sq.m (net) and 16,500 sq.m (net) respectively.

Westmeath Retail Strategy

- 3.49 With the proximity and attraction of large centres such as Athlone and Mullingar in County Westmeath, the County Westmeath Retail Strategy has also been reviewed.
- 3.50 The Westmeath Retail Strategy was approved in 2007 and makes an assessment of future retailing requirements, and suggests policies and actions for Athlone and Mullingar. Up to 2011, capacity is identified for 6,500 sq.m of additional convenience floorspace capacity, and 19,000 sq.m of comparison floorspace capacity. By 2021, this may rise to an accumulated convenience floorspace capacity of potentially 29,000 sq.m; potential comparison requirements of 100,000 sq.m; and bulky goods household floorspace capacity of up to 63,000 sq.m.
- 3.51 The Strategy recommends that additional floorspace provision should reflect population distribution and anticipated growth. Most of the above requirement is therefore expected to be met in the Linked Gateway towns of Athlone and Mullingar.

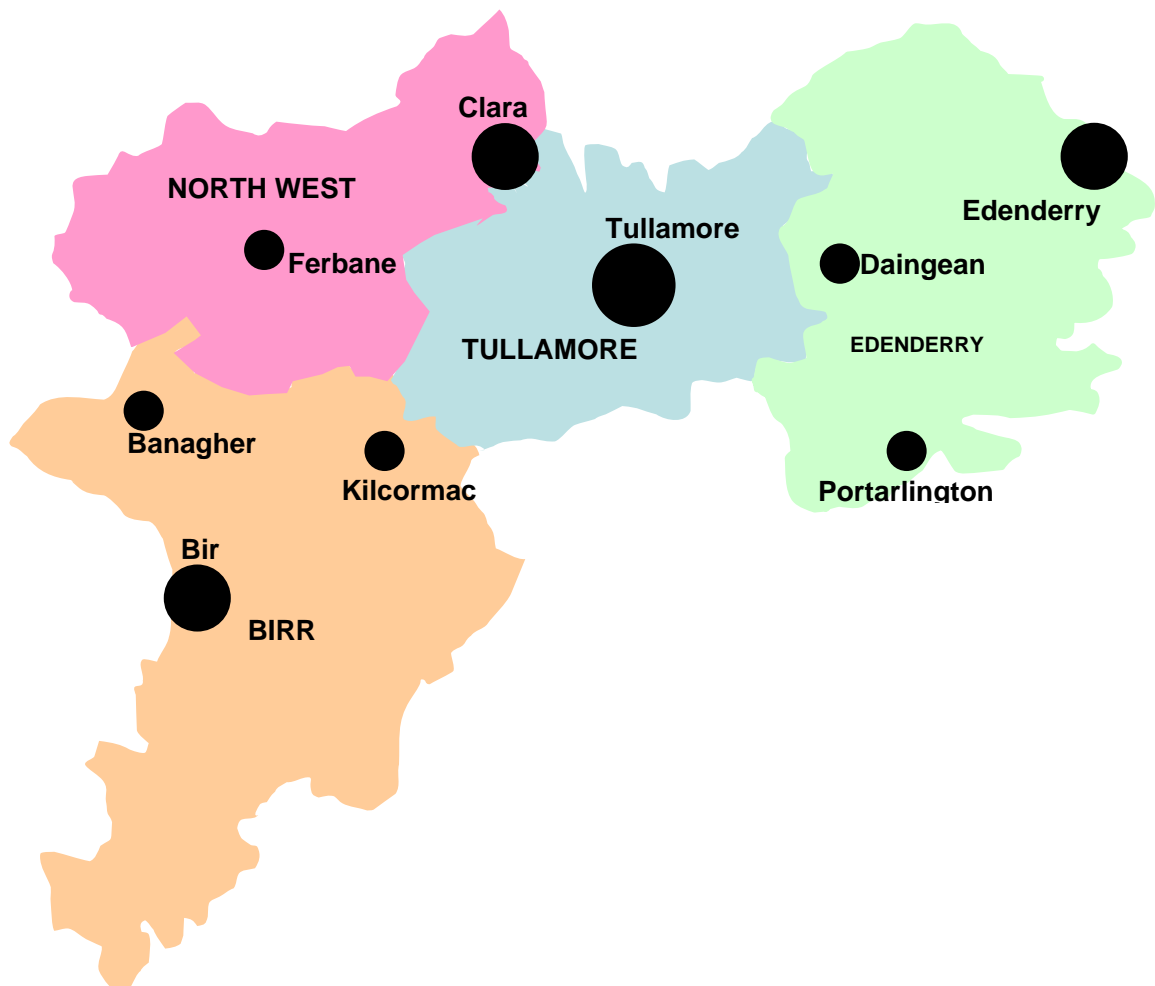
4 SHOPPING PATTERNS

- 4.1 This chapter profiles the shopping patterns of residents and shoppers in County Offaly based on the findings of Household and Shoppers Surveys carried out in Autumn 2007.

Household Survey

- 4.2 In August and September 2007, a Household Survey was undertaken, with a household sample drawn from across County Offaly, to establish shopping patterns of the resident population for different types of retailing.
- 4.3 The survey was carried out by Lansdowne Market Research, using a questionnaire designed by Roger Tym & Partners (see Appendix 2). The survey was conducted by telephone, using Eircom listings together with quota controls, yielding 868 useable interviews. The results were disaggregated into four zones, the boundaries of which are shown in Figure 4.1.

Figure 4-1 Household Survey zones



- 4.4 The household survey sought information on where residents carried out main food shopping, general comparison shopping and bulky household shopping. It also sought to establish the frequency of shopping trips and the mode of transport employed.

Convenience and Supermarket Shopping

- 4.5 It is difficult for household surveys to tackle the full range of convenience shopping. Respondents are normally able to give clear information about the supermarkets they use regularly but shopping patterns at butchers, bakers, off-licence and other specialist convenience outlets are more variable and can be complex to be deal with in a brief interview.
- 4.6 Supermarkets account for most household expenditure on convenience retail items and their location is at the centre of retail planning and policy debate. The Household Survey therefore focused on supermarket shopping.
- 4.7 The questions asked households to indicate where their main supermarket shopping was carried out and whether they made use of any other facilities.
- 4.8 The responses to the two questions were combined to establish market shares, using weighting factors derived from previous surveys in Ireland and elsewhere. It should be noted that the shares refer to places, and are not restricted to central areas. For example, Tullamore's market share includes town centre stores (such as Dunnes and Lidl) as well as supermarkets in edge of centre and out of centre locations.

Table 4-1 Convenience (supermarket) goods - Market Shares (%)

Shopping location	Place of residence (Zone)				Total
	Tullamore	Edenderry	Birr	North West	
Tullamore	92.8	41.8	44.9	72.4	64.6
Birr	0.6	0.5	34.9	3.2	9.5
Banagher	0.8	0.5	1.0	10.7	2.5
Clara	0.1	0.0	0.0	4.7	0.9
Edenderry	0.4	49.7	0.0	0.0	12.7
Ferbane	0.1	0.0	0.0	1.0	0.2
Kilcormac	0.5	0.0	10.2	0.0	2.7
Portarlington	1.6	1.8	0.0	0.0	1.0
Athlone	0.5	1.5	0.2	5.7	1.6
Ballinasloe	0.0	0.0	0.2	0.0	0.0
Dublin City Centre	0.0	0.2	0.0	0.0	0.1
Mullingar	0.2	0.0	0.0	0.0	0.1
Other Dublin	0.0	0.8	0.0	0.0	0.2
Others	2.3	3.3	8.6	2.2	4.1
TOTAL	100	100	100	100	100

- 4.9 Tullamore is the most important location, accounting for nearly two thirds of all supermarket expenditure across the County. It dominates the Tullamore and Northwest zones (attracting 93% and 72% market shares in the respective zones) and is the main shopping location for Birr zone residents. After Edenderry, Tullamore is the second most important shopping destination in the Edenderry zone.
- 4.10 Other locations are less significant and other than the attraction of Tullamore, there is little movement between zones. As would be anticipated due to the generally local nature of supermarket shopping, leakage of expenditure to centres outside the County is not significant (certainly when compared with comparison shopping patterns) - with just over 6% going to Athlone, Mullingar, Dublin and Roscrea (the latter being included in the 'other' category).

Comparison Shopping

- 4.11 The survey distinguished between patterns of purchasing for 'mainstream' comparison goods - fashion, small household items, books, cds etc and other goods that are typically found in High Street stores - and bulky goods comparison items, including

furniture, larger domestic appliances and other items, which are increasingly sold from retail warehouse units.

- 4.12 Market shares for 'mainstream' comparison spending were established, taking patterns of spending on clothes and shoes as a proxy. As for convenience goods items, households were asked to indicate both main and alternative centres for this type of shopping.¹⁰ Following detailed analysis, the market shares for 'mainstream' comparison goods are shown below.

Table 4-2 Mainstream comparison goods - Market Shares (%)

Shopping location	Place of residence (Zone)				Total
	Tullamore	Edenderry	Birr	North West	
Tullamore	58.9	42.9	52.8	52.0	52.1
Birr	0.8	1.1	15.1	2.0	4.6
Banagher	0.3	0.0	0.0	0.0	0.1
Clara	0.2	0.0	0.0	2.0	0.4
Edenderry	0.3	20.4	0.0	0.0	5.2
Ferbane	0.0	0.0	0.0	0.7	0.1
Kilcormac	0.1	0.0	3.7	0.0	1.0
Portarlington	0.5	0.2	0.0	0.0	0.2
Athlone	11.7	4.6	14.0	29.0	13.6
Kildare	1.5	0.0	0.0	0.0	0.5
Mullingar	1.2	4.8	0.2	0.0	1.6
Naas	0.0	0.0	0.0	0.0	0.0
Portlaoise	1.0	1.0	0.3	1.2	0.9
Newbridge	2.1	6.6	2.2	0.3	2.9
Dublin City Centre	10.7	7.3	4.5	6.5	7.6
Liffey Valley	5.8	8.4	0.0	3.9	4.7
Other Dublin	1.9	1.1	0.4	0.5	1.1
Internet	0.2	0.0	0.0	0.0	0.1
Mail order	0.2	0.0	0.4	0.0	0.2
Others: in Offaly	0.0	0.0	0.0	0.0	0.0
Others: Out Offaly	2.5	1.7	6.3	1.9	3.1
TOTAL	100	100	100	100	100

- 4.13 Tullamore's market share exceeds 50% in all zones with the exception of Edenderry, (where it remains the most important shopping destination). Although well behind Tullamore's market share, facilities in Birr still retain a significant proportion of local mainstream comparison spending.
- 4.14 The survey findings show that a considerable proportion of spending on mainstream comparison goods is being exported to centres outside the County, with Athlone and the neighbouring centres of Newbridge and Mullingar attracting over 18% of household spending. Leakage to centres further afield including Dublin City Centre, Liffey Valley and other centres accounts for a further 18%. This pattern of expenditure and the relative importance of external centres is not unusual for a rural county - there are many others that have no major centre and export much of their expenditure to centres in Tiers 1 and 2 of the national retail hierarchy such as Dublin and Cork etc. (the guidelines note that Tier 1 and 2 centres combined account for nearly 60% of all comparison goods turnover).
- 4.15 The 190,000 sq.m Athlone Town centre shopping development started trading on 1 November 2007 i.e. after the household survey was completed. It provides space for a wide range of national multiple retailers and High Street marques. The Tullamore

¹⁰ The limited duration of a telephone survey tends to preclude detailed discussion of spending on individual goods categories.

Household Survey indicates that 13.6% of comparison goods expenditure is exported to Athlone (Refer to Table 4-2). This figure does not reflect any trade that may have been exported from the County since the Athlone Town Centre shopping development has opened.

Retail Warehousing

- 4.16 The definition of 'bulky goods' does not accurately reflect the nature of shopping purchases that are made at retail warehouse outlets. Many retail warehouses do not sell bulky goods and - with those that do - it frequently happens that purchases are not particularly bulky, like a piece of computer software from PC World or a hand tool from B&Q.
- 4.17 Research based in the UK has questioned the belief that consumers choose to shop at retail warehouses in order to drive bulky goods away in their cars. Instead, other factors such as low prices and the ability to view a wide range of certain types of goods, which are not traditionally displayed in the High Street, are thought to be more significant. Ease of access and car parking are also important considerations.
- 4.18 The retail warehousing sector is also highly fragmented - people who use them may buy DIY goods in one location, furniture and carpets at a quite different place, then white durables at a third, and so on. This is in marked contrast to what is commonly referred to as "mainstream comparison" shopping, where the consumer will carry out most of their expenditure in a single centre (or shopping mall).
- 4.19 Households were asked which retail warehouses they had used in the last year, indicating the names and locations of up to three retail warehouses. Some 28% said they had not been to a retail warehouse in the past year. The responses of the remainder show the following pattern.

Table 4-3 Retail Warehouses / locations used in the last year

Retailers	%	Centre	%
Atlantic	33.3	Tullamore	73.5
Argos	18.4	Athlone	17.3
B&Q	4.9	Mullingar	0.8
Currys	6.7	Naas	0.6
D.I.D Electrical	11.9	Portlaoise	0.3
Harry Corry	5.9	Liffey Valley	2.0
Homebase	1.1	Tallaght	0.3
Power City	0.6	Other Dublin	1.5
Woodies	11.6	Others	3.7
Others	5.6	TOTAL	100
TOTAL	100		

- 4.20 Over half of the retail warehouse brands mentioned were DIY based outlets, led by Atlantic Homecare, followed by Woodies, B&Q and Homebase. The most important non-DIY outlet was Argos with the remainder mainly electrical based retailers. Nearly three quarters of the retail warehouse outlets are located in Tullamore (see Table 4.3) although most of the remainder are outside the County. As with mainstream comparison shopping, high levels of expenditure leakage from the County are experienced for goods sold from retail warehouses.
- 4.21 The survey also asked respondents to indicate their household spending at the various retail warehouse locations over the last year against broad expenditure ranges (*up to €50; €50 to €99; €100 to €499 etc*).
- 4.22 While the emerging data can only be regarded as indicative, it is nonetheless comparable to that found in previous surveys. Average expenditure in Offaly was €685

per household, ranging from €747 in the Tullamore zone to €584 from residents in the Birr zone.

Views of Local Shopping

- 4.23 The survey also asked whether residents would like more retail warehouses in out-of-town locations. In the Tullamore zone, where existing retail warehousing is concentrated, less than half responded positively. The percentages of respondents who favour more provision were higher elsewhere: over the whole county 58% were in favour, 36% against and the remainder unsure.
- 4.24 More broadly, the survey also sought information on the level of resident's satisfaction with shopping facilities in their area. The following responses were received.

Table 4-4 Levels of satisfaction with local shopping facilities (%)

View	Place of residence (Zone)				Total
	Tullamore	Edenderry	Birr	North West	
Very Happy	38.3	36.0	31.2	36.9	35.7
Happy	36.4	38.0	35.9	36.0	36.6
Neither happy or unhappy	12.6	7.7	16.8	13.5	12.6
Unhappy	8.3	13.5	13.6	9.0	11.1
Very Unhappy	4.1	4.7	2.4	3.6	3.8
Don't know/No opinion	0.2	0.0	0.0	0.9	0.2
TOTAL	100	100	100	100	100

- 4.25 Despite the high levels of comparison expenditure leakage, most respondents are either happy or very happy with shopping provision in their area. This indicates that residents' expectation of provision locally reflects the generally rural character of the area, and that travel to other centres for higher order items is considered normal.
- 4.26 Overall, the main criticisms included the limited range of shops available together with poor public transport and parking facilities.

Tullamore Shoppers' Survey

- 4.27 The survey of shoppers (see Appendix 3) was carried out in Tullamore in early October 2007, yielding 320 interviews in the town centre. The survey was completed on Thursday, Friday, Saturday and Monday (October 4-8) to avoid the National Ploughing Competition, which would otherwise have provided atypical results.
- 4.28 Interviews were carried out by an experienced team in central locations in Tullamore: at Bridge Street; the Bridge Centre; Patrick Street; High Street; and Columcille Street.
- 4.29 Two thirds of respondents were females aged 20 to 59. A further 8% - again mostly female - were under 20 years of age, while 12% were 60 years or over. 86% of respondents households had cars, with over half having two or more cars.
- 4.30 Of the main household income earners, 43% were non-manual workers, 39% were manual workers and the remainder were retired, unemployed or otherwise classified as being economically inactive.

Main Purpose of Visit

- 4.31 While the survey was confined to those shopping in the centre of Tullamore, the main purpose of respondents' visits was more diverse.

Table 4-5 Main Purpose of Visit (%)

Reason	Total	Fri/ Sat	Thu/ Mon
Supermarket shopping	44.7	51.7	32.2
Other food & groceries shopping	11.6	6.8	20.0
Clothes & Shoes shopping	17.2	19.0	13.9
Visiting the market	0.6	1.0	0.0
Other forms of shopping	12.5	10.7	15.7
Visiting bars/cafes/restaurants	0.3	0.5	0.0
Bank, building society etc	5.0	5.9	3.5
Leisure/recreation	0.9	0.5	1.7
Education	0.0	0.0	0.0
Work here	7.2	3.9	13.0
Other reasons	0.0	0.0	0.0
TOTAL	100%	100%	100%
No. of responses	320	205	115

4.32 For 45% of respondents, supermarket shopping was the main purpose of their visit, with the percentage higher on Friday and Saturday.

4.33 Smaller numbers of shoppers were in Tullamore to purchase food or groceries in other shops (excluding supermarkets). Most of the remainder had come to Tullamore for other forms of shopping, while a minority of survey respondents were in the town mainly for other purposes (most frequently as their place of employment).

Access

4.34 The survey sought details of visitor's journey time and the mode of transport utilised. The responses are grouped by the purpose of visit. Within all three groups, between 65% and 70% of town centre visitors had travelled less than 20 minutes to get to the town centre. The largest proportion of visitors taking more than 30 minutes was found among shoppers for comparison goods.

Table 4-6 Journey Time

Journey Time (mins)	Total	Convenience	Comparison	Others
0 to 10	33.4%	34.1%	33.7%	30.2%
10 to 20	38.8%	41.8%	32.6%	39.5%
20 to 30	16.3%	14.8%	15.8%	23.3%
30 to 45	9.7%	9.3%	13.7%	2.3%
45 or more	1.9%	0.0%	4.2%	4.7%
TOTAL	100%	100%	100%	100%
No. of responses	320	182	95	43

4.35 The mode of transport used did not differ greatly between the three groups of visitors. Most used private cars to reach Tullamore but a sizable minority (mainly local residents) walked or cycled. Very few visitors and shoppers used public transport.

Table 4-7 Mode of Transport

Mode of Transport	Total	Convenience	Comparison	Others
Own Car	64.7%	63.7%	64.2%	69.8%
Other Car	10.6%	9.3%	11.6%	14.0%
Taxi	4.1%	5.5%	3.2%	0.0%
Bus	3.1%	3.3%	3.2%	2.3%
Walk or Cycle	17.5%	18.1%	17.9%	14.0%
TOTAL	100%	100%	100%	100%
No. of responses	320	182	95	43

Place of Residence

- 4.36 Visitors were asked where they lived. Table 4.8 shows that 9% of respondents lived outside County Offaly, mainly in the neighbouring counties of Westmeath and Laois. The absolute number - 30 - is too small to support a detailed statistical analysis but the following generalisations can be made:
- Shopping for either convenience shopping goods (14) or comparison goods (13) was the most common reason for their visit. As shown later, reported expenditure was broadly similar in each retail category;
 - Most had started their journey from their home address and 5 worked in Tullamore. Just over a third had taken more than 30 minutes to get to the town, a similar proportion making shorter journeys of up to 20 minutes (Tullamore is easily accessed from population centres in Counties Westmeath and Laois); and
 - While 17 said they shopped in Tullamore once a week or more often, all but one of the remainder shop in the town regularly.
- 4.37 Previous survey work of imported expenditure shows that an important component is shopping activity by occasional visitors, such as tourists or people on business trips. This appears less common in Offaly: rather regular trips are observed often for convenience shopping.

Table 4-8 Place of Residence (%)

Location - County or Town	Total	Fri / Sat	Thu / Mon
Tullamore	52.8%	47.8%	61.7%
Elsewhere in Offaly	37.8%	42.4%	29.6%
Laois	2.8%	1.5%	5.2%
Tipperary (both)	0.3%	0.5%	0.0%
Westmeath	4.4%	5.4%	2.6%
Kildare	0.3%	0.5%	0.0%
Galway	0.3%	0.5%	0.0%
Elsewhere in Irish Republic	0.9%	1.5%	0.0%
Outside the Irish Republic	0.3%	0.0%	0.9%
<i>Total Outside of County Offaly</i>	<i>9.3%</i>	<i>9.9%</i>	<i>8.7%</i>
TOTAL	100%	100%	100%

- 4.38 It is noted from previous surveys and experience that shoppers from outside a county tend to spend more per trip than by those locally resident. Visitors were asked how much they expected their parties to spend during their visit.

Table 4-9 Mean trip expenditure by shopping party (€)

Expenditure	Non-Offaly	All
No. of respondents	30	320
Supermarkets	€49.50	€58.30
Food/Groceries at Other Shops	€9.50	€16.70
Clothes & Shoes	€37.40	€29.40
Market	€2.50	€0.50
Other Shops	€25.70	€17.80
Total Expenditure	€124.60	€122.70
Total Convenience Expenditure	€61.50	€75.50
Total Comparison Expenditure	€63.10	€47.20

- 4.39 The differences noted by previous surveys are related to the fact that non-residents tend to make much longer trips, which is not the case in Tullamore. The table above

shows total expenditure was similar for both groups. Non-Offaly residents spent slightly more on comparison goods and slightly less on convenience goods.

- 4.40 Furthermore, non-Offaly residents account for about 9% of all shoppers and as indicated by the expenditure figures, a similar percentage of its trade, perhaps a little more for comparison turnover and a little less for convenience goods turnover. The implications of this are discussed later.

Purchases of Clothes and Shoes

- 4.41 Shoppers were asked which other centres or locations they used when shopping for clothes & shoes.

Table 4-10 Clothes and shoes - other centres used (%)

Location	Total	Fri / Sat	Thu / Mon
Athlone	44.1%	43.9%	44.3%
Mullingar	11.9%	13.2%	9.6%
Birr	4.7%	4.9%	4.3%
Edenderry	3.8%	4.4%	2.6%
Clara	1.3%	1.5%	0.9%
Banagher	0.3%	0.5%	0.0%
Ferbane	0.6%	0.0%	1.7%
Kilcormac	2.8%	2.9%	2.6%
Portarlington	0.9%	1.5%	0.0%
Daingean	1.3%	1.0%	1.7%
Dublin City Centre	30.3%	29.3%	32.2%
Liffey Valley	15.9%	15.6%	16.5%
Portlaoise	4.1%	2.9%	6.1%
Newbridge	9.7%	11.2%	7.0%
Other	10.0%	12.7%	5.2%
None, no reply	14.7%	11.7%	20.0%
TOTAL	100%	100%	100%

- 4.42 The results tended to mirror those provided by the Household Survey. The nearby centres such as Athlone, Mullingar and Newbridge were the most commonly named. Further afield, Dublin City Centre and Liffey Valley were also frequently identified as important shopping locations.

Table 4-11 Clothes and shoes shopping - main centre used (%)

Location	Total	Fri / Sat	Thu / Mon
Tullamore	63.8%	63.4%	64.3%
Athlone	6.3%	5.4%	7.8%
Mullingar	1.3%	1.5%	0.9%
Birr	1.3%	1.5%	0.9%
Edenderry	0.6%	0.5%	0.9%
Clara	0.3%	0.5%	0.0%
Banagher	0.3%	0.5%	0.0%
Portarlington	0.6%	0.5%	0.9%
Daingean	0.3%	0.5%	0.0%
Dublin City Centre	13.8%	11.7%	17.4%
Liffey Valley	0.6%	1.0%	0.0%
Portlaoise	0.6%	0.0%	1.7%
Newbridge	5.9%	7.3%	3.5%
Other	4.1%	5.4%	1.7%
None, no reply	0.3%	0.5%	0.0%
<i>Total outside Offaly</i>	4.1%	5.4%	1.7%
TOTAL	100%	100%	100%

- 4.43 Most shoppers identified Tullamore as their main shopping location. The most frequently mentioned other centres included Dublin City Centre, Athlone and

Newbridge - all outside the County. In broad terms, approximately one third of the (shopping) centres identified are outside County Offaly.

Views of Tullamore as Shopping Centre

- 4.44 Respondents were asked why they chose to shop in Tullamore. Table 4.12 provides a summary of the responses.¹¹

Table 4-12 Reasons for shopping in Tullamore

Factors	Total
Close to home	62.8%
Close to work	13.8%
Easy to get to Tullamore	47.5%
Good public transport	5.0%
Sufficient car parking	5.9%
Reasonably priced and/free parking	2.2%
Good selection/quality of shops	16.9%
Good mix of shopping & leisure	5.0%
Specific shop or shops	1.9%
Pleasant shopping environment	8.1%
Good standard of cleanliness	1.3%
Like the market	0.3%
Safe shopping environment	6.9%
No reply provided	1.3%

- 4.45 Proximity factors dominate the responses -i.e. Tullamore is close to home, close to work or simply easy to get to. Factors such as the range of shops or the quality of the shopping environment were less frequently mentioned.

- 4.46 The survey asked what people disliked about the (shopping) centre in Tullamore. It is noted that a high proportion of respondents gave no reply, or specifically stated that there was nothing they particularly disliked about the town as a shopping centre or location. When criticisms were made, they related to car parking in the town centre, either due to the cost of parking or the quantity of parking provision. A similar proportion commented on a limited range and quality of shopping on offer in Tullamore.

Table 4-13 Negative features of Tullamore

Factors	Total (%)
Inconvenient to get to Tullamore	0.3%
Poor public transport	3.4%
Inadequate car parking	23.8%
Expensive car parking	19.7%
Poor quality shops	19.7%
Lack of particular type of shop	20.6%
Lack of leisure facilities	1.3%
Poor standard of cleanliness	2.2%
Unsafe/ threatening environment	0.6%
Traffic in the town	10.3%
Nothing of dislike	43.1%
No reply provided	0.9%

- 4.47 Suggestions for improving the town centre were also sought, although a quarter of those surveyed offered no response. The main suggestions mirrored the previous criticisms, relating to parking and the provision of particular shops or a wider range of

¹¹ As respondents could give several responses, this table sums to more than 100

shops. Particular retailers and stores were mentioned in this context including for example, Penneys, M&S, Boots, Next and the main Irish department stores.

Table 4-14 Suggested Improvements to Tullamore

Improvements for Tullamore	Total (%)
Provision of park & ride facilities	2.8%
Improve accessibility to centre	2.2%
Provide more parking	31.3%
More shops required (quantity)	27.8%
Better range of shops (quality)	36.6%
Provide specific shops	24.4%
Provide particular leisure facility	1.3%
Improve traffic conditions	9.7%
Improve street cleanliness	1.6%
Pedestrianise particular street	1.3%
Improve pedestrian environment	2.5%
No reply provided	25.3%

5 TOWN CENTRE APPRAISAL

- 5.1 The Retail Planning Guidelines 2005 indicate a variety of factors, which contribute to town success and vibrancy. Encouraging centre vitality and viability requires a balance to be struck between these factors. The RPG lists four broad categories of the 'qualities', which need to be balanced:

“

- *Attractions* - these underpin a town and comprise the range and diversity of shopping and other activities, which draw in customers and visitors.
- *Accessibility* - successful centres need both to be accessible to the surrounding catchment area via a good road network and public transport facilities, and to encompass good local linkages between car parks, public transport stops and the various attractions within the centre.
- *Amenity* – A healthy town centre should be a pleasant place to be in and should be attractive in terms of its environmental quality and urban design, safe and it should have a distinct identity and image.
- *Action* - to function effectively as a viable commercial centre, things need to happen. Development and improvement projects should be implemented efficiently; there should be regular and effective cleaning and maintenance and there should be a coordinated town centre management initiative to promote the continued improvement of the respective centre.”

Retail Planning; Guidelines for Local Authorities

- 5.2 This chapter contains summary health checks for Tullamore, Birr, Edenderry and Clara.

Tullamore

Attractions

- 5.3 Tullamore, with Mullingar and Athlone, is part of the Midlands Linked Gateway. It attracts considerable trade from within County Offaly and parts of adjoining Counties, while also attracting visitors, some of whom visit the town's various tourist attractions.
- 5.4 Tullamore occupies a prime geographical location that is further enhanced by its setting on the Tullamore River and the Grand Canal. The town may be considered to have tourism potential, which is yet to be realised. While there have been improvements in recent years, the appearance of the town to the visitor is affected by some prominent areas of poor environmental quality and appearance, including empty properties, building fabric and aspects of dereliction.
- 5.5 The growing significance of conference and related business to Tullamore is noted with facilities such as those at Tullamore Court and Bridge House increasing their role in this regard.
- 5.6 Tullamore is increasingly capitalising on its central location, focusing on events such as Fleadh Ceoil na hEireann, the Tullamore Show and the National Ploughing Championship.
- 5.7 Despite the prominence of the Tullamore River and Grand Canal, and signs of (mainly residential) riverside development, the redevelopment potential of this area has still to be fulfilled. This would be assisted through improved linkages between these areas and key focal points in the core town centre and shopping area.

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

Accessibility

- 5.11 The main thoroughfares through the town centre are frequently congested, with Harbour Street, Henry St./O'Carroll St and Church Street being particularly affected. This also includes circular movement along the town's Western Relief Road. The town centre offers a pedestrian-friendly environment in which to undertake shopping and leisure activities and trips. A major upgrade of footpaths in the town centre was completed in 2007.
- 5.12 Car parks can be found throughout central Tullamore with ample provision through an estimated 500 off-street and 850 on-street parking spaces in Tullamore town centre¹². Off-street car parking is of varied quality and some facilities, such as the multi-storey car park on Main Street remain under-used.
- 5.13 In terms of service provision, public transport accessibility to Tullamore is reasonable. The town is designated as a principal location served by a choice of national and regional services run by Bus Eireann linking to major destinations such as Dublin, Galway, Sligo, Limerick and Waterford, as well as intervening towns in the Midlands and beyond, including Athlone, Edenderry, Birr, Fermoy, and Daingean etc. There are also a number of taxi operators trading locally in Tullamore and the town environs.
- 5.14 Tullamore is also served by an Irish Rail station to the south-west of the town centre, on the Western Relief Road. Tullamore offers a daily passenger service to Athlone, Clara, Portarlinton and Kildare, with onward services to Dublin, Galway, Roscommon, Castlebar and Westport. However, bus services in particular do not appear to be well used.

Amenity

- 5.15 Most parts of the traditional shopping core are of a reasonable quality. The extent and quality of the public realm improvement programme completed in 2007 has attracted positive comment from members of the public as well as local retailers and the Chamber of Commerce. The town centre has also benefited in the past from improvement initiatives, led by the Chamber of Commerce and local authorities.
- 5.16 Nonetheless, a few areas have suffered from lower levels of investment in recent years, although this may change as and when key redevelopment opportunities, such as the former Texas department store site at Offaly Street, the Kilroy's site on the High Street, the Coens' site at Hophill Road/Church Road, and the Tanyard area are taken forward.

¹² Tullamore Town Council

- 5.17 The town centre as a whole is seen by many consultees as a valuable amenity and heritage asset for the wider community, which has greater potential as an area of formal civic and open space with links to the River, Grand Canal and the Harbour.

Action

- 5.18 In Tullamore, the future vitality and viability of the town centre will be linked to its ability to adapt to changing consumer trends and needs, no more so than in the identification of a range of sites to be brought forward and made available for retail and associated mixed use development. This will be critical for Tullamore to grow as part of the NSS 'Linked Gateway' and help meet the needs of its increasing population.
- 5.19 At the same time, there needs to be continuing improvement in the centre of Tullamore, where there are some signs of trade deterioration and where heavy traffic congestion, movement and parking may be hindering its retail prosperity. The ongoing rejuvenation and vitality of the town centre is seen by many consultees as being vitally important in securing its longer term future.
- 5.20 As noted above some of these actions have already been implemented. There are also plans in hand to address other identified issues. In 2008, Offaly County Council will prepare a Transportation Study for Tullamore to improve the town's performance in light of recent development and the town's linked Gateway status.
- 5.21 A supplementary series of phased programmes and key actions should be identified, including additional environmental and shop front improvements (where appropriate), as well as pedestrian initiatives for crossings, lighting, security and safety etc. The programme could include measures to raise general public awareness to improve civic pride and encourage town centre maintenance and use.

Birr

Attractions

- 5.22 Birr is a designated heritage town located approximately 35km south-west of Tullamore. It is a developing tourist destination with a range of attractions including Birr Castle Demesne with award winning gardens and Science Centre; Birr Theatre and Art Centre (presently Offaly's Centre for the Arts); and Birr Golf Club established in 1893.
- 5.23 Lidl is presently the town's main food convenience retailer and is located at the edge of the traditional town centre. In the traditional town centre, food retailing is mainly offered by SuperValu on Main Street; Londis at Townsend Street; Silas (a Polish food store) on Connaught Street and two local butcher shops.
- 5.24 Birr's comparison retail offer is dominated by independent retailers. Relative to its size the town centre has a good range of general comparison shopping, particularly in men and women's fashion. Outlets include: Zandra; Kabelo; Hedgerows; Alpha Fashion; Threads; Jerro; Jazz; J Smith -Menswear and Eclipse. Birr also has two dedicated children's clothing shops - Junior Junction and Hip Hop.
- 5.25 Bulky goods comparison shopping is split between Wilmer Road (Oliver Douglas and Son - Homewear and DIY; and the Birr Garden Centre) and Main Street (Birr Carpets and Furnishings Ltd; and W.K Fayles Hardware Limited).

Accessibility

- 5.26 Birr is accessible by the N52 and N62 national secondary roads by private car and bus. There is currently no rail link to Birr however the area is serviced by a regular bus service to Limerick and a daily bus service to Dublin.
- 5.27 Pedestrian accessibility on Main Street is restricted by narrow pavements in parts and general traffic movement through the town centre.

- 5.28 Birr has two car parks (c.90 and c.135 spaces - both free of charge) located either side of Main Street. Emmet Square (c.65 spaces) and Main Street have short term (2 hour) fee paying car parking spaces. Free on street car parking is also available in some peripheral areas of the town centre.
- 5.29 According to the Birr Land Use Transportation Study (2005) 'there is a deficit in infrastructure required to support development over the next 20 years.' Roadside interviews and surveys conducted as part of the work highlighted resident's general dissatisfaction with the level of traffic congestion and the provision of parking.

Amenity

- 5.30 The town centre offers a high quality shopping environment. Shop fronts and building facades in Birr town centre are generally appealing, well maintained and in good condition. Emmet Square located between Main Street and Emmet Street offers a civic focal point. Traditional street lighting and seating further enhances this area of public realm and contributes to the town centre's overall high quality streetscape and environmental appeal.

Action

- 5.31 The general streetscape is of a high standard however Main Street in particular would benefit from investment in street paving to improve the physical shopping environment.
- 5.32 At the moment Main Street has one way traffic movement flanked by narrow pavements. Main Street also permits on street time limited car parking. These features restrict pedestrian movement in the town centres main retail strip.
- 5.33 The partial pedestrianisation of Main Street may be an action worth investigating. This, with added street furniture and improved parking provision nearby, would enhance pedestrian access and improve the town's retail and tourism product visually. Careful consideration should be given to site assembly in the town centre for future retail development, particularly in light of the heritage value associated with Birr and its town centre.

Edenderry

Attractions

- 5.34 Edenderry has experienced significant population growth in recent years arising from its close proximity to Dublin. Relatively high house prices in Dublin have increased the popularity and appeal of neighbouring towns with lower property values. The resulting population change influences retail development in Edenderry.
- 5.35 In recent years the focus of convenience food shopping in the town has shifted from the traditional town centre to edge of town locations. Tesco, formerly located in J.K.L Street, has moved to a large format superstore at an edge of town location joining two other food retail multiple operators (Aldi and Lidl).
- 5.36 Recent retail development in the town centre includes the completion of the Edenderry Shopping Centre. Anchored by Dunnes Stores the centre supplies a modest degree of convenience shopping (butchers, delicatessen) and comparison shopping (ladies fashion, music).
- 5.37 Convenience food retailing in the town centre is now mainly provided by a local Spar. With the exception of local butchers the town centre has no independent food retailers. The range and quality of comparison shopping is also limited for a town of its size.

Accessibility

- 5.38 Edenderry is accessible by two regional roads - the R401 or R402, both of which provide access to the M4 motorway to Dublin which has enhanced Edenderry's appeal

to Dublin based workers. Edenderry currently has no rail link or bus station but is served by a regular bus service to Dublin and Tullamore.

- 5.39 Within the town centre J.K.L Street is the main retail centre but also the main traffic thoroughfare, which has implications for congestion and reduces road and pedestrian accessibility within the town centre.
- 5.40 Free on-street car parking is available throughout the town centre, with car parks provided at Edenderry Town Hall (c.115 spaces) and Edenderry Shopping Centre (c.415 spaces). Tesco, Aldi, Lidl also offer around 520 dedicated car parking spaces.¹³

Amenity

- 5.41 The town centre's civic focal point is Edenderry Town Hall which benefited from internal and external renovations as part of a conservation project in 1996. The surrounding environmental quality and streetscape is however poor. The surrounding shop fronts and pavements and along J.K.L Street are of a mixed standard.
- 5.42 The overall appearance of shop fronts in the town centre is tired and requires investment. A number of vacant units (most noticeably the former Tesco outlet) and presence of shutters on some premises further detracts from the overall appeal.
- 5.43 A proportion of shop fronts along J.K.L Street (generally close to the area which has benefited from streetscape improvement work) are attractive and appealing and the general building structures appear sound. There was also a noticeable lack of graffiti and litter.

Action

- 5.44 Streetscape improvements have recently been undertaken in certain parts of the town centre. Street paving and shop front improvements could be extended throughout the town centre to enhance the overall shopping environment and promote continuity.
- 5.45 The reoccupation or positive redevelopment of the former Tesco unit and others closeby on J.K.L Street is vital to improving the town centre offer, change perceptions and increase footfall.

Clara

- 5.46 Clara is a secondary tier retail centre some 12km north-west of Tullamore.

Attractions

- 5.47 It's proximity, and Clara's relatively small population has limited the type and scale of retail development that can be sustained in the town centre and restricted Clara's retail growth.
- 5.48 The town centre's principle shopping area is Main Street and River Street. Convenience shopping appears ample for the current population and is available in various outlets throughout the town centre. Convenience stores include Londis; Centra; Late and Local; Hiney's and Fred Payne (next to Maxol garage). The town also has two local butchers shops and a green grocers.
- 5.49 Retail services such as hairdressers, barbers and estate agents are located throughout the centre whereas banks and other services are located towards the northern end of the town next to St Brigid's Church on Church Street and Main Street.
- 5.50 A limited supply of general comparison shopping (Kelly Sportswear) and bulky comparison (Jimmy Rabbitte - Hardware) is available in the town centre.

¹³ Tesco c.310 spaces, Aldi c. 90 spaces and Lidl c.120 spaces

- 5.51 In May 2008, construction is scheduled to begin on a mixed use retail, office and residential development in River Street.
- 5.52 Planning permission has also been granted on a 2.5 acre site adjacent. The mixed use development, due to be completed around September 2009, will comprise:
- A 19,000 sq ft supermarket with c.180 underground parking and 60 surface spaces;
 - A second phase of a further 9 or 10 retail units;
 - A third phase of 3 retail units with overhead office space; and
 - 3 units for leisure or retail service use (with one anchor tenant - pub).

Accessibility

- 5.53 The town centre is easily accessible by the N80 by private car and is also within close proximity to the N6 (leading onto the M4 to Dublin).
- 5.54 Clara has good public transport links to Tullamore and Dublin by train and bus. Clara is on the main Dublin to Ballina/ Westport/ Galway railway line and has a regular rail service throughout the day. Clara is also served by a twice daily bus services to Tullamore and one daily bus service to Dublin.
- 5.55 Pedestrian movement within the town centre is enhanced by two pedestrian crossings - one on Main Street and one on River Street. Traffic movement within Clara is restricted by the N80's route through the town centre. On street car parking and pedestrian crossings can interrupt traffic flows during peak times and lead to congestion.
- 5.56 The town centre does not currently have a dedicated car park. However, free on-street car parking is available throughout the town centre.

Amenity

- 5.57 The shopping environment in Clara requires upgrading and improvement. The town centre's streetscape has the potential, though improving and upgrading the visual appearance of the main streets in the town, to attract trade and business. The visual appeal of the centre of the town is affected by graffiti and litter. A coordinated approach to shop front improvement could improve the visual image of the centre while also stimulating increased levels of investment.

Action

- 5.58 Dedicated off-street car parking is required to improve accessibility within the town centre and cater for retail expansion. Planned developments involve the creation of some 240 spaces. The provision of off street car parking towards the northern end of the town may help to address the potential shift in shopping patterns and retail expenditure towards the new development and help maintain a healthy retail sector across Clara.

County Offaly Retail Floorspace

- 5.59 Table 5-1 shows the distribution of retail floorspace across County Offaly and changes since 2002.
- 5.60 Retail development has continued in Tullamore, increasing the volume of net floorspace by some 75% between 2002 and 2007. Retail warehousing development has been responsible for a large proportion of the uplift.
- 5.61 However, the increase in levels of development outside Tullamore over the same period has been striking. In Edenderry, the volume of retail sales floorspace has increased by nearly 200%. In Birr a 122% increase has been witnessed, while there

has been a 96% increase in provision in other towns. Clara has been a notable exception to this growth.

- 5.62 Over the period of the current County Offaly Development Plan, retail facilities have become less focused on Tullamore. This pattern is also reflected in the schedule of pipeline commitments, where planned retail development in Tullamore accounts for just 18% of development permitted but not yet constructed (17% of the comparison floorspace pipeline). Edenderry accounts for 50% of comparison goods pipeline floorspace while Birr and Clara both account for a further 14% of expected comparison retail development. This has significant implications for efforts to promote Tullamore as a Gateway retail centre.

Table 5-1 Retail Floorspace in County Offaly

	ALL FLOORSPACE		CONVENIENCE		COMPARISON		RETAIL WAREHOUSING	
	Gross	Net	Gross	Net	Gross	Net	Gross	Net
2001-2002								
Tullamore Town	36,392	23,655	13,921	9,048	22,471	14,606	0	0
Remainder	8,258	5,367	4,696	3,052	3,562	2,315	0	0
Tullamore Total	44,650	29,022	18,616	12,101	26,033	16,921	0	0
Edenderry	6,154	4,000	3,077	2,000	3,077	2,000	0	0
Birr	9,205	5,983	7,671	4,986	1,534	997	0	0
Clara	1,843	1,198	1,351	878	492	320	0	0
Other Towns	5,334	3,467	3,268	2,124	2,066	1,343	0	0
TOTAL	67,185	43,670	33,983	22,089	33,203	21,581	0	0
Developed 2002 -2008								
Tullamore Town	25,193	17,644	7,875	4,899	5,702	3,453	11,615	9,292
Remainder	250	163	250	163	0	0	0	0
Tullamore Total	25,443	17,806	8,125	5,061	5,702	3,453	11,615	9,292
Edenderry	11,574	7,820	8,113	5,705	3,461	2,116	0	0
Birr	1,396	7,293	3,977	2,585	7,243	4,708	0	0
Clara	0	0	0	0	0	0	0	0
Other Towns	4,941	3,212	709	461	4,232	2,751	0	0
TOTAL	43,354	36,131	20,924	13,811	20,638	13,028	11,615	9,292
2007								
Tullamore Town	61,585	41,299	21,796	13,947	28,174	18,059	11,615	9,292
Remainder	8,508	5,530	4,946	3,215	3,562	2,315	0	0
Tullamore Total	70,093	46,829	26,742	17,162	31,736	20,375	11,615	9,292
Edenderry	17,728	11,820	11,190	7,705	6,538	4,116	0	0
Birr	10,601	13,276	11,647	7,571	8,777	5,705	0	0
Clara	1,843	1,198	1,351	878	492	320	0	0
Other Towns	10,275	6,679	3,977	2,585	6,298	4,094	0	0
TOTAL	110,539	79,801	54,907	35,900	53,841	34,609	11,615	9,292
Pipeline								
Tullamore Town	5,004	3,253	1,400	910	3,604	2,343	-	-
Remainder	-	0	0	0	0	0	0	0
Tullamore Total	5,004	3,253	1,400	910	3,604	2,343	0	0
Edenderry	12,747	8,293	2,317	1,506	10,430	6,787	-	-
Birr	9,420	4,052	3,336	2,052	6,084	2,000	0	0
Clara	3,017	1,961	-	-	3,017	1,961	-	-
Other Towns	945	614	-	-	945	614	-	-
TOTAL	31,133	18,173	7,053	4,468	24,080	13,705	0	0

6 PROJECTED REQUIREMENTS

- 6.1 This section sets out estimates of retail sales growth (and thus future floorspace requirements) in County Offaly from 2007 to 2020. A sales picture is compiled for the base year - 2007 - and from this estimates of the turnover of comparison and convenience retail floorspace in Tullamore centre is derived. Sales are then projected forward to 2015 and 2020 consistent with population growth forecasts/targets and projected increases in per-capita expenditure.

Estimated Sales 2007

- 6.2 Table 6-1 estimates the level of sales in 2007. National per-capita sales of comparison and convenience goods are taken from the Roger Tym & Partners retail model (see Appendix 4) and are outlined in line 1 of the table. These are converted to a County Offaly level using the sales indices in Appendix 4. Total resident expenditure of €221 million on comparison goods and €216 million on convenience goods is generated (line 5).

Table 6-1 Sales in 2007

Line	Description	Comparison 2007	Convenience 2007
1	National Per Capita Sales (€)	3,277	3,049
2	Sales Index	0.939	0.986
3	Local Per Capita Sales (€)	3,077	3,007
4	Population (1,000s)	71,757	71,757
5	Total Residents' Sales (€ millions)	221	216
6	Net Exports (€ millions)	64	-
7	Available Expenditure (€ millions)	157	216

- 6.3 Table 4-2 shows that some 36% of resident's expenditure on mainstream comparison goods is exported from the County. The Household Survey also found a high level of exports for the retail warehousing element of comparison goods expenditure; although on the basis of the flows identified (see Table 4-3) the level of leakage appears somewhat lower, at 27%.
- 6.4 Considering that retail warehousing accounts for some 15% of all comparison sales, exported comparison expenditure is estimated to be 35% of the total (€221 million) i.e. €77 million. This is a gross figure in that it excludes imported expenditure. The Shoppers Survey indicated that more than 9% of Tullamore's comparison retail turnover is imported from outside the County.
- 6.5 This turnover is estimated below (Table 6.2) as €111 million so that imports - at say 10% - will amount to €11 million, which is low in relation to exports. Allowing for small gains by Offaly centres other than Tullamore, County imports are assumed as €13 million. The net export of expenditure is therefore €77 million minus €13 million, which is €64 million. The level of available expenditure for sales from outlets in the County is therefore €157 million.

Comparison Turnover

- 6.6 The plausibility of the calculations above has been tested by deriving a comparison goods turnover for Tullamore. This is done by applying the Tullamore market share (52.1%) from Table 4-2 to the level of available residents' sales. As this market share is based on non-retail warehousing comparison sales it is first necessary to deduct a retail warehousing element from Table 6.1.
- 6.7 Based on the amount of existing retail warehousing in the County and the estimate of exported expenditure, this element is assumed to be €30 million, approximately 14% of

all comparison sales - similar to the proportion found in other Irish Counties and in the UK. Deducting this from the €221 million residents-based sales above, this leaves some €191 million (see Table 6.2 below).

Table 6-2 Comparison Turnover in Tullamore

Item	Quantity
Non-Retail Warehousing Comparison Sales (€ millions)	190.8
Market Share for Tullamore (%)	52.10%
Resident-based Turnover (€ millions)	99.4
Imports (assumed at 10% of overall total)	11.0
Total Turnover (€ millions)	110.5
Net Comparison Floorspace for Tullamore (sq.m)	18,059
Sales Density (€ per sq.m)	6,116

- 6.8 By applying Tullamore's market share, a resident-based turnover of €99.4 million is generated. The addition of imports - estimated above at 10% of the total - gives a total turnover of €110.5 million. Tullamore's net comparison retail floorspace is estimated at 18,059 sq.m. The average sales density of comparison goods floorspace is therefore €6,116 per sq.m. Average turnover for new comparison goods floorspace across the country is estimated to be €5,223 per sq.m. The relatively high figures calculated for Tullamore indicate that existing floorspace is overtrading, suggesting scope for additional retail development.

Projections to Years 2015 and 2020

- 6.9 The comparison calculation is carried out for all comparison goods expenditure, including the retail warehousing element, as it is a matter for future policy direction as to how the total comparison 'pot' should be distributed between any retail warehousing and other comparison goods outlets.
- 6.10 For both comparison and convenience expenditure, the process is first to multiply for the population in each of the target years by per capita sales to give total resident-based expenditure.
- 6.11 Estimates of net exported expenditure are then subtracted. The 2007 level of €64 million is equivalent to 29% of resident-based sales. Assuming improvements in County Offaly's comparison offer (supported by retail planning and other strategies), this could reduce to 25% by 2015 and to 20% by 2020.
- 6.12 Finally, an allowance is made for increases in special forms of trading. This covers non-store retail expenditure - by mail order, by internet and at street markets. Internet trading is the main growth area and is expected to make sizeable inroads into store-based expenditure over the next decade, a major determinant being the level of broadband internet connections.
- 6.13 The calculations in Appendix 4 - being based on the Annual Services Inquiry - include special forms of trading although there is little detailed evidence on special forms of trading in the Irish Republic.
- 6.14 The capacity assessment assumes that after 2007, the Internet and other special forms of trading will absorb store-based comparison expenditure by an amount that increases by 0.35% of a residents' expenditure in each year. No increases are assumed for supermarket expenditure since internet orders are delivered from stores and are therefore included in the store turnover levels.
- 6.15 Table 6-3 follows this process. Available comparison expenditure rises from €157 million in 2007 to €264 million in 2015 and to €413 million in 2020. Available

convenience goods expenditure increases from €216 million in 2007 to €266 million in 2015 and up to €319 million in 2020.

Table 6-3 Potential Sales in County Offaly - 2007, 2015 and 2020

	Comparison	Convenience
	2007	2007
Available Expenditure (€ million)	156.8	215.7
	2015	2015
National Per Capita Sales (€)	4,589	3,174
Local Per Capita Sales (€)	4,309	3,130
Population (1,000s)	85,000	85,000
Total Residents' Sales (€ million)	366.3	266.0
Net Exports (€ million)	91.6	0
Increase in SFT (€ million)	10.3	0
Available expenditure (€ million)	264.4	266.0
	2020	2020
National Per Capita Sales (€)	6,274	3,483
Local Per Capita Sales (€)	5,891	3,435
Population (1,000s)	93,000	93,000
Total Residents' Sales (€ million)	547.9	319.4
Net Exports (€ million)	109.6	0
Increase in SFT (€ million)	24.9	0
Available expenditure (€ million)	413.4	319.4
Changes		
Increase 2007 - 2015 (€ million)	107.6	50.3
Increase 2007 - 2020 (€ million)	256.6	103.7

Projected Floorspace Requirements

- 6.16 Comparison of available expenditure and the potential sales generated by existing floorspace and effective 'pipeline' retail development¹⁴ (experience across the County suggests a substantial minority of permissions granted are not implemented) allows the level of 'residual' expenditure to be identified.
- 6.17 This is converted to a level of additional floorspace that could be sustained based on the market shares identified at paragraph 6.11.
- 6.18 The figures calculate the requirement to the end of the period of the County Development Plan 2009-2015 and for a further 5 years thereafter. The target populations referred to in the Midlands Regional Planning Guidelines 2004 form the basis of the assessment.

¹⁴ Developments which have the benefit of planning permission but which have not yet been constructed

Table 6-4 Additional floorspace requirements - 2015 and 2020

	Comparison	Convenience
Available expenditure (2007) (€ million)	156.8	215.7
Available expenditure (2015) (€ million)	264.4	266.0
Sales from 2007 floorspace (€ million)	169.8	233.6
Residue for new floorspace 2015 (€ million)	94.7	32.4
Sales density (per sq.m) ¹⁵	5,667	11,333
Gross additional floorspace requirement (2007-2015)	16,702	2,858
Pipeline floorspace (sq.m net)	13,705	4,468
Effective pipeline floorspace*	8,908	2,904
Net additional floorspace (2007-2015)	7,794	-46
Available expenditure 2020 (€ million)	413.4	319.4
Less sales from 2007 floorspace (€ million)	178.5	245.5
Residue for new floorspace 2020 (€ million)	234.9	73.9
Sales density (per sq.m)	5,956	11,911
Gross additional floorspace requirement (2007-2020)	39,441	6,203
Pipeline floorspace (sq.m net)	8,908	2,904
Net additional floorspace (2007-2020)	30,533	3,299

* assuming 65% pipeline development

Convenience

- 6.19 In quantitative terms, there is expected to be a limited requirement for additional convenience floorspace in County Offaly in the period to 2015. This reflects the current level of provision and the number of recent commitments and other proposals in Tullamore and the secondary tier centres (see discussion of pipeline commitments in Chapter 5). Beyond 2015, there will be a requirement for incremental additions to meet the needs of the anticipated population. Additional provision is required, of the order of 3,300 sq.m (net) to 2020. However, additional provision may be warranted where gaps in local provision can be identified and where qualitative improvements are effected.

Comparison

- 6.20 The estimates cover all comparison goods expenditure, including mainstream comparison goods shopping and bulky goods, such as those typically sold from retail warehousing outlets. This approach provides flexibility in considering future policy direction, by not rigidly separating requirements for the distribution of floorspace between 'high street' and 'retail warehousing' provision.
- 6.21 Taking account of pipeline commitments, population and expenditure growth forecasts there is a significant requirement additional floorspace before 2015. There is a quantitative requirement for 7,800 sq.m net comparison floorspace to 2015. Between 2015 and 2020, the combination of anticipated population and expenditure growth is estimated to generate capacity for a significant level of additional comparison goods floorspace¹⁶.
- 6.22 This assessment relates purely to the increased effectiveness of Tullamore and the other centres in the County in absorbing the expenditure of Offaly residents. Further significant additions to the County's comparison offer require to be brought forward if

¹⁵ It has been assumed that the sales efficiency of existing floorspace will increase over time. A rate of 1% per annum is incorporated in the calculation.

¹⁶ Estimates based on ESRI Consumption forecasts and national population projections. From 2016 expenditure growth on comparison items is forecast at 7% per annum. For convenience goods, annual expenditure growth of 2.2% is assumed

Tullamore is to function more effectively on a regional basis consistent with its designation as a Linked Gateway town.

7 RETAIL STRATEGY

- 7.1 Paragraph 36 of the Retail Planning Guidelines highlights those matters relating to retail development, which need to be included in the development plan. Of particular importance to Tullamore and County Offaly are guidelines relating to the quantum of floorspace to be provided, the relative split between uses: convenience, comparison and bulky household, and the location of future development.
- 7.2 The Strategy provides:
- Confirmation and update of the County retail hierarchy;
 - Identification of the extent of the retail catchment areas;
 - Broad assessment of the additional quantitative retail floorspace requirements (capacity and need) for the County;
 - Recommendations on key policy approach for assessing retail proposals; and
 - Guidance on an appropriate approach to monitoring and implementation, and the need for strategy flexibility over time to reflect data monitoring.
- 7.3 There are two aspects to the policy recommendations:
- A broad description of the overall strategy for County Offaly over the period of the County Development Plan 2009-2015; and
 - Policy requirements for the range of locations in the retail hierarchy with appropriate policy advice and guidance.

Future requirements

- 7.4 Chapter 6 demonstrates scope for carefully planned major retail development over the period of the 2009-2015 County Offaly Development Plan. This reflects the high levels of development witnessed between 2002 and 2007 and the large volume of floorspace in the retail development pipeline.
- 7.5 In quantitative terms, between 2007 and 2015, there is scope for further comparison retail development of some 7,800 sq.m (net), although it is anticipated that this will increase substantially towards the end of the plan period.
- 7.6 Comparison retail development in the plan period should also seek to address qualitative deficiencies. The Shoppers Survey identified gaps in Tullamore's existing provision and it is vital that these are filled if the town is to further develop its regional role as part of a Linked Gateway. For convenience retail facilities, additional provision should, in the main, be related to neighbourhood requirements.
- 7.7 In considering comparison retail facilities, all of the secondary centres have either witnessed recent development of major retail facilities or have commitments to its provision approved. The Tullamore Shoppers Survey identified several concerns over the quality of existing provision in the town, including the range and quality of shops. As the main focus of retail activity in Offaly, there is scope for major comparison retail development here, where it would extend the quality and range of the existing offer.
- 7.8 Additional comparison goods floorspace may also be developed in Tullamore town, where it is intended to further develop the town's regional retail function and part of the Linked Gateway. At a regional level, a coordinated planning approach should be adopted to the development of major retail facilities in the Linked gateway towns.
- 7.9 Beyond 2015, there is considerable scope for further development, particularly of comparison retail facilities. The identified requirement to 2020 is some 30,530 sq.m (net). For convenience goods, limited additional provision is anticipated, of the order of

3,300 sq.m (net). There is continued scope and opportunity to extend the quality of the area's convenience retailing offer

Location of New Floorspace

- 7.10 Retail Planning: Guidelines for Local Authorities (paragraphs 28 & 29) details the importance of retailing in town centres: in meeting the retail requirements of residents and others who use or visit town centres; in contributing to levels of activity and town centre viability and health; and in supporting their general improvement. The guidance notes the considerable investment that has been directed to central areas and the vital role of planning policy in sustaining and enhancing their role.
- 7.11 A centre-based approach is therefore adopted consistent with national and regional planning policy.
- 7.12 The Retail Strategy encourages the provision of retail floorspace in the County's centres at a level appropriate to the size and projected roles of its various settlements as outlined in Midlands Regional Planning Guidelines 2004 and the County Offaly Development Plan 2009 - 2015.
- 7.13 For comparison goods shopping, the strategy supports the achievement of a critical mass of higher order shopping facilities in Tullamore, consistent with its Linked Gateway Town designation. This will assist in the town's ongoing strengthening and consolidation, simultaneously enhancing its overall status and competitiveness as Offaly County's key shopping centre and destination.
- 7.14 Subject to sequential approach provisions, the Council will encourage development, which seeks to reduce the level of expenditure exported to centres outside the County (consistent with the provisions of Policy 09-05 of the County Offaly Development Plan 2009-2015).
- 7.15 It is noted that a substantial proportion of the quantitative requirement to 2015 has already been met through a combination of built and committed development.
- 7.16 The bulk of additional retail floorspace in the future will be directed to Tullamore and the main existing centres in the retail hierarchy, consistent with Policy P09-01 to P09-03 and Policy P09-04 of the County Offaly Development Plan 2009-2015 and the County Settlement Strategy¹⁷. Tullamore as a Linked Gateway Town and County Town will be the main focus of retail development activity as identified in Policy 09-03.
- 7.17 Tullamore, as a Linked Gateway Town, needs to retain the capacity to cater for major retail development and such development should be directed to Tullamore town in the first instance. Its role, as one of the Midlands Linked Gateway Towns, can be strengthened through securing major retail development for the town, which will in turn benefit the county area and the wider region. Major comparison retail development should be focused in Tullamore town. Retail development will be encouraged in Tullamore, particularly those developments passing the Sequential Test.
- 7.18 It is vital that the town perform its function as a Gateway retail centre. In view of the scale of approved development in other centres in the County up to 2015, proposals for major comparison retail development will mainly be encouraged in Tullamore town. This will aim to extend the quality of existing facilities while enabling it to retain trade and compete in the face of additional provision in neighbouring counties. In the Plan period, major retail development in Tullamore will therefore be considered over and above the quantitative requirement of 7,800 sq.m net where it can be demonstrated that proposed developments will have a positive impact:
- In further reducing levels of retail expenditure exported from the County; and
 - In generating a significant improvement in Tullamore's regional appeal.

¹⁷ Chapter 4, Offaly County Development Plan 2009-2015

- 7.19 As 'Large Towns', appropriate levels of convenience floorspace will be encouraged in Birr, Edenderry, and Portarlington (subject to retail impact considerations).
- 7.20 The Settlement Strategy identifies Clara as a Medium Town and as a town that supports the Midlands Linked Gateway. Additional floorspace will be encouraged where needed to support levels of growth over and above that already identified and where gaps are identified in local provision.
- 7.21 Beyond 2015, a significant floorspace requirement has been identified for comparison retailing in the County. As an indicative requirement, Tullamore should accommodate a minimum of 75% of the County's future comparison goods floorspace requirement i.e. a further 22,900 sq.m net to 2020. The distribution of the remainder should be mainly targeted to Birr, Edenderry and Clara.
- 7.22 It will be necessary to ensure the provision of appropriate sites to accommodate anticipated demand.
- 7.23 In smaller, local centres there is unlikely to be much increase in retail requirements in the short-to-medium term. Should local population changes require significant additional provision, this position should be reviewed.
- 7.24 In meeting convenience shopping needs, the strategy supports the provision of local and accessible facilities, to actively encourage a sustainable approach to shopping activity, through a reduction in distances travelled by motor vehicle, linked to greater opportunities to maximise linked shopping trips. The strategy supports provision of modern supermarket developments of a scale appropriate to the settlement in each of the secondary (and potentially tertiary) town centres.
- 7.25 In local and other centres (including the Settlement Strategy's Local Service Towns, Villages and Sraids), minor floorspace increments and new retail developments will be supported where they meet the needs of the local population.

The town centres as priorities

- 7.26 The role and function of existing town centres should be consolidated (at all levels in the retail hierarchy) by encouraging the improvement of retail facilities and supporting services appropriate to each of the existing centres. This will include: a positive approach to planning applications which reinforce retail roles and functions; in principle support for town and other centre improvement initiatives (including for example, public realm and business development initiatives); and support for the resolution of traffic and transport-related issues which will require to be considered simultaneously.
- 7.27 Policy P09-08 of the Offaly County Development Plan 2009-2015 provides clear support for the retail sector and its future development as part of the maintenance and improvement of existing centres, stating,
- "It is Council policy to encourage retail development, including new forms of shopping which relates to regeneration of existing Town Centres. Proposals which undermine the vitality and viability of core areas of Town Centres, as a whole will not be permitted."*
- 7.28 The capacity for additional comparison retail development to 2020 is such that it will not all be able to be accommodated within established centres. Town centre and edge-of-centre sites will therefore require to be identified. In doing so, local authorities and those proposing development should wherever possible be consistent with the directions of Policy 09-07 of the County Offaly Development Plan which encourages the re-use and regeneration of derelict land and buildings for retail uses consistent with the sequential approach.

Criteria for Assessment

- 7.29 The hierarchical role of each of the towns, villages and settlements within Offaly has been devised with a view to encouraging the improvement of all the town centres in the County. To strengthen the respective role of each town centre, it is necessary for the Offaly County Development Plan to incorporate a set of policy criteria for assessing retail developments.
- 7.30 The current provisions of paragraphs 55 to 65 of the Retail Planning Guidelines outline the main principles for assessing new retail proposals. These should be used in the Development Management Process to inform site selection, scale and form of development, access and servicing arrangements, linkages and support for creation of a competitive retail sector throughout Offaly.
- 7.31 The preferred location for retail development is within existing town centres. In the instances where towns cannot accommodate retail provision within the defined town centres then edge-of-centre locations require to be identified. The distance to and from a defined core shopping area varies according to the local circumstances of each town but nonetheless this should preferably be of no more than 300-400m from the edge of the town's defined central area. Only when these options have been exhausted should alternative out-of-centre locations be considered.

Large Foodstores

- 7.32 Despite the recent amendment in 2005 to lift the aspects of thresholds relating to large scale retail warehousing in the key gateway towns across the State, the 3,000 sq.m floorspace maximum threshold cap for convenience foodstores still applies throughout Offaly.
- 7.33 Where practicable, new large convenience foodstore developments should be located within or on the edge of a town centre or rather within a designated District Centre (if appropriate) serving a large residential area and community. The level of accessibility by all modes of transport is therefore vital - more so for pedestrians and those using public transportation - in choosing the location of new foodstores.
- 7.34 However, as large foodstores tend to attract high volumes of shoppers undertaking less frequent but larger weekly grocery trips, the availability of convenient and easily accessible car parking is a pre-requisite. Thus, in the future, large scale foodstores in town centre or edge-of-centre locations are more than likely to require the provision of decked car parking given the potential constraints on site availability.

Retail Warehousing

- 7.35 The Retail Planning Guidelines recognise that retail warehousing is not easily accommodated within town centres, mainly due to their physical requirements, the need for large parking areas, and issues with site assembly. Where a need can be demonstrated and where it can be demonstrated that there are no town centre sites, it may be appropriate to plan retail parks on the edge-of-town centres (where a site may be available) where one or more retail warehouse units could preferably be accommodated, or on out-of-centre sites should no edge-of-centre site be available. Policy 09-08 of the Offaly County Development Plan provides for the protection of town centre sites:

"It is Council policy to encourage retail development, including new forms of shopping which relates to the regeneration of existing Town Centres. Proposals, which would undermine the vitality and viability of retail core areas or Town Centres, as a whole will not be permitted".

- 7.36 In assessing the suitability of any retail warehousing it will be important to consider: the range of goods to be sold; the quantitative and qualitative need for development;

potential impacts on centre vitality and viability; the scale, design and character of development; and vehicular access and movement arrangements.

- 7.37 The Retail Planning Guidelines indicates that individual retail warehouses should be no smaller than 700 sq.m gross floorspace (with no permission to sub-divide), and no larger than 6,000 sq.m. Increasingly, retail warehouse parks have been allowed which sell toys and sports goods.
- 7.38 Operations for retail warehouse units will therefore be restricted to the sale of bulky household¹⁸ goods and the use of planning conditions and enforcement powers, will ensure that the range of goods sold from these premises will tend to comply with DIY and garden materials, carpets, furniture and white electrical goods.
- 7.39 There will be a presumption that the range of goods sold be strictly limited to that recommended in the Retail Planning Guidelines. Where this is not possible, the sale of goods which fall outside this category should be restricted to no more than 20% of the proposed net floorspace.

Retail Warehouse Clubs

- 7.40 Retail warehouse clubs, as identified in the Retail Planning Guidelines¹⁹, should be treated in the same way as large scale retail developments, as they share similar characteristics.
- 7.41 Retail warehouse clubs should only be located on edge of centre or out of centre sites if no sequentially preferable sites are available. In such cases, there should be a clear and demonstrable quantitative and qualitative need for the development. In addition, particular consideration should be given to the details of design, scale, format and characteristics, to ensure consistency with the wider town centre environment. Adequate car parking facilities should be provided.

District and Neighbourhood Centres

District Centres

- 7.42 At present there are no formally designated District Centres in Offaly. The Retail Planning Guidelines (paragraph 71, and in Annex 1) indicate that a purpose built District Centre can be within the built up area or a suburban location on the edge of an urban area and would usually contain at least one food supermarket or superstore together with non-retail services. District Centres serve the local community within a 15-20 minute drive time and typically comprise up to 10,000 sq.m gross floorspace.
- 7.43 As the majority of projected convenience and comparison goods requirements in Offaly are directed to town centre or edge-of-centre sites in Tullamore and second tier towns, the strategy does not designate any District Centres.

Neighbourhood Centres

- 7.44 Local or neighbourhood centres are defined as: small groups of shops, typically comprising a newsagent, small supermarket/general grocery store, sub-post office and other small shops or a local nature serving a small, localised catchment population. National Retail Planning Guidance provides no specific quantitative criteria for a Neighbourhood Centre.
- 7.45 While neighbourhood centres should be convenient to a localised catchment, there needs to be a reasonable quantum of floorspace to provide a good local range and provide a viable focus of shopping and service outlets.

¹⁸ DIY and garden materials, carpets, furniture and white electrical goods.

¹⁹ RPG, paragraph 89 provides a definition "Retail warehouse clubs or discount clubs combine elements of cash and carry wholesaling with sales to qualifying members of the public. This balance may vary according to the operator"

- 7.46 The definition of specific locations for development of neighbourhood centres should form part of the process of local town and development plan preparation.

Discount Foodstores

- 7.47 Discount convenience retailing is a niche market sector and one that is increasingly dominated by European retailers such as Aldi and Lidl. It is considered that these discount formats will complement supermarkets and larger superstores providing additional variety and competition in the retail market. Discount supermarkets are firmly established in Offaly at Birr, Edenderry and Tullamore.
- 7.48 Discount foodstores will typically comprise about 1,500 sq.m gross and are served by a surface car park with up to 100 spaces. The preferred location for a discount foodstore would be town centre or edge-of-centre, or in a larger Neighbourhood Centre. The potential for a discount foodstore to act as the anchor for a small centre is acknowledged in the Retail Planning Guidelines.
- 7.49 The main criteria to be adopted in assessing the suitability of discount foodstore proposals includes: its impact on centre vitality and viability; the likely impact on the urban design, character and amenity of the town or area; and its level of accessibility by different modes of transport.

Other Retailing Formats

Factory Outlet Centres

- 7.50 Factory outlet centres are not currently part of the retail hierarchy in County Offaly. Factory outlet centres are deemed to be inappropriate development if sited in close proximity to higher order comparison centres. This is due to the direct competition offered through the provision of fashion related retail outlets and products.
- 7.51 Factory outlet centres offer a niche format of retailing which may be accommodated in unique or special circumstances, perhaps in or close to a smaller town within the retail hierarchy, that may benefit significantly from being an established destination for tourism-led trading, and only where there may be potential for the creation of stronger linkages with the nearby town centre.
- 7.52 The success of factory outlet centres will normally depend on its attraction across a wide catchment area, including tourists. There may therefore be implications for existing tourist facilities and established town centres, even those some distance from the proposals.
- 7.53 Criteria for assessing this form of development should primarily focus on whether the development is located in a truly strategic location with the capability to capture sufficient tourism based expenditure. In sustainability terms, the preferred location should be close to or in an existing town centre.

Traditional Markets

- 7.54 Markets are a popular form of traditional retailing which meets local shopping needs, often with a range of other specialist and tourism related shopping. Markets are sometimes perceived as creating adverse environmental effects such as noise, litter, and traffic congestion. Effective management and regulation can improve their operation while also minimising adverse impacts. The development of a Markets Strategy covering Tullamore and the secondary centres in Offaly's retail hierarchy is recommended.

Petrol Filling Station and Forecourt Convenience

- 7.55 Convenience retail floorspace associated with petrol filling station forecourts is a growing sector. Petrol filling station shops have a part to play in serving the needs of many of the more isolated and rural communities in Offaly.

- 7.56 The development of facilities of this nature will also be subject to the sequential approach recognising that in certain circumstances, their development in out-of-town locations may have detrimental impacts on the performance of an established centre, and particularly small convenience shopping outlets. Reflecting national planning guidance, local policies restrict the maximum retail floorspace at petrol filling stations to 100 sq.m. In order to ensure an adequate provision of local retailing in villages, there may be circumstances where this figure can be exceeded

Local and Village Shops

- 7.57 Local and village shops have an important role serving the convenience shopping requirements of local communities throughout Offaly. It is essential that local shops be easily accessible to all sections of the local community, in particular the elderly or less mobile, and those people with disabilities. Where possible, the development of small-scale retail facilities should be located in existing village or neighbourhood centres.
- 7.58 There will be a presumption in favour of new small-scale retail development in villages and small settlements, having regard to the following:
- there is likely to be no significant adverse impact on the vitality and viability of existing centres, and
 - the proposal is of an appropriate scale and is acceptable in terms of design, impact on any residential amenity, servicing and parking arrangements.
- 7.59 Where the planning authority demonstrates the local importance of shops in defined local centres, they will be safeguarded in development plans, through an appropriate land-use zoning.

Isolated and Rural Small Shops

- 7.60 It is a generalised policy within most Counties, including County Offaly that all retail development should be directed to existing settlements (as per the hierarchy) and that development in the countryside should only be considered where appropriate to the needs of the local population.

Implementation and Monitoring

- 7.61 The guidelines and policy proposals outlined are not intended to be inflexible. It is essential in the context of changing market conditions that the retail strategy is reviewed subsequently and updated as applicable. Consequently, monitoring procedures need to be put in place.
- 7.62 Given the designation of the Midlands Linked Gateway and the inclusion of Offaly's County town, Tullamore, as part of this linked gateway, the possibility of undertaking a Midlands Regional Gateway Retail Strategy should be examined in order to strengthen the combined retail catchment of the region.
- 7.63 Co operation between the linked gateway towns of Athlone, Tullamore and Mullingar is an important facet to the success of individual retail strategies operating within the Midlands Region
- 7.64 As outlined in the Retail Planning Guidelines there should be a coordinated approach to retail strategy development and implementation in County Offaly (and potentially jointly with County Laois due to the proximity and shared administrative responsibilities in Portarlinton town environs). The recommendations of this retail strategy need to be reflected in considering any proposals which raise cross-County retail issues.
- 7.65 Given the relevant links between vitality, viability and performance of town centres and their accessibility, it will be important to ensure that a programme for reviewing transport planning and traffic management arrangements is in place in Tullamore town, and elsewhere in the secondary centres of Birr, Edenderry and Clara.

Supporting information

- 7.66 Information on changes to existing levels of floorspace should be collated centrally for the whole of County Offaly. This should be updated regularly to reflect permissions granted, their implementation and any changes of use taking place in central areas.
- 7.67 A retail GIS system could function as a data storage, information management and analysis tool that would be beneficial for future retail planning and decision-making on individual applications. In terms of monitoring, there would need to be a commitment from Offaly County Council (and to some extent Tullamore and Birr Town Councils) to provide a system which contains up-to-date data and correct information, on existing floor areas and changes permitted through planning applications.

APPENDIX ONE

Consultation Exercise

APPENDIX 1: WRITTEN CONSULTATION

Approach to Written Consultation

- 1.1 We wrote to a selection of 170 organisations based within County Offaly - and/or those with an interest in operations in Offaly - inviting them to each submit any written observations and comments on the current and future retail requirements for the County as a whole, as well as the Midlands Gateway town of Tullamore, and second tier centres of Birr, Clara and Edenderry.
- 1.2 It should be noted that in addition to the interests in the third tier local service centres of Banagher, Ferbane, Kilcormac (and Daingean), the consultation exercise was further extended to a range of interested parties in Portarlington - which falls in part in Counties Offaly and Laois - thus reflecting the current and emerging future role of the individual centres and their communities within County Offaly.
- 1.3 A list of those relevant organisations and businesses contacted are included in this Appendix for reference, along with a copy of the letter of invitation as distributed to those on the list. The consultees were asked to respond within a defined structure of six headings (see the bullet points below), and were given a period of between 6-8 weeks in order to respond. The results have been analysed in full and summarised for inclusion within the strategy documentation.
 - Strengths and weaknesses of Tullamore, Edenderry, Birr and Clara (as well as other villages and settlements) as retail centres;
 - Potential for additional convenience shopping provision - e.g. food, alcoholic and non-alcoholic beverages, tobacco, and non-durable household goods;
 - Potential for additional comparison (non-food) shopping provision - e.g. clothing, and footwear; furniture, furnishings and household equipment; pharmaceutical and medical products; education and recreational accessories; newspapers, books and magazines; and goods for personal care;
 - Potential for additional bulky goods (non-food) shopping provision - e.g. goods generally sold from retail warehouses, such as DIY, carpets, furniture etc;
 - Identification of potential development locations in the individual town centres or on the edge of the town centres; and
 - Improvements needed to the road and traffic circulation, car parking provision as well as public transport arrangements.

<Date>

<Name>
<Position>
<Organisation>
<Address>
<Town>
<County>

Dear <Name>

REVIEW OF THE COUNTY OFFALY RETAIL STRATEGY

Offaly County Council has commissioned Roger Tym & Partners, planning and economic development consultants, to carry out a review of the present County retail strategy. This review will look at where residents do their shopping at present and examine in detail the need for further retailing requirements in Tullamore, Edenderry, Birr, and Clara, as well as elsewhere across Offaly.

As part of this review exercise, our study approach requires us to consult with a diverse range of interested parties to seek their views on a range of retail and town centre issues, under the following broad headings:

- Strengths and weaknesses of Tullamore, Edenderry, Birr and Clara (as well as other villages and settlements) as retail centres;
- Potential for additional convenience shopping provision - e.g. food, alcoholic and non-alcoholic beverages, tobacco, and non-durable household goods;
- Potential for additional comparison (non-food) shopping provision - e.g. clothing, and footwear; furniture, furnishings and household equipment; pharmaceutical and medical products; education and recreational accessories; newspapers, books and magazines; and goods for personal care;
- Potential for additional bulky goods (non-food) shopping provision - e.g. goods generally sold from retail warehouses, such as DIY, carpets, furniture etc;
- Identification of potential development locations in the individual town centres or on the edge of the town centres; and
- Improvements needed to the road and traffic circulation, car parking provision as well as public transport arrangements.

As the results of this work will help shape future policy and development of retail in Offaly, we would very much appreciate if you would make time available to provide your written comments. We look forward to receiving your reply by Friday 28 September 2007. **Please structure your response under the six individual bullet points listed above.**

If you should require further information on this review then please contact Nairn Pearson at Roger Tym & Partners by telephone or e-mail nairn.pearson@tymconsult.com.

We warmly welcome your co-operation and participation in this exercise and look forward to receiving your comments in due course.

Yours sincerely

Nairn Pearson
Associate

Name	Position	Organisation	Address	Street	Town	County	Country
Mr. Tony McCormack	Chamber Retail Action Group	Tullamore & District Chamber of Commerce	Esker House	Patrick Street	Tullamore	Co. Offaly	Republic of Ireland
Mr Hugh Byrne	Managing Partner	Byrne Casey & Associates	Clonminch Hi-technology Park		Tullamore	Co. Offaly	Republic of Ireland
Mr Patrick Little		Axis Architecture	The Penthouse	Castle Buildings	Tullamore	Co. Offaly	Republic of Ireland
Mr Dominic Doheny		Flanagan Developments	Central Business Park	Clonminch	Tullamore	Co. Offaly	Republic of Ireland
Mr Eamonn O'Neill		RE/MAX Central (Tullamore)	O'Connor Square		Tullamore	Co. Offaly	Republic of Ireland
Mr & Mrs T McNamara		Texas Department Store	Offaly Street		Tullamore	Co. Offaly	Republic of Ireland
		Tullamore Furniture Centre	The Tan Yard		Tullamore	Co. Offaly	Republic of Ireland
		Dunnes Stores	Tullamore Shopping Centre	Church Road	Tullamore	Co. Offaly	Republic of Ireland
		Lifestyle Sports	Offaly Street		Tullamore	Co. Offaly	Republic of Ireland
Mr John Cusak	Centre Manager	Centre Management Team	The Bridge Shopping Centre	Bridge Street	Tullamore	Co. Offaly	Republic of Ireland
		Dunnes Stores	The Bridge Shopping Centre	Bridge Street	Tullamore	Co. Offaly	Republic of Ireland
		Omniplex Cinema Complex	The Bridge Shopping Centre	Bridge Street	Tullamore	Co. Offaly	Republic of Ireland
		An Post	The Bridge Shopping Centre	Bridge Street	Tullamore	Co. Offaly	Republic of Ireland
		Dolan's Pharmacy	The Bridge Shopping Centre	Bridge Street	Tullamore	Co. Offaly	Republic of Ireland
		Paul Byron Shoes	The Bridge Shopping Centre	Bridge Street	Tullamore	Co. Offaly	Republic of Ireland
		Heartbeat City	The Bridge Shopping Centre	Bridge Street	Tullamore	Co. Offaly	Republic of Ireland
		Aldi Ireland	Portarlington Road	Bridge Street	Tullamore	Co. Offaly	Republic of Ireland
Mr Fergus Flanagan	Store Manager	Tesco Ireland	Tullamore Retail Park	Portarlington Road	Tullamore	Co. Offaly	Republic of Ireland
Ms Miriam Quinn	Manager	Atlantic Homecare	Unit A, Tullamore Retail Park	Portarlington Road	Tullamore	Co. Offaly	Republic of Ireland
Mr Tony Pender	General Manager	D.I.D. Electrical	Unit B, Tullamore Retail Park	Portarlington Road	Tullamore	Co. Offaly	Republic of Ireland
		Argos Extra	Unit D, Tullamore Retail Park	Portarlington Road	Tullamore	Co. Offaly	Republic of Ireland
		Harry Corry Interiors	Tullamore Retail Park	Portarlington Road	Tullamore	Co. Offaly	Republic of Ireland
		Furniture Depot	Tullamore Retail Park	Portarlington Road	Tullamore	Co. Offaly	Republic of Ireland
Mr Fergus Byrne		Byrne's World of Wonder	Tullamore Retail Park	Portarlington Road	Tullamore	Co. Offaly	Republic of Ireland
		Gala Convenience Store	The Whitehouse	Portarlington Road	Tullamore	Co. Offaly	Republic of Ireland
		Nationwide Cellulars	O'Connor Square		Tullamore	Co. Offaly	Republic of Ireland
		#1 Church Street	1 Church Street		Tullamore	Co. Offaly	Republic of Ireland
Ms Mary Murphy	General Manager	Days Hotel Tullamore	Main Street		Tullamore	Co. Offaly	Republic of Ireland
Mr Robert Fleming		Tullamore Court Hotel & Leisure Centre	O'Moore Street		Tullamore	Co. Offaly	Republic of Ireland
Mr Joe O'Brien	Manager	Bridge House Hotel & Leisure Club	Bridge Street		Tullamore	Co. Offaly	Republic of Ireland
Mr Colm McCabe		Clonmore House Hotel	Arden Road		Tullamore	Co. Offaly	Republic of Ireland
Mr & Mrs F & V Sweeney		Lidl Ireland	Main Street		Tullamore	Co. Offaly	Republic of Ireland
		Tullamore Dew Heritage Centre	Bury Quay		Tullamore	Co. Offaly	Republic of Ireland
Mr Kenny Kok		The Paddy Fields Restaurant	15 William Street		Tullamore	Co. Offaly	Republic of Ireland
Ms. Stella Tormey		C.R. Tormey & Sons	Bridge Street		Tullamore	Co. Offaly	Republic of Ireland
Mr Paul Bell		Brewery Tap	High Street		Tullamore	Co. Offaly	Republic of Ireland
Mr Declan Kennedy	Director	Cartridge World Tullamore	Unit B, Block 2	Main Street	Tullamore	Co. Offaly	Republic of Ireland
Ms. Brigid Doorley		Savana J's	Main Street		Tullamore	Co. Offaly	Republic of Ireland
		The Office Centre	O'Connor Square		Tullamore	Co. Offaly	Republic of Ireland
		The Acorn Restaurant	16 Harbour Street		Tullamore	Co. Offaly	Republic of Ireland
		Senor Rico Italian Restaurant	Patrick Street		Tullamore	Co. Offaly	Republic of Ireland
		Bank of Ireland	Bridge Street		Tullamore	Co. Offaly	Republic of Ireland
		Permanent TSB	O'Connor Square		Tullamore	Co. Offaly	Republic of Ireland
		Yaadgar Indian Restaurant	Esker Court		Tullamore	Co. Offaly	Republic of Ireland
		Waterfront Cafe	William Street		Tullamore	Co. Offaly	Republic of Ireland
Mr Jim Goulding	Secretary General	Irish Hardware & Building Materials Association	Elmville	Upper Kilmacud Road	Tullamore	Dublin 14	Republic of Ireland
Ms Tara Buckley	Director General	Retail Grocery Dairy & Allied Trades' Association	Rock House	Main Street	Blackrock	Dublin	Republic of Ireland
Ms Deirdre Cole	Marketing & Development (Laois & North Offaly)	East Coast & Midlands Tourisms	Dublin Road		Mullingar	Co. Westmeath	Republic of Ireland
		Midland Regional Authority	Bridge Centre	Bridge Street	Tullamore	Co. Offaly	Republic of Ireland
		Offaly County Enterprise Board	Cormac Street		Tullamore	Co. Offaly	Republic of Ireland
Mr Sean Ryan	Chief Executive Officer	Offaly County Development Board	Aras an Chontae	Charleville Road	Tullamore	Co. Offaly	Republic of Ireland
Mr Seamus Corrigan		Irish Auctioneers & Valuers Institute	38 Merrion Square		Tullamore	Dublin 2	Republic of Ireland
Mr Alan Cooke	Chief Executive	Oak Partnership	Edenderry Business Park		Edenderry	Co. Offaly	Republic of Ireland
Frances Farrell	Business Development Co-ordinator						

Name	Position	Organisation	Address 1	Address 2	Town	County	Country
Mr Jim Cashen		RE/MAX Central Auctioneers	Emmet Square		Birr	Co. Offaly	Republic of Ireland
Mr William Loughnane		County Arms Hotel	Roscrea Road		Birr	Co. Offaly	Republic of Ireland
		An Post	Emmet Square		Birr	Co. Offaly	Republic of Ireland
Mr Nigel Craughwell	President	Birr Chamber of Commerce	C/o Craughwell Auctioneers	Connaught Street	Birr	Co. Offaly	Republic of Ireland
Mr David Brogan		Buckleys SuperValu Supermarket	25 Main Street		Birr	Co. Offaly	Republic of Ireland
Ms Dolores Molloy		Molloy Travel Worldchoice	Connaught Street		Birr	Co. Offaly	Republic of Ireland
Mr John Tierney		Emo Service Station & Londis Top Shop	Banagher Road		Birr	Co. Offaly	Republic of Ireland
		Fayles Stores	Main Street		Birr	Co. Offaly	Republic of Ireland
Mr Mullholland		Mulhollands Pharmacy & Opticians	O'Connell Street		Birr	Co. Offaly	Republic of Ireland
		Campbell's Londis Supermarket	Townsend Street		Birr	Co. Offaly	Republic of Ireland
Ms M Fetherstonhaugh		Mannion's Expert TV & Electrical	Emmet Street		Birr	Co. Offaly	Republic of Ireland
Mr Pat Guinan		Majella's Flower Shop	Main Street		Birr	Co. Offaly	Republic of Ireland
		P. Guinan Sports & Shoes	Main Street		Birr	Co. Offaly	Republic of Ireland
		Butlers Pharmacy	Main Street		Birr	Co. Offaly	Republic of Ireland
Mr Robert Alexander		Frames of Mind	Townsend Street	Tullamore Road	Birr	Co. Offaly	Republic of Ireland
		Loughnane's Texaco Station & Centra Store	Tullamore Road		Birr	Co. Offaly	Republic of Ireland
Mr Aiden Horan		Horan's Service Station	Dublin Road		Birr	Co. Offaly	Republic of Ireland
		DNG Purcell Auctioneers	Green Street		Birr	Co. Offaly	Republic of Ireland
		D. L. Cullinane Butchers	Emmet Square		Birr	Co. Offaly	Republic of Ireland
		Lidl Ireland	Tullamore Road		Birr	Co. Offaly	Republic of Ireland
		O'Briens Décor Centre	31 Main Street		Birr	Co. Offaly	Republic of Ireland
		Larkin's Menswear and Dress Hire	Emmet Square		Birr	Co. Offaly	Republic of Ireland
		Patti Nee Newsagents	Main Street		Birr	Co. Offaly	Republic of Ireland
		Xtra-Vision	O'Connell Street		Birr	Co. Offaly	Republic of Ireland
		Dooly's Hotel	Emmet Square		Birr	Co. Offaly	Republic of Ireland
Ms Tricia Hynes		RE/MAX Alliance	29 JKL Street		Edenderry	Co. Offaly	Republic of Ireland
		An Post	28 JKL Street		Edenderry	Co. Offaly	Republic of Ireland
		Aldi Ireland	Dublin Road		Edenderry	Co. Offaly	Republic of Ireland
		Lidl Ireland	Dublin Road		Edenderry	Co. Offaly	Republic of Ireland
		Tesco Ireland	Clonmullen Industrial Estate		Edenderry	Co. Offaly	Republic of Ireland
		Dunnes Stores	Edenderry Shopping Centre		Edenderry	Co. Offaly	Republic of Ireland
		Eivery's Sports	Edenderry Shopping Centre		Edenderry	Co. Offaly	Republic of Ireland
		Ryans Pharmacy	Edenderry Shopping Centre		Edenderry	Co. Offaly	Republic of Ireland
		Sherry Fitzgerald O'Connell	64 JKL Street		Edenderry	Co. Offaly	Republic of Ireland
		Carrolls Menswear	JKL Street		Edenderry	Co. Offaly	Republic of Ireland
		The Butcher Block Convenience Store	JKL Street		Edenderry	Co. Offaly	Republic of Ireland
		Conlon's Sports & Leisure	JKL Street		Edenderry	Co. Offaly	Republic of Ireland
		Eden Deli & Café	JKL Street		Edenderry	Co. Offaly	Republic of Ireland
		Foy's of Edenderry & Off-Licence	84 JKL Street		Edenderry	Co. Offaly	Republic of Ireland
		Harbour Deli	54-55 JKL Street		Edenderry	Co. Offaly	Republic of Ireland
		Hoopers' Family Grocers	JKL Street		Edenderry	Co. Offaly	Republic of Ireland
		Lily Garden Chinese Restaurant	JKL Street		Edenderry	Co. Offaly	Republic of Ireland
		Tedders Chemist	St Mary's Road		Edenderry	Co. Offaly	Republic of Ireland
		Midlands Phone Centre & Internet Café	Main Street		Edenderry	Co. Offaly	Republic of Ireland
		Quality Cleaners	7 St Francis Street		Edenderry	Co. Offaly	Republic of Ireland
			Father Paul Murphy Street		Edenderry	Co. Offaly	Republic of Ireland

APPENDIX TWO

Offaly Household Survey

OFFALY COUNTY COUNCIL: TELEPHONE SURVEY

ASK FOR THE PERSON WHO DOES MOST OF THE HOUSEHOLD SHOPPING

Good afternoon Mr/Mrs _____ I am working on a survey of shopping patterns in the Offaly area. This survey is being carried out for Offaly County Council – we are not trying to sell you anything. Your number has been picked as part of a random sample of the people who live in County Offaly. Can I take up five minutes of your time?

ALL INFORMATION YOU PROVIDE WILL BE TREATED IN STRICTEST CONFIDENCE.

1 First, can I ask where you do your main supermarket shopping? (LOCATION AND NAME OF STORE)

STORE NAME PRECODES

No supermarket used	00
Aldi	01
Centra	02
Costcutter	03
Dunnes	04
Lidl	05
Londis	06
Spar	07
Superquinn	08
Supervalu	09
Tesco	10
Others (<i>WRITE IN & CODE</i>)	

LOCATION PRECODES

No Place	00
Tullamore	01
Birr	02
Banagher	03
Clara	04
Edenderry	05
Ferbane	06
Kilcormac	07
Portarlinton	08
Athlone	09
Ballinasloe	10

Kildare	11
Mountmellick	12
Mullingar	13
Naas	14
Portlaoise	15
Dublin City Centre	16
Liffey Valley	17
Tallaght	18
Other Dublin	19
Internet	20
Others (<i>WRITE IN & CODE</i>)	

2 Is there any other supermarket you go to? (NAME OF STORE: AND LOCATION PRECODES AS ABOVE)

3 Now, in which centre do you do most of your shopping for clothes and shoes?

(LOCATION ONLY: PRECODES AS Q1 ABOVE BUT ADD “MAIL ORDER”)

Mail Order	21
------------	----

4 Do you shop in any other centre for clothes and shoes?

(LOCATION ONLY: PRECODES AS Q1 & Q3 ABOVE BUT ADD “MAIL ORDER”)

5 Now, I want you to think about retail warehouses – the big shopping sheds like Homebase or Comet. Which of these places, if any, have you used in the past twelve months? (GIVE UP TO THREE, WITH STORE NAMES AND LOCATIONS)

STORE PRECODES

None used	Z
Atlantic	A
Argos	B
B&Q	C
Comet	D
Currys	E
D.I.D Electrical	F
Harry Corry	G
Homebase	H
Power City	I
Woodies	J
Others	K

(*WRITE IN & CODE*)

LOCATION PRECODES

No Place	Z
Tullamore	A
Athlone	B
Mullingar	C
Naas	D
Portlaoise	E
Liffey Valley	F
Tallaght	G
Other Dublin	H
Others	I

(WRITE IN
& CODE)

6 (SECOND RETAIL WAREHOUSE: STORE AND LOCATION PRECODES AS Q5 ABOVE)

7 (THIRD RETAIL WAREHOUSE: STORE AND LOCATION PRECODES AS Q5 ABOVE)

8 About how much has your household spent at retail warehouses over the past year?

Nothing	00
Up to €50	01
€50 to €99	02
€100 to €499	03
€500 to €999	04
€1000 to €1,999	05
€2,000 or more	06

9 Thinking of the area where you live, are you happy with the range and quality of the shopping you can get to, or are there problems?

Very happy	A
Things are alright	B
Fairly dissatisfied	C
Very dissatisfied	D
Don't know/No opinion	E

10 Which particular centre has the biggest problems?

Tullamore	A
Birr	B

Banagher	C
Clara	D
Edenderry	E
Ferbane	F
Kilcormac	G
Portarlington	H
Athlone	I
Mullingar	J
Others (<i>WRITE IN & CODE</i>)	K

11 What is the main problem there?

Distance from Home	1
Traffic/Poor Public Transport	2
Poor Parking	3
Poor Environment	4
Shopping areas too crowded	5
Poor Range of Shops	6
High prices/Poor service	7
Other (SPECIFY)	

12 Would you like to see more retail warehouses – big shopping sheds in out-of-town locations ?

Yes	1
No	2
Don't Know/Not Sure	3

13 Now, I'd like to ask some questions to make sure we have interviewed a good cross section of people. First, what is the occupation of the principle wage earner in your household?

14 Does your household have a car?

No car	1
One car	2
Two or more cars	3

15a Can I check your address? Is it? (RECORD TOWN OR VILLAGE AND NEAREST TOWN)
(NOTE THERE ARE NO ZONES FOR THIS SURVEY)

APPENDIX THREE

Offaly Shoppers' Survey

TULLAMORE SHOPPERS' SURVEY

Good morning/ afternoon. I am undertaking a town centre survey on behalf of Offaly County Council. We are asking people about their shopping habits and what they think of the town centre. Can you spare a few minutes of your time to answer a few questions?

INTERVIEWER (1) _____

TOWN (2) TULLAMORE

DATE (3) _____

LOCATION (4) _____

<p>1 First, can I ask what is the <u>main</u> purpose of your visit to the Town Centre today? Is it... ..</p> <p style="text-align: right;">Supermarket shopping A</p> <p style="text-align: right;">Shopping for food and groceries at other shops B</p> <p style="text-align: right;">Shopping for clothes/shoes C</p> <p style="text-align: right;">Shopping for DIY/Electricals D</p> <p style="text-align: right;">Other forms of shopping E</p> <p style="text-align: right;">Visiting pub / café / restaurant F</p> <p style="text-align: right;">Visiting bank or building society G</p> <p style="text-align: right;">Leisure / recreation H</p> <p style="text-align: right;">Education I</p> <p style="text-align: right;">Work here J</p> <p style="text-align: right;">Other (<i>WRITE IN</i>)</p>		<p>7 How long will you have stayed in the Town Centre today from the time you arrived until the time you leave?</p> <p style="text-align: right;">less than 30 minutes 1</p> <p style="text-align: right;">30 - 59 minutes 2</p> <p style="text-align: right;">1 - 2 hours 3</p> <p style="text-align: right;">2 - 3 hours 4</p> <p style="text-align: right;">3 - 4 hours 5</p> <p style="text-align: right;">longer than 4 hours 6</p>	
<p>2 Apart from this, are there other purposes for your visit today? MULTICODE</p> <p style="text-align: right;">Supermarket 1</p> <p style="text-align: right;">Other shops for food and groceries 2</p> <p style="text-align: right;">Clothes or shoe shops 3</p> <p style="text-align: right;">DIY, electricals 4</p> <p style="text-align: right;">Other shops 5</p> <p style="text-align: right;">Pub/café/restaurant 6</p> <p style="text-align: right;">Bank or building society 7</p> <p style="text-align: right;">Leisure /recreation facilities 8</p> <p style="text-align: right;">other (<i>WRITE IN</i>)</p>		<p>8 How often do you come to Tullamore Town Centre?</p> <p style="text-align: right;">more than once a week A</p> <p style="text-align: right;">once a week B</p> <p style="text-align: right;">once every 2 to 3 weeks C</p> <p style="text-align: right;">monthly D</p> <p style="text-align: right;">less often/not regularly E</p> <p style="text-align: right;">this is the first time F</p>	
<p>3 How did you travel here today?</p> <p style="text-align: right;">Walk A</p> <p style="text-align: right;">Cycle B</p> <p style="text-align: right;">Own Car C</p> <p style="text-align: right;">Other Car D</p> <p style="text-align: right;">Taxi E</p> <p style="text-align: right;">Bus F</p> <p style="text-align: right;">Train G</p>		<p>9 How long do you intend to stay in the Town Centre from the time you first arrived?</p> <p style="text-align: right;">less than 30 minutes 1</p> <p style="text-align: right;">30 - 59 minutes 2</p> <p style="text-align: right;">between 1 - 2 hours 3</p> <p style="text-align: right;">between 2 - 3 hours 4</p> <p style="text-align: right;">between 3 - 4 hours 5</p> <p style="text-align: right;">Over 4 hours 6</p>	
<p>4 How long did your journey take?</p> <p style="text-align: right;">0 - 10 mins 1</p> <p style="text-align: right;">10 - 20 mins 2</p> <p style="text-align: right;">20 - 30 mins 3</p> <p style="text-align: right;">30 - 45 mins 4</p> <p style="text-align: right;">45 mins plus 5</p> <p>5 Where did you park today?</p> <p style="text-align: right;">Bridge Street Shopping Centre 1</p> <p style="text-align: right;">New Main Street 2</p> <p style="text-align: right;">Church Street 3</p> <p style="text-align: right;">Church Road 4</p> <p style="text-align: right;">O'Connell Street 5</p> <p style="text-align: right;">Other (<i>WRITE IN</i>)</p>		<p>10 Which other place do you visit most frequently for shopping?</p> <p style="text-align: right;">Athlone 1</p> <p style="text-align: right;">Mullingar 2</p> <p style="text-align: right;">Birr 3</p> <p style="text-align: right;">Edenderry 4</p> <p style="text-align: right;">Clara 5</p> <p style="text-align: right;">Banagher 6</p> <p style="text-align: right;">Ferbane 7</p> <p style="text-align: right;">Kilcormac 8</p> <p style="text-align: right;">Portarlington 9</p> <p style="text-align: right;">Daingean 10</p> <p style="text-align: right;">Dublin City Centre 11</p> <p style="text-align: right;">Liffey Valley 12</p> <p style="text-align: right;">Other (<i>WRITE IN</i>)</p>	
<p>6 Was this parking place convenient?</p> <p style="text-align: right;">Very convenient A</p> <p style="text-align: right;">Convenient B</p> <p style="text-align: right;">Poor C</p> <p style="text-align: right;">Very inconvenient D</p>		<p>11 How often do you go to this other place?</p> <p style="text-align: right;">Live here/more than once a week A</p> <p style="text-align: right;">Once a week B</p> <p style="text-align: right;">Once a week to once a month C</p> <p style="text-align: right;">Less often D</p> <p style="text-align: right;">Not regularly E</p>	

<p><i>IF THIS IS THE MAIN SHOPPING CENTRE</i></p> <p>12 Why do you use (THIS) Town Centre? (MULTICODE, DO NOT PROMPT)</p> <p>close to home 1</p> <p>close to work 2</p> <p>easy to get to 3</p> <p>good public transport links 4</p> <p>sufficient car parking 5</p> <p>reasonably priced car parking 6</p> <p>good selection/quality of shops 7</p> <p>good mix of shopping and leisure facilities to visit specific shop(s) (NAME) 8 9</p> <p>pleasant shopping environment (general ambience) D</p> <p>good standard of street cleanliness E</p> <p>visit the market F</p> <p>safe shopping environment G</p> <p>other (WRITE IN)</p>		<p>15 Do you have any suggestions for improving this centre? (MULTICODE, DO NOT PROMPT)</p> <p>no nothing 1</p> <p>make the town centre easier to get to 2</p> <p>provide more parking 3</p> <p>more shops 4</p> <p>provide better range of shops 5</p> <p>provide specific shop (NAME) 6</p> <p>provide particular leisure facility (NAME) A</p> <p>improve the cleanliness of the streets F</p> <p>pedestrianise particular street (NAME) G</p> <p>improve the pedestrian environment other (WRITE IN)</p>	
<p>13 Is there anything you particularly <u>dislike</u> about this Town Centre? (MULTICODE, DO NOT PROMPT)</p> <p>no, nothing 1</p> <p>inconvenient to get to 2</p> <p>public transport links are poor 3</p> <p>inadequate car parking 4</p> <p>expensive car parking 5</p> <p>poor quality shops 8</p> <p>lack of particular type of shops 9</p> <p>lack of leisure facilities A</p> <p>unpleasant shopping environment (general ambience) B</p> <p>poor standard of street cleanliness C</p> <p>unsafe/threatening environment D</p> <p>other (WRITE IN)</p>		<p>16 Where do you live ? (Full home address)</p>	
<p>14 What non-shopping services/facilities have/will you use today? (MULTICODE, DO NOT PROMPT)</p> <p>tourist attractions 1</p> <p>sports/leisure facilities 2</p> <p>museum 3</p> <p>cinema 4</p> <p>library 5</p> <p>other (WRITE IN)</p>		<p>17 Does your household have the use of a motor car?</p> <p>yes, one car 1</p> <p>yes, two or more cars 2</p> <p>no, no car 3</p>	
		<p>18 What is the occupation of the main income earner in your household?</p>	
		<p>19 Gender (Observe)</p> <p>male 1</p> <p>female 2</p>	
		<p>20 Age</p> <p>less than 20 1</p> <p>20 to 39 2</p> <p>40 to 59 3</p> <p>60 or over 4</p>	

Thankyou for your help. Would you have any objection if someone from our office called you back by telephone? This would be just be to check that the interview was carried out properly

telephone number _____

name of respondent _____

INTERVIEWER'S SIGNATURE _____

APPENDIX FOUR

Retail Model Explanation

APPENDIX 4: EXPLANATION OF PER-CAPITA SALES

Introduction

- 1.1 This Appendix outlines the Roger Tym & Partners retail model. It describes the estimation of retail sales at the national level, divided between convenience goods and comparison goods, and the projection of future levels. It sets out the methodology for moving to local estimates at county level.

Base Year Retail Sales

- 1.2 The starting point is an analysis of the Annual Services Inquiry (ASI)¹ in which details of firms' sales are classified into categories which enable the following breakdown:
- Sales of convenience goods, which we define as food, non-alcoholic beverages, alcohol and tobacco.
 - Sales of comparison goods, which we define as all other retailed goods, with two exceptions. Only half of the sale of spare parts and accessories for motor vehicles has been included, since some of these sales are related to car servicing etc. Only one quarter of the sales under the category 'Other goods and services' has been included. The bulk of sales here are estimated to be services.
- 1.3 Using special tabulations from the CSO we can eliminate from the crude ASI data sales of alcohol and tobacco that take part in bars rather than shops. We then make allowances for VAT and eliminate sales to foreign tourists, using data from surveys of non-resident expenditure by Bord Failte. (Estimates of tourist expenditure at the local level are added back in at a later stage) The results, based on the 2003 ASI updated to 2004 using the Index of Retail Sales, are as follows:

Table A1: National Sales of Convenience and Comparison Goods, 2004

	State total € million	State population million	Sales per capita €
Sales of convenience goods	12,043	4.076	2,955
Sales of comparison goods	11,170	4.076	2,741

- 1.4 Total sales of convenience goods were €12,043 million in 2004. Dividing by the population in that year gives per capita sales of €2,955. Sales of comparison goods

¹ The ASI provides more comprehensive data on retail sales than the National Accounts. National Accounts figures for Personal Consumption do not include sales to businesses, as pointed out below. In addition, personal expenditure on materials for housing maintenance is deliberately understated and that on housing improvement is eliminated. We do, however use the Personal Consumption data for future estimates, on the assumption that there is a stable relationship between Personal Consumption and total retail sales

were €11,170 million, giving a per-capita level of €2,741. The following points should be noted on these estimates.

- 1.5 Although the figures are couched in terms of sales per person they do include sales to businesses, such as the following:
 - Sales of food and drink to hotels and restaurants by supermarkets, butchers, greengrocers and the like;
 - Sales to builders by DIY and hardware stores; and
 - Retail purchases by offices of stationary or office equipment.
- 1.6 These are important ingredients of retail turnover and it is necessary that they be included. The implication of such inclusion is that there is a reasonably stable relationship between personal and business expenditure in shops.
- 1.7 A second point is that sales of retail goods other than through stores are excluded. The figures do not therefore include mail order sales or most internet sales. The value of home deliveries of convenience goods is included in the calculations, however, since these items are dispatched from supermarkets and are included in their turnover figures.

Future Growth in Retail Sales

- 1.8 We project retail sales forward using the forecasts of GNP and consumption made by the latest ESRI Mid Term Review, for 2005 to 2012. The projection follows the ESRI high forecast, which is considered to be the most likely.
- 1.9 Retail expenditure only takes a third of total personal consumption. The rest is devoted to services, including financial transactions. It is therefore invalid to assume a simple relationship between retail sales and personal consumption or income - an assumption frequently made by many practitioners of retail planning. Instead, we relate future retail sales to the ESRI personal consumption forecasts using an analysis of trends over the periods 1995 to 2004 and 2000 to 2004.
- 1.10 We have produced a projection of the national population to correspond with the ESRI forecasts. Dividing the foregoing estimates of national retail sales by these populations gives average sales per head of population, shown in Table A2. In 2006 this is €3,040 for convenience goods and €3,151 for comparison goods. Moving to 2016 the convenience goods figure rises very slightly to €3,193, while that for comparison goods rises to €4,785. This latter increase is equivalent to 4.3 percent per annum over the ten year period- much lower than the rates of the late 1990s but still rather higher than current projections for the United Kingdom.

Table A2 National per Capita Convenience and Comparison Sales, 2006 - 2016

Year	Convenience per capita sales	Increase on previous year (%)	Comparison per capita sales	Increase on previous year (%)
2004	2,955		2,741	
2005	3,011	1.9%	2,974	8.5%
2006	3,040	1.0%	3,151	6.0%
2007	3,049	0.3%	3,277	4.0%
2008	3,056	0.2%	3,398	3.7%
2009	3,060	0.1%	3,515	3.4%
2010	3,089	1.0%	3,714	5.7%
2011	3,110	0.7%	3,890	4.7%
2012	3,124	0.5%	4,052	4.2%
2013	3,140	0.5%	4,223	4.2%
2014	3,157	0.5%	4,401	4.2%
2015	3,174	0.6%	4,589	4.3%
2016	3,193	0.6%	4,785	4.3%

Estimation of Local Sales

- 1.11 For individual zones in the Offaly study area, per capita sales figures are derived by adjusting the national levels according to differences in composition of the population by socio-economic group. This process uses differentials by socio economic group provided by the CSO Household Budget Survey. Again there is the assumption made that there is a stable relationship between household expenditure and total retail sales.
- 1.12 The Census of Population, 2002, gives breakdowns of households by the socio-economic group of the household reference person. The Household Budget Survey gives average weekly expenditure for five consolidated socio-economic groupings, grouped as follows:
- Employers, managers, higher and lower professionals;
 - Non-manual and own account workers;
 - Skilled manual ;
 - Semi-skilled and unskilled; and
 - Farmers, agricultural workers and others gainfully occupied and unknown.
- 1.13 There are large differences between the expenditure levels of the five groupings, for example, that of the first being well over double that of the last. Combination of the Household Budget data with the Census breakdowns gives the differential between national and local sales levels.