Leitrim County Development Plan

2015 – 2021

Retail Strategy

Comhairle Chontae Liatroma
Leitrim County Council
Leitrim County Retail Strategy
2015 - 2021
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Leitrim County Retail Strategy 2015-2021

1. Introduction

The Retail Planning Guidelines for Planning Authorities (2012), issued by the Department of the Environment, Community and Local Government (DoECLG), require Local Authorities to prepare retail strategies and retail policies for their areas and to incorporate these where appropriate into their respective statutory plans. Previously, Leitrim County Council prepared a Retail Strategy for the County to cover the 2002-2009 and 2009-2015 periods.

Leitrim County Council is currently preparing the County Development Plan 2015-21 and it is considered an appropriate time to review the current Retail Strategy and to prepare a new one in tandem with the preparation of the new County Development Plan. It is envisaged that the Retail Strategy will form an integral part of Leitrim County Council’s overall vision for the development of the County over the period of the plan. It will inform the policies of the plan in respect of retail development and ensure that such policies are based on the most up-to-date information.

The Strategy provides advice regarding the broad quantum, scale and type of retail development required in County Leitrim. The Strategy involves both desk-top and fieldwork surveys including a review of existing published documents, studies, plans, retail legislation, government policy, local studies, analysis of current international, national and local retail trends and a review of best practice in the sector, as applicable in both a national and local context. Field surveys comprising the availability and quality of retail floorspace and extent of shopping catchment areas were also undertaken.

This Strategy will examine in detail the ‘key towns’ and ‘support towns’ in County Leitrim, namely Carrick-on-Shannon, Ballinamore, Manorhamilton, Drumshanbo, Dromahair and Mohill. Smaller towns and villages are also examined in order to provide an understanding of the role and function of such towns and villages.

This Strategy and retail planning in Leitrim needs to be prepared taking full cognisance of the shift in shopping habits including the growing role of online shopping and the implications of this for the retail sector, including the location of business. Whilst this Retail Strategy is primarily focused on the formulation of policy to control the geographic characteristics of retail operations, the Strategy must consider this in light of altering shopping habits and modern shopping demands.

1.1 Review of the Retail Strategy 2009-15

Having regard to the Retail Strategy report for the 2009-2015 period, the following core elements and recommendations of the Strategy were recognised.

The 2009 Retail Strategy updated the visual survey carried out for the 2002 Strategy and the number of vacant units was also surveyed in each of the towns and villages, providing an insight into the retail function of towns and villages that have a particularly high number of vacant units. Updating the visual survey also allowed for comparisons to be made in the changes in retail provision between 2002 and 2007. The retail hierarchy presented was broadly similar to that presented in the 2002 Strategy with the following exceptions:
Three additional villages were included in Tier 4 ‘Rural Villages/Shops’. These are Ballinagleragh, Drumcong and Kildare. The reason for including these additional areas was stated as been based upon their identification as Tier 4 ‘Rural Villages/Shops’ under Variation No.7 of the Development Plan 2003-2009 – ‘Land-Use Strategy for Selected Towns, Villages and other Centres’ and;

Three villages were excluded from Tier 4 ‘Rural Villages/Shops’, as they had not been identified as ‘Graigs’ under Variation No.7 of the Development Plan 2003-2009 – ‘Land-Use Strategy for Selected Towns, Villages and other Centres’. These ‘rural villages/shops’ were detailed as Aghamore, Aughavas & Garvagh.

Photographic evidence was included in the previous Strategy highlighting the main positive changes and features in many of the towns and villages, including aesthetic and accessibility improvements.

The boundaries of retail development in each of the key centres was informed by the land use strategy maps, as opposed to referencing specific streets beyond which no retail development should take place (as was specified in the 2002 Strategy).

Mohill, Manorhamilton, Drumkeerin and Newtowngore were identified as priority settlements and areas for upgrading in encouraging new retail development, however the upgrade of Carrick-on-Shannon should remain a principal priority.

The 2009 Strategy identified that the Council should carry out a vitality and viability ‘health-check’ assessment of all towns and villages in the County once every five years using a consistent methodology. This Retail Strategy includes a ‘health-check assessment’ using retail categories consistent with the previous Strategies, in order to allow an element of comparative analysis.

The Strategy actively promoted the now defunct Rural Tax Incentive Scheme to ensure maximum benefit for the County and encouraged use of the Scheme to renovate existing buildings. The Strategy discouraged ribbon development along the approach roads to towns. The recommendations identified in the 2009 Retail Strategy informed the policies and objectives for retailing in the Leitrim Plan 2009-2015.

1.2 Study Approach

The approach taken in the formation of the review of the Retail Strategy included the undertaking of a baseline survey and research. This comprised the following components:

**Policy Analysis** - National, regional and local policies will be reviewed in the context of the Retail Strategy with particular reference to the retail hierarchy, as well as existing and emerging Development Plan policies.

**Economic Context** - Retail expenditure is influenced by the economic performance of the County. The economic context for the analysis will therefore be established.

**Retail Trends** - A review of recent retail trends will be carried out and an assessment made of their impact and influence on the retail profile and function of Leitrim.

**Surveys** - The visual survey undertaken in 2008 will be updated to reflect the distribution of uses throughout the County and the level of occupancy. A review of the County Rates Book will be undertaken and a visual survey of retail provision and urban design issues in the County will be undertaken. Update of the permitted retail space granted since the 2009 Retail Strategy will be undertaken and a review of the vacant units in each town and village will be prepared.

**Quantitative Analysis:** Population analysis, expenditure analysis, turnover analysis, retail floorspace analysis and overall analysis has been carried out for the first time by the Council within this Retail Strategy.
Qualitative Survey: A qualitative health-check survey was carried out in order to assess the current level of vitality and viability of the ‘key centres’ in the County; Carrick-on-Shannon, Ballinamore and Manorhamilton; and the ‘Support Towns’ of Dromahair, Drumshanbo and Mohill, in order to assess their strengths and weaknesses in retail terms.

Analysis of Competing Centres: Major competing centres including Sligo, Longford, Boyle, Athlone, Cortober, Cavan, Bundoran and Enniskillen were assessed to identify their retail offer and roles in the context of County Leitrim.

Retail Hierarchy and Identification of Core Retail Areas - The structure and retail function of each town was analysed to determine the core retail area and to identify the hierarchical retail structure of the principal settlements in the County.

1.3 Preparation of the Report

The qualitative and quantitive analysis and other inputs as outlined above are fundamental in the capacity assessment of the County's need for future convenience, comparison and “bulky goods” (retail warehouse) floor space (see Appendix B for details of Retail Categories). In brief, the assessment comprises the following principal elements:

(i) Population forecasts;
(ii) Forecasts of convenience, comparison ‘bulky goods’ expenditure for 2014-2021;
(iii) Establishing the extent of existing floor space and its turnover; and
(iv) Analysing the above data to determine the potential convenience and comparison spend available to support new retail floor space to 2021.

The final component of the study is to determine the retail strategy for County Leitrim to the year 2021. The factors influencing this include:

- Retail hierarchy;
- Population size and distribution;
- Sequential test;
- Nature of retail provision and need – convenience, comparison and retail warehousing (bulky goods);
- The shopping environment and mechanisms to enhance the vitality and viability of town centres;
- The need to sustain and enhance Leitrim’s role and prevent unnecessary leakage of expenditure to competing centres;
- Recognition of the predominantly rural nature of the County and the need to ensure the strategy serves all sectors of the community in a way, which is efficient, equitable and sustainable;
- Opportunities to attract shopping to the County.

1.4 Structure of the Report

The remainder of the Strategy is divided into the following sections:

- Chapter 2: Retail Policy
- Chapter 3: Aim of the Retail Strategy
- Chapter 4: Retail Context & Trends
- Chapter 5: Retail Activity in the County
- Chapter 6: Health Check Qualitative Assessment
- Chapter 7: Assessment of Competing Centres
- Chapter 8: Recommendations
2. **Retail Policy**

The retail sector is Ireland’s largest employer, with over 250,000 people employed representing 14.5% of Ireland’s total workforce according to Retail Ireland (2013). Retail accounts for over 10% of Ireland's Gross Domestic Product (GDP). Ireland’s retail sector is made up of predominantly small, indigenous companies, with approximately 44,000 active wholesale and retail enterprises in Ireland with 86% Irish-owned according to Retail Ireland (2013).

2.1 **Policy Context**

The purpose of this chapter is to review the relevant spatial and sectoral policy documents that will influence the future development of the retail sector in the County. In this section, we identify the current and emerging plans, policies and proposals that are relevant to the review of the Retail Strategy in the following order:

- National;
- Regional; and
- Local.

2.1.1 **National Policy Context**

**National Spatial Strategy 2002 – 2020**

The National Spatial Strategy (NSS) is a twenty-year strategic planning framework whose aim is to achieve more balanced social, economic and physical development and population growth between the regions. The NSS introduced the concepts of gateways and hubs; with Carrick-on-Shannon and Manorhamilton being identified as performing regionally strategic, residential, employment, administrative, commercial and service functions, whilst Sligo is identified as a Gateway for this part of the Border Region. Suggestions have been made in recent months that the NSS should now be revisited in light of the spatial manifestations of the economic recession.

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1 Retail Ireland is a representative body for the retail sector in Ireland and is affiliated to the Irish Business and Employer’s Confederation (IBEC).
Figure 2-1 National Spatial Strategy Context


Retail Planning Guidelines for Planning Authorities (2012)

The Retail Planning Guidelines (2012) were adopted by the Department of the Environment, Community and Local Government in April 2012 and replace the previous Retail Planning Guidelines published in 2005. The purpose of the Retail Planning Guidelines is to promote sustainable retail planning, by assisting Planning Authorities in addressing retail development, in preparing Development Plans and in assessing applications for retail developments. They also guide retailers and developers in formulating retail development proposals.

The Guidelines emphasise that enhancing the vitality and viability of town centres in all their functions through sequential development is an overarching objective in retail planning. The Guidelines include a presumption against large out-of-town retail centres, in particular those adjacent to or close to existing, new or planned national roads / motorways.

The Guidelines have five key policy objectives, namely: -
1) Ensuring that retail development is plan-led;
2) Promoting city/town centre vitality through a sequential approach to development;
3) Securing competitiveness in the retail sector by actively enabling good-quality development proposals to come forward in suitable locations;
4) Facilitating a shift towards increased access to retailing by public transport, cycling and walking in accordance with the Smarter Travel Strategy; and
5) Delivering quality urban design outcomes.

The Guidelines emphasise that in order to ensure proper planning and sustainable development, retail development and activity must follow the settlement hierarchy of the State, including the various Gateway and Hub town locations identified in the NSS 2002-2020, the Regional Planning Guidelines and the Core Strategies of Development Plans.

The Guidelines also provide specific guidance for the content and role of Development Plans. It is stated, inter alia, that:

- Development Plans must set out clear evidence-based policies and objectives in relation to retailing in a discrete section of the Plan;
- Joint or multi-authority retail strategies, where required, will guide the preparation of retail policies and objectives in the relevant Development Plans;
- The need for any additional retail warehousing should be carefully assessed in view of the significant levels of recent provision and potential impacts on vitality and viability of city and town centres;
- At a minimum, County Development Plans must:
  - State the elements of their settlement hierarchy in line with the relevant regional planning guidelines and their core strategy;
  - Outline the level and form of retailing activity appropriate to the various components of the settlement hierarchy in that core strategy;
  - Define, by way of a map, the boundaries of the core shopping areas of city and town centres and also location of any district centres;
  - Include a broad assessment (square metres) of the requirement for additional retail floorspace only for those plans in the areas covered by a joint or multi-authority retail strategy;
  - Set out strategic guidance on the location and scale of retail development to support the settlement hierarchy, including where appropriate identifying opportunity sites which are suitable and available and which match the future retailing needs of the area;
  - Identify sites which can accommodate the needs of modern retail formats in a way that maintains the essential character of the shopping area;
  - Include objectives to support action initiatives in city and town centres, such as mobility management measures that both improve accessibility of retail areas, while aiming to develop a pedestrian- and cyclist-friendly urban environment and vibrant street life;
  - Public realm interventions aimed at improving the retailing experience through high-quality civic design, provision of attractive street furnishing, lighting and effective street cleaning/business improvement district type initiatives; and
Identify relevant development management criteria for the assessment of retail developments in accordance with these guidelines.

Some other key guidance set out in the Retail Planning Guidelines, as relevant to County Leitrim, includes the following:

- The fourth tier of the national retail hierarchy, ‘Small Towns and Rural Areas’ comprises 75 no. towns in the 1,500 to 5,000 population category, including Carrick-on-Shannon. These 75 no. towns are stated as providing basic convenience shopping, either in small supermarkets or convenience shops and in some cases, also provide comparison shopping, for example small-scale hardware, retail pharmacies and clothes shops;
- 3,000 sq.m. net cap on convenience retail floorspace;
- 6,000 sq.m. gross cap on retail warehouse floorspace;
- The need for any additional retail warehousing should be carefully assessed in view of the significant levels of recent provision and potential impacts on vitality and viability of city and town centres.

Whilst the Guidelines have been prepared with an onus on guiding retail development in complex urban environments, they do have pertinence for rural areas including small villages and local level shopping. The Department state that the lowest tier of shopping “is provided by a mixture of neighbourhood shops in suburban areas and village stores/post-offices in rural areas” (p. 11). The Guidelines therefore recognise that rural villages perform an important retail function and a Strategy such as this must be prepared with due consideration for same.

Retail Design Manual (2012)

One of the key messages of the Retail Planning Guidelines is that a high level of design quality can make an important contribution to the future health of city and town centres. The Guidelines are therefore accompanied by a Retail Design Manual, which sets out the key principles of urban design, which should form the framework for policies to promote quality design in Development Plans and Local Area Plans. The Manual sets out key principles of urban design under a number of headings, for example, design, context and character, access and connectivity, density and mixed use and utilises case studies to demonstrate the application of the principles.

Investing for Growth and Jobs: Infrastructure Investment Priorities 2010 – 2016

Changes in the Irish economy since 2008 required a revised approach to the Public Capital Investment Programme (i.e. the National Development Plan). Under the revised programme the Government has prioritised investment in productive and employment supporting sectors, including enterprise and innovation, education, public transport and environmental services.

The Investment Programme sets spending within a sustainable budgetary and economic framework and provides a financial and policy structure for the Government departments and implementing agencies to rollout programmes and projects. The Programme notes the reduction in employment in particular sectors including retail and the loss of revenue through taxation.

Leitrim County Council contends that aspects of the retail function of Carrick-on-Shannon are more akin to a tier 3 ‘District Centre’ retail function, particularly when considering the current extent of retail floorspace within the Carrick-on-Shannon and Cortober areas of the town. It can also be contended that the towns of Ballinamore and Manorhamilton provide retail services akin to a tier 4 settlement in the national retail hierarchy, albeit without the relevant urban population, but with sizeable ‘retail catchments’.

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Local Government and Regional Government Reform

This recently unveiled Local and Regional Government reform measure, contained within the reform programme ‘Putting People First: Action Programme for Effective Local Government’ (2012) is intended as a comprehensive mechanism for the reform of Local Government in Ireland. Local and regional bodies are involved in the development and implementation of policies and the provision of funds which are designed to give effect to the strategic goals of the NSS.

The establishment of three Regional Assemblies, as well as the amalgamation of a number of Local Authorities, as set out in Putting People First, is hoped to have an important impact in relation to the delivery of services and funding and the creation of policies in support of individual Gateways.

The three new assemblies will be as follows:

1. Southern Region Assembly, which will evolve from the existing Southern and Eastern Regional Assembly (consisting of Munster and the south-east counties of Carlow, Kilkenny and Wexford);
2. Eastern and Midland Region Assembly, which will be newly established (consisting of the province of Leinster other than the south-east counties in the Southern Region);
3. Connacht-Ulster Region Assembly, which will evolve from the existing Border, Midland and Western Regional Assembly (consisting of the province of Connaught and the counties along the Border with Northern Ireland other than County Louth).

These Assemblies will assume all of the responsibilities previously held by the eight Regional Authorities. Within the context of the NSS, this means that these Assemblies will now be responsible for the delivery and administration of regional and economic strategies, including the continued management of EU Regional Operational Programmes, all of which will be influential in the future development of the designated Gateway and Hubs, as well as the continuing implementation of the RPGs, which will run until 2016, pending their replacement by the new regional strategies mentioned above, the preparation of which will commence in 2014/15.

Smarter Travel – A Sustainable Transport Future; A New Transport Policy for Ireland 2009-2020

*Smarter Travel - A Sustainable Transport Future* (2009) is the transport policy for Ireland for the period 2009-2020. It recognises the vital importance of continued investment in transport to ensure an efficient economy and continued social development, but also promotes more sustainable transport modes such as walking, cycling and public transport. A key action of the guidelines is a general restriction on the development of out-of-town retail centres except in exceptional circumstances and consideration of a similar requirement that parking charges be introduced for most existing centres.


The Council will have due regard to the *Design Manual for Urban Roads and Streets* recently released, outlining means for promoting sustainable forms of transport. The Manual aims to achieve a better balance in how urban roads and streets are designed and used through a multi-disciplinary approach (planning/engineering/architecture). Implementation of ‘self-regulating’ streets is supported in the Design Manual, including provisions for reducing vehicular speeds by influencing driver behaviour through design measures, allowing for exceptional/infrequent vehicular movements and
allowing for more efficient use of urban space. The Manual also supports proposals to increase permeability and connectivity within existing and proposed communities, particularly for pedestrians and cyclists. Of note for this Retail Strategy, the Manual suggests that within town centre environments measures should be introduced that will enable a more attractive and accessible shopping environment, which will create increased footfall. Whilst accepting the major urban design benefits supported by the Manual and the aspiration for reducing the dominance of cars in our town centres, in order for the aims of the Manual to be realised, significant funding is required.

### 2.1.2 Regional Policy Context

**Border Regional Planning Guidelines, 2010-2022**

The *Border Regional Planning Guidelines, 2010-2022* formulate public policy for the region covering Leitrim, Sligo, Donegal, Monaghan, Cavan and Louth, integrating land-use, transport, economic growth, investment and the environment. The Guidelines are set within the context and framework of the NSS, and highlight that the retail sector is “a significant sector within the Region that will experience cycles due to currency differentials, but with improved diversity through the development of retailing in key centres, there is potential for more sustainable jobs” (p. 68).

The *Regional Planning Guidelines* were published in 2010 and highlighted that the retail sector had grown significantly over the period 1998-2008, representing 14.7% of those employed in the Border Region as a whole.

That Guidelines outline that in order to address retail leakage to Northern Ireland, the retail sector in the Border Region will require a regional approach, possibly by the development of a Regional Retail Strategy. The *Regional Planning Guidelines* include the following policies with respect to the retail sector:

- **ESP14** Direct new retail floor space into Gateways and Hubs and those centres selected for additional population growth. Future provision of significant retail developments within the Border Region should be consistent with the policies and recommendations of the DEHLG Retail Planning Guidelines for Planning Authorities

- **ESP15** Develop a Regional Retail Planning Strategy in accordance with National Retail Planning Guidelines” (p. 83).

The Guidelines require Planning Authorities reviewing Development Plans to consider the following in developing retail planning policy within constituent counties:

- DoEHLG Retail Planning Guidelines, January 2005 (and any subsequent guidance);
- Retail policy as part of wider town centre management issues;
- Retail vacancies both within town centres and outside town centres” (p. 83).

**Regional Strategic Framework for the Irish Central Border Area 2013-2027**

Irish Central Border Area Network (ICBAN) has prepared a non-statutory regional strategy, which sets out a workable structure for the Region to identify investment priorities for the next 15 years.

The RSF identifies four action priorities for developing the assets of the Central Border Region:

1. Smart and Internationally Competitive – Development of intellectual and enterprise assets.
2. People-Centred and Inclusive - Development of people, skills and organisational assets.
3. Sustainable - Development and protection of natural assets.
4. Accessible and Connected - Development of physical assets.

This RSF can assist in suggesting and identifying potential opportunities for further consideration and development by stakeholders. The Strategic Framework notes the important role played by the retail sector particularly in employment numbers and also the fact that "[t]he above-average proportion of older persons indicates a strong potential demand for older person’s services, disability services and care, and niche retail outlets, and a need for additional resourcing to enable retention of rural provision" (p. 20).

2.1.3 Local Policy Context

At the local level, the plans and strategies that have an influence, or will have an influence on the Retail Strategy, are:

Statutory Plans
- Leitrim County Development Plan 2009-2015 (as varied)
- Draft Leitrim County Development Plan 2015-2021
- Carrick-on-Shannon Local Area Plan 2010-2016 (as varied)

Urban Framework Plans
- Ballinamore Urban Framework Plan
- Dromahaire Urban Framework Plan
- Drumkeeran Urban Framework Plan
- Drumshanbo Urban Framework Plan
- Mohill Urban Framework Plan
- Manorhamilton Urban Framework Plan

Non-Statutory Plans/Guidelines
- Carrick-on-Shannon 2020 Vision (2013)

Leitrim County Development Plan 2009-2015 (as varied)

The County Development Plan came into effect in February 2009 and provides a framework for development and planning in the County for the 2009-2015 period. The County Development Plan seeks to establish a framework for the future development of the County as a thriving rural community, with a beautiful, clean environment, a rich and varied heritage and a vibrant and diverse social, cultural and economic life. The Plan includes accompanying maps detailing land-use zoning objectives for selected towns, villages and other settlement centres within the County. In July 2011 the Development Plan was varied to incorporate a Core Settlement Strategy for the County and to update proposals in respect of preferred arterial routes.
The County Development Plan included a retail settlement hierarchy broadly similar to that presented in the Retail Strategy 2002, but with some alterations to the lower-tier settlements (Tier 4 – Rural Villages/Shops). The retail hierarchy proposed was broadly similar to the settlement hierarchy proposed for the County in the Development Plan.

The Development Plan included a host of retail policies and objectives, which had emerged as part of the preparation of the Retail Strategy covering the 2009-2015 period. Policy guiding the location and scale of retail development in particular was incorporated into the Development Plan, including the following policies:

**Policy 6.5a** It is the Policy of the Council to confirm and maintain the County’s retail hierarchy as detailed in the Retail Strategy for Leitrim.

**Policy 6.5b** It is the Policy of the Council to assess all large scale retail applications against the criteria set down in the Retail Strategy for Leitrim and the Retail Planning: Guidelines for Planning Authorities, 2005.

**Policy 6.5c** It is the Policy of the Council to protect and reinforce the existing retail centres and direct retail development to serviced areas.

**Policy 6.5d** It is the Policy of the Council that the preferred location for large scale retail developments is in town centres, and that alternative locations may only be considered in accordance with the ‘Sequential Test’ as required under the Retail Planning Guidelines 2005 as published by the DoEH&LG.

Leitrim County Development Plan 2015-2021

It is expected that this Retail Strategy will inform the retail policy contained within the County Development Plan for the 2015-2021 period. Likewise the County Development Plan 2015-2021, currently at draft stage, will inform aspects of the Retail Strategy, including appropriate locations for retail development and the retail hierarchy.
Carrick-on-Shannon Local Area Plan 2010-2016 (as varied)

The Local Area Plan for Carrick-on-Shannon was informed by the County Development Plan 2009-2015, which sets out policies and objectives for the planning of the County town. The Local Area Plan came into effect in June 2010 and was subsequently varied in July 2011 to also include a Core Settlement Strategy and revised preferred arterial routes.

The Local Area Plan states that "[w]ith regard to determining the suitability of retail developments, applications will be assessed having due regard to the current County Retail Strategy and the Retail Planning Guidelines for Planning Authorities" (p. 26). Policy particularly guiding the location and scale of retail development has been incorporated into the Local Area Plan including:

**Policy 6.1f** It is the policy of the Council to encourage the development and consolidation of the retail function of the town core and expand the range of retail facilities on offer, in accordance with the County Retail Strategy. The Council will have regard to the County Retail Strategy and the Planning Retail Guidelines when considering retail development proposals in town centre, edge of town and out of town locations.

**Policy 6.1o** It is the policy of the Council to encourage the development of a retail and/or business identity for the town in order to attract new niche retail and other business developments to the town centre.

**Policy 6.1p** It is the policy of the Council to encourage the maximisation of use of all available public and private infrastructure including retail and workspace, as a means to secure the further development of the town core.

**Objective 6.2a** It is an objective of the Council to carry out a retail floorspace survey of the town.

**Objective 6.2c** It is an objective of the Council to encourage the use of all available retail and workspace within the town.

The Local Area Plan provides details for managing retail development including aspects pertaining to shopping centres, petrol-filling stations, amusement arcades, hot-food take aways, nightclubs and shopfront designs. The Plan notes that the “[t]he town had a thriving and vibrant Main Street and Bridge Street as the principal shopping area. The Council will support further investment in retail facilities in the town centre, in accordance with its retail strategy, in order to stimulate competition, re-capture the attractiveness of the town centre as a retail centre and minimise leakage of consumer spending outside the county” (p. 47).

Carrick-on-Shannon 2020 Vision

Leitrim County Council commissioned the preparation of ‘Carrick-on-Shannon 2020 Vision’, a Strategy to guide Carrick on Shannon’s economic, social and cultural development to 2020. Within this Strategy, the retail sector is expected to form a vital element in the success of the town. From the outset, the Vision statement notes that ‘small independent retailers’ are a key strength to the town. The Vision document was subject of consultation with an array of local interest groups including those with local knowledge and insight of business dynamics and performance. The strategy document notes the following in relation to the retail performance of the County town:

“While the traditional town centre has suffered a decline in trading over the past decade there has been a wider retail draw to the town primarily due to two strategically located retail parks on both, the Dublin road and Sligo road respectively. While these ‘large box’ retail formats have elevated Carrick on
Shannon to a regional retail centre it is perceived by some that they have impacted on the vibrancy and viability of the town core. There has been a gradual disimprovement in the occupancy levels and rental rates of premises on Main St, in particular, and a relocation of some prominent businesses to the out of town centres.

On the upside there is a key opportunity to draw from this bigger pool of shoppers into the town centre for a more atmospheric retail and leisure experience. Meeting this ‘connected’ objective will be key to regenerating the town centre in the coming years” (p. 8).

Whilst the Retail Planning Guidelines suggest that Carrick-on-Shannon is located within Tier 4 of the national retail hierarchy, the information emerging suggests that its performance is more akin to a Tier 3 ‘Sub-regional’ retail function. It is also important to note that the Strategy recognises shifts in the geographical performance of the town.

A strategic objective from the vision relating to retail emerged, as follows: -

“SO3: Develop a unique retail experience to further develop the town centre and attract ‘add-on’ footfall from out-of-town Centres” (p. 13)

The Vision refers to a number of objectives required in order to achieve the above quoted Strategic Objective (SO3). The Vision seeks to achieve an attractive and accessible town centre with a high-quality offering in hospitality, food and speciality shopping.

Considering the above, this suggests that in order to support the vitality and viability of Carrick-on-Shannon town centre, the Retail Strategy should be looking towards measures to restrict further out-of-town centre development, in favour of measures to improve the attractiveness of the town centre for retailing, in particular speciality shopping and to support implementation of a number of urban improvement and connectivity measures.


These Council Guidelines require a high standard of shopfront design and advertising displays. The Guidelines support maintaining existing traditional shopfronts, where possible, especially in town centres. The Council will encourage good shopfront design, either of traditional or modern design, provided that they are constructed from appropriately robust materials and are in scale and proportion to the building and neighbouring buildings. The design must be approached in an integrated way, including signage, advertising and lighting.

Building and plot divisions should be retained externally, even when the internal divisions have been removed.

2.2 Consideration of Retail Policy

The proposals in these documents must be viewed in the context of the overall aim of Government retail planning policy, which “is to ensure that the planning system continues to play a key role in supporting competitiveness in the retail sector for the benefit of the consumer in accordance with proper planning and sustainable development” (Retail Planning Guidelines 2020, p. 2).

Leitrim County Council as the Planning Authority will seek to implement the measures outlined in national retail policy in so far as needs dictates and resources permit. It is Council policy to provide a quality retail environment and opportunities, having regard to the requirements and views of the various sectors in the retail market whether on the supply or demand side. In particular, it is Council policy to look at measures to
improve the performance of the retail sector in Leitrim considerate of the market context and the strengths and weaknesses of the County.

3. **Aim of the Retail Strategy**

The aim of the Strategy is to ensure that future retail and town and village development in the County is accommodated in a manner that is efficient, equitable and sustainable.

The purpose of the Retail Strategy is to implement the objectives of the *Retail Planning Guidelines*. The Retail Strategy considers in particular the following:

- Confirmation of the retail hierarchy, the role of centres and the size of the main centres in the County;
- Definition of the boundaries of the core shopping area (town centre area);
- An assessment of the requirement for additional retail floorspace;
- Strategic guidance on the location and scale of retail development;
- Preparation of polices and action initiatives to encourage the improvement of town centres;
- New and emerging retail trends, best land-use planning practice and changes in national policy and market shifts;
- Population growth based on the 2011 Census and predicted trends set out in the *Border Regional Planning Guidelines 2010-2022*;
- The impact of major retail development in competing centres;
- Identification of criteria for the assessment of retail developments;
- Health-check assessments for ‘key’ and ‘support’ towns;
- Analysis and review of the *Leitrim County Retail Strategy 2009-2015* and using that study as a baseline, update and analyse the current situation and available information on the retail sector within the County including retail mix and vacancy rates for the key towns;
- Quantifying the anticipated need, if any, for additional floorspace requirements within the county, having regard to the anticipated population growth within the county up to the year 2021;
- Identifying the strengths, weaknesses, opportunities and threats to the retail sector with the county, focussing primarily on the key towns and proposing strategies to capitalise on strengths and opportunities, while minimising or removing identified threats and weaknesses;
- Devise policies aimed at promoting retail developments that are easily accessible and avoiding locations based solely on single-purpose car journeys;
- Identifying the extent and causes of trade leakages to other centres outside the county and make recommendations that will seek to reduce and/or eliminate these leakages;
- Identifying the extent of the retail catchment areas, including existing and potential population of these for the key towns;
- Making recommendations on policy and actions required to address changing trends in retailing as they might affect the towns of County Leitrim;
- Making recommendations on policy and actions aimed at preserving existing independent retailers within the town centre core areas;
- Recommendations for additional and/or revised policies and actions aimed at encouraging retail developments, while protecting town centre areas.
3.1 **Methodology**

In order to establish the baseline data for the retail study, it was necessary to undertake a number of qualitative and quantitative surveys. These included:

1) Review and Update of the Unit Survey contained within the 2009 Retail Strategy for County Leitrim;

2) Undertake a Unit Survey floor area analysis for convenience, comparison and ‘bulky goods’ (retail warehouse) units within the County;

3) Survey of vacant units within each of the identified towns;

4) Consultation with key stakeholders.

A brief description of each of the surveys carried out, identification of the methodology utilised in undertaking the surveys and the key survey results are set out below. Details of the survey of vacant units within each of the main towns of the County are set out within Section 5.4.6 of the Retail Strategy.

3.1.1 **Unit Survey**

The previous Retail Strategy for Leitrim, which was prepared in 2000, set out a breakdown of existing unit types within the County, but did not provide a breakdown of convenience, comparison and retail warehousing floorspace. The data collated in 2008 Strategy has been updated and reviewed in the preparation of the current retail strategy by Leitrim County Council. The Council’s Planning Register was utilised to determine the extent of retail floorspace that has been permitted since the 2008 Retail Strategy for the County.

It should be noted that for the purpose of this study, the floor areas relate to the net retail floor area, as defined in the Retail Planning Guidelines, 2012:

“The area within the shop or store which is visible to the public and to which the public has access including fitting rooms, checkouts, the area in front of the checkouts, serving counters and the area behind used by serving staff, areas occupied by retail concessionaires, customer service areas, and internal lobbies in which goods are displayed, but excluding storage areas, circulation space to which the public does not have access to, cafes, and customer toilets” (p. 52).

Therefore, any ancillary spaces such as offices, store rooms etc. are excluded from the net floorspace figure. Where register information detailed the gross floor area of a development, the net floor area of the development was estimated based on the nature of the retail floorspace proposed.

Annex 1 of the Retail Planning Guidelines, 2012 provides clear guidance on how to classify convenience, comparison and bulky goods. The floorspace survey undertaken as part of this Retail Strategy categorised the different retail units in accordance with the definitions, as set out within the Retail planning Guidelines 2012 and Appendix B to this Strategy.

While the ‘bulky goods’ category is listed under the classification of comparison floorspace above, it is considered appropriate to make a distinction within the Retail Strategy between pure comparison floorspace and ‘bulky’ household goods.

Goods generally sold from retail warehouses where DIY goods or goods such as flat pack furniture are of such a size that they would normally be taken away by car and not be portable by customers travelling by foot, cycle or bus, or that a large area would be required to display them, for example, repair and maintenance materials; furniture and furnishings; carpets and other floor coverings, household appliances, tools and equipment for the house and garden, bulky nursery furniture and equipment including
perambulators, bulky pet products such as kennels and aquariums, audio visual, photographic and information processing equipment, catalogue shops and other bulky durables for recreation and leisure.

Floorspace figures have been calculated with additional reliance from visual inspections, supplemented by remote sensing using aerial photography and information contained within the Council’s Planning Register.

### 3.1.2 Consultation

Following preparation of the initial draft Retail Strategy for the 2015-2021 period, various interested stakeholders were contacted directly by Leitrim County Council to inform them that the Draft Retail Strategy had been prepared and to offer the opportunity to make comment. Public meeting were held in Carrick on Shannon, Ballinamore and Manorhamilton, however attendance at these meetings was very low.

It was recommended in the Manager’s Report (June 2014) that the retail section in the Draft Plan should be replaced by a significant section extracted from the Draft Retail Strategy. Such an amendment to *Draft Leitrim County Development Plan 2015 – 2021* (Draft CDP) was considered as a Material Alteration in terms of legislative requirements. Having regard to the foregoing it was decided to place the Draft Retail Strategy on public display alongside the proposed Material Alteration to the Draft CDP and invite submissions/observations.

Responses received during this consultation have been taken into consideration in the making of the Development Plan.
4. Retail Context & Trends

In setting out the Retail Strategy for the County, it is important to assess the economic context relevant to the retail sector at a national, regional and local level, as current and projected economic growth can have a significant effect on factors, such as expenditure change and thus on the nature and quantum of retail development that occurs.

This section of the Strategy considers the national, regional and local context for the retail sector. This section also sets out recent trends in retailing in Ireland, which will have an influence on future development. Retail trends are intrinsically linked to the economic context.

Sources for this section include the Central Statistics Office (CSO) publications, most notably the 2011 Census of Population and the Retail Sales Index, ESRI publications such as Quarterly Economic Commentary (Autumn 2013), the National Spatial Strategy, the Retail Planning Guidelines (2012), and the Regional Planning Guidelines for the Border (2010 – 2022). The information relating to retail trends is sourced from a combination of in-house experience in retail development and a review of the relevant planning policy context.

4.1 National Context

4.1.1 Economic Performance

According to the ESRI (2013), over the past 20 years Ireland has experienced a strong economic expansion followed by a sharp economic contraction. The Irish economy enjoyed an exceptional period of growth from 1994 through to 2007. It resulted in the standard of living in Ireland, measured as Gross Domestic Product (GDP) or Gross National Product (GNP) per head, rising above the average for the European Union (EU) in the late 1990s and the early years of the 2000s. However, the result of the crisis has been to reduce GNP per head to slightly below the average for the EU. Ireland’s economic difficulties have been compounded by global difficulties in the financial markets, which emerged in 2007.

With the decline in economic growth, came a decline in employment. From a peak of 2.1 million persons employed in 2007, an increase of 75% from 1990 and averaging a low unemployment rate of 4.5% in 2007, the unemployment rate stood at 15.1% in February 2012 and in February 2013 stands at 11.9% of the population.

The ESRI Quarterly Economic Commentary of Autumn 2013 states the following in relation to recent and future economic outlook:

“The economy returned to significant growth in 2012 and we expect that growth in GNP will accelerate this year [2013] and next [year - 2014]” (ESRI, 2013a).

4.1.2 Retail Performance

Recent CSO figures released relating to retail sales show the performance of the various retail sectors using 2005 as a base year. This indicates that ‘Non-specialised Stores (excluding Department Stores)’ and the Fuel sectors had increased value in sales over 2005 figures, whilst the volume of sales was up for ‘Non-specialised Stores (excluding Department Stores)’, ‘Department Stores’, ‘Pharmaceutical, Medical &

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3 The Gross Domestic Product is the market value of goods and services produced in a year.
4 The Gross National Product is the value of all the goods and services produced in an economy, plus the value of the goods and services imported, less the goods and services exported.
Cosmetic Articles', 'Clothing, Footwear and Textiles' and the 'Electrical Goods' sectors. The volume of sales in the 'Motor Trades', Furniture & Lighting', 'Books, Newspapers & Stationery' and 'Bars' has significantly reduced since 2005. The performance of these sectors will have significant implications for retail planning and it is important that the Planning Authority is cognisant of shifts in the performance of the various retail sectors as planning policy will need to be aligned to account for same.

According to (October 2013) Europe-wide research from property consultants, Jones Lang LaSalle and the Oxford Economics Study, Ireland's retail market is no longer wallowing and the forecast for Ireland is for retail growth in 2013 beating most of Europe (Jones Lang LaSalle, 2013). Figure 4-1 below shows the forecasted performance in retail sales within Europe over the period 2013-2015 and highlights an anticipated 1.2% retail sales increase for Ireland.

**Figure 4.1 Retail Sales Change Forecast in Europe, 2013-2015**

Research from March 2014 investigating the performance of convenience shopping in Ireland has highlighted that 88.5% of the market share is held by the multiples; Tesco (27.6%), Dunnes Stores (23.3%), SuperValu (25.3%), whilst the 'discount supermarkets' Aldi (6.1%) and Lidl (6.2%) continue to increase their share (Kantar Worldpanel Ireland, 2014).

### 4.2 Regional Context

Between 2002 and 2006 the population of County Leitrim showed a significant increase in population of 12.2%, outstripping the 8.3% increase experienced in the Border Region and the 8.2% increase experienced in the State as a whole.

Over the 9-year period, 2002 to 2011, the population of the County recorded an increase of 23.3% compared to population increases of 19% and 17.1% respectively for the Border Region and the State. Recent population statistics clearly show the pace of population growth in the County is above that occurring at regional and state levels (as shown in Table 4-1). Population increase over the 1996-2006 period was based on immigration to the County, and without this the population over the 1996-2002 period would have declined, as the death rate exceeded the birth rate.
The Border Regional Planning Guidelines 2010 – 2022 estimate that the population of the border region is set to increase from an estimated 492,500 in 2008 to 552,700 in 2016 and 595,000 in 2022. As demonstrated by Table 4-2 below, this anticipated growth rate is slightly below the State average and also equal to the increase anticipated within County Leitrim. We note that Carrick-on-Shannon is expected to undergo considerable population increase over the 2010-2022 period.

### Data Sources:
CSO, Census of Population 2011 & Border RPGs 2010-2022

With regards to retail performance, Experian (2008) has provided a ranking of retail centres in Ireland based on comparison retail spend. This shows that Sligo served as the main comparison retail centre in the Border region and 21st overall in the countrywide rating survey. Carrick-on-Shannon was placed 10th in the ranking of comparison retail centres in the Border region (see Table 4-3), with an annual comparison spend of circa €39 million.

Similar retail ratings have not since been updated or published by Experian or another organisation. It would be expected that the comparison retail offering of many centres will have decreased during the recessionary period following the ranking in 2008 and the ranking of smaller towns like Ballyshannon and Dungloe in Donegal will have been impacted more so than the larger towns, which also have a sizeable convenience retail offering.
4.3 County Profile

Within this section of the Retail Strategy, an analysis of the population is undertaken primarily based on CSO data. By analysing this data it is hoped that a better understanding of the retail customer base can be achieved, as this will have implications in the future development of the retail and services industry in the County. An analysis of retail activity in the County is undertaken in Section 5 of this Strategy Report.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Carrick-on-Shannon</td>
<td>2,595</td>
<td>3,314</td>
<td>27.7%</td>
</tr>
<tr>
<td>Ballinamore</td>
<td>805</td>
<td>889</td>
<td>10.4%</td>
</tr>
<tr>
<td>Drumshanbo</td>
<td>665</td>
<td>857</td>
<td>28.9%</td>
</tr>
<tr>
<td>Manorhamilton</td>
<td>1,158</td>
<td>1,336</td>
<td>15.4%</td>
</tr>
<tr>
<td>Mohill</td>
<td>931</td>
<td>928</td>
<td>-0.3%</td>
</tr>
<tr>
<td>Carrigallen</td>
<td>303</td>
<td>384</td>
<td>26.7%</td>
</tr>
<tr>
<td>Dromahair</td>
<td>503</td>
<td>748</td>
<td>48.7%</td>
</tr>
<tr>
<td>Dromod</td>
<td>210</td>
<td>432</td>
<td>105.7%</td>
</tr>
<tr>
<td>Drumkeeran</td>
<td>249</td>
<td>252</td>
<td>1.2%</td>
</tr>
<tr>
<td>Kinlough</td>
<td>690</td>
<td>1,018</td>
<td>47.5%</td>
</tr>
<tr>
<td>Leitrim</td>
<td>258</td>
<td>485</td>
<td>88%</td>
</tr>
<tr>
<td>Tullaghan</td>
<td>216</td>
<td>228</td>
<td>5.6%</td>
</tr>
<tr>
<td>Countryside</td>
<td>20,367</td>
<td>20,927</td>
<td>2.7%</td>
</tr>
<tr>
<td>County Leitrim</td>
<td><strong>28,950</strong></td>
<td><strong>31,798</strong></td>
<td><strong>9.8%</strong></td>
</tr>
</tbody>
</table>

The population of County Leitrim continued to grow at a rate of 9.8% over the 2006-11 inter-censal period, compared with neighbouring County growth rates of 9.0%, 7.4% and 14.3% for Roscommon, Sligo and Cavan over the same period.
Over the 2006-2011 period, the level of change in population in the main settlements serving Leitrim was quite disparate. Whilst smaller villages such as Dromod and Leitrim experienced 105.7% and 88% respective population increases, the urban population of Mohill and Drumkeerin remained almost stagnant. This information provides an insight into how the urban settlements within the County performed during recessionary times and should also serve as a guide to formulation of retail related policy.

**Figure 4-2** Population Change in Leitrim County Main Settlements, 2006-2011

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Carrick-on-Shannon</td>
<td>2,586</td>
<td>2,398</td>
</tr>
<tr>
<td>Ballinamore</td>
<td>3,314</td>
<td>3,112</td>
</tr>
<tr>
<td>Drumshanbo</td>
<td>1,158</td>
<td>1,098</td>
</tr>
<tr>
<td>Manorhamiltan</td>
<td>1,158</td>
<td>1,098</td>
</tr>
<tr>
<td>Mohill</td>
<td>1,158</td>
<td>1,098</td>
</tr>
<tr>
<td>Carrigallen</td>
<td>1,158</td>
<td>1,098</td>
</tr>
<tr>
<td>Dromahair</td>
<td>1,158</td>
<td>1,098</td>
</tr>
<tr>
<td>Dromod</td>
<td>1,158</td>
<td>1,098</td>
</tr>
<tr>
<td>Drumkeerin</td>
<td>1,158</td>
<td>1,098</td>
</tr>
<tr>
<td>Killoe</td>
<td>1,158</td>
<td>1,098</td>
</tr>
<tr>
<td>Leitrim</td>
<td>1,158</td>
<td>1,098</td>
</tr>
<tr>
<td>Tullaghban</td>
<td>1,158</td>
<td>1,098</td>
</tr>
</tbody>
</table>

Data Sources: CSO, Census of Population 2006 & 2011

### 4.3.1 Age Profile

Population pyramids are beneficial in providing a brief illustration of the age distribution of the population, and can be utilised to identify the characteristics of geographic areas. Wider bands on the pyramids identify those ages with greatest numbers and the thinner bands represent those ages with least population. Population pyramids can also show where imbalances appear between male and female genders. An orthodox age distribution would be reflected in a perfectly symmetrical pyramid shape, with population reducing with age.

The Age Profile for Carrick-on-Shannon, County Leitrim, the Border Region and the State is illustrated in Figure 4-5, and this shows how the population in Leitrim compares to national and regional trends. The population at a regional level is much more in line with the national trends with a pronounced dip in persons within the 15-24 age category.

It is evident that a large proportion of the population for the County is within the young (0-14 years) and old (65 years and above) age-dependent categories. In fact, in 2011 Leitrim County had the largest proportion of its County population in these age categories compared to other counties. The dip in persons aged within the 15-24 age category is even more pronounced within County Leitrim in comparison with regional and state figures, indicating high levels of emigration from Leitrim in these age categories.
In comparison to the other geographic areas, the age profile for Carrick-on-Shannon (including the Roscommon side) is significantly different. A high proportion of the urban population is contained within the formative family age categories (25-44 years). This also shows that in 2011 there was a significant increase in the number of infants, whilst there was a sizeable portion of the town’s population in the female 25-34 age category (12.7% of the population).

4.3.2 Distribution of the Population

According to the CSO, in 2011 Leitrim was the most rural county in the country with almost 90% of the population living in a rural setting, followed by Galway County (77.4%), Roscommon (74%), Donegal (72.5%) and Mayo (71%). The largest proportion of the population within County Leitrim is centred upon the main settlements serving the County, including Carrick-on-Shannon, Manorhamilton, Dromahair, Mohill, Drumshanbo, Kinlough and Ballinamore. The greatest pressure for housing within the County is experienced within those areas proximate to the main urban centres inside and outside the County. Areas in the County with least housing vacancy are generally those under greatest influence of urban centres, such as areas proximate to Sligo, Carrick-on-Shannon and Longford.
Whilst the population of Leitrim has grown over the 2006-2011 period, this growth has not been spread evenly and some areas within the County experienced population decline (see Figure 4-4). Areas that experienced the greatest population increase (100% to 350%) were generally suburban areas in Manorhamilton and Carrick-on-Shannon and small villages along strategic roads corridors serving the County, for example, Dromod. Other areas that experienced a reasonable increase were noted to be in areas under greatest influence of urban centres. The greatest population decline (at small area level) was not solely associated with rural areas, as some urban areas experienced significant population loss, including parts of Manorhamilton, the northside of Carrick-on-Shannon, Ballinamore town centre, Mohill town centre and the east side of Drumshanbo. Rural areas that experienced the greatest decline in population were generally in isolated areas, such as Glenade, Yugen, Belhavel and Aghnacashel.

The demographic performance of the County will give an indication of where the County is experiencing development pressure and this will therefore have an implication in terms of development policy, including retail policy. Retail policy will need to be aligned to best serve expanding areas, whilst attempting to curtail loss of services within areas of decline.
4.3.3 Economic Status

The table below shows the number and percentage of people in County Leitrim and the State in terms of their social class based on ‘Principal Economic Status’. In 2011 County Leitrim had a slightly below average percentage of persons ‘at work’ based on State figures. Furthermore, compared to the State average in 2011, Leitrim has a higher percentage of ‘retired’ persons and a lower percentage of persons ‘unemployed having lost or given up a previous job’. This is reflective of a high proportion of the population being in the ‘old-age dependent category’ and the high levels of emigration of young adults from the County.

Figure 4-5 Population aged 15 years and over by Principal Economic Status in County Leitrim in 2011

<table>
<thead>
<tr>
<th>Principal Economic Status</th>
<th>Leitrim</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No.</td>
<td>%</td>
</tr>
<tr>
<td>At work</td>
<td>11,972</td>
<td>48.0</td>
</tr>
<tr>
<td>Looking for first regular job</td>
<td>207</td>
<td>0.8</td>
</tr>
<tr>
<td>Unemployed having lost or given up previous job</td>
<td>2,840</td>
<td>11.4</td>
</tr>
<tr>
<td>Student</td>
<td>2,291</td>
<td>9.2</td>
</tr>
<tr>
<td>Looking after home/family</td>
<td>2,343</td>
<td>9.4</td>
</tr>
<tr>
<td>Retired</td>
<td>3,907</td>
<td>15.7</td>
</tr>
<tr>
<td>Unable to work due to permanent sickness or disability</td>
<td>1,217</td>
<td>4.9</td>
</tr>
<tr>
<td>Other</td>
<td>142</td>
<td>0.6</td>
</tr>
<tr>
<td>Total</td>
<td>24,919</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Data Source: CSO, Census of Population 2011

4.3.4 Occupation

The largest employment sectors in Leitrim included those working in ‘Human Health and Social Work’, ‘Wholesale and Retail Trade’ and ‘Agricultural, Fishing & Forestry’. Notably the ‘Agricultural, Fishing & Forestry’ sector and ‘Human Health and Social Work’ sector of occupation were well above the State average. Other categories of occupation notably above the State average include ‘Public Administration’ and ‘Construction’ sector workers.

Occupation in categories such as ‘Professional, Scientific and Technical Workers’, and ‘ICT Service Workers’ and ‘Manufacturing’ are marginally below State averages.

On the basis of the ‘categories of occupation’ information emerging from the Census data, this would suggest that County Leitrim has a significant reliance on rural-based activities, a relatively thin manufacturing base and an underperforming retail function relative to overall population.

Over the inter-censal period 2006 to 2011, the number of persons employed in ‘Building & Construction’ in the County declined by 1,328 no. persons, in contrast to an increase of 754 no. persons employed in ‘Professional Services’. There have been significant reductions in those employed within the ‘Manufacturing Industries’ and in ‘Commerce and Trade’. The ‘Agricultural, Fishing and Forestry’ sector, the ‘Communications and Transport’ sector and the ‘Public Administration’ sectors all experienced marginal net gains in employment figures within Leitrim during 2006-
2011. Overall there was a net decrease of 697 persons employed within the County, compared to an increase of 1,245 no. persons employed during the 2002 to 2006 period.

<table>
<thead>
<tr>
<th>Employment Category</th>
<th>Leitrim No.</th>
<th>Leitrim %</th>
<th>State No.</th>
<th>State %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agricultural, Fishing &amp; Forestry</td>
<td>1,194</td>
<td>10.0</td>
<td>91,526</td>
<td>5.1</td>
</tr>
<tr>
<td>Mining and Quarrying</td>
<td>77</td>
<td>0.6</td>
<td>5,339</td>
<td>0.3</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>993</td>
<td>8.3</td>
<td>183,692</td>
<td>10.2</td>
</tr>
<tr>
<td>Electricity, Gas, Steam etc.</td>
<td>60</td>
<td>0.5</td>
<td>11,328</td>
<td>0.6</td>
</tr>
<tr>
<td>Water Supply</td>
<td>80</td>
<td>0.7</td>
<td>9,444</td>
<td>0.5</td>
</tr>
<tr>
<td>Construction</td>
<td>643</td>
<td>5.4</td>
<td>87,371</td>
<td>4.8</td>
</tr>
<tr>
<td>Wholesale and Retail Trade</td>
<td>1,525</td>
<td>12.7</td>
<td>262,206</td>
<td>14.5</td>
</tr>
<tr>
<td>Transportation</td>
<td>315</td>
<td>2.6</td>
<td>77,999</td>
<td>4.3</td>
</tr>
<tr>
<td>Accommodation &amp; Food Services</td>
<td>734</td>
<td>6.1</td>
<td>103,549</td>
<td>5.7</td>
</tr>
<tr>
<td>ICTs</td>
<td>214</td>
<td>1.8</td>
<td>68,531</td>
<td>3.8</td>
</tr>
<tr>
<td>Financial &amp; Insurance</td>
<td>331</td>
<td>2.8</td>
<td>92,837</td>
<td>5.1</td>
</tr>
<tr>
<td>Real Estate</td>
<td>38</td>
<td>0.3</td>
<td>8,378</td>
<td>0.5</td>
</tr>
<tr>
<td>Professional, Scientific, Technical</td>
<td>439</td>
<td>3.7</td>
<td>92,868</td>
<td>5.1</td>
</tr>
<tr>
<td>Administrative &amp; Support</td>
<td>485</td>
<td>4.1</td>
<td>60,716</td>
<td>3.4</td>
</tr>
<tr>
<td>Public Administration</td>
<td>1,023</td>
<td>8.5</td>
<td>113,042</td>
<td>6.3</td>
</tr>
<tr>
<td>Education</td>
<td>1,117</td>
<td>9.3</td>
<td>167,290</td>
<td>9.3</td>
</tr>
<tr>
<td>Human Health &amp; Social Work</td>
<td>1,557</td>
<td>13.0</td>
<td>197,343</td>
<td>10.9</td>
</tr>
<tr>
<td>Arts &amp; Recreation</td>
<td>173</td>
<td>1.4</td>
<td>30,663</td>
<td>1.7</td>
</tr>
<tr>
<td>Others</td>
<td>974</td>
<td>8.1</td>
<td>143,238</td>
<td>7.9</td>
</tr>
<tr>
<td>Total</td>
<td>11,972</td>
<td>100.0</td>
<td>1,807,360</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Data Source: CSO, Census of Population 2011

4.3.5 Education Attainment

The table below shows the level of educational attainment achieved by county Leitrim residents, compared to the State averages. The percentages are expressed in terms of the percentage of each category relative to the total population in County Leitrim and the State.

In 2011, 20.1% of Leitrim’s population had a third-level degree or higher qualification, compared to the 24.6% State average. This fact may well be largely down to the fact that the County experiences very high levels of out migration of young adults to Dublin and other third-level institute centres.

Figure 4-7 displays the geographical distribution per Electoral Division within County Leitrim of persons who have ceased full-time education and achieved a third-level postgraduate qualification. This shows a clear bias in concentration towards the west of the County in areas within greatest influence of the main urban centres and along the main strategic road routes.
Figure 4-6 Level of Education Achievement by Leitrim County Residents in 2011

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Leitrim No.</th>
<th>Leitrim %</th>
<th>State No.</th>
<th>State %</th>
</tr>
</thead>
<tbody>
<tr>
<td>No formal education</td>
<td>353</td>
<td>1.6</td>
<td>42,387</td>
<td>1.4</td>
</tr>
<tr>
<td>Primary</td>
<td>3,431</td>
<td>15.9</td>
<td>414,509</td>
<td>13.8</td>
</tr>
<tr>
<td>Lower secondary</td>
<td>3,832</td>
<td>17.8</td>
<td>499,489</td>
<td>16.6</td>
</tr>
<tr>
<td>Upper secondary</td>
<td>4,111</td>
<td>19.1</td>
<td>601,498</td>
<td>20.0</td>
</tr>
<tr>
<td>Technical/Vocational</td>
<td>2,068</td>
<td>9.6</td>
<td>258,697</td>
<td>8.6</td>
</tr>
<tr>
<td>Advanced Certificate/Completed Apprenticeship</td>
<td>1,275</td>
<td>5.9</td>
<td>171,925</td>
<td>5.7</td>
</tr>
<tr>
<td>Higher Certificate</td>
<td>1,064</td>
<td>4.9</td>
<td>135,122</td>
<td>4.5</td>
</tr>
<tr>
<td>Ordinary Bachelor Degree/Professional Qualification or both</td>
<td>1,534</td>
<td>7.1</td>
<td>221,977</td>
<td>7.4</td>
</tr>
<tr>
<td>Honours Bachelor Degree/Professional Qualification or both</td>
<td>1,534</td>
<td>7.1</td>
<td>271,301</td>
<td>9.0</td>
</tr>
<tr>
<td>Postgraduate diploma or degree</td>
<td>1,182</td>
<td>5.5</td>
<td>224,744</td>
<td>7.5</td>
</tr>
<tr>
<td>Doctorate (Ph.D)</td>
<td>76</td>
<td>0.4</td>
<td>21,970</td>
<td>0.7</td>
</tr>
<tr>
<td>Not stated</td>
<td>1,062</td>
<td>4.9</td>
<td>139,871</td>
<td>4.7</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>21,522</strong></td>
<td><strong>100.0</strong></td>
<td><strong>3,003,490</strong></td>
<td><strong>100.0</strong></td>
</tr>
</tbody>
</table>

Data Source: CSO, Census of Population 2011

4.3.6 Broadband Access

Access to the internet has been described as a ‘double edged sword’ for rural areas, offering opportunities for businesses to operate independent of location, but also providing opportunities for consumers to purchase goods and services from outside the local area. Any assessment of the retail sector in Leitrim will therefore have to be prepared mindful of the level of broadband and internet access.

Retailers are reliant on customers to maintain and expand their businesses. There are numerous examples of independent retailers within Leitrim that have identified means to supplement their existing ‘local’ business by utilising a web presence and engaging in online sales. Some of these retailers advertise this by including their web address on their shopfront.
Whilst broadband technology is generally defined as technology that allows connections to the internet at a minimum of 4 megabyte per seconds (mbps) download speeds and 1mbps upload speeds. Broadband technology provides speedy means of transferring information over telecommunication networks and it was become a vital component of information dependent business and for households accessing entertainment. The CSO Census form does not define what it considers broadband technology when questioning whether a household has access to broadband technology. Nevertheless, geographical analysis of the census results provides a firm indicative view of high-speed telecommunication usage within the County.

Figure 4-8 illustrates the variation that existed within the County in 2011 with respect to the proportion of households utilising broadband technologies. There is a clear concentration of broadband usage centred upon the main urban settlements including Dromahair, Manorhamilton, Ballinamore and Carrick-on-Shannon. Other high concentrations are notable along the N4 route, whilst Mohill has a comparatively low uptake of broadband technology compared to similar-size Leitrim towns. The availability of broadband technology is not evenly distributed and this is reflected in the fact that the more isolated parts of the County invariably have the least uptake of broadband technology.
Figure 4-8 % of Households with Broadband Access per Small Area in 2011

Map Source: AIRO Mapping

4.3.7 Population Projections

The future targets for population and households for Leitrim County are based on the target figures as set out in the Border Regional Planning Guidelines 2010 (Border RPGs), which in turn are based on CSO data. In 2010, the Border RPGs proposed a 2016 population target for Leitrim County of 31,942; this 2016 figure was only 144 persons more than the figure enumerated in Census 2011 for the County. Whilst growth patterns have departed slightly from the Border RPGs projections, this Strategy and the County Development Plan must continue to refer to the Border RPGs as a guide towards the future population for the County.
Table 4-6  Population Projections

<table>
<thead>
<tr>
<th>Year</th>
<th>Population</th>
<th>Population Added</th>
<th>Average Household Size</th>
<th>Households</th>
<th>Net Additional Households</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>30,600*</td>
<td>1,198</td>
<td>1.75</td>
<td>17,486</td>
<td>642</td>
</tr>
<tr>
<td>2011</td>
<td>31,798†</td>
<td>-</td>
<td>2.52†</td>
<td>18,128†</td>
<td>-</td>
</tr>
<tr>
<td>2012</td>
<td>32,070</td>
<td>272</td>
<td>2.49</td>
<td>18,237</td>
<td>109</td>
</tr>
<tr>
<td>2013</td>
<td>32,343</td>
<td>273</td>
<td>2.46</td>
<td>18,348</td>
<td>111</td>
</tr>
<tr>
<td>2014</td>
<td>32,616</td>
<td>273</td>
<td>2.43</td>
<td>18,461</td>
<td>112</td>
</tr>
<tr>
<td>2015</td>
<td>32,889</td>
<td>273</td>
<td>2.4</td>
<td>18,574</td>
<td>114</td>
</tr>
<tr>
<td>2016</td>
<td>33,162*</td>
<td>273</td>
<td>2.37</td>
<td>18,689</td>
<td>115</td>
</tr>
<tr>
<td>2017</td>
<td>33,585</td>
<td>423</td>
<td>2.34</td>
<td>18,870</td>
<td>181</td>
</tr>
<tr>
<td>2018</td>
<td>34,008</td>
<td>423</td>
<td>2.31</td>
<td>19,053</td>
<td>183</td>
</tr>
<tr>
<td>2019</td>
<td>34,431</td>
<td>423</td>
<td>2.28</td>
<td>19,239</td>
<td>186</td>
</tr>
<tr>
<td>2020</td>
<td>34,854</td>
<td>423</td>
<td>2.25</td>
<td>19,427</td>
<td>188</td>
</tr>
<tr>
<td>2021</td>
<td>35,277</td>
<td>423</td>
<td>2.22</td>
<td>19,617</td>
<td>191</td>
</tr>
<tr>
<td>2022</td>
<td>35,700*</td>
<td>423</td>
<td>2.19</td>
<td>19,811</td>
<td>193</td>
</tr>
<tr>
<td>Total</td>
<td>-</td>
<td>3,902</td>
<td>-</td>
<td>-</td>
<td>2,325</td>
</tr>
</tbody>
</table>

† CSO Census of Ireland 2011 Figure
* Border RPG Projection Figure

Data Sources: CSO, Census of Population 2011 & Border RPG 2010-22

The Border RPGs set the 2022 population target for the Leitrim County area at 35,700 no. persons and the Core Strategy to the Draft Leitrim County Development Plan 2015-2021 is based on this projection. Based on a reasonable assumption that the current average occupied household size of 2.52 persons will reduce in line with previous and national trends over the period of the Plan, we anticipate that this relates to a requirement for approximately 1,683 no. households over the period 2012-2021 or 967 households over the 2015-2021 Plan period (see Table 4-6).

Future population growth in the county will have a significant impact on the demand for retail services and on the type of retail development that is suitable for the county.

Considering the most recent projection figures referred to above and mindful that the population trends for the County have tended to mirror those of the Border Region, whilst also considering shifts in the age profile of the County, the total population figure of 35,277 for 2021 is considered realistic. Considering the importance of Carrick-on-Shannon as a ‘strategic driver of growth’ within the Border RPGs and population increase in the town over the period 1996 - 2011, it is likely that over one-third of the population increase will occur in Carrick-on-Shannon. The County Development Plan reflects this within its Core Settlement Strategy and any planning policy relating to retail development needs to be cognisant of this.

4.3.8 Income & Disposable Levels

Disposable income figures (per person) for Leitrim were below state averages in 2010, but above regional averages and adjoining counties, with the exception of Sligo, according to the CSO (2013a). Disposable incomes in the County had risen significantly between 1995 and 2004 (at 110.5%), greater than the rate of increase experienced by the State (at 106.6%) and that experienced by the Border Region (105.7%). Estimated disposable incomes rates continued to rise in the country and the County until 2008.

“Ireland is one of the countries most severely affected by the Great Recession. National income fell by more than 10 per cent between 2007 and 2012, as a result
of the bursting of a remarkable property bubble, an exceptionally severe banking crisis, and deep fiscal adjustment” (Callan et al, 2013, p.1).

The overall fall in income was just under 8% between 2008 and 2011, but the greatest losses were strongly concentrated on the bottom and top deciles of the population i.e. the richest and the poorest households. For the most part the incomes of the richest were very much effected by the net effect of changes in direct taxes, welfare and public service pay policies, whilst the impact on the incomes of the poorest were not policy-induced, but reflect the direct impact of the recession (ESRI, 2013, p. 14).

Table 4-7 Disposable Income Estimates, 2005-2010

<table>
<thead>
<tr>
<th></th>
<th>2005</th>
<th>2010</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leitrim County</td>
<td>€18,205</td>
<td>€17,974</td>
<td>-1.3%</td>
</tr>
<tr>
<td>Border Region</td>
<td>€18,106</td>
<td>€17,719</td>
<td>-2.1%</td>
</tr>
<tr>
<td>State</td>
<td>€19,827</td>
<td>€19,318</td>
<td>-2.6%</td>
</tr>
</tbody>
</table>

Data Sources: CSO (2013b), County Incomes and Regional GDP

Total household income in County Leitrim was an estimated €673 million in 2010 according to the CSO (2013b), whilst the estimated total County disposable household income was €569 million. The estimated disposable income per person for Leitrim County was €17,974 per annum (see Table 4-7).

In more recent years the estimated amount of disposable income relative to the population of Leitrim peaked in 2008 and by 2010 the estimated disposable income available had dropped back to 2004-2005 levels (€17,974 per annum). This represented 93% approximately of the state average of €19,318.

Forecasts of Ireland’s Gross Domestic Product (GDP) are recognised by most economic commentators as a good measure of disposable income as historically disposable incomes closely track GDP. Nationally GDP grew marginally in 2011 and 2012, whilst estimates point towards this trend continuing through 2013 and 2014 as part of a “recovery scenario”. Based on this scenario income levels should increase nationally to €21,532 in 2015. Maintaining the existing relative relationship (93% of national average), the average disposable income per person in Leitrim should have increased to €20,033 per annum in 2015 (see Appendix A).
During the period November 2006 to February 2012, the numbers on the live register\(^5\) increased nationally by 10.7% of the workforce to 15.1% and in February 2014 this had decreased to 11.9%. Recent economic commentary anticipates a continued marginal growth in Gross National Product (ESRI 2013), which potentially will have positive implications for the retail sector.

4.4 Retail Sector Trends & Challenges

The following section comprises a number of topical issues relevant to land-use planning and the retail sector in Leitrim and is not an exhaustive list. Retail planning policy needs to be framed taking into account the trends and challenges discussed below.

The biggest challenge to recovery in the retail sector is weak domestic demand. Consumer spending has fallen every year since 2008 and IBEC predicts that it will fall by a further 2% in 2012 (IBEC, 2012).

According to Retail Ireland (2013), based on CSO data sales in retail have fallen sharply, declining by 30% since their peak in 2008. For example, the largest declines have occurred in furniture and lighting (‐55%), motor trades (‐50%), hardware (‐39%) and electrical goods (‐38%).

The KBC/ESRI Consumer Sentiment Index reached a five-year high in August 2012. Since then, however, it has fallen back as consumers worry about household finances. In recent months consumer sentiment has marginally improved and it is anticipated that sentiment will improve through 2014, but not with a sudden ’step-up’ (IBEC, 2014).

Despite Ireland’s debatable emergence from the worst of the economic gloom, levels of retail spending declined in 2012. At present the worst of the banking crisis appears to

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\(^5\) The ‘Live Register’ is not designed to measure unemployment. It includes part-time workers (those who work up to three days a week), seasonal and casual workers entitled to Jobseeker’s Benefit (JB) or Jobseeker’s Allowance (JA). Unemployment is measured by the Quarterly National Household Survey and the latest estimated number of persons unemployed as of the third quarter of 2013 was 282,900.
have been resolved and whilst further Government hits to personal spending are not expected in the short term, they are not out of the question either. Unemployment remains high at 11.9% (February 2014), whilst low-paying Government employment schemes are popular and emigration remains widespread; consumers remain reluctant to engage in unnecessary or frivolous spending.

According to the CSO, between 2008 and 2011 the share of total turnover attributed to foreign-owned ‘Service and Distribution Enterprises’ has increased steadily from 35% in 2008 to 47% in 2011 (CSO 2012c). Whilst this fact does not directly relate to ‘retail-trade services’, it is considered to portray the increased activity of foreign-owned companies in the Irish market.

4.4.1 The Global Marketplace

In the search for lower-priced and better-value goods, many Irish consumers are making the switch to online retailing. Once viewed with suspicion, the now nationwide penetration of reliable broadband services combined with widespread computer access and high uptake of smart phones and tablets has ensured that internet retailing has experienced a dramatic boom. The focus by retailers on offering improved Internet retailing facilities as well as interactive mobile phone applications has further influenced this growing shopping trend.

Retailers are all too aware of the fact that when dealing with comparison goods, they have to be mindful of global market prices and not just prices offered by local competitors. Online shopping through websites such as Ebay, Amazon, DoneDeal etc. can often offer consumers the opportunity to purchase goods from other countries at reduced prices even when taking into account postage fees. Figure 4-10 below illustrates the marked global variation in the retail price of a product dependent upon the country of purchase. In this case the Apple iPhone 5s is used as the sample product.

![Figure 4-10 Global Variation in Product Retail Price (iPhone 5s)](map-source:softpedia-static.com)

This variation in price will impact on our willingness and ability to engage in the global retail market. With retail prices in Ireland generally above many national figures, there is a reduced scope to sell globally-available products into other countries.

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However, *niche*, alternative or indigenous products unique to the Irish market may prove desirable on the global markets and offer Irish retailers an opportunity to expand their customer base.

Retailers develop their strategies based on a number of factors including demographics and income/expenditure levels which transcend local government boundaries. Considering this, retailers in Leitrim must compete with retail operations outside the County and this Retail Strategy must be prepared cognisant of this fact. Overly restrictive planning policy could result in a significant loss of revenue to the County if retail planning policy is not aligned in a similar way to that in adjoining jurisdictions.

### 4.4.2 Casual Trading and Car Parking

The Strategy is being prepared at a time when retail activity is undergoing significant change. Whilst mass-supply chain management measures implemented by major retail suppliers can significantly impact on pricing structures and the livelihood of small independent retail operators, there is a growing movement recognising the economic benefits of sourcing local produce. For example, with regards food products, the ability to acquire the freshest food is invariably sourced through local producers, who can provide product from ‘field to fork’ in the shortest time.

Whilst a local source-supply approach would present a more ideal retail scenario, the reality on the ground is that mass production and superstore chains exist within and outside the County and a balance will need to be struck in guiding the Strategy. Whilst it is difficult to measure, there are clear social, economic and health benefits for local communities to be served by local retailers. The ‘farmers’ market’ operated weekly from Carrick-on-Shannon (Market Yard) and Manorhamilton (Bee Park Resource Centre) can offer an alternative high-quality local product from that found on the supermarket shelf. Similar but smaller-scale retailing of fruit and vegetables is also found in other towns within the County, including Mohill, Drumkeerin and Carrigallen.

With significant levels of vacancy arising, an increasing level of properties are lying idle. ‘Pop-up shops’ and restaurants are a growing feature in the market and can have a positive impact on the retail performance of centres where these do not directly impact on neighbouring competitor retailers, where demand is high and where these offer alternative services and products. However, these operations can also place severe difficulties on local services such as parking and environmental services when not appropriately positioned and serviced.

It is important that all angles to improving the retail scenario within the County are explored and supported, and that measures to facilitate appropriate levels of ‘Casual Trading’ should be explored and supported, particularly where this might sell the ‘Leitrim’ brand.

#### Car Parking

Provision of accessible and functional car parking remains a vital aspect in supporting town centre retail operations. It is vital that where gaps exist in car parking provision, measures to improve the scenario in order to maintain vibrant town centres. There will always be a debate regarding the appropriate level of car parking for town centres and retail operations, whilst Planners must aim to strike a sustainable balance, discouraging the use of private-motor vehicles, where possible, and encouraging more sustainable means of transport where feasible.

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7 ‘Pop-up shops’, ‘pop-up stores’ or ‘flash retailing’ are terms often used in describing short-term sales spaces, exhibitions and events, which generally open in vacant premises.
Leitrim County Council acknowledges that safe, convenient and accessible car parking is a vital component in creating functional shopping destinations, but that excessive and obtrusive parking can seriously detract from the visual appearance of such destinations. The centralising of services and shops will create a livelier environment, but this will also concentrate demands for services such as parking into specific areas. Where policy provides a bias in terms of the location of development, this needs to be coupled with sensitive consideration of the availability of car parking.

It is acknowledged that all shop units would prefer to have safe, accessible and convenient parking at their door, but that this is not always possible due to urban design and traffic implications. Where such parking is not available, alternative appropriate parking facilities are generally sought, often incorporating off-street car parking. Off-street parking has been successfully incorporated into Drumshanbo, Main Street. However, difficulties arise in terms of identifying viable and convenient sites for off-street parking and the Council is often dependent upon local knowledge regarding the availability of such sites for car parking proposals.

4.4.3 The Legacy Issue & the Dilution of Local Services

The Retail Planning Guidelines note that at a local level shopping “is provided by a mixture of neighbourhood shops in suburban areas and village stores/post-offices in rural areas” (p. 11). Many local businesses have been in families for generations and this is particularly true of many rural-based businesses, such as small shops and pubs. With significant pressure on these businesses from a variety of directions, coupled with the dilution of rural services to urban centres and decreases in rural population, it is becoming increasingly difficult and unattractive for younger generations to take over these businesses. Consequently, the longevity of such businesses is compromised, which could potentially lead to the loss of retail premises within the County, which not only serve as important employers, but also perform significant social functions. The closure of Post Offices throughout rural Ireland provides an insight into this issue and its correlation with the dilution of local retail services (see Section 4.4.5).

4.4.4 Case Study – Post Offices Closures in County Leitrim

Every community needs access to a range of essential services. However, in recent decades many services in rural areas are being withdrawn or wound down resulting in significant reductions in the availability of services. Research has highlighted the particular problems associated with the closure of basic services such as Post Offices, shops, pharmacies and pubs, and the impact that this has had on quality of life for older people in particular (Walsh, O’Shea & Scharf, 2012).

Services such as shops, primary schools, general practitioners, community halls and playing fields act as the core services for a rural community, encouraging social inclusion by enhancing public interaction and participation. Rural Ireland has experienced significant loss of services in the form of Post Offices, which regularly included some retail element which in turn become commercially unviable and are subsequently withdrawn.
Figure 4-11 illustrates the distribution of existing Post Offices within the County and those that have been closed over the 1997 to 2014 period. This information is collated through a variety of sources including Government discussion papers (2001), local media sources (2007), from previous County Retail Strategies (2002 & 2007) and from discussions with local Post Office operators, whilst undertaking the County retail survey.

Closure of rural Post Offices has occurred throughout the County, but in particular in close proximity to the main towns, in small villages and along the main strategic road.

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corridors serving the County. The number of Post Office closures in south Leitrim is striking despite the fact that this area has a comparatively sizeable population base. There have also been a large number of post office closures in the glens around Dromahair.

Whilst this Strategy relates to the appropriate level of retail services throughout the County, the loss of Post Office services has indirectly resulted in the loss of convenience services. As this Strategy feeds into the preparation of the *County Development Plan* it is also important to note that the loss of Post Offices and other rural services represent a major decline in rural social and physical infrastructure. The loss of this infrastructure represents a reduction in community interfaces and social meeting points that especially impact on the social lives of older residents.

The Council’s Development Plan needs to support sustainable forms of development, and the loss of essential rural services forcing the population to travel extended distance to larger towns is not conducive to sustainable development. Plan policy should be implemented to attempt to safeguard rural services, including retail operations.

### 4.5 Consideration of Retail Context & Trends

Analysis of recent changes and forecasts for the retail sector points towards a gradual improvement in the markets over the lifetime of the Strategy and coupled with population and income growth this suggests a more positive outlook for the retail sector in Leitrim. However, this growth must be considered in the context of a changing ‘shopping environment’ and other challenges to the sector, including currency fluctuations, market dynamics and legacy issues.
5. **Retail Activity in the County**

It is vital that an accurate picture of the current baseline information on retail activity within the County is established as part of the preparation of this Retail Strategy. Identification of retail activity will facilitate forecasting for future retail requirements and monitoring to ensure the Strategy remains relevant over its lifetime.

5.1 **Retail Expenditure**

The total retail expenditure of residents of County Leitrim has been estimated using statistics from the CSO *Household Budget Survey 2009 – 2010 (First Results)* (CSO, 2013b), which are released every 5 years and the household income statistics for the County.

As noted above in Section 4.3.8, the estimated total disposable household income was €569 million in Leitrim in 2010. The estimated number of occupied households in 2010 in Leitrim was 11,990 and using this figure the disposable household income in the county is an estimated €47,455 per household in 2010. This equates to a weekly household disposable income of €912, which interestingly replicates the weekly household disposable income identified for Leitrim in the County Retail Strategy 2009-15, whilst reflecting the data illustrated in Figure 4-9.

The CSO *Household Budget Survey 2009 – 2010* provides a breakdown of household expenditure in the state and estimates differences between the expenditure of 'urban' and 'rural' households. Applying a similar weighting to that applied by the CSO (2013b) in their research titled 'County Incomes and Regional GDP 2010', we estimate that the expenditure rates in Leitrim would consequently be 93% of the State average.

The average weekly expenditure of households across the state is €810.61 in 2009-2010 according to CSO (2012a). For the purpose of this strategy, using a 0.93 multiplier an assumption has been made that average weekly expenditure of households applicable to County Leitrim is €753.86. It is therefore estimated that households in Leitrim spent a combined total of over €9.04 million per week on retail commodities in 2010.

5.2 **Expenditure on Different Commodity Types**

The CSO *Household Budget Survey 2009 – 2010* also provides information on the types of commodities that Irish (urban and rural) households spend their income upon. Applying a similar weighting (93%) to that used above for the average weekly expenditure of households applicable to County Leitrim (€753.86), a total breakdown of the types of commodities, which Leitrim households consume on a weekly basis can also be estimated (see Table 5-1). The CSO provide a breakdown of commodities based on urban and rural households and as Leitrim is noted by the CSO as being the 'most rural County in Ireland' (CSO, 2012), we consider the rural breakdown more applicable and more reflective of Leitrim households.

As indicated in Table 5-1, expenditure on 'Transport', accounts for an estimated 31.3% of all retail expenditure of Leitrim households, and this is generally attributable to the cost of fuel, motor purchase and maintenance and motor insurance. We can infer this as there are very low levels of public transport uptake within Leitrim according to the

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10 The CSO detail that in their Census of Population results from 2011, the total housing stock of Leitrim was 18,128 and 12,331 of these houses were occupied. Applying a consistent growth rule over the 2006-2011 period, this would infer total occupied housing stock for Leitrim County of approximately 11,990 in 2010.
CSO Census of Population (CSO, 2012). Housing expenditure costs are next in line at 18.2%, although given the fact that Leitrim continues to feature the lowest housing prices in the country (Daft.ie, 2013), weekly expenditure in this commodity category is expected to be below the 18.2% stated. Convenience ‘food’ products are identified as a major commodity with which Leitrim households spend their weekly disposable income upon.

Table 5-1 Estimated Average Household Expenditure for County Leitrim 2009-2010

<table>
<thead>
<tr>
<th>Commodity Groups</th>
<th>State Expenditure (€)</th>
<th>Leitrim Expenditure (€)</th>
<th>Rural Expenditure % Breakdown</th>
<th>Total Weekly Expenditure (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food</td>
<td>€131.28</td>
<td>€129.66</td>
<td>16.2%</td>
<td>€1,554,670</td>
</tr>
<tr>
<td>Alcoholic Drink &amp; Tobacco</td>
<td>€39.48</td>
<td>€33.92</td>
<td>4.9%</td>
<td>€406,745</td>
</tr>
<tr>
<td>Clothing &amp; Footwear</td>
<td>€40.11</td>
<td>€35.43</td>
<td>4.9%</td>
<td>€424,823</td>
</tr>
<tr>
<td>Fuel &amp; Light</td>
<td>€35.35</td>
<td>€38.45</td>
<td>4.4%</td>
<td>€460,978</td>
</tr>
<tr>
<td>Housing</td>
<td>€147.73</td>
<td>€118.36</td>
<td>18.2%</td>
<td>€1,419,089</td>
</tr>
<tr>
<td>Household Non-Durables</td>
<td>€16.49</td>
<td>€15.83</td>
<td>2.0%</td>
<td>€189,814</td>
</tr>
<tr>
<td>Household Durables</td>
<td>€30.06</td>
<td>€27.89</td>
<td>3.7%</td>
<td>€334,435</td>
</tr>
<tr>
<td>Miscellaneous Goods</td>
<td>€116.31</td>
<td>€123.63</td>
<td>14.4%</td>
<td>€1,482,360</td>
</tr>
<tr>
<td>Transport</td>
<td>€253.81</td>
<td>€230.68</td>
<td>31.3%</td>
<td>€2,765,867</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>€810.61</strong></td>
<td><strong>€753.86</strong></td>
<td><strong>100%</strong></td>
<td><strong>€9,038,781</strong></td>
</tr>
</tbody>
</table>

Data Sources: CSO Household Budget Survey 2009-2010 and CSO County Incomes & Regional GDP 2010

It is important to note that whilst this Strategy is intended to cover the 2015-2021 period, the above figures reflect estimated income and expenditure in 2009 and 2010, and figures relating to 2014-15 are not expected from the CSO until 2017-2018. Furthermore the expenditure figures can only be considered a reasonable estimate because they do not take account for household spending outside the county boundaries, and because they do not incorporate the share of total turnover contributed by visitors. This is particularly important considering the fact that the Leitrim is a growing tourism destination and because the County town of Carrick-on-Shannon is an increasingly important and accessible convenience shopping destination for the County and parts of Roscommon, Sligo and Longford.

5.3 **Existing Activity in Retail**

Two methodologies have been implemented to determine activity in the retail sector in County Leitrim. Information was gathered from the County Rates Book on the number and value of retail and commercial properties in the county, and a survey of retail floorspace in the county has been undertaken. Analysis of previous Retail Strategies undertaken by Leitrim County Council permits an assessment of changes within the retail sector over the 2002-2013 period.

5.3.1 **Rateable Properties**

Commercial rates are an annual charge on non-domestic property and are an important element in funding the general provision of services of Local Authorities. They are payable on commercial, industrial and some other non-domestic properties. Each Local Authority charges commercial rates on the basis of the valuations provided to them by the Valuation Office.

The Valuations Office provide details of commercial rates applied on properties throughout the country on their website, including reference to the occupier, property address, property description (category), rateable value and position on Valuation map (including link where available). The detail available is not a completely accurate
picture of the commercial sector in the County, but it does give an understanding of the location of specific categories of development within the County and analysis of changes in the Rates Book provides information regarding shifts in the retail market and overall performance information, particularly when supplemented with other Council data such as the Planning Register.

The level of activity in the commercial and retail sectors can be assessed by identifying the number of ratepayers in an area and by considering changes in the total rateable valuation of commercial property in the context of changes in the Council's levy rate.

During the 'Celtic Tiger' era commercial activity in the County significantly increased and during the 2002 to 2007 period the rateable valuation of commercial properties in Leitrim increased from €35,598 to €63,821, an increase of approximately 79%. However, it should be noted that the Council's Annual Rate increased during the same period on annual basis between 3.5% and 6.6%.

In 2007 and 2008 the Council's Annual Commercial Rates increased by 3.5% and 4.5% respectively. Following this the Council's Annual Commercial Rate to date has not increased further, and in fact was reduced by 1% in 2010. Consequently, over the 2007-2014 period the Council's Annual Commercial Rate increased by a total of 7%. The total rateable valuation of commercial properties in Leitrim increased from €63,821 to €79,512 over the 2007-2013 period and this represents a 25% increase in total commercial rates. This suggests that commercial property, including retail and industrial businesses are continuing to perform reasonably well in the County despite the poor economic conditions.

A general overview of the Rateable Properties in Leitrim suggests that specific businesses in the Carrick-on-Shannon area are performing reasonably well particularly when compared with smaller support towns.

### 5.3.2 Planning Register

Analysis of the Planning Register for the 2008-2013 period provides additional detail regarding changes in retail and other sectors (see Table 5-2). The number of planning applications received by the Planning Authority has significantly reduced over the period of the previous Strategy and there has also been a reduction in planning applications relating to retail development. In fact much of the retail development proposals relate to change of use of existing retail premises to retail-related services, such as restaurants, cafes and betting shops, and to residential uses.

The vast majority of retail and associated planning applications were submitted for the towns of Carrick-on-Shannon, Manorhamilton, Mohill and Ballinamore. In the other support towns of Drumshanbo and Dromahair, very few applications have been received for retail development.

Over the 2008 to 2013 period, most proposals for retail development were permitted during the initial years 2008-2009. Whilst the extent of permitted retail floorspace has increased over the 6 years, there has been a marked replacement of retail floorspace with alternative commercial uses including betting shops, restaurants and take-aways, no more so than in Carrick-on-Shannon. The town of Ballinamore has experienced minimal retail floorspace growth with the exception of the new Tesco supermarket, however, much of the additional permitted retail floorspace not yet been occupied. During the 2008-2013 period Manorhamilton benefitted from two major retail permissions for SuperValu and Tesco supermarkets. Whilst only the SuperValu development has been constructed at this time, these permissions appear to have indirectly encouraged additional retail floorspace in the town.
Table 5-2 Change in Gross Retail Floorspace Granted January 2008 to Dec 2013

<table>
<thead>
<tr>
<th>Area</th>
<th>Permitted</th>
<th>Not Constructed (&amp; Expired)</th>
<th>Reduced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carrick-on-Shannon</td>
<td>8,620</td>
<td>3,979</td>
<td>1,970</td>
</tr>
<tr>
<td>Ballinamore</td>
<td>1,285</td>
<td>4,393</td>
<td>151</td>
</tr>
<tr>
<td>Manorhamilton</td>
<td>4,490</td>
<td>897</td>
<td>192</td>
</tr>
<tr>
<td>Mohill</td>
<td>1,652</td>
<td>-</td>
<td>39</td>
</tr>
<tr>
<td>Dromahair</td>
<td>84</td>
<td>600</td>
<td>54</td>
</tr>
<tr>
<td>Drumshanbo</td>
<td>-</td>
<td>-</td>
<td>216</td>
</tr>
<tr>
<td>Others</td>
<td>569</td>
<td>848</td>
<td>613</td>
</tr>
<tr>
<td>Total</td>
<td>16,701</td>
<td>10,717</td>
<td>3,234</td>
</tr>
</tbody>
</table>

Data Source: Leitrim County Council Planning Register

Applications for retail development have reduced significantly over the 2007-2013 period, reflecting the difficult circumstances for retail development in the County.

5.4 Retail Survey

This survey considers the range of services within a town and levels of overall occupancy, as this will allow for comparative analysis of the retail situation within the county on an ongoing basis and is an important aspect in undertaking a town-centre health check. It is anticipated that the experiences of the economic recession will have impacted settlements to different extents, with some towns performing well, whilst others may struggle. It is vital to understand how towns are performing and what potentially influences this performance, as this will direct future policy in developing the County. This assessment is not solely constrained to retail matters, but also considers wider planning issues, in order to understand how these might influence town performance.

Table 5-3 Retail Floorspace in County Leitrim, 2014

<table>
<thead>
<tr>
<th>Town/Village</th>
<th>Convenience (m²)</th>
<th>Comparison (m²)</th>
<th>Bulky Goods (m²)</th>
<th>Total (m²)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carrick-on-Shannon</td>
<td>2,717</td>
<td>7,782</td>
<td>4,380</td>
<td>14,879</td>
</tr>
<tr>
<td>Ballinamore</td>
<td>1,893</td>
<td>791</td>
<td>320</td>
<td>3,004</td>
</tr>
<tr>
<td>Manorhamilton</td>
<td>1,179</td>
<td>719</td>
<td>1,300</td>
<td>3,198</td>
</tr>
<tr>
<td>Mohill</td>
<td>989</td>
<td>766</td>
<td>1,494</td>
<td>3,249</td>
</tr>
<tr>
<td>Drumshanbo</td>
<td>708</td>
<td>298</td>
<td>0</td>
<td>1,006</td>
</tr>
<tr>
<td>Carrigallen</td>
<td>215</td>
<td>84</td>
<td>300</td>
<td>599</td>
</tr>
<tr>
<td>Kinlough</td>
<td>305</td>
<td>121</td>
<td>0</td>
<td>426</td>
</tr>
<tr>
<td>Dromahair</td>
<td>262</td>
<td>36</td>
<td>0</td>
<td>298</td>
</tr>
<tr>
<td>Dromod</td>
<td>211</td>
<td>0</td>
<td>0</td>
<td>211</td>
</tr>
<tr>
<td>Other Centres</td>
<td>912</td>
<td>199</td>
<td>2,343[11]</td>
<td>3,454</td>
</tr>
<tr>
<td>Total</td>
<td>9,391</td>
<td>10,796</td>
<td>10,137</td>
<td>30,324</td>
</tr>
</tbody>
</table>

A retail survey for County Leitrim was undertaken in January and February 2014. The survey identified the total of retail and services premises in the county (including, pubs, financial institutions, post offices, property and legal consultants, beauticians and hair salons and fuel stations) and assessed the quality, floor area and distribution of retail available. Results were recorded by location (town or village) and by retail

[11] Primarily comprised of Builder’s Merchants and Timber Suppliers, for example, NWTH, Kilclare and GWP, Glenfarne.
category, including whether or not the premises was occupied or unoccupied. A summation of the results of the retail survey is presented in Table 5-3. In total over 800 commercial and retail premises were included in the retail survey and data was collated in tabulated format according to business name and location for ease of amending and revisiting in future retail surveys of the County.

As expected the main towns of the County contain the vast bulk of retail and retail-related services. Carrick-on-Shannon leads the way in the County in terms of the quantum of retail and retail-related units with 265 units, followed by Ballinamore with 108 units and Manorhamilton with 88 units. Carrick-on-Shannon, Ballinamore and Manorhamilton are the ‘Key towns’ serving the 3 Municipal Areas of the county and these are twinned respectively with the ‘Support towns’ of Mohill, Drumshanbo and Dromahair, which contain 78 units, 45 units and 20 units respectively. Other towns with significant retail and similar offerings include Carrigallen (27 units) and Kinlough (23 units). In total 34 towns, villages and crossroads were visited in undertaking the retail survey and detailed results taken.

5.4.1 Existing Convenience Shopping Provision

The distribution of convenience shopping throughout the County is not directly reflective of the distribution of the population of a town and its hinterland. The main centres of Carrick-on-Shannon and Ballinamore contain almost half (49.1%) of the convenience retail floorspace provision for County Leitrim and the vast bulk of this floorspace is contained in the SuperValu and Tesco supermarkets in Ballinamore and the Aldi and Tesco supermarkets in Carrick-on-Shannon. Manorhamilton contains 12.6% of convenience retail floorspace for the County. As a result almost 62% of convenience retail provision for the County is located in the key towns of the County. The key support towns of Drumshanbo, Dromahair and Mohill contain 20.8% of convenience retail floorspace for the County. The remainder of convenience shop floorspace is spread throughout the smaller villages of the County.

Considering the population structures of Dromahair and Kinlough, both located in north Leitrim, it would appear that these towns are underserved by convenience retail floorspace when compared with other Leitrim centres, but this may be due to their proximity and access to other retail centres, such as Sligo and Bundoran. Retail policy needs to consider this fact when addressing the appropriate scale and location of development in these towns. Provision of additional retail convenience offerings should serve to significantly reduce retail leakage out of the County. The convenience retail provision of Carrick-on-Shannon would be significantly higher if the provision on the Cortober side of town was included, and this emphasises the growing importance of Carrick-on-Shannon as a retail destination for the wider region.

5.4.2 Case Study - Discount Foodstores in Leitrim

Since the preparation of the previous Retail Strategy, Discount foodstores such as Aldi and Lidl have significantly penetrated the Irish convenience shopping market. To date only Aldi has located a ‘discount foodstore’ in county Leitrim. Journey times for Leitrim residents to the nearest discount foodstores, including those in neighbouring counties, can be considered reasonable at between 1 and 30 minutes. Discount foodstores are now categorised as ‘convenience shops’ within the new Retail Planning Guidelines 2012, but in reality these outlets provide an alternative convenience

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12 Planning Reg. Ref. 10/228 (opened 23rd August 2012 at Attifinlay along the Dublin Road in Carrick-on-Shannon with a net shop floorspace of 990sq.m.).
shopping option to the main operators, Tesco, SuperValu and Dunnes Stores who control over 70% of the Irish convenience retail market (DoEHLG, 2012).

The geographical distribution of shopping services is not even and Figure 5-1 below shows indicative drivetimes to the nearest ‘discount foodstores’. The vast majority of Leitrim residents who shop in ‘discount foodstores’, have to shop in stores outside the County, thus resulting in significant retail expenditure leakage from the County. Convenience retail shopping habits are continually evolving, and are very much linked to economic circumstances. In recent years shoppers have decided to undertake the weekly convenience shop by spreading their grocery shopping between a number of shops. An alternative shopping offer is therefore important if Leitrim is to reduce retail leakage to other areas, including areas north of the border.

5.4.3 Existing Comparison Shopping Provision

As noted at various points throughout this Strategy, growth in online shopping is having a marked impact on comparison retail shopping. Results of the survey undertaken by Leitrim County Council indicate that the distribution of comparison retail is generally diluting in provincial towns and concentrating into a smaller number of centres. Carrick-on-Shannon now comprises over 72% of the comparison retail floorspace for County Leitrim. Other than Carrick-on-Shannon, only Manorhamilton, Mohill and Ballinamore contained a sizeable level of comparison retail floorspace, with 21.1% of comparison retail floorspace located in these towns. With the exception of pharmacies and gift shops in the smaller towns and villages, comparison retail floorspace is almost non-existent outside of the key county towns and Mohill (support town).

Clothes shops (including shoe shops) were included in the comparison retail survey results and this shows a significant bias in the location of these shops within Carrick-on-Shannon. Many of the clothes shops and other comparison retailers throughout the County are family-run businesses and the longevity of many of these premises is coming increasingly under threat from online shopping and the willingness of shoppers to travel longer distances to larger centres to avail of ‘retail experiences’. Considering the trends, it is highly unlikely that the main ‘High Street’ comparison shops will establish themselves in areas of Leitrim outside of Carrick-on-Shannon. Policy needs to be prepared mindful of these facts and the market reality.
5.4.4 Existing Bulky Goods Shopping Provision

Bulky goods shopping in the survey figures include premises categorised as ‘Builders Merchants’ and similar uses. A number of these premises have significantly large floor areas and are located in rural areas, away from the main urban centres. Nevertheless, the results of the survey show a high proportion (43.2%) of the bulky goods retailers are located in Carrick-on-Shannon. When undertaking the retail survey, it became evident that a large volume of bulky goods units in Carrick-on-Shannon were unoccupied, including those in the Northwest Technology Park and off the Dublin Road. The Retail Planning Guidelines highlight that a large volume of bulky goods units constructed during the economic boom are now vacant and occupation of these units should be considered, rather than new build units. Compared with similar-size towns, such as Manorhamilton and Mohill, Ballinamore is underserviced by bulky retail units, despite having a very high overall vacancy level.

5.4.5 Existing Retail Services Provision

Whilst the Retail Planning Guidelines focus on the preparation of Strategies based on identifying the appropriate levels of convenience, comparison and bulky goods floorspace, it is clear that this is an over-simplistic approach considering reductions in travel times and the growing tendency for shoppers to travel longer distances particularly for comparison goods. Retail Strategies need to be more concerned in the modern age of competing with the online marketplace and policy needs to identify measures and means to support the existing retail base. Whilst shopping for convenience goods is a frequent and essential activity for the population, shopping for comparison and bulky goods is undertaken on a much less frequent basis. However, shoppers are attracted to particular shops based on a variety of reasons, including
choice or products and services. Creation and maintaining of economies of scale through the complimentary grouping of businesses within close proximity can have positive implications for retail development. This does not solely refer to retail businesses as other services can create additional footfall and cross-visititation. It is therefore important that the Strategy and the Council’s planning policy are prepared mindful of this. Similar to the visual survey undertaken in 2008, the retail survey undertaken in early 2014 by Leitrim County Council indicated that ‘speciality shops and services’ (239 units) followed by ‘Public Houses’ (102 units) and then convenience retail, including shops selling food, alcoholic and non-alcoholic beverages make up the majority of retail outlets in the county, followed by lower-order comparison goods such as clothing, shoes, books, newspapers and magazines and medical and pharmaceutical products. This is somewhat consistent with retail expenditure figures, which indicate that spending on services and other expenditure makes up over 27% of weekly expenditure while spending on food equates to 20% and spending on clothing 5%. It is clear however that while the second highest retail use was found to be Public Houses/Bars, weekly household expenditure in this area only equates to 5.4% (a drop from 6.9% in 1999-2000) which would suggest that there is an oversupply of such establishments in the County. This may account for the difficulties currently being experienced by the licensed vintners’ trade.

5.4.6 Vacancy & Occupancy Rates

Retail vacancy levels have been historically utilised by geographers and others as an indicator of the economic prosperity or otherwise of settlements. Occupancy levels vary throughout the County of Leitrim and average out at 22% or just over one in five units. This will have significant implications in the guiding the location of new retail and related services in the County. The villages of Leitrim and Carrigallen fare best in terms of occupancy levels with significantly better occupancy levels than larger urban centres in Leitrim (6.7% and 7.4% respectively). Vacancy levels in Drumshanbo are well below the County average at 13.3%. The population of Kinlough has increased significantly in recent years and consequently has a narrow historical service base relative to the population. As a result, the level of vacant units (17.4%) is below the County average.

<table>
<thead>
<tr>
<th>Town/Village</th>
<th>No. of Vacant Units</th>
<th>No. of Occupied Units</th>
<th>Total No. Of Units</th>
<th>% of Vacant Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carrick-on-Shannon</td>
<td>60</td>
<td>205</td>
<td>265</td>
<td>22.6</td>
</tr>
<tr>
<td>Manorhamilton</td>
<td>16</td>
<td>72</td>
<td>88</td>
<td>18.2</td>
</tr>
<tr>
<td>Drumshanbo</td>
<td>6</td>
<td>39</td>
<td>45</td>
<td>13.3</td>
</tr>
<tr>
<td>Mohill</td>
<td>19</td>
<td>59</td>
<td>78</td>
<td>24.4</td>
</tr>
<tr>
<td>Ballinamore</td>
<td>31</td>
<td>77</td>
<td>108</td>
<td>28.7</td>
</tr>
<tr>
<td>Carrigallen</td>
<td>2</td>
<td>25</td>
<td>27</td>
<td>7.4</td>
</tr>
<tr>
<td>Dromod</td>
<td>5</td>
<td>12</td>
<td>17</td>
<td>29.4</td>
</tr>
<tr>
<td>Drumkeerin</td>
<td>3</td>
<td>13</td>
<td>16</td>
<td>18.8</td>
</tr>
<tr>
<td>Dromahair</td>
<td>5</td>
<td>15</td>
<td>20</td>
<td>25.0</td>
</tr>
<tr>
<td>Kinlough</td>
<td>4</td>
<td>19</td>
<td>23</td>
<td>17.4</td>
</tr>
<tr>
<td>Leitrim Village</td>
<td>1</td>
<td>14</td>
<td>15</td>
<td>6.7</td>
</tr>
<tr>
<td>Other Centres</td>
<td>24</td>
<td>75</td>
<td>99</td>
<td>24.2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>176</strong></td>
<td><strong>625</strong></td>
<td><strong>801</strong></td>
<td><strong>22.0</strong></td>
</tr>
</tbody>
</table>

Interestingly, the overall level of commercial vacancy (22%) in the County is directly aligned with the overall level of housing vacancy (22%) in the County when secondary and holiday homes are excluded from the count.
Of the larger ‘key towns’ and ‘support towns’ serving the County, Manorhamilton fares best in terms of vacancy rates (18.2%). SuperValu recently opened a large supermarket in Manorhamilton and this is expected to have significantly reduced retail leakage to other centres and in particular out of the County to Sligo and Enniskillen. Tesco also has planning permission for a large supermarket in the town. Carrick-on-Shannon has a retail vacancy rate (22.6%) in line with the County average and much of this vacancy is founded upon vacant retail warehouses. Dromahair and Mohill have vacancy levels of 25% and 24.4% respectively, above the County average vacancy levels. The vacancy rates suggest that the towns of Ballinamore (28.7%) and Dromod (29.4%) are performing poorest in the county. Ballinamore has a large bulk of this vacant stock within the recently constructed Tesco complex, which has suffered from the economic recession, whilst much of the retail stock in Dromod emerged on the basis of the village becoming bypassed by the national route (N4) between Sligo and Dublin.

5.5 Changes in Retail Provision

Changes in the actual number of retail and retail-related services are difficult to track within the current Strategy, as the method of recording is not precisely similar to that undertaken during previous Strategies. Recording methods have not been consistent; however, going forward, in using the detailed unit-by-unit, town-by-town records undertaken in this survey, Leitrim County Council will be better able to track changes in retail stock over future Strategy periods.

5.5.1 Changes in Retail Provision 2008-2014

Some premises provide a multiple of retail services such as bar/restaurant/accommodation. The perceived dominant floorspace use is only identified, as the primary and sole use, unless the uses are reasonably separated (e.g. separate entrance doors). The Survey comprises was undertaken in as comprehensive a manner as deemed possible. B&B and similar guest accommodation are not included in the Survey, but hotels are included as these generally have additional publically-accessible retail-related services such as restaurants and bars. Some discrepancies exist between the previous ‘visual survey 2008’ and the ‘retail floorspace survey 2014.

As expressed above, the figures referred to within Table 5-5 below should be taken with a ‘pinch of salt’. Nevertheless, on the basis of our familiarity with the study area, including review of the Planning Register and the County Rate Books it can be confirmed that Carrick-on-Shannon remains the key growth centre in the County, with retail and related provision increasing by 50 occupied units. This has been followed by Manorhamilton which experienced an increase of 7 occupied units. It is expected that the growth of additional units was bottom-heavy over the 2008-2014 period, as there have been very few new businesses openings in recent years.
### Table 5-5 Changes in Occupied Retail Provision 2008-2014

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Aghamore</td>
<td>3</td>
<td>3</td>
<td>0</td>
<td>-3</td>
<td>-100.0</td>
</tr>
<tr>
<td>Aghnasheelan^</td>
<td>(1)</td>
<td>(1)</td>
<td>0</td>
<td>-1</td>
<td>-100.0</td>
</tr>
<tr>
<td>Aughavas</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>Ballinagleragh*</td>
<td>(3)</td>
<td>3</td>
<td>3</td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>Ballinamore</td>
<td>57</td>
<td>74</td>
<td>77</td>
<td>+3</td>
<td>+4.1</td>
</tr>
<tr>
<td>Carrick-on-Shannon</td>
<td>107</td>
<td>155</td>
<td>205</td>
<td>+50</td>
<td>+32.3</td>
</tr>
<tr>
<td>Carrigallen</td>
<td>25</td>
<td>27</td>
<td>25</td>
<td>-2</td>
<td>-7.4</td>
</tr>
<tr>
<td>Cloone</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>Corrawallen^</td>
<td>(1)</td>
<td>(1)</td>
<td>1</td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>Dowra</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>Dromahair</td>
<td>10</td>
<td>20</td>
<td>15</td>
<td>-5</td>
<td>-25.0</td>
</tr>
<tr>
<td>Dromod</td>
<td>3</td>
<td>18</td>
<td>12</td>
<td>-6</td>
<td>-33.3</td>
</tr>
<tr>
<td>Drumcong*</td>
<td>(2)</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>Drumkeeran</td>
<td>12</td>
<td>14</td>
<td>13</td>
<td>-1</td>
<td>-7.1</td>
</tr>
<tr>
<td>Drumshanbo</td>
<td>38</td>
<td>42</td>
<td>39</td>
<td>-3</td>
<td>-7.1</td>
</tr>
<tr>
<td>Drumsna</td>
<td>8</td>
<td>9</td>
<td>9</td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>Fenagh</td>
<td>4</td>
<td>4</td>
<td>3</td>
<td>-1</td>
<td>-25.0</td>
</tr>
<tr>
<td>Garvagh**</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>Glenfarne</td>
<td>4</td>
<td>7</td>
<td>10</td>
<td>+3</td>
<td>+42.9</td>
</tr>
<tr>
<td>Jamestown</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>Keshcarrigan</td>
<td>11</td>
<td>9</td>
<td>5</td>
<td>-4</td>
<td>-44.4</td>
</tr>
<tr>
<td>Kilclare*</td>
<td>(6)</td>
<td>6</td>
<td>6</td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>Killarga</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>Kilnagross</td>
<td>(2)</td>
<td>(2)</td>
<td>2</td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>Kinlough</td>
<td>11</td>
<td>18</td>
<td>19</td>
<td>+1</td>
<td>+5.6</td>
</tr>
<tr>
<td>Kiltyclogher</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>Leitrim</td>
<td>11</td>
<td>15</td>
<td>14</td>
<td>-1</td>
<td>-6.7</td>
</tr>
<tr>
<td>Lurganboy</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.0</td>
</tr>
<tr>
<td>Manorhamilton</td>
<td>33</td>
<td>65</td>
<td>72</td>
<td>+7</td>
<td>+10.8</td>
</tr>
<tr>
<td>Mohill</td>
<td>48</td>
<td>64</td>
<td>59</td>
<td>-5</td>
<td>-7.8</td>
</tr>
<tr>
<td>Newtowngore</td>
<td>9</td>
<td>6</td>
<td>5</td>
<td>-1</td>
<td>-16.7</td>
</tr>
<tr>
<td>Roosky</td>
<td>5</td>
<td>10</td>
<td>2</td>
<td>-8</td>
<td>-80.0</td>
</tr>
<tr>
<td>Rossinver</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>-2</td>
<td>-100.0</td>
</tr>
<tr>
<td>Tullaghan</td>
<td>4</td>
<td>8</td>
<td>2</td>
<td>-6</td>
<td>-75.0</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>440</td>
<td>604</td>
<td>625</td>
<td>+21</td>
<td>+3.5</td>
</tr>
</tbody>
</table>

* Not surveyed in 2002 (estimates provided in brackets)
** Was referenced as ‘Crossroads’ in the 2002 survey
^ Not surveyed in 2002 or 2008 (estimates provided in brackets)

Many of the medium-size villages remained static in terms of the number of retail outlets and when the increase in units in Carrick-on-Shannon is taken from the total figures, the retail base for the County will have reduced. This would infer that Carrick-on-Shannon is driving the retail growth of the County. Despite having a high vacancy rate, the number of units occupied in the ‘key town’ of Ballinamore has increased slightly, whilst the support towns of Mohill, Drumshanbo and Dromahair have experienced slight decreases in the number of occupied units.

Small villages such as Aghamore, Aghnasheelan, Keshcarrigan, Newtowngore and Rossinver experienced significant reduction in occupied retail or related units. In the case of Aghamore, Aghnasheelan and Rossinver, their retail base no longer exists,
primarily based on the closure of post offices. During the 2002 to 2008 period the settlements of Dromahair, Roosky, Dromod and Tullaghan experienced a 100% or more increase in retail provision, but in the intervening period these settlements have suffered significant erosion of their retail base.

5.5.2 Changes in Retail Occupancy 2008-2014

Analysis of the distribution and shift in the number of vacant units is significantly influenced by new units that became available just as the economy dived into a recession. This is emphasised in the fact that the level of vacancy in Carrick-on-Shannon and Ballinamore increased significantly during the 2008 to 2014 period. A marked increase in vacancy of units was also identifiable for the settlements of Kinlough, Dromahair, Drumkeerin and Dromod. These locations now have significant vacancy rates compared to other towns and villages in Leitrim. The increase in vacancy rates within these settlements and the County in general is primarily as a result of the impact of the recession in Leitrim. The recession has not influenced vacancy rates on a level plane within Leitrim. Some towns and villages have fared worse than others. Increase in vacancy rates within the towns of Kinlough and Dromahair appears to be primarily due to their proximity to other centres outside the County, whilst the increased vacancy in Dromod appears to have emerged as a result of the new bypass.

However, the extent of vacancy in the towns of Manorhamilton, Carrigallen and Drumshanbo improved over the 2007 to 2014 period. These towns had traditional strong market functions and they appear to be benefitting from servicing of increased population in their hinterlands and because they are reasonable distances from the nearest large urban centres.

Table 5-6 Vacant Units in Tier 1-3 towns, County Leitrim 2007-2014

<table>
<thead>
<tr>
<th>Town/Village</th>
<th>No. of Vacant Units</th>
<th>No. of Occupied Units</th>
<th>% of Vacant Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carrick-on-Shannon</td>
<td>28</td>
<td>60</td>
<td>155</td>
</tr>
<tr>
<td>Ballinamore</td>
<td>14</td>
<td>31</td>
<td>74</td>
</tr>
<tr>
<td>Manorhamilton</td>
<td>23</td>
<td>16</td>
<td>65</td>
</tr>
<tr>
<td>Mohill</td>
<td>17</td>
<td>19</td>
<td>64</td>
</tr>
<tr>
<td>Drumshanbo</td>
<td>19</td>
<td>6</td>
<td>42</td>
</tr>
<tr>
<td>Carrigallen</td>
<td>4</td>
<td>2</td>
<td>27</td>
</tr>
<tr>
<td>Kinlough</td>
<td>1</td>
<td>4</td>
<td>18</td>
</tr>
<tr>
<td>Dromahair</td>
<td>2</td>
<td>5</td>
<td>20</td>
</tr>
<tr>
<td>Dromod</td>
<td>4</td>
<td>5</td>
<td>18</td>
</tr>
<tr>
<td>Drumkeerin</td>
<td>2</td>
<td>3</td>
<td>14</td>
</tr>
<tr>
<td>Leitrim Village</td>
<td>1</td>
<td>1</td>
<td>15</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>115</strong></td>
<td><strong>152</strong></td>
<td><strong>512</strong></td>
</tr>
</tbody>
</table>

Overall within the main urban centres serving Leitrim County, the extent of vacancy has increased by 3.4% over the 2007-2014. When the towns of Carrick-on-Shannon and Ballinamore are taken out of the figures, the vacancy rate in the remainder of the towns will have actually reduced slightly overall during 2007-2014.

It is expected that subsequent reviews of the County Retail Strategy will incorporate a section dealing with ‘changes in retail floorspace’ occupancy.
5.6 Future Retail Growth Potential

This section provides the first floorspace capacity assessment for the County taking into account changes to the economy, population and future economic and population forecasts. It should be noted that a quantitative retail appraisal of this nature can only provide a broad brush indication of the likely floorspace quantum that need to be achieved in the County. It involves making forecasts for the future population, expenditure, turnover and other factors. A number of inputs have to be estimated. As the study is based on a number of assumptions, it can only provide a broad indication of anticipated capacity. Nonetheless, the quantitative study can give a useful overview of the position of the County from a retailing perspective. Furthermore, it should be noted that the figures set out in this section are not intended to be prescriptive thresholds nor should they be treated as upper limits.

5.6.1 Methodology

The approach taken is a step-by-step capacity assessment including the following steps:

1) Estimate the population at base and design year;
2) Estimate of expenditure per capita on convenience, comparison and bulky household goods at the base year and design year;
3) Estimate of total available expenditure in the base year and design year for residents of County Leitrim;
4) Estimate the likely increase in expenditure available for provision of additional floorspace, making allowances for existing planning permissions, increased efficiency of existing retail floorspace and changes to the proportion of expenditure on other forms of retailing such as Internet shopping;
5) Estimate the likely average turnover of new floorspace in convenience, comparison and bulky household goods;
6) Estimate the capacity for additional floorspace in the County.

5.6.2 Population Estimates

As noted in Section 4.3 the population of County Leitrim grew at a rate of 9.8% over the 2006-11 inter-censal period, increasing from 28,950 persons to 31,798 persons. In order to be consistent with the Regional Planning Guidelines 2010-2022 population targets for County Leitrim, the following population projections for 2020 and 2022 are set out in Table 5-7 below, which has been extracted from Leitrim County Housing Strategy.
5.6.3 Expenditure Estimates

Expenditure per capita is calculated based on the information contained within Table 5-1 above which in turn is based on information published by the Central Statistics Office. This provides data for the total estimated breakdown in household expenditure on convenience, comparison and other expenditure categories for the 2009-2010 period. When broken down into weekly spend and multiplied per resident of Leitrim for 2010, the estimated annual spend per capita is calculated as €3,238 on convenience goods and €2,328 on comparison goods. It is noted that this is very much in line with figures for other neighbouring Counties, despite the fact that CSO Annual Service Inquiry Returns were used to calculate this spend. This source is therefore used for the purposes of this capacity assessment.

Table 5-8 Estimated Spend on Comparison & Convenience Goods for Leitrim County, 2010 - 2013

<table>
<thead>
<tr>
<th>Total Weekly Household Spend</th>
<th>Convenience</th>
<th>Comparison</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly Spend per Capita</td>
<td>€1,961,416</td>
<td>€1,410,050</td>
</tr>
<tr>
<td>Annual Spend per Capita, 2010</td>
<td>€62.27</td>
<td>€44.76</td>
</tr>
<tr>
<td>Annual Spend per Capita, 2013</td>
<td>€3,238</td>
<td>€2,328</td>
</tr>
<tr>
<td></td>
<td>€3,209</td>
<td>€2,307</td>
</tr>
</tbody>
</table>

14 No precise population figures are available for the year 2010, as the Census of Population was undertaken in 2011. The Border Regional Planning Guidelines estimate a population of 30,600 for Leitrim in 2010, but this is considered to have significantly underestimated the population based on the Census 2011 figure for the County of 31,798. Consequently, a figure of 31,500 is considered a more reasonable estimate of the 2010 population for County Leitrim.

15 For example see Roscommon County Retail Strategy 2014-2020, p. 29
An adjustment for the County retail expenditure (using a 0.93 weighting) based on State averages has already been incorporated into the data extrapolated from Table 5-1. In order to estimate the current annual spend per capita in Leitrim for convenience and comparison goods, we have reviewed the retail sales index from 2010 to the last quarter of 2013 (CSO, 2014). This indicates that the retail sales dropped from an index of 89.1 in 2010 to 88.3 in the last quarter of 2013.

Future Estimates (2014-2021)

For the purposes of estimating the future floor area requirements, it is essential that future changes in retail sales are estimated. As per estimates in the Housing Strategy 2015-2021 relating to overall estimated economic growth patterns and based on economic commentary from the ESRI (2013), the CSO and others, we have assumed a reasonable annual growth index of 0.3 per annum over the 2014-2021 period. This will provide a current estimate and an estimate of retail spending per capita in Leitrim in the design year 2021.

Table 5-9 Estimated Spend on Comparison & Convenience Goods for Leitrim County, 2014 - 2021

<table>
<thead>
<tr>
<th></th>
<th>Convenience</th>
<th>Comparison</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Spend per Capita, 2014</td>
<td>€3,220</td>
<td>€2,315</td>
<td>€5,534</td>
</tr>
<tr>
<td>Annual Spend per Capita, 2021</td>
<td>€3,358</td>
<td>€2,414</td>
<td>€5,772</td>
</tr>
<tr>
<td>Total Annual Spend, 2014</td>
<td>€105,014,465</td>
<td>€75,494,27</td>
<td>€180,508,734</td>
</tr>
<tr>
<td>Total Annual Spend, 2021</td>
<td>€118,520,771</td>
<td>€85,203,872</td>
<td>€203,724,644</td>
</tr>
</tbody>
</table>

The total annual spend for the County is estimated in Table 5-9 using the population projection figures used as part of the County Housing Strategy, which in turn reflect the Border Regional Planning Guidelines projections for Leitrim.

In considering the above expenditure levels, it is important to note that significantly different levels of turnover will apply to town-centre comparison goods, such as clothing and footwear and smaller household durables than would apply to ‘bulky-household goods’ sold in retail warehouses. Retail warehouses have a distinct function and are generally located outside of the town centres. It is necessary to establish the expenditure potentially available to town centre comparison floorspace. In this regard, it is considered important to split between expenditure available for bulky household goods and comparison goods within the study area. Having regard to the Household Budget Survey, experience elsewhere in this respect and the comparative low level of bulky goods units in Leitrim and the high vacancy levels of units in Leitrim, it is estimated that approximately 10% of comparison expenditure will be accounted for by bulky household goods in retail warehouse type premises. The split in estimated spend on comparison, convenience and ‘bulky-goods’ is detailed in Table 5-10 below and this will feed into estimates regarding floorspace requirements.

Table 5-10 Total Estimated Spend on Comparison, Convenience & Bulky Goods, 2014 - 2021

<table>
<thead>
<tr>
<th></th>
<th>Convenience</th>
<th>Comparison</th>
<th>Bulky Goods</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Annual Spend, 2014</td>
<td>€105,014,465</td>
<td>€67,944,843</td>
<td>€7,549,427</td>
<td>€180,508,734</td>
</tr>
<tr>
<td>Total Annual Spend, 2021</td>
<td>€118,520,771</td>
<td>€76,683,485</td>
<td>€8,520,387</td>
<td>€203,724,644</td>
</tr>
</tbody>
</table>
Trade Draw & Leakage

Further adjustments are required to the capacity figures outlined in to take into account the levels of trade draw and leakage of expenditure from the study area. Household and shopper surveys have not been undertaken as the necessary resources were not available to Leitrim County Council, therefore reasoned assumptions on both market share and trade draw inform this aspect of the retail expenditure estimates.

Based on the retail survey, the County would appear to be well-served by convenience shops, particularly with the opening of the new SuperValu in Manorhamilton and Tesco and Aldi within Carrick-on-Shannon. Convenience retailers are expected to draw shoppers from outside the County into the town, whilst it is expected that there would be reasonable level of outflow to convenience outside the County for some 'weekly grocery shopping', particularly in areas proximate to other large retail centres such as, Sligo, Longford, Enniskillen, Bundoran and Cortober. Consequently, we are assuming an overall trade leakage of approximately 10%.

It is estimated that given the similar comparison and convenience floor areas existing within the County, a 10% trade leakage for comparison floor area is initially estimated. However, as noted over 72% of the comparison floorspace is located in Carrick-on-Shannon and whilst this may have significant trade draw, much of the County is underserved by comparison shops. Trends also show that people are willing to travel further distance in availing of retail experiences in other competing retail centres. Consequently, we consider that a 20% trade leakage overall in terms of comparison retail expenditure would be reasonable to assume.

With regards to bulky goods shopping, it is assumed that a similar situation to the comparison trade leakage would emerge. Consequently, we consider that there is a 20% trade leakage overall in terms of bulky goods retail expenditure.

Table 5-11 Adjusted Estimated Spend on Comparison, Convenience & Bulky Goods, 2014 - 2021

<table>
<thead>
<tr>
<th></th>
<th>Convenience</th>
<th>Comparison</th>
<th>Bulky Goods</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Annual Spend, 2014</td>
<td>€94,513,018</td>
<td>€54,355,874</td>
<td>€6,039,542</td>
<td>€154,908,434</td>
</tr>
<tr>
<td>Total Annual Spend, 2021</td>
<td>€106,668,694</td>
<td>€61,346,78</td>
<td>€6,816,310</td>
<td>€174,831,792</td>
</tr>
<tr>
<td>Change in Total Annual</td>
<td>+€12,155,676</td>
<td>+€6,990,914</td>
<td>+€776,768</td>
<td>+€19,923,358</td>
</tr>
<tr>
<td>Spend 2014-2021</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

It is estimated that there will be almost a €20 million increase in retail spend in the County over the 2014 – 2021 period based on population projections and retail spend change.

5.6.4 Floorspace & Turnover Capacity

It is acknowledged that irrespective of the floorspace analysis and requirements set out, ultimately the economic climate and retail market will dictate future retail development in the County. It is the responsibility of the Council to steer this development to the appropriate locations within the County. It is hoped that retail activity throughout the County will prosper over the lifetime of this Strategy and beyond.
Floorspace

A survey of existing and constructed floorspace with County Leitrim has been carried out by Leitrim County Council to inform the Retail Strategy. This floorspace is classified as convenience, comparison or bulky goods.

<table>
<thead>
<tr>
<th>Floorspace (m²)</th>
<th>Convenience</th>
<th>Comparison</th>
<th>Bulky Goods</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>9,391</td>
<td>10,796</td>
<td>10,137</td>
<td></td>
<td>30,324</td>
</tr>
</tbody>
</table>

Table 5-12 does not take into consideration retail floorspace, which has been permitted, but not yet constructed. Due to the current economic and retail conditions on a national basis, and the considerable uncertainty as to which developments will be implemented and further uncertainty on timing, it is considered that the situation should be reviewed and assessed in considering future applications having regard to the situation at that time. Any implementation of such permissions is likely to be on a much-reduced scale from that originally approved, and/or on a phased basis.

Turnover Capacity of Existing Floorspace (2014)

The turnover figures for 2014 set out in Table 5-11 are an estimate of the amount of expenditure that is currently being sustained by the estimated amount of floorspace in the County. For example, Leitrim had 9,391 sq.m. convenience floorspace in 2014, which is estimated to be generating a turnover of €107 million; 10,796 sq.m. of comparison floorspace, which is estimated to be generating €61 million; and 10,137 sq.m. of bulky household floorspace, which is estimated to be generating €6.8 million. Looking at indicative turnover ratios (turnover divided by floorspace), trading conditions in the convenience sector would be considered to be trading at a reasonably healthy level (€10,064 per sq.m) with a good mix of modern retail floorspace and smaller symbol stores. Comparison floorspace is trading reasonably at an average of €5,035 per sq.m. and bulky-goods floorspace is trading poorly at €596 per sq.m. (reflected in high-vacancy rates).

Turnover Capacity of Floorspace (2021)

Assuming a similar trend in retail spending change to that exercised within Table 5-9 above, we can calculate the estimated turnover per floorspace in county Leitrim in 2021.

<table>
<thead>
<tr>
<th>Turnover</th>
<th>Convenience</th>
<th>Comparison</th>
<th>Bulky Goods</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>€10,064</td>
<td>€5,035</td>
<td>€596</td>
</tr>
<tr>
<td>2021</td>
<td>€10,496</td>
<td>€5,251</td>
<td>€621</td>
</tr>
</tbody>
</table>

By dividing the estimated change in retail expenditure 2014-2021 (see Table 5-11) with the estimated turnover per floor area for 2021 in Leitrim, the additional floorspace envisaged to be required in Leitrim over the 2014-2021 period can be estimated (see Table 5-14).
Future Floorspace Requirements

Table 5-14 Estimated Additional Retail Floor Area in County Leitrim, 2021

<table>
<thead>
<tr>
<th>Year</th>
<th>Convenience</th>
<th>Comparison</th>
<th>Bulky Goods</th>
</tr>
</thead>
<tbody>
<tr>
<td>2021</td>
<td>1,158 m²</td>
<td>1,331 m²</td>
<td>1,250 m²</td>
</tr>
</tbody>
</table>

Approximately between 1,100 sq.m. and 1,300 sq.m. of comparison, convenience and bulky goods floorspace is anticipated to be required over the lifetime of the Strategy. However, given the extent of vacant units and extant permissions (many of which will soon expire), it is considered that there is sufficient provision at present, and that this will need to be reviewed over the lifetime of the Strategy. It would appear far more sustainable to encourage reoccupation or replacement of existing vacant floorspace within town centres rather than seek new build additional floorspace outside of town cores. However, it is recognised that this is not always possible given the changing dynamics of shopping. Robust Retail Impact Statements will be required as part of future planning applications for retail development, in order to best guide the development of retail planning in Leitrim, in particular based on sound rationale, evidence and the findings of this Retail Strategy. In considering proposals for future retail provision, the Council will have regard to the need to avoid unnecessary leakage of retail expenditure to competing centres outside of the County, where this is not considered a sustainable form of development.

Whilst noting the estimated future additional retail floor area required for the County and the extent of existing vacant retail space, it is important to note that current vacant retail space may not be best located to satisfy the County retail floor space needs. Furthermore, it must be emphasised that it is not the aim of this Retail Strategy to inhibit new retail development. Instead this Strategy aims to ensure recognition is given to the importance of maintaining the existing retail hierarchy of the County and a town-centre first approach is encouraged when assessing convenience and comparison retail proposals.

It is recommended that the need for longer term retail development is reviewed in 2018, to ensure that there is adequate flexibility in the Retail Strategy to adapt to changing needs.

5.7 Consideration of Retail Survey

The survey highlights the distribution of convenience retail space throughout the County, with 62% located in the County ‘key towns’. In 2014, Carrick-on-Shannon contained 72% of comparison retail floorspace within the County, but also contained and significant excess of ‘bulky goods’ retail floorspace. The level of commercial vacancy overall in the County had increased by over 3% since 2008 to 22% and this vacancy rate matched the housing vacancy rates for the County (when secondary and holiday homes were excluded). Estimates suggest that between 1,100 sq.m. and 1,300 sq.m. of convenience, comparison and ‘bulky goods’ retail floorspace will be required over the lifetime of the Plan. Whilst recognising the extent of retail vacancy, robust retail assessments would be necessary for future retail proposals, where town centre sites are not available and/or suitable.
6. **Health Check Qualitative Assessment**

The *Retail Planning Guidelines* (RPGs) emphasise the importance of setting retailing activities within an established settlement hierarchy. It is essential to firstly confirm a hierarchy of settlements in Leitrim and secondly to identify the opportunities and constraints for retailing within the recognised centres.

The RPGs refer to the core strategies of Development Plans providing details of the relevant city and town centre areas, as well as any locations designated for significant growth.

A key message of the RPGs is the enhancement of the vitality and viability of city and town centres in all their functions through sequential development. To apply this to Leitrim, we must firstly examine the existing centres in the County and set them against the following four criteria, which contribute to the vitality and vibrancy of a centre.

1) **Attractions** – these underpin a town and comprise the range and diversity of shopping and other activities, which draw in customers and visitors.

2) **Accessibility** – Successful centres need to be both 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.

3) **Amenity** – A healthy town centre should be a pleasant place to be in. It should be attractive in terms of environmental quality and urban design, and it should be safe with distinctive identity and image.

4) **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 coordinated town centre management initiatives to promote the continued improvement of the centre.

Implementation of measures supported in the Design Manual for Urban Roads and Streets reducing the dominance of cars in town centres, increasing footfall and generally creating a more attractive self-regulating urban shopping environment will have significant benefits for each of the County towns. However, it is understood that such measures are severely constrained by budgetary demands.

### 6.1 Key Towns & Support Towns

Carrick-on-Shannon is the principal town of the County and as such, maintaining and enhancing retailing in this town is essential. The other main retailing towns within the County comprise the key towns of Ballinamore and Manorhamilton and the support towns of Mohill, Drumshanbo and Dromahair. Kinlough in the north of the county has a sizeable population but a relatively small retail base with significant reliance on Bundoran for convenience retailing. Carrigallen in the west of the County has a reasonable service function serving the village and its hinterland. It is envisaged that convenience and comparison retailing will be aimed at the principal town, the keys towns and support towns within the County i.e. towns placed in Tier 1 and Tier 2 of the Retail Hierarchy. In assessing the retail function of Carrick-on-Shannon it will also be vital that the relationship of Cortober is also assessed.
6.1.1 Carrick-on-Shannon

Carrick-on-Shannon is the largest town within County Leitrim and is located on an important crossing point over the river Shannon. The town has a relatively young population with many adults in the family formative years, very much linked to employment sectors and access to housing. Assuming low levels of emigration and relocation, this should point towards a natural increase in the population of the town over the period of the Plan, reflective of population projections provided for in the Border Regional Planning Guidelines. As the main administrative town for the County, Carrick-on-Shannon is very well-known as a town aligned to serve the tourism industry. The town is divided into two physical distinct areas by the river Shannon, with the southwest bank comprising the Cortober area within the jurisdiction of Roscommon County Council. That part of the town on the northeast bank within Leitrim County Council jurisdiction comprises the vast majority of the town population and employment providers and the historic town core.

Proposals with respect to directing the retail development of Carrick-on-Shannon needed to be prepared mindful of the existing Carrick-on-Shannon Local Area Plan 2010-2016, Carrick-on-Shannon 2020 Vision and the aspiration of the Council that a separate integrated Local Area Plan will be prepared for the county town of Carrick-on-Shannon and Cortober, in conjunction with Roscommon County Council.

Attractions

Retail Attractions

Carrick-on-Shannon continues to offer considerable retail attraction in comparison to the smaller towns within the County. As the largest town within the County, it has the widest retail base and offering with over 200 businesses offering retail produce and retail-related services. There is a strong emphasis on tourism-related shops and bijou shopping in the town centre.

Asides from the usual comparison goods shops expected in a town the size of Carrick-on-Shannon, the town hosts a sizeable number of speciality retail outlets specifically geared to visitors to the area, including gift shops. The town also has a strong concentration of public houses, restaurants and cafes, which are particularly busy at the weekends.

Vacancy within the town is very much concentrated in backstreet locations where footfall is quite low, whilst premises along Bridge Street and Main Street are reasonably well occupied. Since the preparation of the previous Retail Strategy in 2007-08, Rosebank Retail Park on the Dublin Road has opened, providing a more balanced layout to the retail infrastructure of the town. Retail parks are located on either side of the town centre (Rosebank and Cortober). Based on occupancy rates,
bulky goods operators on the outskirts of Carrick-on-Shannon appear to have suffered most in the town during the economic downturn.

Tourism

"Carrick on Shannon is the regional gateway to the River Shannon and the Shannon – Erne waterway to the north and the Lakelands of Lough Allen and Lough Key. Within this extensive inland waterway system there is up to 41 lakes within a 10km radius of Carrick on Shannon. This waterway system has made Carrick on Shannon what it is today and has allowed the town to become synonymous with traditional river activities including cruising, rowing and angling. However, in more recent years there has been a growing trend in water based adventure activities such as kayaking. This rich environment and the natural facilities have made Carrick on Shannon an inland tourism hub on which the town has thrived (Carrick-on-Shannon 2020 Vision, p. 7)."

Carrick-on-Shannon is a natural hub for boat cruisers who can utilise the town's expanding convenience and comparison shopping base. As noted under previous studies of the County, there is a concentration of tourist accommodation, particularly within the hotel sector in Carrick-on-Shannon. However, there is a wide variety of accommodation to suit a host of needs available in the town and surrounding area. The tourist office is located along the Quays in Carrick-on-Shannon and a website and social media are operated outlining the extent of activities and accommodation available to visitors to the area. It is important to note that many of the visitors to Carrick-on-Shannon do so because of its proximity to attractions outside the County, including the Arigna Mines, Lough Key Forest Park and Carrick-on-Shannon Golf Club.

Carrick-on-Shannon boasts an impressive architectural heritage including the Market Yard and the Costello Chapel opposite the town clock, reputed to be the smallest chapel in Europe.

Recreation and Leisure

There are 12 public houses and 21 restaurants/cafes located in Carrick-on-Shannon, providing an expansive array of eating and drinking options within the County town. Carrick-on-Shannon is home to attractive walking routes and green areas including the Riverfront Amenity Park with its boardwalk over the Shannon.

The town hosts a number of festivals and events throughout the year including Shannon Boat Rally (July), the Water Music Festival (August), The Regatta (August), Carrick-on-Shannon Fishing Festival (September) and Hunter’s Moon Festival (October). The recent Carrick 400 Festival operated throughout 2013 to celebrate 400 years of the town being established and included a host of festivals and events reflecting on the culture and heritage of the town.

Carrick-on-Shannon Sport and Leisure Centre (The Aura) in Attifinlay comprises a host of sports and recreation facilities including a swimming pool and gymnasium facility. A large sports hall is also available in Attifinlay. Pairc Sean McDiarmuda on the Dublin road is home to Leitrim GAA teams and comprises a stadium capacity of almost 9,500 persons including a 3,000 seat covered stand.

Housed in the impressive 19th-Century former-Courthouse building, The Dock on St. George’s Terrace comprises a 100 plus seat ‘Black Box’ performance space, three art galleries, artists studios, an arts education room and is home to The Leitrim Design House.

On the southwest side of the Shannon there are additional facilities including Carrick Cineplex comprising a 4-screen cinema, Mulvey's Bowling Centre and the Kidz Kingdom Amusement Centre.
While there has been considerable recent entertainment development, the demand for services such as restaurants in the town appears to be high and increasing and should be generally encouraged. There may also be opportunities for the Council to initiate new arts and craft festivals in the town and the County as a whole. The Market Yard may be a suitable location for such events.

**Education and Employment**

Carrick-on-Shannon provides for a variety of employment and education opportunities. Aside from the array of tourism, services and retail employers in the town, Bank of America, Avantcard, the Department of Social Protection, Masonite, the HSE, St. Patrick’s Community Hospital and the Leitrim County Council are the other major employers in the town. The Hive Centre recently opened on the Dublin Road is now home to over ten Companies operating in the creative/innovative sector, with strong demand for ‘hot desks’ and high-quality training facilities.

Close proximity and good access by road to other employment centres such as Longford and Sligo, allow a variety of employment opportunities for residents of the town.

Carrick-on-Shannon hosts a number of education facilities, including offices for Mayo, Sligo and Leitrim Education Training Board (formerly the VEC). Carrick-on-Shannon Education Centre in Marymount provides a range of courses for residents of Leitrim, Longford, Roscommon and beyond. The Community School is also located in Summerhill and this provides post-primary education and adult courses.

The development of new employment and education opportunities in the town should be supported, however, these should be located in town centre locations and appropriately zoned lands, where possible.

**Accessibility**

Carrick-on-Shannon is strategically-located on the N4 Dublin to Sligo national primary road network and also along the Sligo to Dublin mainline rail. Access to Carrick-on-Shannon on this major artillery, along with air access via Ireland West Airport Knock places the town in a strong position for regional investment, commuter-location choice and tourism.

The town is served by a railway station at Cortober side with 6-7 no. scheduled services connecting to Dublin and Sligo on a daily basis. Bus Éireann services from the shelters fronting Cryan’s Hotel connect with Sligo and Dublin (6 daily services), Stroketown (2 daily services on 3 weekdays) and Dromahair (Saturday service). Private bus services serving Sligo and Dublin are also offered by Furey’s Coaches (3 services daily on Thursday, Friday and Sundays). Westlink Coaches provide a daily bus service from Drumshanbo to Sligo via Carrick-on-Shannon on weekdays (during college term), as well as services to Donegal, Galway and Athlone at weekends.

It is an objective of the Council to complete the design and construct the proposed Carrick-on-Shannon bypass. This is expected to have the effect of reducing traffic congestion, improving the physical environment of the town, encourage further investment in the region through improved infrastructure and reduce travel time on the National road network.

Car parking remains an issue within Carrick-on-Shannon town centre, as is the case in most County towns and large retail centres. An expanded area of the town is now controlled via on-street disk-parking, which has helped to alleviate some of the congestion, along with an increase in off-street parking. However, the level of on-street and off-street parking is not always available to meet peak demands, particularly during summer months when the town experiences an influx of visitors.
Amenity

There is a growing consistency in shopfronts and signage since the preparation of the previous Retail Strategy, and this in turn is improving the general appearance of the streetscape within the town centre. A more visually appealing town centre will serve to attract more shoppers into the town. Any proposals for development or redevelopment along the town centre streets should incorporate façades, building height and proportions similar to other buildings on the street. Any new additional signage should provide a positive addition to the streetscape.

Continued improvements will be needed to further improve the visual appearance and impression of the town along the main approach roads. It is noted that extensive landscaping works were recently undertaken within the Cortober area and this has improved the appearance along this entrance route.

The quality of retail outlets in Carrick-on-Shannon is generally quite good, but there is a clear preference to attract ‘bijoux’ retailers into this area, given its attraction to the tourist trade, as emphasised in the Carrick-on-Shannon 2020 Vision document. The needs of local residents are also well provided for, albeit with the exception of having to undertake the ‘weekly’ shopping trip to out-of-town areas. The development of niche market and quality produce retail outlets will continue to be encouraged in the future. As detailed within the previous Retail Strategy "Carrick-on-Shannon may not be able to compete with larger centres for comparison shopping for example, the development of specialist products and services within Carrick-on-Shannon will act as a magnet attraction to the town" (p. 62). The weekly ‘Farmers’ Market’ in the Market Yard complex is a welcome addition to the retail base and offers an opportunity for local producers to highlight the quality ingredients and produce of the area.

Actions

In general, retail development in Carrick-on-Shannon should be confined to the existing retail centre of Main Street and Bridge Street. In addition, there are a number of vacant or rundown premises within the retail core, and the amenity of the area would be improved if these were redeveloped or renovated for retail purposes, subject to planning permission. The development of new retail outlets should therefore only be considered where existing buildings are inappropriate for the envisaged use.

Provision of a centralised parking area with connections to Main Street and Bridge Street would encourage an increased volume of shoppers to the town centre area and would introduce increased footfall to the laneways referred to above, which currently contain the greatest concentration of vacant commercial units. Provision of off-street parking in this area may alleviate further on-street parking particularly along Main Street, Bridge Street, St George’s Terrace and St. Mary’s Close. This may in turn serve to give greater scope to improve the visual amenity of the town centre streetscape. Disabled-parking bays have now been allocated along the main streets of the town.

Measures to prevent vacant units within the town centre falling into disrepair should be implemented and any means to creating a living unit should be considered as an alternative.

Measures to improve accessibility and connectivity between Rosebank Retail Park and Cortober retail areas with the town centre should be supported, as this will enhance the service offering of the town and create a more cohesive and robust retail centre.

The zoning map of Carrick-on-Shannon shall inform the retail boundaries. Regard shall be had to Section 8 of this report and the sequential test approach.
With the growth in out-of-town shopping, the town of Carrick-on-Shannon appears to have generally fared well with an increased retail draw. However, this draw has also impacted upon the town centre and any future growth in retail needs to be very sensitive to this fact.

Proposals to increase connectivity in the town should be explored and encouraged, particularly where this can increase footfall to backstreet areas, which suffer highest levels of retail vacancy.

The further development of niche retail markets in Leitrim in general, but particularly in Carrick-on-Shannon town centre, should be encouraged.

Proposals should seek to consolidate the town core and strengthen the attractiveness of this area for doing business. Further out-of-town retail should be avoided where this can lead to weakening of the viability and vitality of the town centre.

Of all the retail centres in Leitrim, Carrick-on-Shannon has the greatest potential to attract national and international multiples. Many of these multiples are recognised to have corporate logos/branding. Nevertheless, it will be essential that any proposals by such multiples for new shopfronts will need to be sympathetic to the building on site, the character of the street and the architectural heritage of the town.

6.1.2 Ballinamore

Ballinamore is situated in east county Leitrim along the Shannon-Erne Waterway and surrounded by a necklace of lakes. Ballinamore performs an important service function for the east Leitrim area and west County Cavan. The commercial core of the town generally extends along Main Street and High Street, which runs in an east-west direction. In recent years retail expansion emerged along Cannoboe Road, which functions as a bypass of the main town core. However, this growth has stalled with many constructed units remaining vacant within the Tesco Shopping Centre complex.

Attractions

Retail Function

Ballinamore is very well served by convenience shopping, with SuperValu and Tesco supermarkets located in the town and a number of smaller outlets, a reflection of its important service function. A good mix of services is available within the town, although there are is a distinct lack of comparison goods outlets. The town has a low level of bulky goods retailers. The town has a high number of public houses, which can contribute to the tourism function of the town.

Tourism

The economy of Ballinamore is highly-dependent upon services, agriculture, the tourism industry and the need to continue to development the town as a tourism destination. The town and environs are served by a range of guesthouses, hotels and self-catering accommodation. Many visitors to the town travel via the Shannon-Erne waterways, with mooring points in numerous locations along the canal. Much of the tourism market is focussed upon activity holidays, but there is also a significant draw to the area from returning emigrants tracing their ancestry in the Genealogical Centre.
Visitors to the town also have a range of festivals to choose from throughout the year including the Drama, Spraoi, Family, Free-Fringe and Angling Festivals. Glenview Folk Museum 3km southwest of the town is an important asset to the area.

Recreation and Leisure Facilities

Ballinamore and the surrounding areas are well-serviced in relation to recreation and leisure facilities. The canal and Shannon-Erne waterways provide for numerous boating and angling opportunities for locals and tourists to the area. Ballinamore Golf Club is located northwest of the town and Ballinamore Sports Complex on Railway Road offers a range of recreation facilities. Cycle and walking routes loop around the town, some of which take in the canals, the Kingfisher Cycle Trails and Sliabh an Iarainn hillwalks.

Education and Employment

The town has a new impressive post-primary school facility constructed on Railway Road. An Enterprise Centre has been constructed along Willowfield Road and the town is well-served by broadband telecommunications. The bulk of employment in Ballinamore is associated with the services operated within the town.

Accessibility

Ballinamore is located at a busy intersection on the regional roads network with the R199, R202 and R204 regional roads converging on the town. These routes provide ease of access to the town from surrounding and wider areas. Cannaboe Road linking with The Line provides an alternative route through the town for vehicular traffic, although HGVs and other large vehicles continue to travel along the shorter route of Main Street and High Street when passing through the town.

In June 2011 Ulsterbus Goldline route 296 (Omagh-Enniskillen-Ballinamore-Longford) was discontinued and this has significantly reduced interregional connectivity. The only buses serving Ballinamore at present are local Bus Éireann route 462 serving Sligo and Carrigallen on Fridays and Saturdays and route 464 serving Enniskillen and Mohill on Thursdays.

Vehicular movement speeds through the town are far from conducive to an attractive shopping environment and discourage motorists to stop and shop. This loss of passing trade requires addressing through implantation of self-regulating streets, as supported within the Design Manual for Urban Roads and Streets.
Car parking is primarily provided in the form of parallel on-street parking, but there are also off-street parking areas in ‘The Square’ at the top of the town, within the Tesco complex, to the rear of SuperValu and adjacent to the river (behind AIB). In general the town appears to be well-served by parking, but this does not appear to have halted illegal parking. At various locations within the town core, cars are parked partially mounting footpaths and on ‘double-yellow’ lines, restricting movement and access.

The lack of formalised on-street parking appears to facilitate and encourage illegal parking and to restrict movement on paths.

**Amenity**

The general visual amenities of Ballinamore are of a reasonably high standard with the majority of buildings in good condition. Many buildings which were previously used for retail purposes are now vacant and some are used for display purposes. Many shops use the Irish language to advertise and this has created a unique identity for the town despite not being located in a Gaeltacht area.

The main street through the town is connected by a number of pocket parks and civic plazas, which offer interesting breaks in the streetscene and well-landscaped seating areas. Parking in areas fronting these spaces, screens these spaces from view (at eye-level) and restricts views from these spaces, reducing the overall visual aesthetics and quality of these spaces.

The town centre generally lacks vibrancy and has a low footfall. As a Sub-County Town Centre, it should have a greater and better comparison offer, whilst convenience offer within the town is generally located on the fringes of the town centre (SuperValu, Tesco and XL Park Store).

Removal of some on street parking would allow for improvements to the streetscape, improved pedestrian facilities and some traffic calming. In particular, the provision of double yellow lines along one side of the road at the top of High Street would ease traffic congestion caused by parked cars in this area.

There is a distinct lack of uniformity in the styles of shopfront and this may be primarily relative to the variety in the age of buildings. Greater consistency should be sought in new shopfront proposals.

Retail and associated services for the town are spread out along the Main Street/High Street over 600 metres and this results in the town lacking a fixed centre and low levels of footfall throughout. Creation of a more centric urban design concept between the Church, the Courthouse and St. Brigid’s Street would provide for a focal point to the town.

**Actions**

The development of new retail outlets in Ballinamore should only be considered where existing buildings are inappropriate for the envisaged use.
Some form of shopfront renewal scheme should be considered for Ballinamore to reinvigorate the streetscene and provide for greater consistency in appearance. There is a need for additional urban design treatment and removal of on-street parking to reduce the visual dominance of roads and parking. The vacant units along Cannoboe Road are impacting significantly upon the streetscape and efforts to improve the upkeep of these buildings should be made in the interests of the general visual amenity of the town. Alternative uses such as ‘bulky goods’ could be appropriate for these units, particularly considering the availability of parking. The land use strategy map for Ballinamore will inform the retail boundaries for the town. Regard shall be had to Section 8 of this report and the sequential test approach.

6.1.3 Manorhamilton

Manorhamilton is located centrally within north County Leitrim and performs an important service function for the town and the wider area, including the glens of north Leitrim. The town history is steeped in the history of Manorhamilton Castle, which overlooks the town.

The main commercial streets include Old Church Street, Church Lane, Main Street, Castle Street and New Line. The majority of the buildings in the town centre are traditional 3-storey townhouses, with commercial users at ground floor level. The town is constructed on a number of interlocking hills and expanded from the Castle along the current Castle Street – Main Street (northwest-southeast) axis. In more recent times the provision of a national route through the town has resulted in the town expanding along New Line and the national route.

**Attractions**

**Retail Function**

Prior to 2011 when SuperValu supermarket opened up, Manorhamilton suffered from significant loss of retail income to other neighbouring centres. Permission for another major supermarket, Tesco, has also been granted planning permission, but work on this has not commenced to date. A reasonable mix of services is available within the town, although there is a distinct lack of comparison goods outlets. The town has a low level of bulky goods retailers. The town is well-served by financial institutions, emphasising the towns importance in the local economy, which is primarily centred upon agriculture. Retail activity within the town is primarily centred on SuperValu the main convenience store in the town. Manorhamilton 'Farmers' Market' takes place every Friday from (10am to 2pm) in the grounds of the Bee Park Resource Centre.

**Tourism**

The town has a magnificent setting against the backdrop of Benbo Mountain and the north Leitrim Glens. Manorhamilton is surrounded by significant swaths of unspoilt green countryside and glens. The town attracts visitors to the area who wish to explore the seven impressive glens that surround the town. The main tourist attraction within the town is the Manorhamilton Castle and Heritage Centre which is open all the year round to the general public and to organised tours.
The Glen Centre also serves as an important tourist attraction to the town, with regular concerts held within this intimate setting. Compared with other towns of similar size within Leitrim, Manorhamilton is poorly-served by tourism accommodation. The arts, drama, heritage, hillwalking and angling figure prominently as tourist activities associated with the area.

Recreation and Leisure Facilities

Manorhamilton is served by a number of sporting organisations and clubs with boxing, GAA, soccer, hillwalking and tennis very prominent within the town. Bee Park Resource Centre on New Line includes a large hall space and a gymnasium facility.

Education and Employment

St. Clare’s Comprehensive School is the main secondary school in the town and includes an all-weather athletics track, Gaelic football pitch, soccer pitch, basketball court and sports hall. Asides from the service providers, the main sources of employment within the town of Manorhamilton include Mirror Controls International (MCi), Merenda Ltd., Elastometall Ireland, the HSE, Leitrim County Council, Manorhamilton Livestock Mart & Export Sales, Lock Up Alarms Ltd. and Melvin Plastics.

Accessibility

Manorhamilton has excellent accessibility by private car, being served by the N16 road, which connects with Sligo 26km to the west and Enniskillen 40km to the east. Bus Éireann serves Manorhamilton each way to and from Sligo four-times daily and the journey takes approximately 35 minutes.

The N16 primary route dissects the town and transports high volumes of traffic through the town along the Sligo Road and New Line. Fortunately much of the through-traffic is diverted from Main Street, but not in its entirety. HGVs and other large vehicles continue to travel along Main Street when travelling from the south (Carrick-on-Shannon) towards the east (Enniskillen). Peer review for an N16 bypass of Manorhamilton was completed in 2009, but the project has since been suspended. It was also noted that the extent of on-street parking leads to difficulties in servicing of retail units, with informal service arrangements prevalent throughout, but particularly along Old Church Street.

Car parking is primarily provided in the form of parallel on-street parking, but there are also off-street parking areas in backland areas. New parking for customers of SuperValu is provided off Main Street and this has reduced parking pressure along the street. Extensive off-street parking has also become available on New Line opposite the Church. Parking spaces throughout the town are delineated resulting in reduced presence of illegal parking.

Whilst a pedestrian crossing traverses the N16 at the junction with Main Street and Castle Street, many road-users fail to recognise this and fail to stop their vehicles to facilitate crossing. It was further noted that at Buckard’s bridge along Castle Street there is significant potential for conflict between road users and pedestrians as there is no footpath.
Consequent to being built on a number of hills, parts of the town have steep topography and steps are needed to facilitate some pedestrian movement. This makes it difficult for wheelchair users and persons with buggies to move around town. Whilst the use of pavements along Main Street and crossing points subtly serves as a traffic-calming measure, many of pavement sections are in poor condition and in need of relaying.

**Amenity**

The general visual amenities of Manorhamilton are of a reasonably-high standard, but the buildings along the Sligo Road, a busy route through the town, are in poor condition and in need of regeneration. This provides a disappointing image of the town overall particularly given its scale and landmark position at one of the main entrances to the town. This is in contrast to the well-presented commercial and community buildings further along the New Line. Mature trees along New Line provide an impressive setting for the town along this route.

In general, signage and shopfronts are to a very high standard and have improved since the previous Strategy, with greater consistency throughout, providing a distinct character to the town. However, some PVC and similar materials are beginning to be used and these should be discouraged and controlled.

The town has a reasonable mix of retail services, including bars and restaurants. Many of the main public spaces are located in areas distant from the main shopping area, with the exception of the space fronting Market House, which suffers from its north-facing orientation and cars obstructing the space.

The town’s retail core is within a confined area and therefore within walking distance, however, the N16 severs one side of the town centre (Castle Street and New Line) from the Main Street. Bypassing of the town would have significant potential to impact on some businesses, which thrive on passing trade. However, the town and environs should have sufficient critical mass to serve the retail and service base, whilst bypassing the town would create a more cohesive and composed town centre.

Removal of festive lights from shopfronts and the street should occur immediately after they are no longer being used, to avoid unnecessary additional clutter to the streetscape. The level of vacancy within units in Manorhamilton is quite low compared with other towns of similar size within Leitrim, suggesting the town is performing well.

**Actions**

The development of new retail units in Manorhamilton should only be considered where existing buildings are inappropriate for the envisaged use.
The historic milestones along the top of St. Patrick’s Terrace are almost hidden from view and action should to be taken to highlight this important architectural heritage.

There is a need to remodel the space fronting Market House, as it is considered that this space has become underutilised, lacking function and redundant. This fact is emphasised by the locating of the ‘farmers’ market’ in the Bee Park Resource Centre car park, rather than the town centre.

The land use strategy map for Manorhamilton will inform the retail boundaries for the town. Regard shall be had to Section 8 of this report and the sequential test approach.

Any proposals creating additional convenience floor area outside of the town centre of Manorhamilton, including ‘Extension of Duration’ applications should be accompanied by a Retail Impact Statement assessing the impact of such a development in the context of, *inter alia*, the Development Plan and this Strategy.

### 6.1.4 Case Study – Drive Times in North Leitrim

Using Geographic Information Systems to calculate the average distance from an area to a retail shop, it is possible to estimate the length of time it would take a person to drive to a retail shop. Prior to the opening of SuperValu in Manorhamilton, residents in the town and the surrounding north Leitrim area would have had to travel long distances in order to access a major retail supermarket. Whilst convenience shops were available in the area, the majority of households would have generally undertaken their ‘weekly’ shopping in a supermarket.

Fig 6.1 below illustrates ‘drivetimes’ that households would have had to undertake in the absence of a major retail supermarket in Manorhamilton in 2010. This highlights that households in the east side of North Leitrim would have had to travel for the longest times (approximately 30 minutes plus) in order to undertake their weekly shopping, whilst areas proximate to the coast and along the Sligo boundary would have had reasonable journey times of approximately 5 and 20 minutes to retail supermarkets in Sligo, Ballisodare and Bundoran. Tesco and SuperValu would have had regard to similar mapping when considering their new shop locations.

Drivetimes will have significantly altered following the opening of SuperValu and this will have significantly benefited the residents of North Leitrim. This is reflected in the second map below, which illustrates estimated drivetimes to supermarkets following the opening of SuperValu in Manorhamilton. Residents can now experience much reduced travel times in order to undertake their weekly shopping and there is a consequent reduction in retail expenditure leakage from the County. This represents a more sustainable development pattern and will indirectly benefit the County and its residents on a number of levels, including reduced car journeys, reduced carbon emissions and encouraging the growth of an expanded service base for Manorhamilton and its hinterland.
Figure 6-1 Estimated Drivetimes to Supermarkets in North Leitrim Environs in 2010-2014
6.1.5 Mohill

Mohill is an important service town for south County Leitrim, however, with improved access to Carrick-on-Shannon via the N4 national route, the town has come increasingly more under the influence of the county town. The County Development Plan recognises this by identifying Mohill as a ‘Support Town’ for Carrick-on-Shannon. The town of Mohill is laid out in a cruciform street layout with a crossroads intersection at the centre of the town. The town centre mainly comprises 2 and 3-storey buildings with commercial uses at ground floor. Development within the town has stagnated in recent years and this is reflected in the lack of fluctuation in the town population.

The town is constructed on an east-facing hillslope with a gradual decline towards the river Rinn. The town has a proud history with close connections to Douglas Hyde, Turlough O’Carolan and the Earls of Leitrim.

**Attractions**

*Retail Function*

Similar to other Leitrim towns, the comparison retail function of Mohill has gradually depleted over the last number of decades. The vast bulk of commercial units within the town centre now provide retail services with a reasonable mix of units and vacancy levels. The town has traditional reputation for hardware stores, whilst it was noted that the town was well-represented by beauticians/hairdressers, public houses and butchers.

Many of the smaller historical convenience retailers within the town centre have closed shop and convenience shopping is primarily provided along the main routes serving the town. Centra is the main convenience retailer in Mohill, located on the edge of the town centre on the Cloone Road.

*Tourism*

Lough Rynn Castle and its associated facilities serve as the main tourist attraction to the area, with its ornamental gardens and nature trails. The Castle is located outside the town with only minimal accommodation within the town, some of which indirectly draw business from the Castle. Caravan bays are available from April to September at Lough Rynn.

Mohill is located in an area with a strong reputation for coarse angling, whilst equestrian, water sports and hillwalking enthusiasts are also attracted to the area. Various festivals and the Annual Agricultural Show in Mohill during the summer attract additional visitors to the area.

*Recreation and Leisure Facilities*

The GAA commands a prominent role in the livelihood of Mohill with a playing facility on Hyde Street in the town. The Mohill Sports Complex on the east side of the town provides indoor sporting activities including indoor soccer and basketball. As
mentioned above walking and angling are prominent within the town and its surroundings. Keeldra Lake located 6km to the east of Mohill, includes the only designated bathing area for County Leitrim.

**Education and Employment**

Mohill Community College is the main secondary school in the town with St. Manchan’s National School and the Hunt National School the main primary schools. The town also contains a public library. Asides from retail and administrative service employment, the main sources of employment in the town are Mohill Enterprise Centre, the Health Centre, Lough Rynn Castle, the Mart and Modular Cold Storage.

**Accessibility**

Mohill is 8km from the N4 national route which connects with Sligo, 34km to the northwest and with Dublin, 140km to the east. Dromod Railway Station is also located 8km to the south of Mohill providing daily rail services to Carrick-on-Shannon, Longford and beyond. Bus Éireann serves Mohill on Saturdays and Mondays with a connection to Longford which takes approximately 1 hour, whilst intercity bus services to Sligo and Dublin are provided daily from Annaduff Church 8km to the west of Mohill.

Mohill is easily accessible by private motor vehicle, as it is at the intersection of the R201 and R202 regional roads. The town is situated deep within an expansive drumlin belt extending into the neighbouring counties of Cavan, Roscommon and Longford. Roads in the environs of the town skirt around the drumlins, avoiding steep slopes and low-lying bogland. Although there is no bypass of the town, excessive heavy traffic through the town is not a major issue and this is probably a reflection of the fact that the town has a narrow industrial base, however the R201/R202 junction is a reasonably busy pinch point.

Car parking is primarily provided in the form of parallel on-street parking, with low levels of off-street parking areas. Where parking areas are delineated within the town, there is a reduced occurrence of illegal parking. However, where parking spaces are not outlined, for example, Hyde Street and Glebe Street, there is greater propensity for cars to be parked partially on footpaths or double-parked. In general, traffic volumes through the town were reasonable, allowing for ease in crossing roads.
Amenity

The general visual amenities of Mohill are of a reasonably-high standard, but some improvements could be made. Soft landscaping along the road verge approaching the Church at the top of the town has softened the setting and improved the general appearance of the street. Most buildings are well maintained, despite an increase in vacancy rates within the town.

Unlike many towns Irish towns, Mohill does not turn its back on the river which runs through it, and there is a fine space opening onto the river on the east side of town, with the iconic O’Carolan Statue. However, this space is dominated by car parking and hardsurfacing and lacks soft landscaping, which detracts from the experience.

The quality of signage and shopfronts varies considerably throughout the town with some fine examples, such as, Gannon & Co. and O’Brien’s Tavern, whilst numerous units have no signage. Shop owners should be encouraged to install appropriate shopfronts and signage to commercial premises to enliven the space.

Mohill is fortunate to have numerous historical buildings of considerable quality, particularly those relating to the religious and financial institutions. Care should be taken with any future proposals to develop and maintain these structures.
The space adjacent to the Spirit Bar/Niteclub on Main Street was earmarked previously for urban renewal works, but this has remained undeveloped and could form a strong additional civic space to the benefit of residents and visitors.

The approach along Hyde Street is lacking greenery and does not present the town well. Some tree planting should be encouraged along this approach.

**Actions**

The development of new retail outlets in Mohill should only be considered where existing buildings are inappropriate for the envisaged use.

There is a need for additional urban design treatment particularly involving additional ‘greening’ and pedestrian crossing points in the town centre.

Whilst the buildings fronting onto Main Street provide a strong interface with the street, this space could be improved with the introduction of greenery and a resultant reduction in car parking.

Introduction of additional planting to the area surrounding the O’Carolan statue will help to soften and improve the visual appearance of this space.

There are numerous *ad hoc* signs displayed on routes into the town. Whilst understanding the desire for each business to advertise their products, services and events; there is a need to restrict the proliferation of such signage, where this could distract road users and impact on the appearance of the approaches to the town. There is potential to consider the viability of appropriately-located shared signage cabinets along the main routes which could be used intermittently by businesses to facilitate local advertisements.

Some form of traffic calming would facilitate easier crossing for pedestrians at the centre of the town (i.e. the R201/R202 junction) and thereby a safer and more attractive town centre shopping environment. Reductions in the retail offer along Hyde Street have resulted in less pressure for parking in this area and less obstructions to road users and pedestrians.

Road markings have somewhat eroded and disappeared in some locations, which will potentially lead to a lack of definition and eventually to conflict in vehicular and pedestrian movements.

The land use strategy map for Mohill will inform the retail boundaries for the town. Regard shall be had to Section 8 of this report and the sequential test approach.
6.1.6 Drumshanbo

Drumshanbo is situated centrally within County Leitrim along the southern shores of Lough Allen set against the backdrop of Slabh an Iarairinn and Arigna mountain. The town has a compact commercial core, which has retained much of the architectural heritage from previous centuries with High Street an iconic feature of this. Although within close proximity of the County town, Drumshanbo remains a busy market town serving a growing hinterland. The town has a fine history in food producing, celebrated in the running of an annual Food Festival in the town.

Attractions

Retail Function

In the past Drumshanbo had only a narrow comparison retail base and this remains the case today. A large majority of retail service offering in the town is connected to the tourism industry with a higher than average number of food and drink offerings. There is a reasonable provision of convenience retail floorspace within the town with Centra and Gala supermarkets in the town centre. The Development Plan designates Drumshanbo as a support town to Ballinamore. There is minimal provision for bulky goods sales in Drumshanbo.

Tourism

The local scenery and people serve as the major attraction to the area. Slabh an Iarairinn Visitors’ Centre in the centre of town provides insight into the local landscape and mining history. Drumshanbo is well-served by an array of tourist accommodation. Lough Allen Hotel & Spa is the main visitor accommodation in the area offering rooms, apartments and lodges while Lough Allen Educational Centre and Angling Club offers hostel accommodation. Lough Allen provides a host of water activities, including course fishing, attracting people from far and wide to the town.

Horse-riding and hill-walking figure prominently as a draw for tourists to the town with numerous way-marked routes in the vicinity, including Sli Liatroma. Lough Allen Adventure Centre attracts many outdoor and water enthusiasts to the area throughout the year. Drumshanbo is also home to many festivals and events including the Slabh an Iarairinn Walking Festival, ‘An Tóstal’ and ‘The Joe Mooney Summer School’.

Recreation and Leisure Facilities

Mayflower Community Centre facilitates various indoor sports including handball and bandminton, whilst Bingo nights also feature. Community is an important aspect of the town with a variety of community groups operating. The town boasts tennis courts, a playground and jetties for cruisers. Just one kilometre from the town centre is the heated-outdoor swimming pool at Acres Lake Amenity. Moorlands Equestrian Centre provides a full range of equestrian facilities for the area.
**Education and Employment**

The Vocational School along Keadue Road, leading west of the town, provides post-primary education for teenagers in the catchment, whilst local children are educated at the Central National School. Much of the local employment is engaged in the tourism and services industry, whilst there are also businesses involved in metalwork fabrication, sign-making, plant hire and refuse disposal, telesales, joinery works and crafts. Lough Allen Food Hub in the town is an innovative food-orientated enterprise park aimed at providing niche food products.

**Accessibility**

Drumshanbo is located centrally within the County of Leitrim and close to the boundary with County Roscommon and close to the busy intersection of the R207 and R208 regional roads.

Drumshanbo is located 16km from Carrick-on-Shannon, 166km from Dublin and 48km from Sligo via the N4 national route. The nearest railway services connecting Dublin and Sligo can be accessed at Carrick-on-Shannon. Bus Éireann serves Drumshanbo with connections to Sligo on Fridays and Saturdays and a service to Carrick-on-Shannon and Longford on Saturdays. Intercity bus services to Sligo and Dublin are provided daily from Carrick-on-Shannon. Westlink Coaches operate a daily commuter service between Drumshanbo and Sligo via Carrick-on-Shannon.

Drumshanbo is accessible by private-motor vehicle, as it is at the intersection of the R207 and R208 regional roads. The vast majority of traffic from the north of the County, heading south and vice-versa can bypass the town, as per signposting, along the R280 regional road, resulting in low levels of traffic through the town.

Car parking is primarily provided in the form of parallel on-street parking, with off-street parking beside the Bank of Ireland on Main Street and to the rear of Scallon's Gala supermarket and Millrace. Roads within the town are marked, with parking areas delineated. In general, traffic volumes through the town were reasonable, allowing for ease in crossing roads. The town slopes in a north direction towards Lough Allen, but the steeper parts of the town are outside of the commercial core, meaning access is generally fairly level with the exception of the ramps up to High Street and Bakery Lane.

**Amenity**

The general visual amenities of Drumshanbo are of a very-high standard, with only a small number of buildings in poor repair. High Street and neighbouring terraces of buildings provide a distinct and unique setting for the commercial core of the town. The town’s architectural heritage needs to preserved and development proposals need to be sympathetic to the setting. Most buildings are well maintained and a number of buildings are used for community purposes rather than lying idle, whilst decorative painting is used to disguise some boarded-up buildings.

Parking pressure is greatest along Main Street, particularly below High Street, whilst the parking area adjacent to the Bank of Ireland may not adequately deal with the bulk
of the pressure at peak periods. Some haphazard parking occurs at both ends of the ramp up to High Street and this can lead to further congestion. The paved pathway fronting the premises on High Street should not be used to facilitate parking as it would undermine the quality of this space. There is ample parking available along all approach roads to the town, within easy walking distance of the town’s shops, particularly given the compact nature of the town.

The quality of signage and shopfronts is generally reasonably good throughout the town with some fine examples, for example, Conways. There are also some unique shopfronts which retain some of the main shopfront elements desired, whilst adding a unique slant, for example, Berry’s and Mutt Magic. The building beside Centra and the Bank of Ireland requires new windows which would need to be in keeping with the existing character of the building. One of the windows is missing. The former National Irish Bank building on the corner of Market Square is falling into serious disrepair and is fast becoming an eyesore.

Actions

Signage on gable walls should be discouraged and not permitted where this is not sympathetic to the building on site and relative to the business. Highest levels of vacancy are noticeable along Sráid an Teampall leading away from the town westwards. Alternative uses for such premises should be considered with flexibility. The rear of buildings along Market Square are exposed from view along New Line, with informal parking areas provided within and little or no landscaping. This gives a poor visual impression of the town.

The attractive High Street wall creates a physical buffer between High Street and Main Street. Improved pedestrian movement measures from the steps to the walled street should be supported to allow for ease of cross-visitation in this part of town. This could possibly include a pedestrian crossing.
The signage pole at the junction of Carrick Road and Main Street leading into the town from the southwest is almost covered from top to bottom with fingerpost signs and this needs addressing. The development of new retail units in Drumshanbo should only be considered where existing buildings are inappropriate for the envisaged use. The land use strategy map for Drumshanbo will inform the retail boundaries for the town. Regard shall be had to Section 8 of this report and the sequential test approach.

6.1.7 Dromahair

Dromahair is a scenic town with a sylvan-setting, located in northwest county Leitrim and nestled within the River Bonnet valley which flows westwards into Lough Gill. The town has a distinctive planned-estate layout incorporating buildings with local stone, native trees and many historical features. Located a short distance from the main N4 Sligo-Dublin road and the N16 Sligo-Enniskillen road, Dromahair is just a 25-minute drive from the Gateway city of Sligo. The town has a well-documented history as being a seat of power and an important service town. In recent years the town appears to have waned in the shadow of Sligo City. Previously, Dromahair market town had a fairgreen, a police barracks and a courthouse, which no longer remain.

Attractions

Retail Function

Retail offering in Dromahair has reduced in recent years with only one convenience shop remaining open in the town. Planning permission was granted in 2010 for a 600 sq.m. supermarket, but this development has not taken place to date. The mix of retail floorspace within the town has reduced in recent years with the main retail services relating to public houses and hairdressers. The Development Plan designates Dromahair as a support town to Manorhamilton.

Recreation and Leisure Facilities

The Depot Community Centre offers opportunities for community groups to meet and fundraise. Planning permission is being followed through by a local community group to develop lands south of the River Bonet for recreational purposes comprising a multi-surfaced sports area, training pitch, playground, outdoor gym and a walkway/running track. Work on the first phase of this recreational project has been completed. Soccer, GAA and boxing clubs have strong profiles within the town.

Tourism

The scenery and natural landscape in the area surrounding Dromahair attracts many visitors to the area annually. The Abbey Manor Hotel in town is closed, but there are other accommodation offers in the form of self-catering lodges, ‘B&Bs’ and an eco-retreat at Ard Nahoo north of the town. The ruins of Creevelea Abbey in the town and Parke’s Castle on the shores of Lough Gill attract many visitors to the area, whilst other popular activities include kayaking on Lough Gill, hill-walking and fishing.
Education and Employment

Local children are educated in St. Patrick’s National School, whilst secondary students generally commute to Sligo for their education. Given the proximity of the town to Sligo City, most residents are employed within Sligo and its environs.

Accessibility

Dromahair is linked with Sligo via the R286 and R287 regional roads, whilst the R290 regional road links it with Collooney and the R280/R287 regional roads link it with Manorhamilton. Dromahair is almost equidistant from Sligo, Manorhamilton and Collooney. Railway services connecting Dublin and Sligo can be accessed at Collooney. Bus Éireann operates a number of routes serving Dromahair including the 462, 469 and 470 routes, which link Dromahair with Sligo, Drumkeeran and Manorhamilton respectively. Intercity bus services to Sligo and Dublin are provided daily from Collooney.

The town is not bypassed, therefore traffic must travel along Main Street to get through the town. Car parking is primarily provided in the form of parallel on-street parking, but there are number of locations where the width of the road restricts on-street parking. Pinch points for parking were evident at the Shamrock Chinese Take-Away and McGoldrick’s Londis. In general, traffic volumes through the town were reasonable, allowing for ease in crossing roads. In general, changes in land level did not overly restrict movement along Main Street.

Amenity

The general visual amenities of Dromahair are of a very-high standard, however, with a number of premises now vacated, there is an increasing threat of these buildings falling into disrepair. The architectural heritage of the town needs to preserved and proposals for development need to be sympathetic to this architectural quality, in line with the recommendations of the Dromahair Urban Framework Plan. Alternative uses should be considered for buildings that are lying idle in order to reinvigorate the streetscene.

The quality of signage and shopfronts is reasonable throughout the town, but some of the newer premises have poor signage in place. Many of the historical buildings within the town do not lend themselves to easy adaption for commercial purposes and there is a distinct lack of consistency in shopfronts.

The number of old derelict cars which can be seen from the Main Street fronting the Woodview Inn detracts from the overall appearance of the streetscape.

The Shafin Developments building fronting onto Main Street is falling into serious disrepair and is fast becoming an eyesore.
Actions

The development of new retail outlets in Dromahair should only be considered where existing buildings are inappropriate for the envisaged use.

Retail and other commercial uses are generally spread out along the Main Streets over 500m and therefore do not encourage cross-visititation. A more centric vision for the commercial core is needed to address this.

There is a distinct lack of off-street parking within the town and many restrictions to on-street parking by virtue of pinch points and access routes. Proposals providing for off-street parking should be encouraged where this can be undertaken sympathetic to the buildings on site and streetscape.

There is a distinct lack of civic space within the town and any proposals that can facilitate same should be investigated and encouraged.

The land use strategy map for Dromahair will inform the retail boundaries for the town. Regard shall be had to Section 8 of this report and the sequential test approach.

6.1.8 Small Towns and Villages

Section 4.11.5 of the Retail Planning Guidelines relating to ‘Retailing in Small Towns and Villages’ states the following: -

"The role of small towns and villages in the provision of retail services to their local urban and rural populations should be defined in development plans. Where appropriate, the maximum size of store, consistent with maintaining a variety of shops in the centre of these towns and villages and protecting an appropriate level of retail provision in the rural area, should be identified. In general there should be a clear presumption stated in favour of central or edge-of-centre locations for new developments" (p. 38).

There is a wide variety in the range of services available in some of the smaller towns and villages throughout Leitrim, with towns like Carrigallen and Kinlough containing a substantial service base generally akin to a ‘Support town’ in Leitrim (Tier 2b). Smaller nodes exist throughout the County and these generally contain a small convenience store, post office and pub often within the same building. As expected a low level of comparison goods retailers exist within the smaller towns and villages throughout the County. Reflective of the economic downturn, there have been extensive closures of small-scale retailers and other commercial businesses in recent years.

The closure of the sub post offices throughout many villages has led to the closure of pubs and convenience stores which were interdependent upon the customers using
the post office. An example of this is evident in Aghamore, where the convenience store, pub and post office have closed for business.

It is important that efforts are made to improve the façades of both vacant and occupied commercial premises in many of the towns and villages surveyed and to facilitate alternative viable uses for vacant properties. Dereliction of existing urban buildings is a wider national problem, particularly in small towns and national policy will need to be implemented towards regenerating and reinvigorating these properties to encourage reoccupation of such buildings.

Settlements such as Keshcarrigen, Kiltyclogher and Roosky remain in need of a wider range of commercial investment including uptake of vacant units along the main streets within these settlements. Kinlough has the potential to develop its role in supporting the network of surrounding smaller villages including Tullaghan, which significantly underperforms relative to its population. Leitrim village has significant capacity to maintain its retail core with a focus on tourism given its strategic and quaint location along Ballinamore Canal.

**Actions**

It is the aim of this strategy to sustain and encourage further development of convenience retail facilities within existing villages and small towns relevant to the customer base. Opening of large-scale retailers would not be sustainable or desirable within these villages, as they would likely erode the existing service base. However, the provision of small independent retailers, professional services and specialist functions should be encouraged. The enhancement of small retailers within villages will sustain and improve the quality of life for people living in rural areas.

In line with the Retail Planning Guidelines requirements, as referred to above, there is a need to consider an appropriate maximum floor area for new retail units within small villages and towns. It is considered that proposals for new stores within such centres will need to be prepared cognisant of this Strategy and in particular the retail floor area survey and associated resultant population and expenditure capacities.

**6.1.9 Case Study – Living in Town Centres**

Creation and retention of critical population mass is essential to the longevity and formation of services in our town centres, as a reduced demand for services will inevitably result in a reduced service base. Whilst undertaking the town-centre health check and Housing Strategy, it was noted that many of the residence over ground floor shops appeared to be vacant, whilst some of the smaller historical terraced residences leading from town centres also appeared to be unoccupied.
In order to identify the level of occupancy in town centre residences, it was necessary to refer to the CSO small area population statistics. Whilst this Census data will not give a street-by-street summation of occupancy levels, it will give an indication of how town centres compared with other urban and suburban areas of Leitrim ‘key towns’ and ‘support towns’. The patterns identified in the ‘key towns’ and ‘support towns’ are expected to reflect a similar scenario in the counties smaller towns and villages.

Figure 6-2 provides an illustration of the extent of vacant units within the key towns and support towns of the County and highlights a general pattern of higher residential vacancy rates within each of the town centres compared with suburban areas. The Census ‘small areas’ are the smallest area that geographical analysis can be carried out and if a street-by-street analysis was carried out, it is expected that a more marked difference in residential vacancy would emerge.

During the late 1990s and early to mid-2000s, the Government operated the ‘Living Over the Shop’ scheme, offering tax incentives to tackle the problem of vacant upper-storey space in certain streets. It is noted that it is not just units over shops that are now vacant, as large volumes of town centre terrace units are vacant. Whilst it is noted that the economic context for such a scheme has changed significantly and that there are significant and varying levels of residential vacancy throughout the County, it is apparent that there is a need for some policy to be put in place to address the issue. A sequential approach to reoccupation of residential units from the centre radiating outwards will best serve in achieving sustainable development and creating ‘living streets’. Given modern living requirements there is an anticipated greater demand for larger housing units on individual plots, which are generally found on the outskirts of towns or the countryside. This emphasises the need for incentivising the occupation of town centre residential units.
Figure 6-2 % Residential Units Vacant in Selected Leitrim Towns, 2011

% Residential Units Unoccupied, 2011
- 9-18 %
- 19-28 %
- 29-38 %
- 39-47 %
- 48-57 %
- 58-66 %

Source: AIRO
7. **Assessment of Competing Centres**

At the time of carrying out the previous Retail Strategy, an analysis of customer and retail surveys and key issues was provided. This analysis indicated the trading characteristics of shopping centres in the region and identified important trends relating to trade draw of different centres, including Sligo, Longford, Athlone, Roscommon, Cavan and Enniskillen. This section provides an overview of five of these centres and their likely current and future influence on retail development in County Leitrim. The retail centres of Cortober and Bundoran have been added to the assessment, whilst Roscommon is not considered due to its distance from the County and its retail offering. Figure 7.1 below provides the direct distances to each of the subject competing retail centres from the County town, Carrick-on-Shannon.

**Figure 7.1 Distances to Competing Centres from Carrick-on-Shannon**
The following section comprises a broad overview of the size and role of key urban and retail centres located close to Leitrim and that directly compete for retail spending. An assessment of the main competing centres for retail spend from Leitrim will enable the Planning Authority and others identify means of reducing retail spending leakage out of the County, whilst supporting job creation measures and sustainable development. This Strategy needs to attempt to ensure that people have access to services, retail and employment as close to their homes as feasible.

7.1.1 Sligo, County Sligo – NSS Gateway

Sligo City serves as the main retail centre for the northwest and border region of Ireland and in 2008 it topped retail rankings for the Border region based on estimated comparison retail spend (Experian, 2008). Within the Retail Planning Guidelines 2012, Sligo is placed in the second tier of retail centres having a regional retail function.

Sligo experienced considerable retail expansion during the early to mid-00s, serving an urban core and an extensive rural hinterland. The city has three main shopping centres and two retail parks, as well as an extensive retail town core. The town and environs of Sligo had a population of 16,452 in 2011.

Sligo is very accessible from Leitrim in particular via the national routes N14, N15 and N16 and via Bus Éireann and Iarnród Éireann bus and rail services.

Sligo provides a significant draw to residents in the northern half of County Leitrim, particularly in terms of convenience retail shopping, due to the existence of large supermarkets and discount stores within the town. The opening of SuperValu in Manorhamilton during 2011 has reduced the dependence of the north of the county on Sligo. Major supermarket chains have also recognised the dependence of north Leitrim on Sligo and to a lesser extent Enniskillen and Bundoran for convenience shopping having been granted planning permission with a Tesco supermarket granted planning permission in Manorhamilton in 2013.

Whilst there were various convenience retail shops in the north Leitrim area prior to the opening of SuperValu in Manorhamilton, in order to undertake a weekly convenience shop many residents would have been drawn to large supermarkets in Sligo, Enniskillen and Bundoran. In 2008 Sligo County Council engaged consultants to undertake a Retail Strategy for the entire County which included a survey of shoppers in the Sligo town centre (Sligo County Council & Sligo Borough Council, 2009). We

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16 Leitrim County Council Planning Reg. Ref. 08/406
17 Leitrim County Council Planning Reg. Ref. 12/29
note that 6.5% of shoppers in the town centre were from the north Leitrim area and were primarily regular shoppers to Sligo town centre.

7.1.2 Enniskillen, County Fermanagh, Northern Ireland – DRDNI Main Hub Town

Enniskillen is centrally placed as the county town of Fermanagh, in Northern Ireland. According to the Small Area estimates undertaken by the Northern Ireland Statistics & Research Agency (NIRSA), the population of Enniskillen was 13,865 in 2010. Enniskillen is the retail centre of County Fermanagh and has substantial convenience and comparison retail shops, including multiples, high street stores and small independent traders. The Erneside shopping centre and an Asda supermarket are relatively new developments located on the edge of Enniskillen town centre, which have boosted the retail attraction of the town. The catchment of Enniskillen’s retail centre extends into County Leitrim, with particular draw from the northern glens.

Retail vacancy rates in Enniskillen have decreased between 2012 and 2013, according to the Northern Ireland Commercial Property Report published in November 2013 by commercial property agents Lisney (2013). Lisney surveyed the retail market in a sample of 17 local towns and cities and determined that 11.0% of shops lie vacant in Enniskillen, down 5.8% on 2012. The report reveals that overall rates in Northern Ireland have stabilised, with 19% of all shops lying vacant across the province. Commercial vacancy rates in Leitrim and Carrick-on-Shannon are well above vacancy rates in Enniskillen.

Enniskillen is highly accessible to Leitrim from all parts of the County, but in particular from areas proximate to the N16 national road. As a shopping centre, the town hosts the Erneside Shopping Centre (10,700 sq.m.) anchored by Marks & Spencers and Next. The town has an extensive convenience and comparison retail base including numerous ‘high street’ brands, the Buttermarket (Arts and Crafts market) and major Supermarkets, such as Asda and Tesco.

Attraction of retail spend to Enniskillen from Leitrim and other parts of the Republic of Ireland fluctuates based primarily on changes in sterling-euro currency exchange rates. Over the lifetime of this Retail Strategy it will be important to plan appropriately such currency fluctuations.
7.1.3 Boyle, County Roscommon - Western RPG Key Town

Boyle is situated in the north of County Roscommon and is proximate to Carrick-on-Shannon and a number of key tourist attractions such as Lough Key Forest Park and Arigna Mining Experience. The town of Boyle had a population of 2,588 persons in 2011, according to the CSO (2012).

The town has quite a good convenience retail provision including a large Mace supermarket as well as a purpose-built SuperValu Shopping Centre in the town centre. The SuperValu development has a number of ancillary retail units including a giftware shop, hair studio, clothes shop and pharmacy. It is a popular retail destination in the town centre serving both weekly shopping and top-up needs. Boyle also accommodates a number of other smaller convenience retailers including Londis and Spar supermarkets. Comparison provision in the town is relatively limited and is predominantly characterised by independent retailers such as Boles of Boyle. There is a lack of national and international comparison multiples represented in Boyle. Major comparison stores have generally preferred to set up in the neighbouring centres of Sligo and Carrick-on-Shannon, despite the historical importance of the centre as a comparison retail destination.

The attraction of Boyle as a retail destination for Leitrim residents has waned in recent years, despite its easy access just off the N4 national route. The growth of comparison, convenience and bulky goods stores in Cortober and Carrick-on-Shannon, 14 km southeast of Boyle has significantly impacted on the retail profile and performance of Boyle.

7.1.4 Cortober, County Roscommon

"Cortober within the environs of Carrick-on-Shannon experienced significant residential, commercial and retail development up to 2008, associated with the overall growth and expansion of the urban areas of ... Carrick-on-Shannon respectively. While the development of these areas is beneficial to the performance of the economy within Roscommon, caution must be applied to ensure that the retail and commercial developments in these areas do not stifle growth in the County’s principal urban centre or undermine the retailing function of their parent settlements" (p. 24, Roscommon County Council, 2013).

The area referred to as Cortober on the southwestern bank of the river Shannon forms part of the town of Carrick-on-Shannon and lies within the planning jurisdiction of Roscommon County Council. Based on the small area population statistics from Census 2011, Cortober and its environs is populated by 724 no. persons. The extent of retail
floorspace, convenience, comparison and bulky goods is exorbitant for the areas residential population, a fact emphasised by the extent of vacant premises currently in the area.

“From January 2007 to January 2013 c. 7,280 sq.m of retail floorspace has been granted in Cortober. Of this total figure c. 129 sq. m is operational. The remaining c.7,151 sq. m remains either vacant or is extant i.e. undeveloped” (p. 19, Roscommon County Council, 2013).

Carrick-on-Shannon Retail Park in Cortober includes a number of retail and commercial multiples, including SuperValu, a Cineplex, Supermacs and Elverys Sports Store, as well as cafes, a gym and pharmacy. Lidl also operate a premises in Cortober proximate to the N4. Despite rapid development of retail units prior to 2008, particularly retail warehousing, many of these developments remain vacant. Roscommon County Council intend to adopt flexible planning approach to the use of these vacant premises and alternative commercial uses may be deemed acceptable provided they are compatible to the sustainable development of the surrounding area. Leitrim County Council stress that this ‘flexible planning approach’ should have more than due regard to the need to ensure the viability and vitality of Carrick-on-Shannon town centre.

On previous occasions, Leitrim County Council noted the excessive levels of retail development within Cortober, far exceeding a level appropriate for what was at the time a Tier 3 (Roscommon) settlement, above and beyond the neighbourhood needs of Cortober. During the course of the review of the Roscommon Retail Strategy 2008, Cortober was moved up from Tier 3 (local and neighbourhood centres) to Tier 1 in the Roscommon retail hierarchy (arising from its relationship with Carrick-on-Shannon). The neighbourhood of Cortober was given the same retailing status as Roscommon Town. This approach has severely impacted upon the vitality and viability of the retail core of Carrick-on-Shannon, a fact emphasised as part of the consultation undertaken during the preparation of the Carrick-on-Shannon 2020 Vision document (see Section 0 above). In this unsatisfactory context, this Retail Strategy considers that a ‘neighbourhood (other) status’ is appropriate to Cortober, having regard to the need to retain the retailing primacy of the town centre of Carrick-on-Shannon. Leitrim County Council recommend that any proposals relating to further retail development in the Cortober area, be subject to the guidance contained within the Retail Planning Guidelines and in particular the need to adhere to the sequential test relative to the area’s parent settlement, Carrick-on-Shannon.

The Council considers Carrick-on-Shannon to be a single town. While Leitrim County Council is only statutorily responsible for the administration of that part of the town
on the Leitrim side of the river, it co-operates closely with Roscommon County Council in administering, promoting and developing the town as a whole. Where possible, facilities will be shared. Links between the two sides will be promoted and strengthened. The primacy of the town core on the Leitrim side must however be recognised and development on the Roscommon side limited to satisfying local needs.

Encourage retail development in the Cortober area (Co. Roscommon) to adhere to the appropriate policies in the context of the greater Carrick on Shannon area, as set out in a joint Local Area Plan to be prepared by Leitrim and Roscommon County Councils in partnership.

7.1.5 Cavan Town, County Cavan – NSS Hub Town

Cavan town draws an element of retail spending from County Leitrim, in particular the southern and eastern parts of Leitrim. Cavan town is the principle town in County Cavan and is a service provider for a wide catchment. Cavan town and environs had an urban population base of 10,205 persons in 2011. Within the Retail Planning Guidelines 2012, Cavan is placed in the second tier of retail centres having a regional retail function.

The town includes two large-scale retail developments, Cavan Retail Park and Lakeland Retail Park, on the outskirts of the town, including a range of major multiples such as Argos and Furniture Village, as well as, stores such as Woodies, Homemakers and SuperValu.

Within the Draft Cavan County Development Plan 2014-2020, Cavan town is placed as the only Tier One town in the Council’s retail hierarchy, reflecting its regional importance as a retail destination and the number and variety of both comparison and convenience retail. Within the Draft Cavan Town & Environs Development Plan 2014-2020, it is stated that there has been a reduction in the number of retail firms in County Cavan between 2009 and 2011. According to the Draft Plan, Cavan town and environs is considered to have a sufficient number of retail warehouses for the plan period, but the Council intend to support the continued expansion of Cavan Town as the primary retail and service centre in the County.

7.1.6 Longford Town, County Longford – Midlands RPG Principal Town

Longford town is the County town for Longford, a county situated centrally within the island of Ireland and forming the southern border of Leitrim. According to the CSO the town had a population of 9,601 in 2011.

| Cavan | Longford |
Within the Retail Planning Guidelines 2012, Longford is placed in the third tier of retail centres having a sub-regional retail function.

Longford has a sizeable retail catchment, emphasised by the presence of each of the national supermarket chains; Supervalu, Tesco, Dunnes Stores, Aldi and Lidl.

By virtue of its proximity to Leitrim and easy access via the N4 national route and rail links, Longford has significant draw for the southern communities of Leitrim, although recent developments in Carrick-on-Shannon, particularly within Rosebank Retail Park and along the Dublin Road area are expected to have reduced retail expenditure leakage from Leitrim to Longford.

7.1.7 Athlone, County Westmeath – NSS Gateway

Athlone town is the urban capital of the Midlands and is strategically located in the centre of Ireland. In 2006 the population of Athlone town and environs was 14,347, but by 2011 this had increased by over 40% to 20,153 persons. Within the Retail Planning Guidelines 2012, Athlone is placed in the second tier of retail centres having a regional retail function. Athlone has been identified in the National Development Plan as part of a cluster gateway in the Midlands and has been the focus of significant new development in the 2000s.

Athlone town comprises a formidable retail base including major retailers such as Woodies, Tesco, Dunnes Stores, Boots, Argos, Toy City, Lidl and Penney’s. There are two shopping centres in Athlone; the Golden Island Shopping Centre and Athlone Town Centre. Athlone has only minimal draw from Leitrim for convenience and bulky
goods, but has reasonable draw from South Leitrim for comparison goods, particularly with respect to the major national and international comparison retailers located in Athlone Town Centre.

7.1.8 **Bundoran, County Donegal – NSS Urban Strengthening Town**

Despite Experian (2008) placing Ballyshannon in south County Donegal as having a retail ranking above its neighbouring town of Bundoran, Bundoran serves as more of an attraction to Leitrim residents given its closer proximity, its provision of convenience retail floorspace including Lidl and SuperValu stores and its natural attractions as a coastal town. The opening of the N15 bypass of Bundoran and Ballyshannon in 2007 will have impacted on the retail performance of both towns, but Bundoran appears to be performing stronger than Ballyshannon.

Bundoran is located one mile from the boundary with County Leitrim. According to the CSO, the population of the town in 2011 was 2,140 persons. Reflecting the town’s role and setting as an important tourism destination in northwest Ireland, Bundoran has an abundance of pubs and restaurants. Retail activity within this ‘holiday town’ is notably seasonal with peak activity during summer holidays and at weekends. The town has served as a major attraction to surfers and others availing of the sea’s wave resource. SuperValu supermarket in Bundoran attracts many customers from the Kinlough, Tullaghan and Askill areas of Leitrim.
8. **Recommendations**

8.1 **Retail Strategy**

The Council aim to ensure that all retail development permitted is in accordance with the *Retail Planning Guidelines for Local Authorities* (2012) and the accompanying *Retail Design Manual – A Good Practice Guide* (2012) and the County Retail Strategy 2015-2021. The Retail Strategy sets out the retail hierarchy for the County and confirms the level and form of retailing activity appropriate to each of the main towns.

Leitrim County Council will seek to implement the measures outlined in national retail policy in so far as needs dictates and resources permit.

<table>
<thead>
<tr>
<th>Retail Strategy Policy 1</th>
<th>It is Council policy to provide a quality retail environment and opportunities, having regard to the requirements and views of the various sectors in the retail market, whether on the supply or demand side.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Retail Strategy Policy 2</th>
<th>It is Council policy to look at measures to improve the performance of the retail sector in Leitrim considerate of the market context and the strengths and weaknesses of the County.</th>
</tr>
</thead>
</table>

Analysis of recent changes and forecasts for the retail sector points towards a gradual improvement in the markets over the lifetime of the Strategy and coupled with population increase, this suggests a more positive outlook for the retail sector in Leitrim. However, this growth must be considered in the context of a changing ‘shopping environment’ and other challenges to the sector, including currency fluctuations, market dynamics and legacy issues.

As part of the Retail Strategy a number of case studies considering retail themes and trends were investigated in order to provide more insight and direction to the Strategy. Case studies included investigations of ‘Post Office Closures in Leitrim’, ‘Discount Foodstores’, ‘Weekly Shopping Drivetimes’ and ‘Living in Town Centres’.

For the first time, the County Retail Strategy incorporated a quantitative review of the extent of retail floorspace throughout the County and coupled with information from the *County Rates Book*, the *Planning Register* and the Central Statistics Office this allowed for detailed estimates of the future requirement for convenience, comparison and ‘bulky goods’ floorspace over the lifetime of the Strategy.

Town centre health-check assessments were carried out for the ‘key towns’ and ‘support towns’ in the County in order to procure further information regarding the performance of towns and actions that might promote town centre improvements. Analysis of competing retail centres enables the Planning Authority and others to identify means of reducing retail spending leakage out of the County.

The retail hierarchy decided upon is dictated by the County settlement hierarchy proposed within the *Draft County Development Plan*, which in turn accounts for the introduction of the Local Government municipal areas. However, the retail hierarchy
varies from the settlement strategy based on the findings of the retail survey, which, *inter alia*, details the extent of retail services offered in each settlement.

### 8.2 Retail Policies & Objectives

The Council intends adopting the *Retail Strategy 2015-2021*, in accordance with obligations under the *Retail Planning Guidelines* (2012). All retail and related developments are advised to adhere to the contents of this Retail Strategy, which will be available directly from the Council and on the Council’s website.

The *Retail Planning Guidelines* (2012) emphasise that enhancing the vitality and viability of town centres in all their functions, through sequential development, is an overarching objective in retail planning. The Guidelines include a presumption against large out-of-town retail centres, in particular those adjacent to or close to existing, new or planned national roads / motorways.

The Guidelines also provide specific guidance for the content and role of Development Plans including the requirement to have clear evidence-based policies and objectives in relation to retailing in a discrete section of the Plan.

#### 8.2.1 Retail Hierarchy

Leitrim County Council supports a balanced development model, promoting the treatment of urban and rural settlements, together with the surrounding countryside, as functional, spatially-integrated entities. The Retail Hierarchy proposed has been prepared mindful of this model and is broadly similar to that presented in the *County Retail Strategy 2009-15* with the following exceptions:

1. Dromahair, Kinlough and Carrigallen have been included in the revised retail hierarchy as ‘Tier 2B – Sub-County Retail Centres’ stepping up from Tier 3 ‘Local Retail Centres’. The rationale for including these towns as Tier 2B Centres is based on their revised position within the County settlement hierarchy and having regard to the existing level of retail function performed by these towns. Furthermore, Dromahair is identified as a support town within its Electoral Area, as part of the review of the *County Development Plan 2015-2021*;

2. Leitrim Village, Drumsna, Dromod and Cloone have been included in Tier 3 ‘Local Retail Centres’. The reason for upgrading these additional settlements is based on their ‘Tier 3 Villages’ settlement hierarchy position identified under Variation No.1 of the *County Development Plan 2009-2015* and given the scale of their retail function and population/housing base.

*Graigs* have been identified within the *County Development Plan* and were selected on the basis that they are existing settlements with an established identity, containing a school, post office, shop or other such facility. These ‘Graigs’ and villages guided the selection of ‘Tier 4- Rural Villages/Shops’. The provision of suitable retail development, such as a local shop, within the identified Tier 4 centres would be considered appropriate, subject to normal planning considerations. The retail hierarchy is outlined in Figure 8-1 below and mapped in Figure 8-2.
Figure 8-1 Retail Hierarchy

**Tier 1 – County Retail Centre**
Carrick-on-Shannon - With a cumulative population of over 3,300, the town is the key service, administrative and retail centre in the county with the highest proportion of comparison and convenience retail floorspace.

**Tier 2 – Sub-County Retail Centres**
Towns which have a range of local comparative as well as convenience retail floorspace, including clothes, hardware, pharmaceuticals and specialty stores includes Tier 2A: Manorhamilton, and Ballinamore and Tier 2B: Dromahair, Drumshanbo, Kinlough, Carrigallen and Mohill.

**Tier 3 - Local Retail Centres**
Villages with limited local comparative and convenience retail serving a small, localised catchment include: - Drumkeerin, Cloone, Leitrim Village, Drumsna and Dromod.

**Tier 4 - Rural Villages/Shops**
Very small villages with local convenience retail floorspace, usually consisting of a post office, one or two pubs and, in some cases, a village store. These villages may, in some cases, have once-off comparative retail. Villages in this tier include: - Tullaghan, Rossinver, Glenfarne, Killarga, Fenhagh, Roosky, Jamestown, Dowra, Newtowngore, Keshcarrigan, Kiltyclogher, Ballinagleragh, Drumcong and Kilclare.
Figure 8.2 Location of Retail Centres
8.2.2 Definition of Retail Boundaries

The Retail Planning Guidelines 2000 introduced the sequential test approach in relation to assessing retail applications in Ireland, with the focus on town centres as the preferred location for new retail development. This planning principle is further reinforced through the revised Retail Planning Guidelines 2012. In cases where there are no town centre sites available, the next preferred option is ‘edge of centre’ sites. It is only in cases where there are no town centre or ‘edge of centre’ sites available or where satisfactory transport accessibility realistically cannot be ensured within a reasonable period of time that ‘out of centre’ sites will be considered suitable.

The land-use strategy maps for each of the towns and villages will inform the retail boundaries (i.e. the Book of Maps forming Volume 3 of the Development Plan) and in the case of Carrick-on-Shannon the areas suitable for retail proposals are identified within the Carrick-on-Shannon Local Area Plan 2010-2016. It is noted that the Draft Development Plan includes reference to a desire to prepare a Plan for the town of Carrick-on-Shannon including the Cortober area. Should this occur and/or the Local Area Plan is revised, this shall inform the appropriate retail boundaries for the County town.

Appendix C to this Retail Strategy includes a set of maps delineating the core retail/commercial centres for each of the Tier 1 (Carrick-on-Shannon), Tier 2A (Ballinamore and Manorhamilton) and Tier 2B (Mohill, Drumshanbo, Dromahair, Carrigallen and Kinlough) centres identified within the retail hierarchy. This Retail Strategy supports adoption of a flexible approach to reuse of town centre and vacant properties. For clarity, it should be noted that these maps illustrate the core retail/commercial centres and not the town centre areas suitable for retail, as the Book of Maps forming Volume 3 of the Development Plan will primarily inform this.

Where ‘change of use’ planning permissions for retail are approved for existing premises within Tier 1 and 2 core retail/commercial areas, the Council will consider the development contribution applicable having regard to the Development Contribution Scheme. Such decisions will be at the discretion of the Council considerate of the intent of this objective to support the viability and vitality of the retail centres serving the County, by encouraging use of existing town centres and bring vacant buildings back into use.

The rationale for setting the core areas within each of the Tier 1 and Tier 2 centres is based on a host of factors, including:

- Vacant premises;
- Containment of town centres (encouraging cross-visititation/reasonable walking distances);
- Historic town cores;
- Permitted and existing use of premises;
- Potential for reuse;
- Street frontage;
- Architectural Conservation Areas;
- Development Plan/Local Area Plan land-use zoning objectives;
- Urban Framework Plans/Village Design Statement; and
- General perception of the area (physical buffers).

8.2.3 Broad Assessment of the Requirements for Additional Retail Floor Space

The survey identifies the distribution of convenience retail space throughout the County, with 62% located in the County ‘key towns’. In 2014, Carrick-on-Shannon contained 72% of comparison retail floor-space within the County, but also contained a
significant excess of 'bulky goods' retail floor-space. The level of commercial vacancy overall in the County had increased by over 3% since 2008 to 22% and this vacancy rate matched the housing vacancy rates for the County (when secondary and holiday homes were excluded). Estimates suggest that between 1,100 sq.m. and 1,300 sq.m. of convenience, comparison and 'bulky goods' retail floor-space will be required over the lifetime of the Plan. Whilst recognising the extent of retail vacancy, robust retail assessments would be necessary for future retail proposals, where town centre sites are not available and/or suitable.

8.2.4 **Guidance on the Location and Scale of Retail Development**

The vast majority of the retail developments granted in the County in the last 8 years have been in Carrick-on-Shannon, Ballinamore and Manorhamilton. This is reflective of their roles in serving expansive hinterlands with an expanding population.

Carrick-on-Shannon is expected to absorb one-third of the overall population and housing growth over the lifetime of the Plan. It is anticipated that the majority of future retail applications in the County will be primarily attracted to the County town of Carrick-on-Shannon, whilst there may be some scope for Tier 2A centres of Manorhamilton and Ballinamore. The remaining Tier 2B centres of Dromahair, Drumshanbo, Mohill, Carrigallen and Kinlough have potential to attract retail development appropriate to their scale and status. Appropriately located large-scale retail developments will be directed towards Tier 1 and Tier 2A and Key Town Centres only where a need has been identified and strictly having regard to the sequential test. Appropriate zoning provision to accommodate existing and expanding retail provision have been made in the 'Mixed-Use' town centre zonings within each of the Tier 1, 2A and 2B settlements.

The prospects of growth and expansion in the more rural parts of the County are expected to be more limited. The policy of the Council is to maintain and enhance the existing retail environment to serve and benefit local communities. The importance of general foodstores, post offices and pharmacies, in addition to salons, pubs, restaurants and cafés is acknowledged.

The Council will encourage the provision of retail and related development within the core area of towns and villages. The Council encourages appropriately-located shops and services associated with the tourism and agri-tourism sectors. The Council acknowledges that Leitrim is the most rural County in Ireland, but that this fact should be harnessed as part of the marketing of the County and in business.
Retail Strategy
Policy 4

It is the Policy of the Council to assess all large-scale retail applications against the criteria set down in the Retail Strategy for Leitrim and the Retail Planning: Guidelines for Planning Authorities and accompanying Retail Design Manual.

Retail Strategy
Policy 5

It is the policy of the Planning Authority to support the development of core retail, to reinforce the role and function of the core retail areas and to direct retail development to serviced areas (see Core Retail Areas for Tier 1, 2A & 2B centres in Appendix C Core Retail Areas (Tier 1, 2A & 2B Centres) to the Retail Strategy).

Retail Strategy
Policy 6

It is the Policy of the Council that the preferred location for large-scale retail developments is in town centres, and that alternative locations may only be considered in accordance with the Sequential Test, as required under the Retail Planning Guidelines 2012 as published by the DoECLG.

Retail Strategy
Policy 7

It is the policy of the Planning Authority to promote and encourage the enhancement of retail floorspace, primarily comparison goods, and town centre functions in Carrick-on-Shannon in order to reduce retail expenditure leakage out of the County and to sustain its competitiveness and importance as the County Retail Centre and a regional retail centre.

Retail Strategy
Policy 8

It is the policy of the Council to encourage reuse of vacant town centre commercial premises for alternative uses and adapt a flexible approach to reoccupation, particularly where this can compliment the existing service base. This approach will be reflected within the Council’s Development Contribution Scheme.

8.2.5 Criteria for the Assessment of Retail Developments

A set of criteria for assessing retail developments needs to be incorporated into the Leitrim County Development Plan 2015-2021, in order to best provide for consolidation of the respective role of town centres throughout the County.

For significant retail development proposals, Leitrim County Council encourages early and comprehensive engagement at the pre-application stage.

The Retail Planning Guidelines 2012 provide the main principles for assessing new retail proposals and this Strategy suggests that these should be referred to and
reflected in the County Development Plan. The *Guidelines* state that the main planning considerations for retail development include:

1) Location (site selection);
2) Suitability of use (land use zoning and specific objectives)
3) Size and Scale (impact, form and design);
4) Accessibility (access and servicing arrangements);

In line with the Guidelines the preferred location for retail development is within existing town centres. Development proposals not according with the fundamental objective to support the vitality and viability of city and town centre sites must demonstrate compliance with the sequential approach. Leitrim County Council will require that a full assessment of all suitable and viable sites is undertaken. Availability of these sites will be taken into consideration.

Considering the extent of vacant floorspace and anticipated additional floorspace required over the lifetime of the Plan, it is likely that all application proposals for significant additional retail floorspace, including extension of duration permissions will be required to be accompanied by a Retail Impact Statement, assessing the impact of the proposal relative to the Council Retail Strategy and the viability and vitality of respective town centres.

Transport impact assessments may be required for significant retail development which due to their scale and/or location may impact on the vitality and viability of town centres.

<table>
<thead>
<tr>
<th>Retail Strategy Objective</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective 2</td>
<td>It is an objective of the Council to encourage and facilitate innovation and diversification of the County’s retail profile, including tourism and agri tourism related ventures and markets where appropriate.</td>
</tr>
<tr>
<td>Objective 3</td>
<td>It is an objective of the Council to encourage and facilitate a mix of retail uses in order to achieve a balance in the range of services provided.</td>
</tr>
<tr>
<td>Objective 4</td>
<td>It is an objective of the Council to encourage the retention of retail and service units within town and village centres, with the exception of commercial operations that are no longer viable or are more appropriately located elsewhere.</td>
</tr>
<tr>
<td>Objective 5</td>
<td>It is an objective of the Council to encourage and facilitate the reuse and regeneration of derelict land and vacant buildings within the town core for retail uses having due regard to the sequential approach.</td>
</tr>
<tr>
<td>Retail Strategy Objective 6</td>
<td>It is an objective of the Council to encourage the retention and/or reinstatement of traditional shopfronts and pub fronts.</td>
</tr>
<tr>
<td>----------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Retail Strategy Objective 7</td>
<td>It is an objective of the Council to ensure that retail &amp; service units will generally be located within the central area of a town or village.</td>
</tr>
<tr>
<td>Retail Strategy Objective 8</td>
<td>It is an objective of the Council to ensure that all new retail and commercial development proposals respect the character and scale of the existing streetscape within which they are proposed.</td>
</tr>
<tr>
<td>Retail Strategy Objective 9</td>
<td>It is an objective of the Council to discourage inappropriate out-of-town shopping facilities that detract from the vitality, viability and/or character of existing towns and village centres.</td>
</tr>
</tbody>
</table>
| Retail Strategy Objective 10 | It is the objective of Leitrim County Council to implement the following objectives, as specifically identified within the County Retail Strategy in order to ensure the continued vitality and viability of town centres, including:  
  a) Promote the revitalisation and reuse of vacant and derelict properties/shop units;  
  b) Promote measures to maintain and promote retail services including Post offices in rural areas;  
  c) Promote initiatives or programmes to enhance the character and urban design quality of the County’s towns and villages to improve mobility and to ensure that they remain attractive for investment in commerce and in retailing;  
  d) Promote complimentary non-retail uses in core retail areas, particularly where this can encourage cross-visitation;  
  e) Promote activities including festivals, events and farmers markets in town centres;  
  f) Promote the town centre of Carrick on Shannon as a bijou/niche comparison retail destination  
  g) Encourage the regeneration of over the shop premises and vacant town centre terraces for residential uses, where appropriate;  
  h) Encourage retail development in the Cortober area (Co Roscommon) to adhere to the appropriate policies in the context of the greater Carrick on Shannon area, as set out in a joint Local Area Plan to be prepared by Leitrim and Roscommon County Councils in partnership  
  i) Keep the retail strategy under review and have regard to any such review in determining applications for retail development. |
8.3 Development Management Standards

8.3.1 Criteria for Assessing Particular Types of Development

Retail development decisions will be informed by the Leitrim County Retail Strategy 2015-2021, the Retail Planning Guidelines for Planning Authorities 2012 including accompanying Retail Design Manual and the policies, objectives and statements contained under the ‘Retailing’ Section of the Plan. Proposals comprising new shopfronts should refer to Leitrim County Council Guidelines on Shopfront Design.

Convenience Retail

Where practical, new convenience retail development should be located within town centres. Accessibility is key to the success of such developments and such proposals should be easily accessible by all modes of transport including pedestrians and cyclists. As large convenience shops attract customers carrying out weekly shopping, it is important that such development should also be served by adequate car parking.

Focus in providing new retail floorspace within Tier 1 and 2 towns of the County Retail Hierarchy will help to strengthen the town centres and clearly establish their primacy in terms of retailing roles and functions. Future retailing proposals which cannot be accommodated within established town centres will be steered towards proposals for occupying the existing vacant retail units at edge of centre sites. Retail proposals will be required to clearly delineate the extent of floorspace intended for the sale of convenience and comparison goods.

Comparison Retail

Over the period of the Plan it is anticipated that the vast majority of demand for comparison retail growth will be centred upon Tier 1 and Tier 2 settlements. Changes in shopping habits are having a growing impact on comparison shopping trends. Carrick-on-Shannon retains the vast bulk of comparison shop floor-space and proposals to strengthen the performance of the County town and Tier 2 towns will be supported, particularly where this reduces retail expenditure leakage from the County, subject to Plan policies and objectives.

Bulky Goods/Retail Warehouses

It is noted in the Retail Planning Guidelines that there should in general, be a presumption against further development of out-of-town retail parks. The quantitative assessment in the Retail Strategy details a high level of vacancy for retail warehousing centred on Carrick-on-Shannon. In this regard, it is envisaged that there will be a limited demand for further retail warehouse development in the County over the period of the Plan. Any application for further retail warehouse development should be considered carefully in the context of the ongoing level of provision. The range of goods sold in existing or planned parks should be restricted to bulky goods as defined in Annex 1 of the Retail Planning Guidelines 2012.

Consideration should also be given to alternative uses for existing vacant retail warehouses, provided proposals are not contrary to the proper planning and sustainable development of the area. The occupancy of these units for purposes deemed compatible with the adjacent land uses in the area provides a better alternative than to allow these units to remain vacant and inevitably fall into a state of disrepair.

Retailing in Small Towns and Villages

Small towns and villages play an important role in the lives of the communities that they serve and provide valuable day-to-day retail facilities and services to their
communities. Development in such villages and small towns should be focussed in the core village/town centre area and should compliment existing retail provision.

The key objective is to provide and maintain a range of retail facilities and services to serve the day-to-day needs of the village/small towns’ catchment area. In some small towns in the County, there is a clear need to enhance the convenience retail offer. The scale of such provision should however, be cognisant of the retail role and function of such centres within the retail hierarchy.

**Retailing in Rural Areas**

Plan policy has been formulated to best attempt to serve to facilitate maintaining of rural services. Few proposals for additional retail space in rural areas are expected over the lifetime of the Plan with a growing concern for retaining of the existing retail base. Proposals for retailing in rural areas should be directed towards existing settlements; however, in certain circumstances retail development in rural areas may be appropriate. These include:

1) A retail unit which is ancillary to activities arising from farm diversification;
2) A retail unit designed to serve a tourist of recreational facility, ancillary to the main use;
3) A retail unit attached to a craft workshop;
4) A small scale retail unit (not in excess of 100 sq. metres gross) designed to serve a dispersed rural community.

Such proposals should be considered on their merits in accordance with the proper planning and sustainable development of the area.

**Casual Trading**

Casual trading, including farmers’ markets and street markets, can make a valuable contribution to the local economy and contribute to the vitality and viability of a retail centre. Such activities should be properly regulated as per the provisions of the *Casual Trading Act 1995* and consideration should be given to the quality of offer of such casual trading.

**Forecourt Retailing & Motor Fuel Stations**

Existing motor-fuel stations often provide an important function as the local shop or small supermarket. The most suitable location for motor fuel-filling stations and associated commercial developments is at edge-of-centre locations. Traffic movements associated with such developments can interfere with the safety and free flow of traffic on the road. The slower traffic speeds within urban speed limit areas reduce the risk of such interference. Fuel-filling stations will not be permitted at locations where they would result in traffic hazard or be injurious to the amenities of an area because of their appearance, noise and fumes. Any grant of permission will be dependent on a satisfactory layout which shall include appropriate landscaping proposals advertising and maintenance proposals.

Retail sales from fuel-filling stations will be limited to those required to meet local need. The operational requirements of the filling station must remain unaffected. The Council discourages fuel-filling station forecourt retailing in excess of 100 sq. metres, as per the *Retail Planning Guidelines*. Where permission is sought for floorspace in excess of 100 sq. metres in retail units associated with fuel-filling stations, the ‘sequential approach’ to retail development shall apply. The design and layout of the fuel sign in such instances should reflect the primacy of the convenience retail function over the fuel retail function. Conflict between pedestrian movements to the retail outlet with forecourt vehicle manoeuvres needs to be designed out of the scheme.
Appendices

Appendix A Estimated Change in Disposable Income

<table>
<thead>
<tr>
<th>Year</th>
<th>Leitrim</th>
<th>Borders</th>
<th>State</th>
<th>ESRI Estimated GDP Change %</th>
</tr>
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<tbody>
<tr>
<td>2005</td>
<td>€18,345</td>
<td>€19,186</td>
<td>€19,377</td>
<td>1.4**</td>
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<td>€17,974</td>
<td>€17,719</td>
<td>€19,538</td>
<td>0.9**</td>
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<tr>
<td>2011</td>
<td>€18,254</td>
<td>€17,567</td>
<td>€19,570</td>
<td>1.7**</td>
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<td>2012</td>
<td>€18,369</td>
<td>€18,056</td>
<td>€19,705</td>
<td>3%**</td>
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<tr>
<td>2013</td>
<td>€18,702</td>
<td>€19,980</td>
<td>€20,103</td>
<td>4%**</td>
</tr>
<tr>
<td>2014</td>
<td>€19,253</td>
<td>€20,364</td>
<td>€20,705</td>
<td>4.1%**</td>
</tr>
<tr>
<td>2015</td>
<td>€20,858</td>
<td>€21,422</td>
<td>€21,351</td>
<td>4.2%**</td>
</tr>
<tr>
<td>2016</td>
<td>€21,731</td>
<td>€22,215</td>
<td>€22,414</td>
<td>3.7%**</td>
</tr>
<tr>
<td>2017</td>
<td>€22,535</td>
<td>€23,037</td>
<td>€23,166</td>
<td>3.7%**</td>
</tr>
<tr>
<td>2018</td>
<td>€23,369</td>
<td>€23,953</td>
<td>€23,250</td>
<td>0%**</td>
</tr>
<tr>
<td>2019</td>
<td>€24,303</td>
<td>€24,486</td>
<td>€24,121</td>
<td>2.2%**</td>
</tr>
<tr>
<td>2020</td>
<td>€24,836</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2021</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Based on CSO County Incomes and Regional GDP 2010
**Based on ESRI Medium Term Review 2013-2020 p. 53
***Based on estimate over 2015-2025 period - ESRI Medium Term Review 2013-2020 p. 53
****Based on CSO publication Measuring Ireland's Progress 2011 p. 14

Appendix B Retail Categories

Convenience Goods:
- food;
- alcoholic and non-alcoholic beverages;
- tobacco;
- non-durable household goods;

Comparison Goods:
- clothing and footwear;
- furniture, furnishings & household equipment (excluding non-durable household goods);
- medical and pharmaceutical products, therapeutic appliances and equipment;
- educational and recreation equipment and accessories;
- books, newspapers and magazines;
- goods for personal care;
- goods not elsewhere classified;

Bulky Comparison Goods
- repair and maintenance materials;
- furniture and furnishings;
- carpets and other floor coverings;
- household appliances;
- tools and equipment for the house and garden;
- bulky nursery furniture and equipment including perambulators;
- bulky pet products such as kennels and aquariums;
- audio-visual, photographic and information processing equipment;
- catalogue shops and other bulky durables for recreation and leisure.

Retail Services:
- restaurants/cafes/takeaways;
- hairdressing/beauty/health shops;
- laundrettes and dry cleaners;
- travel agents;
- banks and financial services;
- building societies;
- and estate agents.
Appendix C Core Retail Areas (Tier 1, 2A & 2B Centres)
Manorhamilton
Retail Tier 2A

Commercial Town Centre Area
Commercial Town Centre Area

Drumshanbo
Retail Tier 2B
Dromahair
Retail Tier 2B

Commercial Town Centre Area
Commercial Town Centre Area

Carrigallen
Retail Tier 2B
Commercial Town Centre Area

Kinclough
Retail Tier 2B
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