1 *INTRODUCTION*

ERM Environmental Resources Management Ireland Ltd. (ERM) were commissioned by Monaghan County Council in August 2002, to prepare a Retail Development Strategy for County Monaghan for the period 2002-2012.

The preparation of a Retail Development Strategy for the County, to be formally incorporated into the County Monaghan Development Plan 1999, is in accordance with Section 28 of the Planning and Development Act 2000 and Paragraphs 36-53 of the Retail Planning Guidelines 2000.

1.1 STUDY AIMS AND OBJECTIVES

The main Aim of the Retail Development Strategy for County Monaghan is:

'To strengthen and consolidate the existing retail hierarchy of County Monaghan; to provide adequate retail facilities to service the current and project population; and to ensure that new retail development located within the county is of an appropriate size, equitable, efficient and sustainable in the long-term'.

The key Objectives of the Retail Development Strategy are as follows:

- To provide a reliable Baseline of existing and outstanding retail provision in the County to enable the efficient distribution of future retail development.

- To ensure that all development plans in the county incorporate clear policies and proposals for retail development.

- To facilitate a competitive and healthy environment for the retail industry in County Monaghan.

- To promote various formats of retail development, which are easily accessible – particularly by public transport – in a location, which encourages multi-purpose shopping, business and leisure trips on the same journey.

- To avoid the location of large retail centres adjacent or close to existing, new or planned national roads.

- To support the continuing role of existing town and village centres in order to strengthen their long term-vitality, viability and vibrancy.

1.2 *WHY A RETAIL DEVELOPMENT STRATEGY*

The preparation of a general or broad based Retail Development Strategy for County Monaghan, to be adopted into the County Development Plan, is required under Section 46 of the Retail Planning Guidelines 2002 (RPGs). The RPGs set out the main issues, which need to be addressed in the formulation of a local authority retail development strategy, as follows:

- *Confirmation of the retail hierarchy, the role of centres and the size of the main centres.*
- *Definition in the development plans of the boundaries of the core shopping areas of town centres.*
- *A broad assessment of the requirement for additional retail floorspace i.e. convenience, comparison and bulky comparison.*
- *Strategic guidance on the location and scale of retail development.*
- *Preparation of policies and action initiatives to encourage the improvement of town centres.*
- *Identification of criteria for the assessment of retail developments.*

(Source: RPG, page 9.)

The Strategy seeks to address each issue in turn in the sections below. In addition, it should be noted that although County Monaghan is not one of the listed counties requiring a detailed retail planning strategy, as stated under the provisions of paragraph 46 of the RPGs, a detailed assessment of the additional retail floorspace requirement for the town centres of Monaghan and Carrickmacross has been carried out, due to the current level of commercial interest in these towns.

1.3 *RETAILING TRENDS IN IRELAND*

The Irish retail sector has experienced unprecedented structural changes in the last thirty years. This reflects structural changes, which have taken place within the sector at an international level. The Irish National Policy and Advisory Board for Enterprise, Trade, Science and Technology (Forfás, 2000) has identified four key trends within the international retail sector that are now affecting Ireland, namely:

- A growing trend towards larger sized stores and larger retail groups.
- Diversification by retailers into new product areas, new geographic markets (nationally and internationally) and new business sectors e.g. food retailers such as Marks and Spencer’s into non-food goods.
- Rapid developments in customer services such as home shopping and deliveries, longer opening hours and loyalty car schemes.
- Improvements in supply chain management including centralised distribution centres (CDC’s) e.g. Tesco Ireland’s new CDC at Ballymun, and increased investment in Information Technology (IT).

According to the Forfás Report, future trends identified in the retail sector in Ireland, which have relevance to County Monaghan and the County Monaghan Retail Development Strategy are as follows:

1. Expected growth of the retail sector in line with the overall growth of the economy.
2. Continued growth in retail shop numbers.
3. Increased level of concentration of retail operators and hence market share.
4. Further consolidation of the retail market through mergers and acquisitions (M&A) and expansion by foreign retailers to areas beyond the main cities such as Dublin, Cork, Galway, Limerick, Waterford, etc.
5. Average store sizes will increase but planning regulations may restrict floorspace.
6. Irish prices will converge with those of other European countries.
7. Major retail chains are likely to develop a range of formats to meet the requirements of towns of various population sizes, e.g. Tesco's new format for Ratoath, Co. Meath.
8. Increased market share of own-brand label goods - 20%+.
9. Increased centralised distribution for supplying the retail sector in Ireland.
10. Emergence of new retail formats and operators including factory outlets, retail warehouse parks and hard discounter such as Aldi and Lidl.

As the base line audit demonstrates (Section 3: Baseline Audit - Existing and Proposed Retail Provision in County Monaghan), many of the sectoral changes listed above are currently taking place within the County, particularly in the larger settlements such as Monaghan and Carrickamcross.

1.4 COUNTY MONAGHAN - RETAIL CONSTRAINTS AND OPPORTUNITIES

The provision of a wide range of retail facilities in major town centres within the county e.g. Monaghan, is necessary to protect the overall vitality and viability of these traditional centres and to enhance their unique "sense of place". As such, the strategy seeks to create conditions, which will facilitate appropriate change, within a broader sustainable, social, economic and cultural development context.

As noted above, part of the overall aim of the Retail Development Strategy is to accommodate appropriate additional retail development, which is efficient, equitable and sustainable. In County Monaghan, the focus is currently on two areas – improving retail provision in Monaghan Town and to a lesser extent Carrickmacross and, in accordance with the retail hierarchy, as appropriate in the smaller towns and villages of the county.

In formulating the Retail Strategy, a number of strengths and weaknesses associated with the county's catchment population and existing retail base were identified, including:

Strengths

- Expanding county town - Monaghan.
- Expanding rural areas.
- Significant tourist population.
- Close proximity to Northern Ireland, particularly Counties Armagh and Fermanagh.
- Exchange Rate with Sterling (also a potential weakness).

Weaknesses

- Declining smaller towns.
- Limited existing level of provision of retail services and operators within the County.
- Limited bulky comparison floorspace.
- Competition from retail centres located outside the county such as Armagh, Dundalk and Enniskillen.
- Exchange rate with Sterling.

The strategy aims to build on identified strengths and to limit the impact of any weaknesses in the retail sector within the County. In addition, there are certain retail development issues, which are unique to County Monaghan and the Border area. For example, in recent years there has been a growing proliferation of unauthorised fuel depot developments within County Monaghan the Border area. The strategy provides specific policy in relation to the scale and location of such developments within the County.

1.5 STUDY METHODOLOGY

The Retail Development Strategy was prepared using the following methodology, which is in accordance with the Retail Planning Guidelines 2000, entitled 'Assessment of Additional Retail and Commercial Leisure Floorspace Requirements':

- Review of statutory development plans and relevant national planning guidelines, e.g. County Monaghan Development Plan 1999.
- Land use and retail floorspace surveys undertaken in towns and villages and rural areas throughout County Monaghan in September 2002.
- Review and assessment of current and outstanding planning applications for retail within the County undertaken in September 2002. The figures for Monaghan and Carrickmacross towns were updated in May 2003 by Monaghan County Council.
- Consultation with local commercial estate agents operating in the county.
- Consultation with Monaghan County Council, County Development Board and local Chambers of Commerce.
- Analysis of land use and retail floorspace surveys.

- Identification of ‘*real world*’ retail catchments for Monaghan and Carrickmacross.
- Review and analysis of CSO Household Budget Survey data adjusted for inflation.
- Review and analysis of NI Central Statistics and research Agency Family Expenditure Surveys adjusted for inflation.
- Calculation of existing and projected catchment population and retail expenditure.
- Calculation of additional floorspace requirement for the towns of Monaghan and Carrickmacross.

In addition, the Strategy was informed by the results of shoppers’ surveys [1][1] (total of 300 no. questionnaires), which were undertaken in Ballybay, Carrickmacross, Castleblayney, Clones and Monaghan in September 2002.

(1) (1) [1][1] A copy of the *County Monaghan Shoppers’ Survey Results - Summary Report*, which was prepared by ERM Ireland in November 2002, is available from the Planning Department, Monaghan County Council.

2 *POLICY CONTEXT REVIEW*

2.1 INTRODUCTION

It is important in a study of this type to refer to the current statutory and non-statutory development plans, and relevant national planning guidelines, which set out the policy framework for the physical development of County Monaghan. Therefore, the following strategies, guidelines, development and local area plans are reviewed in detail below.

- *The National Spatial Strategy for Ireland (NSS), 2002-2020.*
- *Retail Planning Guidelines for Planning Authorities (RPGs) December 2000.*
- *County Monaghan Development Plan 1999 (includes Ballybay).*
- *Monaghan Town Development Plan 2000-2005.*
- *Carrickmacross Town Development Plan 2001-2006.*
- *Carrickmacross – Convent Lands Masterplans 2000*
- *Castleblayney Town Development Plan -2006.*
- *Clones Town Development Plan 2001-2006.*
- *Local Area Plans 2002.*

A thorough understanding and appreciation of these reports is crucial to the formulation and delivery of an appropriate, equitable, efficient and sustainable retail development strategy for County Monaghan.

2.2 THE NATIONAL SPATIAL STRATEGY FOR IRELAND, (NSS), 2002-2020

The National Spatial Strategy for Ireland (NSS), which is a twenty-year planning and development framework for the State, envisages that the Border Region, which encompasses Counties Donegal, Sligo, Monaghan, Cavan and Louth, will have a population of around 460,000 no. persons (175,000 no. households) by 2020.

In relation to County Monaghan, the NSS envisages that, within a broad All-Island context, Monaghan Town and the central border area should be viewed as a '*crossroads'* between Dublin, Belfast, Derry, the Midlands and Sligo. According to the NSS (page 59):

> '*Given its position on the N2 strategic road corridor, its position vis-à-vis towns in Northern Ireland whose cross-border links are strengthening, and opportunities for cross-border tourism, there is a particular role for Monaghan as a Hub. This role will complement that of Dundalk as a gateway and will capitalise on Monaghan's midway position on the Dublin-Derry N2 route and its substantial capacity for development'*.

The NSS envisages that Monaghan Town has the potential to grow to a population in the range of 15,000-20,000 persons by 2020 and beyond.

The strategy also states that there is the potential for Dundalk to develop as regional 'Gateway'. In addition, the strategy envisages that Carrickmacross and Castleblayney can promote themselves more effectively in the context of the strength of Dundalk and Monaghan.

2.3 RETAIL PLANNING GUIDELINES FOR PLANNING AUTHORITIES (RPGS), DECEMBER 2000

2.3.1 Overview

The *Retail Planning Guidelines* which were adopted in December 2000, update, and replace, the Local Government (Planning and Development) General Policy Directive (Shopping) 1998. The Retail Planning Guidelines acknowledge that the unprecedented growth of the Irish economy in the 1990s has increased retail expenditure and pressure for retail development, particularly in the Greater Dublin Metropolitan Area and in the major provincial towns around the country, e.g. Monaghan Town.

The key influencing factors of Ireland's economic growth and development can be summarised as follows:

- Sustained economic growth, particularly in GDP (Gross National Product), which closely mirrors growth in spending. GDP grew by an average of 7% p.a. in the 1990s and averaged 9% p.a. since 1993.
- Net in-migration of people within the professional, managerial and skilled category of the workforce.
- Rapid growth in household formation as a result of increasing population levels, changing demographic profiles, and smaller household sizes.
- The greater proportion of the population economically active cohorts and reduction in unemployment levels.

With regard to the provision of additional retail floorspace, the Retail Planning Guidelines forecast that between 1996 and 2011, almost 1 million square metres of new retail floorspace will be required throughout the Country. Approximately 75% of this requirement will be comparison floorspace and 25% convenience comparison floorspace.

2.3.2 Ireland's Retail Hierarchy 2000

Ireland's current retail hierarchy is examined and assessed in the Retail Planning Guidelines 2000. According to the Retail Planning Guidelines there are Five Retail

Tiers within the country. A summary table which provides a detailed description of each Tier, is provided at Annex A(a).

Monaghan Town is classified as a 'Third Tier' Town within the existing State Retail Hierarchy, as defined in the Retail Planning Guidelines 2000. Castleblayney and Carrickmacross are defined as 'Fourth Tier' towns and the remaining towns fall within Tier Five.

2.3.3 Key Objectives

The Retail Planning Guidelines identifies five key objectives in relation to retail development in Ireland:

1. *To ensure that all future Development Plans incorporate clear policies and proposals for retail development.*
2. *To facilitate a competitive and healthy environment for the retail industry in the future.*
3. *To promote forms of development which are easily accessible, particularly by public transport, and encourages multi-purpose shopping, business, and leisure trips of the same journey.*
4. *To locate new retail facilities, where possible, within town and district centres.*
5. *To discourage large retail centres locating ear existing/proposed national road and motorways.*

(Source: Retail Planning Guidelines 2000, pages 4-5.)

In addition to the above objectives, all new retail development proposed in Ireland must have regard to the specific provisions of the Retail Planning Guidelines, which are provided in summarised form in Annex A(b). As noted in the Introduction, the Retail Planning Guidelines require the preparation of Retail Development Strategies for adoption into the County Development Plan by County Councils throughout Ireland.

2.3.4 Sequential Approach to New Retail Development

The Retail Planning Guidelines recommend the adoption of the '*sequential approach*' for the location of new retail development within the country. The sequential approach considers the preferred location for a new retail development to be, firstly, where practicable and viable, within a town centre (or district or major village centre) and secondly, on the edge of the town centre. An edge-of-centre site is considered to be within easy walking distance of the primary retail core of a town centre. According to the Retail Planning Guidelines:

> '*Alternative out-of-centre sites should be considered only where it can be demonstrated that there are no town centre or edge of centre sites which are suitable, viable and available'*.

(Source: Retail Planning Guidelines 2000, page 15.)

2.3.5 Glossary of Retail Terms

The Retail Planning Guidelines Glossary of Terms, applies to the County Monaghan Retail Strategy. The glossary provides numerous definitions of retail terms, which are referred to throughout the remaining chapters of this strategy. For example, convenience goods includes goods such as food, alcoholic and non-alcoholic beverages, tobacco, and non-durable household goods and comparison goods are durable goods such as clothing and footwear for which shoppers are prepared to travel some distance in order to 'compare' prices and quality. The Glossary of Terms is reproduced in full in Annex A(c).

2.4 COUNTY MONAGHAN DEVELOPMENT PLAN 1999

The County Monaghan Development Plan 1999, prepared by Monaghan County Council sets out the Council's strategic planning and development policies for the county- at-large during the 1999 to 2004 period. The following policies, which have relevance to retail development within the county, are examined in detail below:

- Housing.
- Roads.
- Retail.

The County Development Plan also contains the Town Plan for the Scheduled Town of Ballybay, which is examined below.

2.4.1 Housing

According to the Plan, it is the aim of the Council:

> '*To adopt a land-use and settlement strategy, which makes the most efficient and sustainable use possible of resources and service utilities, (i.e. road network, water supply, sewerage treatment facilities, community and social facilities of the County) and which allocates resources in an equitable manner'*.

The Plan states that in order to achieve this aim, it is a policy of the Council to:

- *Implement the Council's housing programme and acquire land, in addition to the Council's land bank, to meet housing demands.*
- *Provide service sites for private housing development in established settlements where these needs are not adequately being met by private developers.*
- *Eliminate as far as possible unfit, obsolescent and overcrowded housing.*

- *Promote the application of the principles of good design and the use of materials indigenous in the locality in house construction.*
- *Encourage appropriate in-depth/infill housing in towns and villages and ensure that the scale, design and density and layout of such developments harmonises with existing pattern of development and protect access points to backland areas.*
- *Maintain a distinct rural environment by controlling the haphazard spread of urban generated housing in rural areas and to prevent the extension of undesirable intensive development in un-serviced areas.*
- *Maintain clear demarcations between existing settlements and prohibiting ribbon development on approach roads to towns and villages.*
- *Require that housing developments are completed to a satisfactory standard and that developers contribute towards the cost of services, roads and public open space.*

(Source: County Monaghan Development Plan 1999, page 10.)

2.4.2 Roads

The Development Plan sets out the proposed road improvements to be undertaken during the Plan period. Consultation with Monaghan County Council and the National Roads Authority in September 2002 provides up-to-date information of the capital costs associated with this road-building programme and likely completion dates, as shown in Table 2.1 below. Investment in the local and regional road network will reduce traffic congestion and improve accessibility to and from towns located within Monaghan County.

Table 2.1: Planned Road Improvements within County Monaghan

Route	Works	Location	Cost (€M)	Completion Date
N2/N54	Realignment	Monaghan Inner Relief Road and N2/N12 junction and approaches	15-20	2006
N2	Realignment	North of Carrickmacross to Aclint and by-passing Carrickmacross	42	2005
N2	Realignment	North of Clontibret to south of Castleblayney and by-passing Clontibret, Annyalla and Castleblayney	112	2006
N2	Realignment	North of Emyvale to south of Monaghan Town	75	2005-2007
N12	Realignment	From its junction with the realigned N2 to Co. Armagh border.	22	2005-2009
N54	Realignment	Tullygrimes to Mullaghbrack	3.5	2004
N54	Realignment	Clones to Stonebridge	10	2014
N54	Realignment	Clonagore to Clonoony	3	2004-2009

(Source: Monaghan County Council and NRA, September 2002.)

2.4.3 Retail

According to the County Development Plan, the Council recognises the value of retail activity in contributing to the overall vitality, viability and attractiveness of towns and village centres. More importantly, it is clearly accepted that retail activity can also make a significant contribution to urban regeneration and revitalisation. The Plan states that:

> '*While the Council recognises that shopping patterns will continue to evolve and change with large scale shopping units attracting an increasing proportion of the commercial activity, it is also recognised that the smaller urban centres must retain an adequate level of retail provision to serve the local needs to ensure the long term vitality and viability of the urban/village centres'*.

(Source: County Monaghan Development Plan 1999, page 16.)

The County Development Plan continues that it is Council policy to:

- *Co-operate with private enterprise in the provision of improved shopping facilities throughout the county to protect the vitality and viability of established town and village centres.*
- *Discourage large-scale shopping and commercial development from locating outside town centres, in order to prevent urban decline and consolidate existing shopping patterns. The Council shall have regard to the Department of Environment Directive on large-scale shopping development SI 264 of 1982 when considering applications for such developments.*
- *Give favourable consideration to the provision of retail warehouses on appropriate sites within urban areas, which are in or adjacent to existing shopping centres, for the sales of goods such s furniture, carpets, electrical and gardening goods which are inappropriate to town centre locations.*
- *Prohibit the development of inappropriate and/or large scale retail facilities in out of town locations, along National Routes or at major road junctions.*
- *Local shops of appropriate scale and function outside existing centres will be permitted where an individual shop or group of shops are required for new residential or employment areas or to meet the needs where deficiencies in provision exist.*

(Source: County Monaghan Development Plan 1999, page 16.)

Petrol/Fuel Filling/Service Stations

The Development Plan also provides specific planning policy in relation to the location of petrol filling/service station in the county. It is Council policy:

- *To protect the existing retail structure of the county by discouraging the location of retail facilities at these stations, where it is considered by the Council, that such facilities would have a detrimental impact on the existing retail structure.*
- *Encourage the construction of petrol filling stations or service stations in existing towns and villages, if it is considered the construction of forecourts and/or canopies would not interrupt the pattern of the street.*

The Development Strategy for the county at large, which is contained in Section 4 of the County Development Plan, requires that new petrol filling stations within County Monaghan meet a number of design and floorspace criteria, as reproduced in Table 2.2 below.

Table 2.2: Criteria for Assessing New Petrol/Fuel Filling Stations within County Monaghan

Criteria No.	**Description**
1	A high level of architectural design and layout will be required.
2	Each station shall have a serving area capable of providing adequate parking and accommodating customer queuing.
3	No building or obstruction, other than pumps, will be permitted within 15m of the roadside.
4	A filling station will be required to be clearly demarcated from the public road.
5	No more than two vehicle openings onto a public road will be permitted Separate clearly defined entry and exit points will be required.
6	Each station will be treated as a road junction and layout and standards suitable to that particular road class will apply.
7	Canopy lighting and on-site advertising will be regulated for traffic safety purposes. No signage which would conflict with traffic signs, interfere with sight lines at entry and exit points or cause glare, hazard or confusion to public road users will be permitted.
8	Advertising sign, flags and bunting will be strictly limited to prevent visual clutter. Only signs that relate to the sale of motor fuel will be permitted.
9	Retail activity should normally be small scale and ancillary to the petrol station use.
10	Floor area devoted to retail sales within a petrol filling station shall be limited to 40 sq m.
11	Comprehensive landscaping with particular emphasis on screening of the side and rear of the development shall be incorporated into the overall design.

(Source: Monaghan County Development Plan, page 40.)

2.4.4 Ballybay

The Development Plan for Ballybay (a Scheduled Town) is outlined in the County Development Plan. According to the Plan, it is an objective of the Council to promote the growth of the town as a commercial, industrial service, social and residential centre; and to reinforce its role as a retail and service centre for its catchment area.

In line with county planning policy, the sales area within petrol filling stations in Ballybay is restricted to 40 sq m.

2.5 *MONAGHAN URBAN DEVELOPMENT PLAN* 2000-2005

The Monaghan Urban Development Plan 2000-2005, which is read in conjunction with the County Development Plan 1999, sets out retail policy to guide proposed retail developments within the administrative boundaries of Monaghan Town.

2.5.1 *Retail Policy*

Again the Development Plan recognises the value of retail activity as a major contributor to urban regeneration and revitalisation. The Town Council's retail policies are as follows:

- *It is the policy of the UDC to protect the vitality and viability of established shopping areas in the town.*
- *The UDC will prohibit the development of inappropriate retail or commercial facilities in the town, which have an adverse impact on the quality and vitality of the town centre.*
- *The UDC will not favour large-scale out of centre retail or commercial activity, which would have an adverse impact on the town centre.*
- *The UDC will co-operate with private enterprise within the town in the provision of improved shopping facilities'.*

The Plan also sets out specific policy in relation to large-scale retail developments, namely,

- *To discourage the development of large retail developments, which are out of scale with the town's commercial needs.*

(Source: Monaghan Urban Development Plan 2000-2005, page 36.)

2.6 *CARRICKMACROSS URBAN DEVELOPMENT PLAN* 2001-2006

The Carrickmacross Urban Development Plan 2001-2006, which was prepared by Carickmacross Town Council, sets out specific retailing planning and development policies to guide new retail development within Carrickmacross during the 2001-2006 period. According to the Plan, it is Council policy to:

- *Retain and promote the economic viability of the town's central Shopping area and to ensure that all application for shopping uses outside this area are of a scale suitable for serving local needs only.*
- *Extend the commercial centre of town by encouraging retail and commercial activity in backland areas away from Main Street and on streets leading into Main Street.*

(Source: Carrickmacross Development Plan 2001-2006, page 35.)

2.7 CARRICKMACROSS - CONVENT LANDS MASTERPLAN 2000

This non-statutory Masterplan for the Convent Lands, located to the south east of the town centre, was undertaken on behalf Monaghan County Council in association with Carrickmacross Urban District Council (Town Council) by Cunnane Stratton Reynolds in 2000. The Masterplan's Vision is to unlock the development potential of the site; make the most efficient use of the land; and accommodate the broadest range of needs and uses possible whilst integrating with the existing town (Source: Convent Lands Masterplan, page 7).

In relation to retailing, the Masterplan states that:

> '*Local retail facilities are most appropriately and conveniently located on the western part of the site. …The range of facilities that would be provided could include newsagents/tobacconists, laundrette, small foodshops, etc.'*.
>
> (Source: Convent Lands Masterplan, page 36.)

2.8 CASTLEBLAYNEY DEVELOPMENT PLAN 2006

The Castleblayney Development Plan 2006 sets out planning and development policy to guide development within the administrative boundaries of Castleblayney during the 2001 to 2006 period. The Plan recommends the opening up of the 'Backlands' to the north of the town centre for mixed-use infill development, in order to consolidate and regenerate Castleblayney town centre. This development, which was first recommended in the previous plan of 1992, includes a new road linking Muckno Street to Monaghan Road. The recent variation to the Development Plan in June 2002 will enable the realisation of this major development objective and will also facilitate the natural expansion of the town.

According to the Plan, in relation to retailing, it is Council's objective to:

- *Promote the shopping appeal of Castleblayney by strengthening its retail function so that it can compete effectively for a proper share of the retail market.*
- *Encourage improvements to and expansion of existing retail outlets in order to consolidate the primary shopping function of West Street, Muckno Street and York Street.*
- *Protect Castleblayney town centre from inappropriate retail development along the N2 Clontibret-Castleblayney realignment.*

(Source: Castleblayney Development Plan 2006, page 73.)

In addition, with specific reference to the planned backlands road, the Plan states that when the road is developed it will enable retailing in the town to develop in two ways:

- *Firstly, it will facilitate the formation of new retail units in the backlands areas of the town.*
- *Secondly, the increased car parking provision will be of benefit in promoting shopping visits, via pedestrian linkages, to those retail properties located along the Main Street frontage.*

(Source: Castleblayney Development Plan 2006, page 73.)

2.9 *CLONES URBAN DEVELOPMENT PLAN 2001-2006*

In addition to the other town plans, the Clones Urban Development Plan 2001-2006 sets out specific retailing planning and development policies to guide new retail development within Clones during the 2001-2006 period. According to the Plan, the Council will:

- *Not favour out-of centre large-scale retail or commercial activity, which would have an adverse impact on the town centre.*
- *Co-operate with private enterprise within the town in the provision of improved shopping facilities.*

The Town Council's specific retail policies include:

- *To assist the implementation of the Town renewal scheme for Clones, especially the re-development of Fermanagh Street.*
- *To operate the provisions of the Derelict Sites Act 1991.*

2.10 *VILLAGES - LOCAL AREA PLANS*

Finally, Local Area Plans have been prepared in 2002, for nine *Priority Villages* within the county[2][2]. These Local Area Plans aim to halt decline and promote and develop the social, physical and economic infrastructure, including retail provision, in the County's smaller traditional settlements within the medium to long term.

Local Area Plans will also be prepared for other villages located within the county.

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(2) (2) [2][2] Local Area Plans have been prepared for the following 'priority' villages within County Monaghan: Ballinode, Emyvale, Inniskeen, Glaslough, Newbliss, Rockcorry, Scotstown, Smithborough and Threemilehouse. Copies of the LAPs are available from Monaghan County Council.

2.11 SUMMARY

The information provided in the above sections can be summarised as follows:

- Monaghan Town, and the central border area, is identified as a *'crossroads'* between Dublin, Belfast, Derry, the Midlands and Sligo under the provisions of the National Spatial Strategy 2002-2020.
- Gross Domestic Product (GDP) in Ireland grew by an average of 7% p.a. in the 1990s and average 9% p.a. since 1993.
- Monaghan Town is classified as a Third Tier Town under the Retail Planning Guidelines 2000. Castleblayney and Carrickmacross are identified as Fourth Tier towns and the remaining towns fall within Tier Five.
- All new retail developments in Ireland must have regard to the specific provisions of the Retail Planning Guidelines 2000, including the *sequential approach* to new retail development.
- There are numerous major road improvements within the County, which are due to be completed by 2014.
- The County Development Plan (which includes the Town Plan for Ballybay) caps retail sales area at petrol filling stations at 40 sq m.
- The county and urban development plans seek to restrict the level of new out-of-centres retail development in order to protect the existing retail base located in and around existing town centres. Existing retail policy does not distinguish between the various types of retail floorspace, i.e. convenience, comparison and bulky comparison.
- The Convent Masterplan 2000 identifies a new retail area suitable for local retail facilities on the western area of the site.
- Local Area Plans have been prepared for nine Priority villages within the County.

3 BASELINE AUDIT - EXISTING AND PLANNED RETAIL PROVISON IN COUNTY MONAGHAN

3.1 INTRODUCTION

This section of the Retail Strategy provides an assessment of existing and planned retail provision within the county, in order to determine the retail hierarchy of County Monaghan. The information set out below has been sourced from retail floorspace and land-use surveys undertaken by ERM Ireland in September 2002. In addition, information on vacancy rates and levels of planned and/or proposed retail investment within each town is also provided as an indicator of the overall ‘health‘ of each centre.

The following areas within County Monaghan are examined in detail below:

- Monaghan Town.
- Carrickmacross
- Castleblayney
- Clones.
- Ballybay.
- Remaining rural areas, e.g. Clontibret.

3.2 MONAGHAN TOWN

Monaghan Town, which is identified as a Third Tier Town in the Retail Planning Guidelines 2000, which dates back to the early 17th century, is the primary shopping destination within the County. The town supports a wide range of retail, commercial and professional service outlets which provide a wide range of convenience, comparison and bulky comparison goods.

Existing retail provision (net floorspace) in Monaghan Town is set out in Table 3.1 below. According to the survey, the quality of comparison goods available within the town is generally very high i.e. medium to high order comparison goods.

Table 3.1: Retail floorspace (Net) in Monaghan Town (May 2003)

Type of Retailing	Net Floorspace (Sq m)
Comparison	6,623
Bulky Comparison	6,113
Convenience	5,882*
*excl projects under construction – see Table 3.2	
TOTAL	**18,618**

(Source: ERM Ireland , September 2002.)

The main retail facility within the town is Monaghan Shopping Centre (8,225 sq m net retail floorspace, 6,080 sq m net excluding retail services), which is located in the town centre adjacent to the National Primary Route linking Dublin and Derry (N2). The shopping centre, which opened in 1996, is anchored by a 2,868 sq m (gross) Tesco and a 1,375 sq m (gross) Pattons.

According to the centre's management (October 2002), the centre has a weekly footfall of approximately 80,000 nos. persons. In addition to the Tesco and Patton's stores, the centre has 26 no. shop units ranging in size from 44 sq m net to 260 sq m (net). The centre contains a number of independent quality women's clothing stores, a Boots Chemist, shoe shops, newsagents, a McDonalds, other fast food outlets, etc.

The main retail core within Monaghan Town is located to the north and west of the shopping centre and is generally centred around The Diamond and Church Square. The main retail attractions in this area include Flemings Department Store and Super Valu supermarket and Heatons. There are also a number of banks and retail services located within this area, including several restaurants, cafes and pubs.

The remaining retail outlets within the town centre, including Dunnes Stores, provide a wide variety of goods including food and drapery, shoes, furniture, mobile phones and sporting equipment, etc. It should be noted that there are seven jewellers totalling 210 sq m (net) within the town centre, indicating a variety of high order comparison goods on offer in the town.

Car Parking

There are three main car parks in the town centre located immediately adjacent to Monaghan Shopping Centre. The front car park, to the south of the centre, adjacent to the N2, is in the ownership of the shopping centre and provides parking for 174 no. cars. To the east of the centre, is the Town Centre car park (owned by the Town Council), which provides parking for 240 no cars. Pedestrian access and linkages from the car park to the shopping centre and town centre have recently been improved. The Court House car park is located to the rear or north of the shopping centre, and provides 151 no. car parking spaces. Access and egress to/from this car park is provided both from the N2 National Primary Route and Church Square. (Source: *Monaghan Town Centre Parking and Traffic Management Study,* WS Atkins, 2002)

In addition, 168 no. car parking spaces are available in Glaslough Street adjacent to Peter's Lake, and a further 84 no. spaces are located at the Diamond car park (paid) near the junction of Glaslough Street and Dublin Street. (Source: *Monaghan Town Centre Parking and Traffic Management Study,* WS Atkins, 2002). The Peter's Lake car-park is presently being extended northwards to the rear of Glaslough Street.

Streetscape and Pedestrian Access

The streetscape of the town, although generally attractive and of a reasonably high standard, is dominated by vehicular traffic movement. The N2 National Primary route passes through the centre of the town. Pedestrian access and linkages between shops, services and other attractions within the town centre are limited.

Pedestrian access between the shopping centre and Dunnes Stores is poor with no traffic lights and limited pedestrian safety, or shared surface features in place. Pedestrian access between the shopping centre and the Mall Road is poor with no traffic lights and no pedestrian safety facilities. The shopping centre car-park is linked to Dublin Street by two pedestrian accesses/alleyways and to the Church Square via a new footpath.

Planned improvements within the town centre include an upgrade in pedestrian linkages from The Diamond and Glaslough Street car park to Dublin Street car park and development of a new roadway to the rear of Dublin Street, linked by existing alleyways.

Vacancy Rate

As noted in the Retail Planning Guidelines 2000, the level of vacant properties is a good indicator of the overall health and vitality of a centre. In general it is good for a centre to have some vacancies as they help to keep the rents down and encourage new enterprise in the area. It is generally accepted in the real estate and planning profession that a vacancy rate of 15% is too high and a vacancy rate of 5% is generally regarded as too low.

According to the land use survey results, (ERM, September 2002), the current vacancy rate in Monaghan Town, including the shopping centre is 4% (or 720 sq m). The highest concentration of vacant retail units is in Dublin Street, which has a vacancy rate of 17% or 216 sq m. The vacancy rate in Monaghan Shopping Centre is 0%, which indicates a shortage in available floorspace/units at the centre. Coupled with this, according to the centre's letting agents, (DTZ McCombe Pierce, October 2002), turnover of tenants at the shopping centre is traditionally very low. For example, there have been two changes in retailers since the centre opened.

As noted, demand for units in the centre is very strong and multiple operators with a current requirement include Monsoon, Subway, Accessorise and H. Samuel. Interest from local independent retailers is also very strong.

Recent Retail Investment

The opening of Monaghan Shopping Centre in 1996 is the most significant investment in the town's retail base in recent years.

There are a number of significant retail developments currently under construction in the town, including a Lidl discount food store on North Road and a major extension to Flemings/Super Value outlined in Table 3.2 below. It should also be noted that Monaghan County Council has recently granted a planning permission for a retail warehouse development (8,429 sq m, 11 no.units) at Cornacassa, Clones Road, Monaghan.

Table 3.2: Retail Floorspace (Net)granted planning permission in Monaghan Town (as at 31 May 2003)

Operator	Type of Retailing	Net Additional Floorspace (Sq m) approx
Lidl	Convenience	1,250
Flemings/Super Valu (ext'n)	Convenience/Comparison	866
Daniel & Barry Aughey	Bulky Comparison	8,429

(Source: ERM Ireland, September 2002.)

3.3 CARRICKMACROSS

Carrickmacross is the principal town serving the southern part of the County. The town, which is located on the N2, approximately 16km south of Monaghan and 22km west of Dundalk. The town ranks second in the county in terms of existing retail activity and floorspace and supports a wide variety of services, convenience and comparison outlets. Existing retail provision (net floorspace) in Carrickmacross is set out in Table 3.3 below.

Table 3.3: Existing Retail Floorspace(Net) in Carrickmacross (2003)

Type or Retailing	Net Floorspace (Sq m)
Comparison	2,638
Bulky Comparison	1,931
Convenience	3,148
TOTAL	7,717

(Source: ERM Ireland, September 2002.)

The core retail area runs along both sides of Main Street in the town. Secondary retail locations include Chapel Lane, Parnell Street, O'Neill Street and Farney Street. A new purpose built shopping centre anchored by O'Gorman's Supervalue, located on Main Street, has recently opened and there are currently 4 no. other supermarkets in the town, which serve as a significant attraction and 'draw' to shoppers. In addition to the supermarkets, the town provides a variety of goods including clothing and shoes, home decorating and hardware, newsagents, assorted gifts, florists and food outlets.

An open-air market is held in the town centre on Thursday. The market, which is held in Main Street, provides convenience goods such as fruit and vegetables and low order comparison goods e.g. clothing. Observations suggest that the market is a significant attraction for the town with car parking in high demand on market day.

Car Parking

A substantial amount of car parking provision in Carrickmacross is on-street, located along the western and eastern side of Main Street. While car parking spaces are generally marked, parking is often haphazard, and can cause obstructions to, and slow, traffic passing through the town. In addition to on-street parking, surface levels car parks are located to the rear of the new Shopping Centre off Main Street (owned by the Town Council), rear of The Fiddler's Elbow, Shirley Arms Hotel and O'Duffy's Centre (privately owned).

Streetscape

Like Monaghan Town, cars and car parking dominate the streetscape of Carrickmacross. Pedestrian access is adequate on Main Street and there are two pedestrian crossings to allow access across the N2 National Primary Road to either side of the street and core shopping area. However, on Thursdays, which is market day, vehicular access is limited, as tents and stalls reduce the number of available car parking spaces in the centre making vehicular (and pedestrian) access more difficult.

The buildings on Main Street are generally well-maintained and relatively consistent in terms of height and façade treatment. The town offers a high class built environment and efforts should be made to maintain and protect the existing character of the area.

Vacancy Rate

In September 2002, The vacancy rate for retail premises in Carrickmacross was 6% or 292 sq m. While this is higher than the vacancy rate for Monaghan Town, it is still a relatively low rate of vacancy. Following the opening of the Market Square Shopping Centre, in March 2003, and relocation of O'Gorman's Supervalue , an existing 437 sq m of retail floorspace is presently vacant.

Recent Retail Investment

The most recent major retail development in Carrickmacross is the Market Square Shopping Centre, located at the northern end of Main Street between the Council Offices and the town's main car park. The centre, which opened in March 2003, comprises of nine retail units ranging in size from 46 sq m to 1,020 sq m. The anchor tenant is a 1,600 sq m (net) O'Gorman's Super Valu.

The retailer, who has been trading in Carrickmacross for over 25 years, has transferred from an existing 437 sq m Super Valu store on Main Street, i.e. net additional convenience floorspace of approximately 1,163 sq m.

A 500 sq m gross floorspace (400 sq m net) furniture showroom is located on the second floor of the centre. The other retail service uses include a pharmacy, home sound and vision shop, stationery and a café/restaurant.

The County Council proposes to develop approx. 100 acres of land, known as the Convent Lands, located to the south of the town. A new civic and town centre development to the south of Main Street on a portion of the Convent Lands is presently being developed in accordance with the Convent Lands Masterplan, as adopted by Monaghan County Council in 2000. The new centre will incorporate new civic offices and library. The Convent Lands Masterplan 2000 also provides for mixed residential and commercial development with pedestrian and road access to Main Street.

A detailed draft plan for the development of the civic centre and adjoining properties was completed in May 2003. This draft plan provides for the development of a number of retail outlets, both large and small. In this regard the Council has recently received a pre-lodgement proposal from Tesco Ireland to construct a store (approximately 2,160 sq m net) at this location. A planning application for this development has not yet been received by the County Council.

Permitted retail floorspace in Carrickmacross is summarised in Table 3.4 below.

Table 3.4: Retail Floorspace (Net) granted planning permission in Carrickmacross (as at 31 May 2003)

Operator	**Type of Retailing**	**Net Additional Floorspace (Sq m)**
Magheross, Ardee Road	Bulky Comparison	3,200
TOTAL		3,200

(Source: ERM Ireland, September 2002.adjusted May 2003)

A retail warehouse development (4,000 sq m gross, 3,200 sq m net) has recently been permitted at Magheross, Carrickmacross, adjacent to the Convent Lands development.

3.4 CASTLEBLAYNEY

Castleblayney is the third largest retail centre in County Monaghan and is again located on the main national primary route from Dublin to Derry (N2). Core retail activity centres on West Street with a secondary retail area located on York Street, Muckno Street and at the southern end of Monaghan Street.

In addition, there are a number of bulky comparison good outlets located on the edge of the town centre on Monaghan Street.

There is a reasonable variety of convenience and comparison facilities within the town. Two supermarkets, Super Valu and Centra, are located on opposite end of West Street and act as a significant attraction to the town. Other goods available within the town include clothing and shoes, gifts, and a number of newsagents and general stores.

Table 3.6 below outlines the amount of existing convenience, comparison and bulky comparison retail floorspace (net) within Castleblayney in 2002.

Table 3.5: Retail Floorspace (Net) in Castleblayney (2003)

Type of Retailing	**Net Floorspace (Sq m)**
Comparison	1,688
Bulky Comparison	3,829
Convenience	2,373
TOTAL	7,890

(Source: ERM Ireland, September 2002.)

Car Parking

The majority of on-street parking is located to the front of the shops and services along West Street. In addition, approximately 195 off-street public car parking spaces are available in York Street and Thomas Street (to the south of the main shopping area in West Street) and 45 no. off-street parking spaces are available off New Street to the rear of the Super Valu supermarket.

In total, there are 453 no car parking spaces in the town, 356 of which are *'well used or fully used'* (Source: *Castleblayney Urban Backlands Road, Braniff Associates 2002).*

According to the Castleblayney Strategic Study, (Source: *Braniff Associates, 1998),* car parking is a critical requirement for shopping in Castleblayney and the lack of it reduces the overall attractiveness of the town for shoppers. Within the town centre, serious congestion is frequent occurrence and parking problems on the main thoroughfare are common. This is particularly true for the junction of West Street, where through traffic on the N2 is significantly restricted due to cars searching for, or waiting to move into, car parking spaces.

In addition, the recent variation to the Town Development Plan in June 2002, and subsequent grant for a Part 8 Development, will facilitate the development of further car parking provision, with linkages to West Street, in the backlands area of the town centre. This project is presently under construction.

Streetscape

Many of the buildings in Castleblayney are somewhat rundown, detracting from the general attractiveness of the area for shopping. While some of the buildings in West Street are attractive and well maintained, prominent derelict buildings reduce the quality of the streetscape, e.g. opposite the Courthouse in Market Square.

The streetscape is also dominated by car parking, and traffic flows prevents easy pedestrian access from one of the road or retail core to the other.

There is one dedicated pedestrian crossing located at the junction of York and West Streets, this also being the main junction for traffic passing through the town on the N2 National Primary Road.

Vacancy Rate

The vacancy rate in Castleblayney is approximately 5% or 427 sq m. If the total floorspace for bulky goods trading is taken out of the equation, the vacancy rate is slightly higher at 9.2%.

Recent Retail Investment

There has been little pure retail investment within the town boundary in recent years. New bulky goods developments have been concentrated to the north of the town centre along the N2. However, there has been significant investment in public houses and nightclubs within the town centre.

3.5 CLONES

Clones is located less than 1.6km from the border with Northern Ireland, the westernmost of the five main towns in County Monaghan. The town is located approximately 21km west of Monaghan Town and a similar distance from Cavan Town. It is situated on the N54, the main route from Galway to Belfast.

In terms of the retail hierarchy, Clones is the fourth of the five main towns in County Monaghan. There is no purpose built shopping centre in the town and the key retail attraction is a 432 sq m Super Valu located on Fermanagh Street. Most of the other retail outlets in the town are also located on Fermanagh Street.

The variety of retail outlets in Clones is limited and there is a lack of both convenience and comparison shops within the town. The type of good available within the town centre consists mainly of clothing and shoes, florists, newsagents, supermarket, hardware and household goods.

Two petrol filling stations with convenience retail stores totalling 285 sq m (net) are located either side of the N54, on the edge of the town centre. The two stores, Maxol Garage (incorporating a Mace supermarket) and Texaco, both offer a relative high standard of convenience goods to the local catchment and passers by.

Their combined floorspace represents 30% of the total convenience floorspace available within the town. Table 3.7 overleaf outlines the amount of existing comparison, bulky comparison and convenience retail floorspace (net) available within Clones in 2002.

Table 3.5: Retail Floorspace (Net) in Clones (2003)

Type of Retailing	**Net Floorspace (Sq m)**
Comparison	706
Bulky Comparison	402
Convenience	783
(Petrol Filling Stations)	285
TOTAL	2,176

(Source: ERM Ireland, September 2002.)

Car Parking

The number of on-street car parking spaces in Fermanagh Street has been reduced following the refurbishment of Fermanagh Street. However the Town Council's two main car parks to the rear of Fermanagh Street and The Diamond provide in excess of 150 parking spaces and tend to be under-utilised. Unregulated car parking in The Diamond and Fermanagh Street is to be addressed shortly by the Town Council. There is additional car parking located in Roslea Road and 98' Avenue. Further improvements in car parking provision within the town centre are planned in the short term.

Streetscape

Fermanagh Street is comprised of 2/3 storey buildings in terrace formation. A number of buildings in the town, and particularly in Fermanagh Street, are derelict or vacant, detracting from the attractiveness of the area for shopping.
Fermanagh Street has recently benefited from major environmental improvements undertaken by the County Council, which have helped to improve the general attractiveness of the core retail area.

Pedestrian access in the town is generally adequate. The Diamond area, in particular, has the potential to be an attractive public space and would benefit from additional landscaping and a reduction in the amount of parking at this location.

Vacancy Rate

The vacancy rate for retail premises in Clones is 13% or 290 sq m in total.

Recent Retail Investment

There has not been any recent significant retail investment in the town.

3.6 BALLYBAY

Ballybay is the smallest of the five main towns within County Monaghan, and is located in the centre of the county, approximately 10km west of Castleblayney on the R183 and 15km south of Monaghan Town on the R180.

The town has a limited variety of retail outlets. The main retail attraction is the Super Valu supermarket located on Main Street. Combined with a number of small general stores, also located in Main Street, this comprises the total amount of shopping provision available in the town. There are 14 no. public houses also located in the town.

In terms of shopping, goods available in Ballybay include clothing, shoes, newsagents, two pharmacists, a florists and a small department store. The overall variety and quality of the goods available is lower than the goods available in larger towns within the county.

Table 3.8 below outlines the amount of existing retail floorspace within Ballybay in 2002.

Table 3.6: Retail Floorspace (Net) in Ballybay (2003)

Type of Retailing	**Net Floorspace (Sq m)**
Comparison	585
Bulky Comparison	-
Convenience	578
TOTAL	1,163

(Source: ERM Ireland, September 2002.)

Car Parking

Unlike other towns in the county, the availability of car parking does not appear to be a significant issue in Ballybay. Most of the parking is located in front of the shops in Main Street although off-street parking is available to the rear of the shops on both sides of the street. A newly paved public car park is located off Meetinghouse Lane.

This and other off-street parking was observed to be underused during site visits in September 2002, although parking was still easily available in Main Street.

Streetscape

The streetscape of Ballybay suffers due to the number of vacant, derelict or un-maintained buildings in Main Street. Residential development in the main street also divides the retail area and does not contribute to an active street frontage.

Footpaths located on both sides of Main Street, allow adequate access between shops and services. However, gutters and inconsistent paving makes access for people with disabilities problematic.

Vacancy Rate

The vacancy rate for retail premises in Ballybay is 21% or a total of 324 sq m of vacant floorspace. All these premises are located on Main Street. Most have been classified as being in poor or reasonable condition.

Recent Retail Investment

Ballybay is similar to Clones in that there has been no significant retail investment in the town in recent years.

3.7 REMAINING RURAL AREAS (INCLUDING VILLAGES AND SMALL SCALE SETTLEMENTS)

Finally, there are a number of villages and small scale settlements within the remaining rural areas offering limited convenience provision usually consisting of a post office and one or two pubs, e.g. Emyvale, Smithborough, etc. In certain locations there are a number of one-off, large-scale furniture and carpet stores, e.g. Clontibret approximately 870 sq m (net).

The floorspace provision in the remaining rural area is provided in Table 3.9 below.

Table 3.7: Retail Floorspace in Remaining Rural Areas (including villages and small-scale settlements), (2002)

Rural Areas	**Convenience Floorspace (Sq m)**	**Comparison Floorspace (Sq m)**	**Bulky Comparison Floorspace (Sq m)**	**Total Sq m**
Clontibret	170	-	870	1,040
Doohamlet	50	-	-	50
Emyvale	730	120	80	930
Glaslough	70	40	-	110
Newbliss	180	-	-	180

Rural Areas	Convenience Floorspace (Sq m)	Comparison Floorspace (Sq m)	Bulky Comparison Floorspace (Sq m)	Total Sq m
Smithborough	70	-	-	70
TOTAL	**1,270**	**160**	**950**	**2,380**

(Source: ERM Ireland, September 2002.)

3.8 SUMMARY

The floorspace and vacancy rate information provided in the above sections can be summarised as follows:

Table 3.8: Distribution of Existing Retail Floorspace and Retail Developments that have been granted Planning Permission in County Monaghan (May 2003)

Location	Convenience	Comparison	Bulky Comp	Total
Monaghan	7,562	7,043	14,542	29,147
Carrickmacross	3,148	2,638	5,131	10,917
Castleblayney	2,373	1,688	3,829	7,890
Clones	783	706	402	1,891
Ballybay	578	585	-	1,163
Remaining Rural Area/ Villages/ Small scale Settlements	1,270	160	950	2,380

(Source: ERM Ireland, September 2002.)

Table 3.9: Vacancy Rates in Towns within County Monaghan(May 2003)

Location	Vacant Floorspace	Vacancy Rate (%)
Monaghan	720	4%
Carrickmacross*	840	12%
Castleblayney	427	5%
Clones	290	13%
Ballybay	324	21%

(Source: ERM Ireland, September 2002 - * Carrickmacross figure updated May 2003.)

4 *EXISTING SHOPPING PATTERNS WITHIN COUNTY MONAGHAN (2002)*

4.1 INTRODUCTION

This section of the Strategy summarises the main findings of the shoppers' surveys, undertaken on a county-wide basis in September 2002 and establishes existing shopping patterns and trends within the county including the level of 'expenditure leakage' from each of the main towns to competing centres located outside the county, e.g. Dundalk and Dublin.

4.2 SHOPPING PATTERNS

Shoppers' surveys were undertaken in the following towns in County Monaghan:

- Monaghan Town.
- Carrickmacross.
- Castleblayney.
- Clones.
- Ballybay.

4.2.1 Monaghan Town

Current shopping patterns indicate that Monaghan town attracts a small inflow of convenience goods expenditure from outside the county (approximately 10%), specifically from Armagh and Cookstown/Dungannon. As expected, convenience leakage to centres outside the county is relatively low- around 10%. In addition, there is also a small amount of intra county expenditure from Clones (12%) and Castleblayney (10%).

As expected of a '*national third tier'* town, there is a substantial outflow of comparison and bulky comparison expenditure (almost 30%), to larger retail centres such as Dublin, Dundalk and Lisburn/Sprucefield. However, this leakage is offset by a significant inflow of comparison and bulky comparison expenditure from Carrickamcross – 30%.

4.2.2 Carrickmacross

The shoppers' survey results indicate that Carrickmacross has a very low outflow of convenience leakage to centres outside the county –5%.

Carrickmacross has a large outflow of comparison expenditure, almost 40% to towns outside the county, in particular Dublin and Dundalk. In addition, there is also a large amount of intra-county comparison/bulky comparison expenditure flow between Carrickmacross and Monaghan- 30%.
The level of outflow is influenced by the close proximity of the town to Dundalk. The effect of the new shopping centre, which is due to open in mid 2003, and the recently permitted retail warehouse units on the main Ardee Road should help to 'claw back' some of this lost retail expenditure.

Current shopping patterns indicate that Carrickmacross attracts a substantial inflow of expenditure from outside the county (approximately 30%), specifically from Armagh and Cookstown/Dungannon.

4.2.3 Castleblayney

Current shopping patterns indicate that Castleblayney has a very high level of convenience leakage - around 25%, with 15% of people travelling outside the county to purchase foodstuffs/groceries, i.e. Dundalk, and 10% remain within the county, shopping in Monaghan Town.

Castleblayney also has a high level of comparison expenditure outflow to centres located outside the county- approximately 45%, with 20% purchasing clothing, furniture, and durable goods in Dundalk and a further 10% in Dublin. A further 15% of shoppers surveyed stated that they purchased these goods in a variety of centres including Ardee and Newry. In addition, there is also a large amount of intra-county comparison/bulky comparison expenditure flow between Castleblayney and Monaghan – around 35%.

4.2.4 Clones

The surveys indicate that Cones has a low outflow of convenience leakage to centres located outside the county (12%) such as Enniskillen and Lisnaskea. In addition, there is a substantial level of intra-county convenience flow with 12% of shoppers travelling to Monaghan Town.

In terms of expenditure on clothing, furniture and durable household goods (i.e. comparison and bulky comparison goods), Clones has a high leakage of expenditure to centres located outside the county- 46% to centres including Enniskillen, Dublin , Lisnaskea and Cavan. According to the shoppers' survey, a further 32% of shoppers chose to purchase such items in Monaghan.

4.2.5 Ballybay

In terms of convenience expenditure, 67% of shoppers surveyed purchased groceries and foodstuffs in Ballybay, i.e. Ballybay has a total convenience leakage of approximately 30%. However, most of this leakage goes to Monaghan Town (18% of shoppers stated that they purchased convenience goods in Monaghan Town) and 6% shop in Castleblayney.

Leakage to centres outside the county is low – 6% split evenly between Dublin and Dundalk (3% did not state a preferred centre for convenience goods).

In terms of expenditure on comparison goods, only 13% of shoppers indicated that they purchased clothing, furniture, and durable household items in Ballybay, indicating a severe leakage from the town of 87%. According to the survey results, the vast majority of expenditure on such goods occurs in Monaghan Town (54%) with some leakage to larger national and regional centres such as Dublin (5%) and Dundalk (3%).

4.3 SUMMARY

The information set out in this section of the Strategy is summarised in Table 4.1 below.

Table 4.1: Summary of Outflow to Centres outside County Monaghan

Town	**Convenience 'Outflow'**	**Destination**	**Comparison/ Bulky Comparison 'Outflow'**	**Destination**
Monaghan	10%	Armagh, Dundalk	30%	Dublin, Dundalk, Lisburn/Belfast
Carrickmacross	5%	Dundalk	40%	Dublin, Dundalk
Castleblayney	15%	Dundalk	45%	Dublin, Dundalk, Ardee, Newry
Clones	12%	Enniskillen, Lisnaskea	46%	Enniskillen, Dublin, Lisnaskea and Cavan
Ballybay	6%	Dublin, Dundalk	8%	Dublin, Dundalk

(Source: ERM Ireland, October 2002.)

5 RETAIL FLOORSPACE REQUIREMENTS WITHIN MONAGHAN TOWN AND CARRICKAMCROSS

5.1 OVERVIEW

As noted in the Introduction, although County Monaghan is not one of the listed counties requiring a detailed retail planning strategy, as stated under the provisions of the Retail Planning Guidelines 2000, a detailed assessment of the additional floorspace requirement for Monaghan Town and Carrickmacross has been carried out, due to the level of commercial interest in these towns.

Floorspace requirement calculations have been based on 'real world' catchments. In the case of MonaghanTown, the catchments are based on a 15-minute drive time for convenience goods and a 20-minute drive time for both comparison and bulky comparison goods. Carrrickmacross's convenience and comparison catchments are based on 15-minute drive times, reflecting the town's position in the retail hierarchy. In addition, population projections for the remaining towns within the county (i.e. Ballybay, Castleblayney and Clones) from 2002 to 2012, and associated catchment maps by 15-and 30-minute drive time isochrones, are provided at Annex B.

5.2 RETAIL EXPENDITURE GROWTH 2002-2012

Current and projected retail expenditure levels during the 2002-2012 period in the Border Area and Northern Ireland are set out in Table 5.1 below. All figures are in 1999 prices. Figures are derived from the Household Budget Survey 1999-2000 and the NI Family Expenditure Survey 1999.

Table 5.1 Projected Expenditure Growth Per Capita in the Border Area and Northern Ireland (in 1999 prices)

Period	Convenience €	Comparison €	Bulky Comparison €
Border			
2002-2007	2,228-2,472	957-1,222	364-465
2007-2012	2,472-2730	1,222-1559	465-593
Northern Ireland			
2002-2007	2,423-2,435	1,601-1,856	846-981
2007-2012	2,435-2,447	1,856-2,151	981-1,137

(Source: ERM Ireland, December 2002.)

5.3 MONAGHAN TOWN – FLOORSPACE REQUIREMENT 2002-2012

The results of combining per capita expenditure with population during 2002-2012 in Monaghan Town's catchment area i.e. projected surplus retail expenditure, are shown in Table 5.2 overleaf. The growth in expenditure assumes that existing net outflow/inflow levels remain unchanged, as show in the Table 5.1.

Table 5.2: Monaghan 2002-2012 Net Expenditure Outflow and Inflow

Expenditure by goods	Outflow	Inflow
2002		
Convenience	10%	20%
Comparison	30%	30%
Bulky Comparison	30%	30%
2007 and 2012		
Convenience	10%	20%
Comparison	30%	30%
Bulky Comparison	30%	30%

(Source: ERM Ireland, December 2002.)

The projected surplus retail expenditure is set out below. The calculations assume that convenience, comparison and bulky comparison outflow and inflow levels remain unchanged during 2002-2012.

Table 5.3: Monaghan Town: Spare Expenditure Capacity 2002-2012

	Spare Expenditure Capacity (€m)
2002-2007	
Convenience (10% net inflow)	5.14
Comparison	8.59
Bulky Comparison	3.45
2007-2012	
Convenience (10% net inflow)	5.58
Comparison	10.93
Bulky Comparison	4.36

(Source: ERM Ireland, December 2002.)

The equivalent floorspace, which can be supported by the projected growth in spare expenditure capacity in 2007 and 2012, is shown in the table below.

Table 5.4:Floorspace Requirement in Monaghan Town 2003-2012

	Existing Floorspace (Sq m) 2003	Permitted Floorspace (Sq m) 2003	Floorspace Requirementp er pop. [1] (Sq m) 2003	Additional Floorspace (sq.m.) required 2007	Additional Floorspace (sq.m.) required 2012
Convenience	5,882	1,683	6,314	809	879
Comparison	6,623	366	10,293	1,593	2,027
Bulky Comparison	6,113	8,429	6,003	1,713	2,064

Assumption: Additional floorspace requirements are calculated using Recognised Industry Turnover per sq.m. figures for different retail formats as follows:
Convenience:- [1] €8,061 (supermarket);Comparison:- €5,390;
Retail Warehousing:- €2,016 -(Source: ERM Ireland, December 2002.)

5.3.1 Conclusions

The Strategy would support limited expansion in the convenience retail market. Three national multiple convenience stores operate in town at present, with an international low-cost convenience operator (Lidl) due to open a 1,250 sq. m. development in 2004 and an 860 sq.m. expansion of the existing Fleming Supervalue due for completion shortly. In the event of lower population growth or a decrease in expenditure inflow, it is envisaged that limited expansion in this sector of retail development would be appropriate.

The Strategy would support expansion in the comparison retail market, although opportunities for expansion in the bulky comparison area would be limited by the development of the edge-of-town development of 8,429 sq. m., which was granted planning permission in May 2003.

In order to provide for the proper planning and sustainable development of the town and ensure compliance with the *Retail Planning Guidelines 2000*, an Applicant/developer must, if required necessary by the Planning Authority, demonstrate a quantitative or qualitative need for a specific proposed retail development within Monaghan Town. Planning applications for retail development in excess of 1,000 sq.m. must be accompanied by a Retail Impact Assessment (RIA) – see Section 6.4.3. It is not the intention of the Planning Authority to limit competition within the town, but to re-enforce and ensure the continuing viability of the town centre as the principal retail and service centre for the area.

5.4 CARRICKMACROSS TOWN – FLOORSPACE REQUIREMENT 2002-2012

The results of combining per capita expenditure with population during 2002-2012 in the Carrickmacross catchment area based on a 15-minute drive time catchment i.e. projected surplus retail expenditure, are shown in Table 5.4 below. The growth in expenditure takes into account existing net outflow/inflow levels and plans for a reduction in outflow of comparison goods from 70% to 50%, as show in the Table 5.3.

Table 5.5: Carrickmacross 2002-2012 Net Expenditure Outflow and Inflow

Expenditure by goods	Outflow	Inflow
2002		
Convenience	5%	5%
Comparison	70%	30%
Bulky Comparison	70%	30%
2007 and 2012		
Convenience	5%	5%
Comparison	50%	30%
Bulky Comparison	50%	30%

(Source: ERM Ireland, December 2002.)

The projected surplus retail expenditure is set out below. It is based on a decrease in comparison bulky expenditure leakage from 70% in 2002 to 50% in 2007 and 2012 with inflow remaining unchanged during the period. Convenience outflow and inflow remains unchanged.

Table 5.6: Carrickmacross Spare Expenditure Capacity 2002-2012

	Spare Expenditure Capacity (€m)
2002-2007	
Convenience (10% net inflow)	5.47
Comparison (20% net outflow)	3.82
Bulky Comparison (20% net outflow)	1.46
2007-2012	
Convenience (10% net inflow)	6.19
Comparison (20% net outflow)	5.13
Bulky Comparison (20% net outflow)	1.95

Source: ERM Ireland, December 2002.)

The equivalent floorspace, which can be supported by the projected growth in spare capacity in 2007 and 2012, is shown in the table below.

Table 5.7:Floorspace Requirement in Carrickmacross 2002-2012

	Existing Floorspace (Sq m) 2003	**Permitted Floorspace (Sq m) 2003**	**Floorspace Requirement per pop. (Sq m) 2003**	**Additional Floorspace (sq.m.) required 2007**	**Additional Floorspace (sq.m.) required 2012**
Convenience	2,638	-	3,560	678	768
Comparison	1,931	-	2,202	709	952
Bulky Comparison	3,148	3,200	1,412	967	967

Assumption: Additional floorspace requirements are calculated using Recognised Industry Turnover per sq.m. figures for different retail formats as follows:
Convenience:- [1] €1,079 supermarket - Comparison:- High order - €7,493
Retail Warehousing:- €4,445 -(Source: ERM Ireland, December 2002.)

5.4.1 Conclusions

The Strategy would support the equivalent of a new supermarket (1,500 sq.m. approx.) or a number of smaller foodstores/district stores and just over 1,000 sq m net of comparison shopping in Carrickmacross by 2007. The town has seen the largest increase in population of each of the county's five towns in the Preliminary Census Report 2002 and plans for the development of an extended town/civic centre are well advanced. Further development in the comparison and bulky comparison sector would be dependent upon reduction in the outflow of expenditure to other retail centres in Dundalk and Dublin.

In order to provide for the proper planning and sustainable development of the town and ensure compliance with the *Retail Planning Guidelines 2000*, an

Applicant/developer must, if required necessary by the Planning Authority, demonstrate a quantitative or qualitative need for a specific proposed retail development within Carrickmacross Town. Planning applications for retail development in excess of 1,000 sq.m. must be accompanied by a Retail Impact Assessment (RIA) – see Section 6.4.3. It is not the intention of the Planning Authority to limit competition within the town, but to re-enforce and ensure the continuing viability of the town centre as the principal retail and service centre for the area.

6 STRATEGY APPROACH AND RECOMMENDATIONS

This section of the Strategy provides recommendations and identifies strategic actions for the future development of retail centres in County Monaghan. This includes general recommendations for actions that need to be undertaken throughout the county in order to strengthen the existing retail hierarchy. It is envisaged that these recommendations will be incorporated into the forthcoming draft County and Town Development Plans and will be used by local authority planners in the assessment of proposed retail development within the county.

6.1 OVERALL AIM

The Retail Development Strategy for County Monaghan aims:

'To strengthen the existing retail hierarchy of County Monaghan; to provide adequate retail facilities to service the current and projected population; and to ensure that new retail development located within the county is equitable, efficient and sustainable in the long term.'

6.2 FUTURE PRIORITIES AND ACTIONS

In drawing up a Retail Development Strategy on behalf of Monaghan County Council, the views and wishes of shoppers and retailers' agents within the county were also considered. When asked for views on what is needed to improve retailing and shopping in towns and villages within the County, respondents stated that the Strategy should focus on:

- Improvements in the range and variety of shopping facilities available.
- Parking and traffic flow in town centres.
- Pedestrian accessibility.
- Upgrading of derelict buildings in smaller towns and villages.
- Provision of facilities such as public toilets and mother and baby changing rooms.

These suggestions have been incorporated into this section of the report.

6.3 POLICY OVERVIEW

In order to achieve the overall Aim, the Retail Development Strategy focuses on the following themes, which are incorporated into 12 policies.

- Strengthen the existing retail hierarchy of town and village centres within the county.
- Maintain and consolidate existing retail cores – adopting the ‘sequential test’ approach to development.
- Ensure that the location of new retail developments within the county, including supermarkets, petrol filling stations and fuel depots, is appropriate and sustainable.
- Ensure scale and type of retail provision is appropriate for different levels of the retail hierarchy.
- Adopt a suitable floorspace restriction or cap for new supermarkets developments within the county.
- Adopt a suitable floorspace restriction or cap for new petrol filling station or fuel depot developments within the county.
- Adopt a suitable minimum floorspace restriction and maximum floorspace cap for new retail park and retail warehouse developments within the county.
- Reduce expenditure leakage to centres located outside the county.
- Improve accessibility to, and from, existing centres.
- Promote excellence in urban design including general upgrade in the built environment and shop facades.
- Require retail development proposals within towns and villages to make a positive contribution to the general townscape.
- Improve the variety, range and quality of retail outlets within town and village centres.
- Encourage alternative uses for vacant or derelict buildings.
- Establish an effective Town Centre Management (TCM) body to manage and promote the county towns.

The individual policies and action lines are described below.

6.4 POLICIES AND ACTION LINES

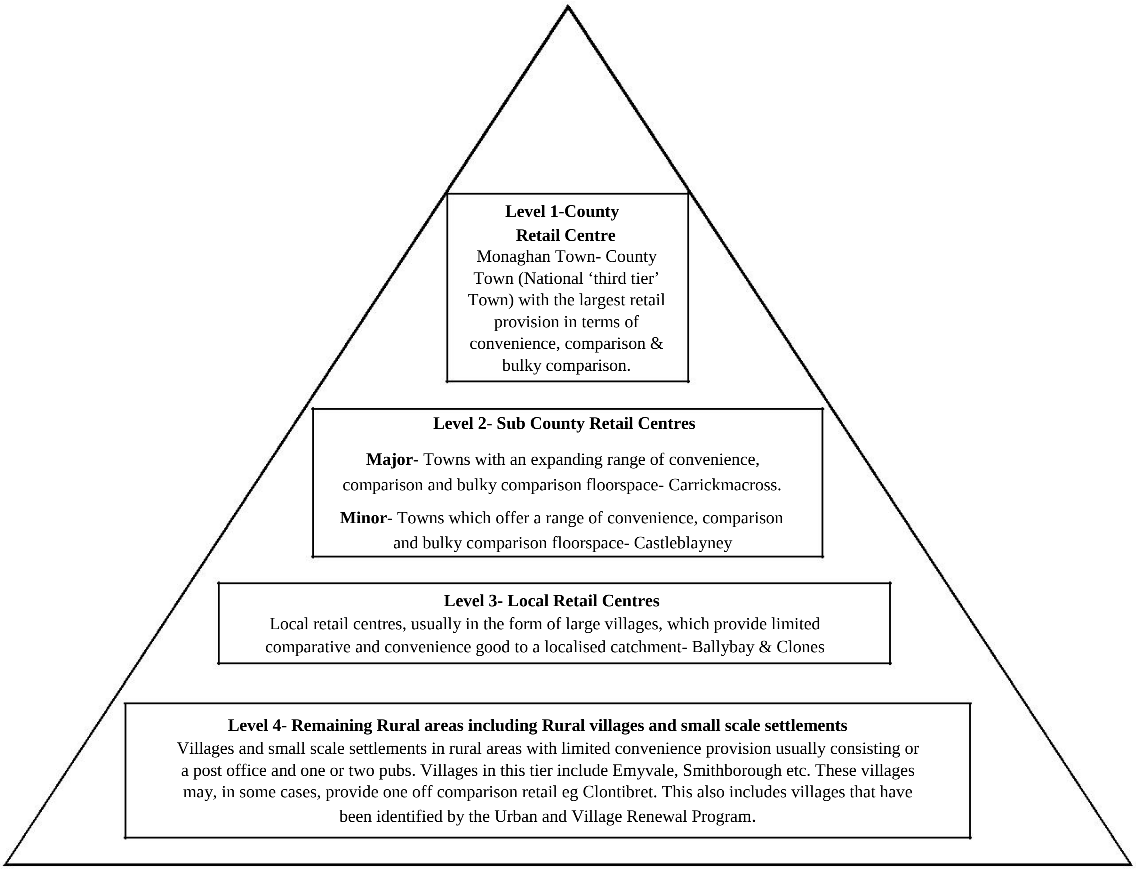
6.4.1 Policy No. 1: To strengthen and protect the existing retail hierarchy of towns and villages within County Monaghan and to support the multi-purpose role of town centres as social, commercial and cultural attractions.

Emerging Retail Hierarchy

County Monaghan, traditionally a rural county, has experienced increased urbanisation since the mid 1990s, which has focused primarily on Monaghan and Carrickmacross. In addition, according to the CSO Census 2002, the population of smaller towns in the County such as Castleblayney and Clones has actually declined over the 1996-2002 period by around 10%. This recent population/catchment change has implications for the long-term viability of existing town centres, and ultimately on the need and distribution of additional retail floorspace within the County.

As such, in developing a retail hierarchy for County Monaghan, towns have been classified into four different levels based on existing and projected population, and current and proposed retail floorspace provision. The retail hierarchy is illustrated in Figure 6.1 overleaf.

Figure 6.1: Retail Hierarchy of County Monaghan



6.4.2 Policy No 2: To maintain and consolidate existing retail cores by strictly enforcing the' sequential approach' test to proposed retail development

The preferred location for new retail development within the County is, where practicable and viable, within a town or village centres. Therefore, the Strategy endorses the sequential approach to site selection (see Section 2.3.4 above) during the pre-planning and site accumulation stage.

In addition, it is a policy of the Council to seek evidence or detailed information from an Applicant to prove that the sequential approach test was adopted during the site selection stage i.e. it can be demonstrated that town centre sites were considered first in the site selection process. Where it is not possible to provide the form and scale of development that is required on a site within the town centre then the Planning Authority will expect the Applicant to consider an edge of centre site before considering alternative sites in and around the town.

The Council will actively encourage new retail development within existing town and village centres by seeking to stimulate consultation with private developers and landowners. For example, the Strategy has identified a number of potential development sites within, and on the edge of, Monaghan Town Centre and Carrickmacross (see Figures 6(b) and 6(c) overleaf).

It is recommended that individual development briefs will be drawn up for these sites as a way of encouraging effective and market driven design and build projects at these locations.

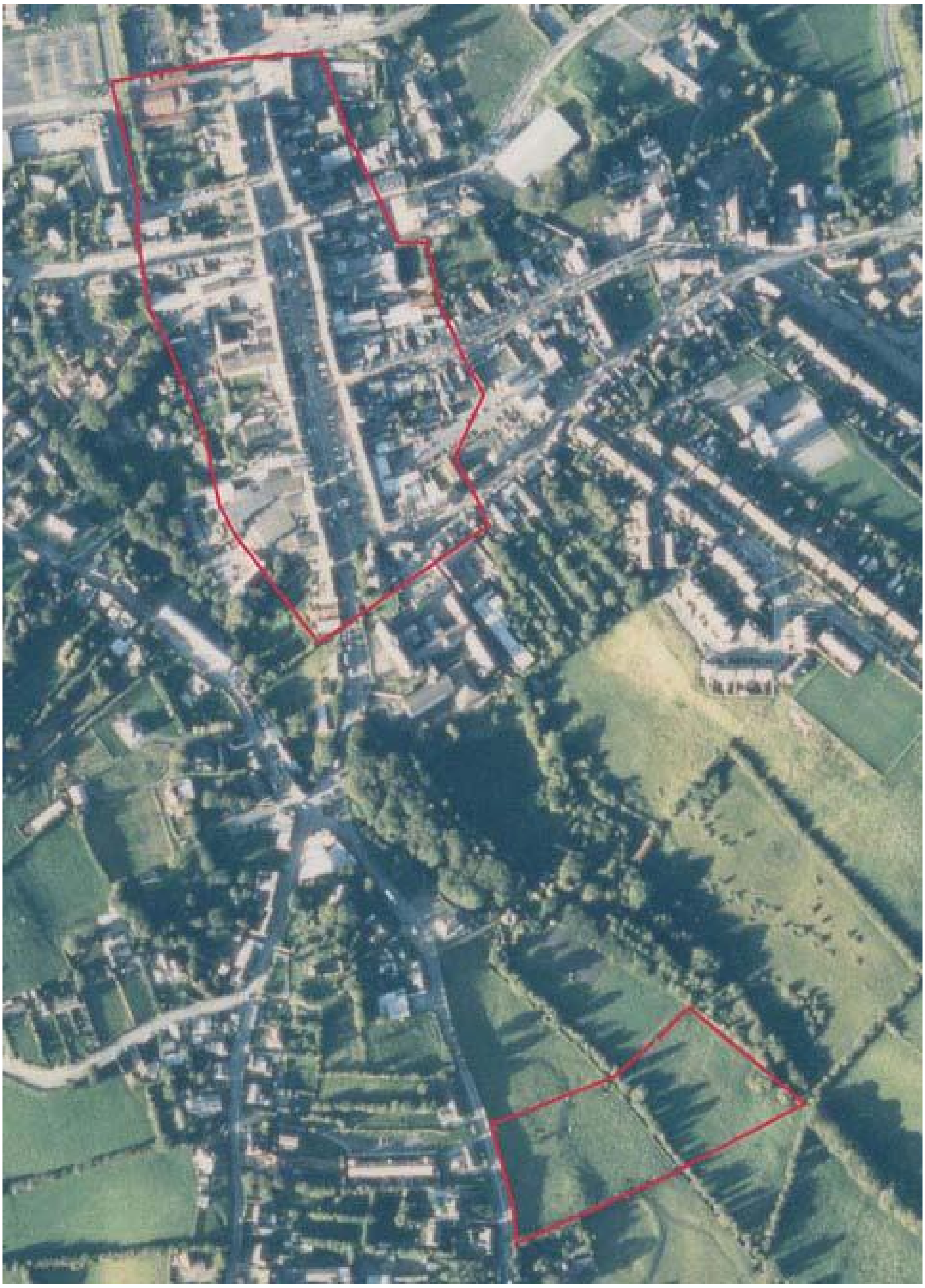
In addition, it is envisaged that, where necessary, compulsory purchase order (CPO) powers may be utilised in order to free up the necessary sites located within town centres.

Figure 6(b)

Potential Retail Development Sites in Monaghan Town

Figure 6(c)

Carrickmacross Core Retail Area



6.4.3 Policy No. 3: To ensure that the location of new retail developments within the County, including supermarkets, petrol filling stations and fuel depots, is appropriate and sustainable.

Assessing Location (General)

In general it is Council policy to:

1. Encourage new retail development to be located within existing town and village centres.

2. Retail development is acceptable outside town and village centres where:
   - The retail development is designed to serve tourist or recreational facilities, and is secondary to the main use of the site.
   - The retail development consists only of a small-scale shop attached to an existing craft workshop retailing the product direct to the public.
   - The retail development consists only of a small-scale shop designed to serve a dispersal rural community.
   - The retail development is ancillary to activities arising from farm diversification.
   - Monaghan County Council approved the retail development prior to the adoption of the County Retail Strategy.
   - Where the Council is satisfied with the findings of the Retail Impact Assessment referred to at No. 5 below.

3. Encourage the use of vacant buildings within the retail core for retail purposes.

4. Discourage retail development along national or regional roads within the county including approach roads to towns and villages.

5. Where it is the opinion of the Planning Authority that the proposed retail development may adversely impact on the vitality and viability of an existing centre, the Applicant shall be required to prepare a Retail Impact Assessment (RIA). An RIA must accompany all planning applications for retail development that exceed 1,000 sq. m. The RIA must be prepared by an independent and appropriately qualified planning consultant and must demonstrate whether or not the proposal would:

   i. Support the long-term strategy for the town centre at issue and not materially diminish the prospect of attracting private centre investment into one or more town centres in the county.
   ii. Cause an adverse impact on one or more town centres, due to size, nature and location either singly or cumulatively with recent developments or other outstanding planning permissions, sufficient to undermine the centre at issue or its role in the wider economic and social life of the community.

iii. Satisfy an acknowledged quantitative or qualitative need, which has been established.
iv. Be in keeping with the character of the locality, in terms of siting, scale, form, design and materials.
v. Result in unsatisfactory traffic arrangements.
vi. Link effectively with existing town centres so that there is likely to be commercial synergy.
vii. Diminish the range of activities and services that a town centre can support.
viii. Cause an increase in the number of vacant properties in the core retail area.
ix. Ensure a high standard of access both by public transport, foot and private car so that the development is easily accessible by all section of society.

In addition, the Retail Impact Assessment will contain information to demonstrate that the sequential approach test was adopted during site selection stage.

Assessing Location (Specific Policy)

Specific policy in relation to the location of new retail developments (by retail format) within the County, is set out in Table 6.1 overleaf. As noted above, definitions of retailing terms, as contained in the Retail Planning Guidelines 2000, which are discussed below are provided in Annex A(c).

Table 6.1: Specific Policy for Assessing the Location of New Retail Developments by Format

Retail Format	Policy
Shopping Centres	It is Council policy that large-scale comparison proposals such as shopping centres should be located in town and village centres.
Superstores (+2,500 sq m net)	It is Council policy that superstores should be located in town centres or if no suitable sites are available, on the edge of the centre where public transport provision can be made available for shoppers who do not have the use of a car.
Supermarkets (<2,500 sq m net)	It is Council policy that wherever possible supermarkets should be located in town or village centres or where no town centre sites are readily available on the edge of the centre where public transport provision can be made available for shoppers who do not have the use of a car.
Discount Foodstores (<1,500 sq m gross)	It is Council policy that wherever possible discount foodstores should be located in town or village centres or on the edge of the centre where public transport provision can be made available for shoppers who do not have the use of a car.
Retail Parks and Retail Warehouses	It is Council policy that wherever possible retail parks and retail warehouses should be located on the edge of town centres. In addition, it is Council policy that retail warehouse units shall be used only for the retail sale and ancillary storage of the items listed below and for no other purposes without a prior grant of permission from the Planning Authority: - - DIY materials, products and equipment. - - Garden materials, plant and equipment. - - Furniture and soft furnishings, carpets and floor coverings. - - Electrical goods. Such items as may be determined in writing by the Planning Authority as generally falling within the category of 'bulky goods'.
Village/Neighbourhood Shops	It is Council policy that small supermarkets of an appropriate size and scale will be considered acceptable within existing village centres or within new housing areas located on the periphery of town centres provided a need has been established.

Retail Format	Policy
Petrol Filling Stations/ Fuel Depots	It is Council policy that new petrol filling stations and fuel depots are not acceptable on national or local roads outside the defined speed limits of towns and villages within the county. New proposals may be acceptable on regional roads provided the applicant has established that: - - There is a clear indication of need for the development. - - The proposed development does not result in adverse environmental or visual impacts. Adequate screening by landscaping will normally be required. - - Access/egress arrangements are satisfactory. - - The proposal does not adversely impact on existing operations within the county. - - The proposal does not detract from residential amenity. Favourable consideration will be given to the siting of proposals opposite existing operations, provided the above criteria have been satisfied.

6.4.4 Policy No 4: To ensure scale and type of retail provision is appropriate for different levels of the retail hierarchy

The allocation of retail provision to existing centres within the county should relate to the strategic retail hierarchy identified in the above section. Existing and emerging retail formats, e.g. recent additions to the Irish retail sector such as discount foodstores, (as set out in the Retail Planning Guidelines 2000 and summarised in Table 6.1 above), which are appropriate to the different levels of the hierarchy, are outlined in Table 6.2 below.

Table 6.2: Appropriate Retail Formats in the Retail Hierarchy

Level	Town/Village	Superstore	Supermarket	Discount Foodstores	Retail Parks/Retail Warehouse parks	Village/ Neighbourhood Shops
Level 1	Monaghan	✎	✎	✎	✎	✎
Level 2						
Major	Carrickmacross		✎*	✎	✎	✎
Minor	Castleblayney		✎*	✎	✎	✎
Level 3	Clones/ Ballybay		✎*	✎		✎
Level 4	Remaining Rural Areas **					✎

Key: ✎= Acceptable.
* = Lower floorspace cap of 2,500 sq m applies (see section below).
** = Including villages and small-scale settlements.

Definitions of retail terms, as set out in the table above, are provided in Annex A(c).

6.4.5 Policy No 5: To adopt a suitable floorspace restriction or cap for new supermarket developments within the country.

As noted in Section 2 (Annex A), there is a size cap on sales floorspace for supermarkets located within the Greater Dublin Area of 3,500 sq m. The remainder of the State is capped at 3,000 sq m net, i.e., under the provisions of the Retail Planning Guidelines 2000 the supermarket sales cap in County Monaghan is 3,000 sq m.

It is recommended that the existing cap restriction of 3,000 sq m should continue for Level 1 – Monaghan Tower and be decreased for the lower level tiers. It is therefore recommended that a lower cap of 2,500 sq m net be enforced in Levels 2-4, i.e., Carrickmacross and Castleblayney to ensure the long-term vitality and viability of these centres. The restriction at 2,500 sq m is reflective of the scale of existing retail provision found within these smaller settlements.

6.4.6 Policy No 6: To adopt a suitable floorspace restriction or cap for new petrol filling station or fuel depot developments within the country.

It is the Council's policy that net retail floorspace, i.e., sales floorspace, for petrol filling station proposals located within the county will be capped at 100 sq m.

It is the policy of the Council that where retail space in excess of 100 sq m of net retail sales area associated with petrol filling facilities is sought the retail element of the development will be assessed by the planning authority in the same way as would an application for retail development (without petrol filling facilities) in the same location.

6.4.7 Policy No 7: To adopt a suitable minimum floorspace restriction and maximum floorspace cap for new retail park and retail warehouse developments within the country.

As stated in the Retail Planning Guidelines 2000,

'Generally speaking smaller units of much less than 700 sq m gross floorspace can be more easily accepted in town centres and in any event, tend to sell a less bulky range of goods. Consequently, local authorities may consider it appropriate to impose a minimum size condition preventing the construction or subdivision of units into stores less that 700 m^2 in out of centre locations '.

Therefore, in order to protect the long-term viability and vitality of existing town and village centres, it is Council policy to restrict the construction or subdivision of retail warehouse units into stores less than 700 sq m in out-of-centre locations.

Furthermore, given the existing limited provision of retail warehousing within the County, it is Council policy that large-scale single retail warehouse units will be capped at 6,000 sq m gross (including any ancillary garden centre) for all new retail warehouse developments within the County.

6.4.8 Policy No. 8: Reduce Expenditure Leakage from the County

There is significant retail expenditure leakage from the County to competing towns in the wider area. It is the objective of the Council to reduce this outflow of expenditure by ensuring that an adequate range of retail facilities and formats are available within the County.

6.4.9 Policy 9: To improve accessibility to, and from, existing centres

Multi-modal accessibility to town centres is perhaps one of the most important factors in ensuring the long-term vitality and viability of any town centre. As such in order to ensure and improve existing access, it is the objective of the Council to:

- Provide promotion material and improved signage for shoppers and visitors within town centres in relation to car parking provision and associated cost, where applicable.
- Encourage retail and other employers and employees within the town centre to park in areas outside the commercial core.
- Upgrade existing pedestrian linkages, to and from, existing car parks in town centres and improve circulation and layout for pedestrians of all abilities.
- Encourage new retail developments to provide public transport facilities and management mobility plans (MMP) for staff and customers.
- Encourage cycling and walking to retail centres through the development of high quality cycle paths/lanes and footpaths of an adequate width and connectability.
- Encourage covered bicycle parking within the town centre.
- Improve pedestrian-crossing facilities, including shared surface treatments, at major road junctions within town centres and through existing car parks.

6.4.10 Policy 10: To promote excellence in urban design including a general upgrade in the built environment and shop facades

Although the land use survey highlighted that many of the town and villages within County Monaghan are generally attractive, the centres would benefit from a number of significant urban design improvements. Therefore, it is the objective of the Council to:

- Progress proposed pedestrian safety and improved linkages within the larger town centres.
- Undertake landscaping of verges and roundabouts, particularly at the entrance to town centres and in hard landscaped public spaces and squares.
- Review the provision of, and linkage to, public spaces within each town/village centre.
- Improve the settings and lighting of historic buildings within town centres.
- Encourage shop fronts, which create an appealing interface with the street.
- Upgrade inappropriate façade treatments and replace with material reaffirming the dominant character and design of the town or village.
- Promote paintwork, which is well maintained.
- Commission public art to improve the attraction of public spaces and squares. Where possible, local artists should be commissioned to produce such projects.
- Upgrade and review the location of existing street furniture, including seats, litter-bins and planters, particularly in relation to the negative visual impact on attractive vistas within town centres.
- Provide new, high quality street furniture in all towns and villages across the county.
- Implement a street furniture maintenance programme.
- Install high quality, attractive lighting to enhance safety and add to the character of the area.
- Provide litter-bins in areas likely to generate a high amount of rubbish.

6.4.11 Policy No.11: To require retail development proposals within towns and villages to make a positive contribution to the general townscape

An attractive and interesting townscape is essential to the quality of life and general well being of residents and visitors. New retail development should, therefore, minimise visual impact and functional and physical disruption, and enhance or create interest, vitality and variety.

In this regard it is Council policy to ensure that all new infill retail development is consistent in height, design and character with the existing streetscape. Care will be taken to ensure that horizontal lines of a new façade or shop front should match as closely as possible with those of adjacent building, and the streetscape generally.

6.4.12 Policy 12: To improve the variety, range and quality of retail outlets within town and village centres

The quality and variety of retail outlets in a town will play an important role in ensuring the long-term sustainability, vitality and viability of the retail core of each town and village. Therefore, it is Council policy to encourage where possible, mixed-use and mixed retail developments within town and village centres to ensure that the development makes a significant contribution to the centre’s daytime and evening economy.

It is also Council policy to ensure that there are adequate public toilets facilities in town and village centres throughout County Monaghan. It is recommended that new large-scale developments will be required to provide toilet facilities, particularly mother and baby changing facilities.

It is important that retail provision in smaller towns and villages is protected. Therefore, it is recommended that the Planning Authority will encourage post offices to remain in village centres. The Council will actively seek to promote niche market developments in smaller villages and hamlets throughout the county.
The Planning Authority will also actively seek to ensure that retail services including banks are located within town and village centres.

In addition, it is the objective of the Council to undertake, where appropriate, extensive tree planting in towns, particularly in town centre car parks, to improve the quality of landscaping, streetscape and the general amenity of town centres.

6.4.13 Policy 13: To Encourage alternative uses for vacant or derelict buildings

Vacant buildings and derelict sites significantly detract from the vitality and attractiveness of towns in County Monaghan. They also present a significant opportunity for refurbishment and renovation to accommodate new retail outlets and other uses. It is an objective of the Council to:

- Encourage new commercial development to establish within existing vacant premises and/or to explore alternative uses including residential on ground and upper floor levels.

- Exercise the powers provided under the *Derelict Sites Act 1991* to upgrade, renovate or demolish derelict sites within core retail areas.

- Prioritise vacant buildings for refurbishment.

6.4.14 Policy 14: Establish effective management and promotion of the county towns.

To maintain long-term viability and vitality of centres, it is recommended that each Town Council together with representatives of the retail community meet to review the managment and promotion of their respective towns.

It is important that the county’s retail facilities and retailers are promoted to existing and future shoppers/visitors to maximise the individual population catchments.

It is also recommended that the Town Councils and local Chambers of Commerce meet on a regular basis to review all aspects of the Retail Development Strategy and to undertake regular ‘health check’ assessments of all towns and villages in the county.

Table 6.3: Town/Village Centre Health Check Indicators

Factor	**Indicator**
Viability	Private investment in property
Vitality	Greater footfall
Diversity	Wider range of shops and services
Security	Reduced crime (e.g. shop theft)
Vacancy	Easier lettings/fewer empty properties
Employment	New businesses/training opportunities/jobs
Accessibility	More shoppers/visitors
Retail Turnover	Increased transactions
Property Investment	Higher rentals/lower yields
Image	Favourable publicity

(Source: URBED, 1997.)

Information and data on health check indicators can be sourced from a number of organisations and bodies operating in the local area including:

- - An Garda Síochána.
- - Bord Fáilte.
- - Valuation Office.
- - Commercial Estate Agents.
- - County Development Board.
- - Chambers of Commerce.

It is recommended that the Council design and implement an effective system to collect and analyse the necessary health centre check data.

7 MONITORTING AND EVALUATION

7.1 OVERVIEW

It is recommended that the various surveys, undertaken as part of the retail study, e.g. the land use retail floorspace surveys, are actively updated on an annual basis. As these surveys have been provided in digitised form to the planning authority, it is recommended that they will be actively maintained and managed in the long term.

In addition, it is recommended that a second shoppers survey should be carried out in Carrickmacross, once the new shopping centre has reached a stable trading pattern, to establish the new shopping pattern in the town.

7.2 DATA

Population, expenditure and additional floorspace requirement forecasts for Monaghan Town, Carrickmacross and the other towns, as set out in the Retail Development Strategy, are based on a number of official sources of data, namely:

- CSO Household Budget Survey.
- NI Central Statistics and Research Agency: Family Expenditure Surveys.
- Corporate Intelligence on Retailing (formerly URPI).
- CSO Population Census.

Each of these sources of data is updated on a regular basis and therefore any changes may influence forecasts, particularly the long-term forecasts. It is therefore recommended that each data set is monitored and the potential for any impact on forecasts assessed.

7.3 REVIEW OF STRATEGY

It is recommended that the first full review of the Retail Development Strategy take place during the preparation of the draft County and Town Development Plans 2005 - 2011.

Annex [illegible]

Retail Planning Guidelines 2000

Annex A [illegible] Ireland's Retail [illegible] 2010

Retail Tier	Retail Centres
Tier 1	[illegible] The population of [illegible] accounts [illegible] [illegible] As well as [illegible] the [illegible] range of [illegible] shopping [illegible] [illegible]
Tier 2	[illegible] Galway [illegible] [illegible] between [illegible] [illegible] Dublin, [illegible] locations in Ireland
Tier 3	The [illegible] Carlow, [illegible], Clonmel, Drogheda, Ennis, Kilkenny, [illegible], Monaghan, Mullingar, [illegible], Port Laoise, Tralee, Tullamore, [illegible] Wexford. [illegible] The [illegible]
Tier 4	[illegible] population [illegible]
Tier 5	[illegible]

Annex A(b): Retail Planning Guidelines 2000 - Summary of Specialist Types of Retail Development, Definitions and Recommendations

Type	Para. Nos.	Description of Retail Development	RPG Recommendation
Regional Shopping Centres	[illegible]	[illegible] large [illegible] retail units [illegible] locations can have a significant impact on established town centres. Elsewhere in Europe they have been [illegible] growth in [illegible] spending is needed to [illegible] form of development cannot be [illegible] Dublin [illegible] regional shopping centres.	[illegible] regional [illegible] town centre [illegible] regional development.
Outlet Centres	[illegible]	Purpose built [illegible] shopping centres [illegible] They are usually [illegible] large [illegible] They [illegible] an important [illegible] for the local community [illegible] depending on the [illegible] of population [illegible] catchment area, they are likely to comprise about [illegible] [illegible]	Development Plans [illegible] consider the need [illegible] Normally, the [illegible] greater [illegible] existing [illegible] retail [illegible] Although [illegible] may be [illegible] local [illegible] developed [illegible]

Type	Para No.	Description of Retail Development	RPG Recommendation
Large Foodstores	[illegible]	Large foodstores ... supermarkets ... hypermarkets [illegible] ... large weekly ... goods [illegible] ... They require large ... [illegible]	[illegible] ... retail [illegible] ... [illegible]
			[illegible] ... floorspace ... [illegible] ... hypermarkets ... [illegible]
Smaller Foodstores	[illegible]	[illegible] ... community ... [illegible] ... neighbourhood ... [illegible]	[illegible] ... significant impact on the [illegible]

Type	Site No.	Description of Risk of Development	KTC Recommendation
[illegible]	[illegible]	[illegible]	[illegible]

Type	Page No.	Description of Retail Development	RPG Recommendations
Factory Outlet Centres	65-66	This form of retailing involves the selling of products at discount prices by [illegible] manufacturers, most usually located [illegible] adjacent to the production facility. During the 1980s factory outlet centres have developed in Europe, [illegible] (e.g. [illegible]). These [illegible] a grouping of factory outlets and other stores, focusing mainly on branded fashion and other specialist goods and generally in out-of-centre locations. Initially devised as a means of disposing of surplus [illegible], they can constitute a mechanism for manufacturers to sell current products direct to the [illegible] [illegible] the sale of goods can be regarded as [illegible] the manufacturing process, such outlets should be treated as normal retail developments [illegible] accordingly.	It is believed that [illegible] manufactured [illegible] and [illegible] comparison [illegible] the goods [illegible] comparison goods [illegible] Applications [illegible] should be considered [illegible] the development [illegible] the [illegible] [illegible] in [illegible] locations
Retail Warehouse Clubs	69	Retail warehouse clubs [illegible] conduct [illegible] trade, [illegible] the [illegible] public.	Any [illegible] should be subject to the policies [illegible] of the development plan and the [illegible] of the guidelines.

Type	Plan Ref	Examples of Retail Development	UDC Recommendation
[illegible] Rural Areas	[illegible]	Parking facilities and supermarkets often play a vital role in maintaining the quality and range of shopping in smaller market towns, centres and assist in enhancing the vitality and viability [illegible], particularly in [illegible] town centres.	In small towns and village centres [illegible] [illegible] development [illegible] development should [illegible] [illegible] [illegible] [illegible] to be located [illegible] [illegible] [illegible] [illegible] [illegible] The scope for supermarket [illegible] development is likely to be [illegible] in smaller market towns than elsewhere. [illegible] development [illegible] should [illegible] maximum size [illegible] [illegible] while maintaining a variety of shops in the centre and protecting [illegible] [illegible] development [illegible] planning authorities should [illegible] mind the need to avoid adding any [illegible] would have [illegible] effect [illegible] centre.

Type	Para Nos	[illegible] Retail Development	[illegible]
Village Shops in Rural Areas	[illegible]	[illegible] and [illegible] important. [illegible] served by public transport.	[illegible] [illegible] - A [illegible] - A [illegible] - A [illegible] - A [illegible]
[illegible]	[illegible]	[illegible]	[illegible]

Type	Para Nos	Description of Retail Development	RPG Recommendation
Petrol Filling Stations	60-68	Petrol filling stations can provide a wide range of retail goods in an ancillary shop. In some areas, these function as the local shop and are a valuable amenity. While the importance of such provision is recognised, such shops should in general remain secondary to the main use as a petrol filling station.	The size of the shop associated with any petrol filling station should be restricted due to the following factors: Relatively large stores tend to attract additional custom that can lead to additional car-borne trips primarily for shopping purposes. Generally, large numbers of parked cars at petrol stations can cause distraction and queuing for traffic and access to the petrol pumps. Generally the preferred location for retailing is in town centres, not at isolated sites [illegible] where parking and access are inadequate. Notwithstanding the sequential approach, a floorspace cap of 100 square metres net retail floorspace in the shop associated with a petrol filling station. Where retail space in excess of 100 sq. m. net [illegible] is proposed in association with a petrol filling facilities is sought, the sequential approach to retail development will apply, as the retail element of the development would be assessed by the planning authority in the same way as would an application for retail development (without petrol filling facilities) in the same location. In assessing applications for developments, [illegible] should also be given to the safety aspects of [illegible] and parking [illegible] (see [illegible]).

Source: Retail Planning Guidelines, 2005

Annex One: Glossary of Terms

This glossary of terms covers forms of retail development and types of retail locations. Because retailing is dynamic it should be noted that new forms of retailing may evolve which are inadequately described by current terminology.

Types of Retail Floorspace

Retail Mall Floorspace – the total area (m. sq.) within the outside walls of a covered mall including gross retail area, floorspace devoted to non-retail activities, entrance space, centre administrative offices, toilets, lifts and escalators and walkways.

Net Lettable Retail Area – total floorspace (measured from inside the shop walls) which is let to a retailer.

Gross Retail Area – this is the net lettable area i.e. sales space, plus storage space, offices, toilets, canteen and circulation space.

Net Retail Sales Area – the area of a shop or store, which is devoted to the sales of retail goods including the areas devoted to checkouts.

Types of Retail Goods

Although there is a trend to "[illegible]" whereby some retail businesses will hold convenience goods and comparison goods, greater definitional clarity is obtained by adopting a goods based retail classification. Retail goods categories are defined by reference to the National Income and Expenditure Accounts and can be divided into convenience goods and comparison goods as follows:

- Convenience
  - Food
  - Alcoholic and non-alcoholic beverages
  - Tobacco
  - Non-durable household goods
- Comparison
  - Clothing and footwear
  - Furniture, furnishings and household equipment (excluding non-durable household goods)
  - Medical and pharmaceutical products, therapeutic appliances and equipment
  - Educational and recreation equipment and accessories
  - Books, newspapers and magazines
  - Goods for personal care and goods not elsewhere classified

[illegible]

- **Bulky Goods** – Goods generally sold from retail warehouses where DIY goods or goods such as flatpack furniture are of such a size that they would normally be taken away by car and not be manageable by customers travelling by foot, cycle or bus, or that large floor areas would be required to display them e.g. furniture in room sets, or not large individually, but part of a collective purchase which would be bulky e.g. wallpaper, paint.

Types of Convenience Good Shopping:

<u>Discount Foodstores</u> – Single level, self-service stores normally of between 1000-1500 square metres of gross floorspace selling a limited range of goods at competitive prices, often with adjacent car parking.

<u>Supermarkets</u> – single level, self-service stores selling mainly food, with a net sales area of less than 2,500 square metres, often with adjacent car parking.

Superstores – Single level, self-service stores selling mainly food or food and some non-food goods, usually with at least 2,500 square metres net sales floorspace, with dedicated surface level car parking.

Hypermarkets – Single level, self-service stores selling both food and a range of comparison goods with net sales floorspace in excess of 5,000 square metres with dedicated surface level car parking.

<u>Convenience Outlet</u> – Single level, partially self-service store with no adjacent car parking, selling convenience items, with a net sales area of not more than 500 square metres and a product range less than that carried by a supermarket. Such stores are characterised by longer opening hours than supermarkets.

Types of Comparison Good Shopping:

<u>Retail Mall</u> – Purpose-built central facility, frequently on one or more levels, providing a mix of large stores and individual shops usually concentrating on comparison goods, together with some convenience shopping and sometimes consumer services and/or a food court.

<u>Regional Shopping Centres</u> – Out-of-town retail centres generally of 50,000 square metres gross retail floorspace or more, typically enclosing a wide range of clothing and other comparison goods with extensive dedicated car parking. Regional shopping centres do not normally include retail warehouses.

<u>Retail Parks</u> – A single development of at least three retail warehouses with associated car parking.

__Retail Warehouse__ – A large single-level store specialising in the sale of non-food household goods, such as carpets, furniture and electrical goods, and bulky DIY items, catering mainly for car-borne customers and often in out-of-centre locations.

__Warehouse Clubs__ – Generally out-of-centre businesses specialising in bulk sales of reduced price quality goods in unsophisticated buildings with dedicated car parks. The operator may limit access to businesses, organisations or classes of individual, through membership restrictions.

Factory Shop – A shop adjacent to the production facility specialising in the sales of own factory products direct to the public.

__Factory Outlet Centre__ – Group of shops, usually in out-of-centre locations, specialising in selling seconds and end-of-line goods at discounted prices.

Types of Centre

__Town Centre__ – The term town centre is used to cover city, town and district centres which provide a broad range of facilities and services and which fulfil a function as a focus for both the community and public transport. It excludes retail parks, local centres and small parades of shops of purely local significance.

__District Centre__ – Either a traditional or purpose built group of shops, separate from the town centre and either located within the built up urban area or in a suburban location on the edge of the built up area, usually containing at least one food supermarket or superstore and non-retail services such as banks, building societies and restaurants.

__Local Centre or Neighbourhood Centre__ – Small group of shops, typically comprising a newsagent, small supermarket/general grocery store, sub-post office and other small shops of a local nature serving a small, localised catchment population.

Types of Location

Retail Area – That part of the town centre which is primarily devoted to shopping.

Prime Pitch – That part of the retail area of a town centre or retail mall where pedestrian flows are greatest, competition for representation is greatest and rents are noticeably higher than elsewhere.

Edge-of-centre – A location within easy walking distance (usually no more than 300 to 400 metres) of the primary retail area of a town centre, and providing parking facilities that serve the centre as well as the new development, thus enabling one trip to serve several purposes.

<u>Out of Centre</u> - A location that is clearly separate from a town centre but within the urban area, including programmed extensions to the urban area in approved or adopted development plans.

<u>Out-of-Town</u> - An out-of-centre development on a greenfield site, or on land not clearly within the current urban boundary.

Annex 3

Drive Time Catchment Maps

Annex B: Catchment Populations by Isochrone 1991 - 2013

Town	Isochrone	Total Population 1991	Total Population 1996	Total Population 2002	Projected Population 2007	Projected Population 2013
Carrickmacross	25 Minute Total	[illegible]	[illegible]	[illegible]	12,152	[illegible]
	50 Minute Total	24,550	24,078	29,167	[illegible]	[illegible]
Monaghan	15 Minute Total	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
	30 Minute Total	[illegible]	30,102	30,579	30,580	[illegible]
	39 Minute Total	72,518	72,100	[illegible]	[illegible]	75,352
Ballybay	25 Minute Total	[illegible]	10,8[illegible]	[illegible]	[illegible]	[illegible]
Castleblayney	25 Minute Total	14,642	[illegible]	[illegible]	14,727	15,05[illegible]
Clones	15 Minute Total	[illegible]	[illegible]	[illegible]	6,[illegible]	6,667

OFF-PEAK DRIVETIME ISOCHRONES FROM MONAGHAN TOWN, COUNTY MONAGHAN

OFF-PEAK DRIVETIME ISOCHRONES FROM CARRICKMACROSS, COUNTY MONAGHAN