

CAVAN COUNTY RETAIL STRATEGY

2021-2028



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Executive Summary

Cavan County Retail Strategy

The Retail Planning Guidelines for Planning Authorities (2012), issued by the Department of the Environment, Community and Local Government (DoECLG), require Local Authorities to prepare retail strategies and retail policies for their areas and to incorporate these where appropriate into their development plans. McCutcheon & Halley Planning was commissioned by Cavan County Council for the preparation and implementation of the Cavan County Retail Strategy (the Strategy) 2021-2028. The timeframe of the Strategy has been adopted to align with the Cavan County Development Plan 2014-2020 and that of the next Development Plan which will cover the period 2022-2028.

In compiling this Strategy, due regard has been had to the most up-to-date information regarding demographics, economics, retailing and the impact of Brexit, COVID-19 crisis and online retail shopping trends. This has been used to provide a firm basis on which to inform future policy direction with the aim of enhancing and developing the retail offering of Cavan Town and Cavan County. Whilst this Strategy is primarily focused on the formulation of policy to control the geographic characteristics of retail operations, the Strategy must consider this in light of altering shopping habits and modern shopping demands.

The overarching aim of the Strategy for County Cavan is to ensure that future retail development in the County is accommodated in a manner that is efficient, equitable and sustainable. This Strategy takes a fresh view of retail development within and impacting County Cavan providing advice regarding the broad projected quantum, scale and type of retail development required in the County.





CHAPTER 1

Introduction

Cavan County Retail Strategy

1.0 Introduction

McCutcheon Halley Chartered Planning Consultants were commissioned by Cavan County Council to prepare the Cavan County Retail Strategy 2021-2028, fulfilling an objective of the Cavan County and Cavan Town & Environs Development Plans 2014-2020. It is envisaged that the new Strategy will provide a framework for guiding the development of a vibrant and competitive retail sector within the County. Besides, the review and update of the Strategy is particularly relevant in the context of the forthcoming review of the current Cavan County Development Plan 2014-2020. It is envisaged that the Retail Strategy will form an integral part of the Council's overall vision for the development of Cavan County over the period of the next development plan (2022-2028).

This Strategy has been updated in accordance with provisions set out in the Retail Planning Guidelines for Planning Authorities (2012), issued by the Department of the Environment, Community and Local Government (DoECLG).

Cavan County Council recognizes that the retail sector will play a key role in relation to economic and social activity, employment and the continued vitality of the towns and villages throughout the County. The review and update of this Strategy which recognises the short and medium-term challenges and opportunities facing the County, such as Brexit and the COVID-19 crisis, and sets out a framework to revitalise retailing, is essential to provide much needed guidance to the future of the retail sector in the County.

1.1 Baseline

The Strategy represents a review of the County's previous Retail Strategy 2008-2014 to ensure a healthy, competitive, and vibrant sector within over the period of the current and forthcoming County development plans, through retail policies recommendations which form the basis for determining the quantum, scale, and location of new retail development within the County. It is particularly relevant in the context of the forthcoming review of the current Cavan County Development Plan 2014-2020.

Shifts in the political, economic and social landscape are constant with border areas even more sensitive to such shifts. The retail centres of Cavan will always be particularly susceptible to changing circumstances and planning policy needs to be prepared mindful of this backdrop. The ability of retail centres to respond and evolve accordingly and remain relevant to local users and businesses is influenced by a wide array of issues, including retail planning policy at national and local level.

The recession that hit Ireland during the late 2000s and early 2010s impacted every town and village and every business. But economies cycle between growth and recession and without recession we would not have a recovery. The recovery in Cavan County following the recession period has a distinctive pattern with our research indicating an unequal recovery, dictated by access and remoteness and clearly a microcosm of the national scenario.

Since the previous Retail Strategy 2008-2014, it is generally perceived that economic and demographic recovery was dictated by access to the Dublin market, given the 'Dublin centric' recovery in the Irish economy and wider housing issues. Retailing expansion within the County will have largely stagnated, with minimal demand for increased space and continued consolidation of retailing and related services within the county. A number of large-scale retail floorspace projects envisaged for the County have not been realized, with permissions extended for developers to consider the ongoing viability of their proposals.

Access to the Dublin market is a double-edged sword, with improvements in accessibility and reduced journey times, residents of Cavan will have improved access to jobs, industry and trade. The downside of this improved accessibility is the impact it can have on the competitiveness of local businesses, particularly providers of comparison goods. The County is particularly susceptible to fluctuations in currency values given its positioning on the border with Northern Ireland and the economic threats that may derive from the practical implementation of Brexit from January 2021.

The COVID-19 crisis is significantly affecting the Irish economy, and the retail sector is no exception. Whilst the overall impact on the retailers and unemployment has been negative, the Irish government has also unveiled an unprecedented Budget 2021 including credit and income supports and rates waiver and tax measures for businesses to meet the challenges of both Brexit and COVID-19 in Ireland in 2021. Despite this, the Republic of Ireland started the effective rollout of COVID-19 vaccination among its population from January 2021, and the economy is forecasted to grow on a national level in 2021. It is therefore vital that planning policy is formulated to deal with any anticipated resurgence in retail, particularly after the COVID-19 crisis is over.

It is also vital that town centre environs are attractive for businesses to operate from as well as to increase consumers' confidence about visiting physical stores again. Whilst this Retail Strategy is primarily focused on the formulation of policy to control the geographic characteristics of retail operations, the Strategy must consider these factors too in light of altering shopping habits and modern shopping demands.

The population of County Cavan reached 76,176 persons in 2016 as stated in the Census 2016 (CSO), having increased by 44.3% (23,380) since 1991, by 19% (12,173) since 2006, and by 4.1% (2,993) since 2011. The NPF's Implementation Roadmap¹ contains population targets for the County at 83,000-84,500 in 2026 and 86,000-88,000 in 2031. However, the growth rates reported by the CSO consistently exceed the average national rate of change for the same periods, which may suggest that the County's population will meet or even exceed the NPF's high-scale growth targets.

¹ National Planning Framework - Implementation Roadmap. Accessible via: <https://npf.ie/wp-content/uploads/NPF-Implementation-Roadmap.pdf>

The identification of the emerging retail hierarchy for County Cavan needs to be mindful of the catchment identified for each retail centre and the extent of floor-space, vacancy levels, retail mix, accessibility, and wider geographical patterns. Positioning on the County Retail Hierarchy should reflect the level of potential for additional retail floor areas and services and the potential absorb same. Recent research suggests a much greater proportion of retail floor-space within rural parts of Ireland than accepted in planning and economic circles. While the level of interest in expanding retailing in rural areas is still low, failure to fully comprehend the extent of rural retailing is a disservice to the operators and users of such services.

1.2 Methodology

The Strategy involves both desktop and fieldwork surveys including a review of existing published documents, studies, plans, retail legislation, government policy, local studies, analysis of current retail trends, both internationally and locally, and a review of best practice in the sector, as applicable in both a national and local context. Two types of surveys were undertaken in 2016 to inform this Strategy. Field surveys comprising the availability and quality of retail floorspace and environments and the extent of shopping catchment areas were also undertaken. Shopper surveys were also carried out to investigate the characteristics of retail customers within the tier 1 and tier 2 towns of Cavan. Householder surveys were also undertaken to aid in providing an understanding of the dynamics of shopping habits of Cavan residents.

This Strategy examines in detail Cavan Town and the Core Strategy Tier 2 towns of Ballyjamesduff, Virginia, Bailieborough, Cootehill and Kingscourt, Tier 3 towns of Belturbet and Ballyconnell, and lower-tier villages with expansive commercial bases (i.e., Killeshandra). Smaller towns, villages, and rural areas are also examined to provide an understanding of the role and function of such areas and to provide a comprehensive view of retailing within the County.

Besides, this Strategy considers the most current retailing trends and changing economic context in the national and regional retail market, including the evolution of online shopping and its impact on retail spaces, emerging technology means which continue to change and shape buying behaviours patterns and the impact from the COVID-19 pandemic and the practical ramifications and potential risks arising from the Brexit Withdrawal Agreement. The Strategy also considers the effects of development and retail policy in neighbouring counties, some of which offer a competing product, while others may be seen as complementing Cavan's retail offer.

CHAPTER 2

Key Policy Framework

Cavan County Retail Strategy

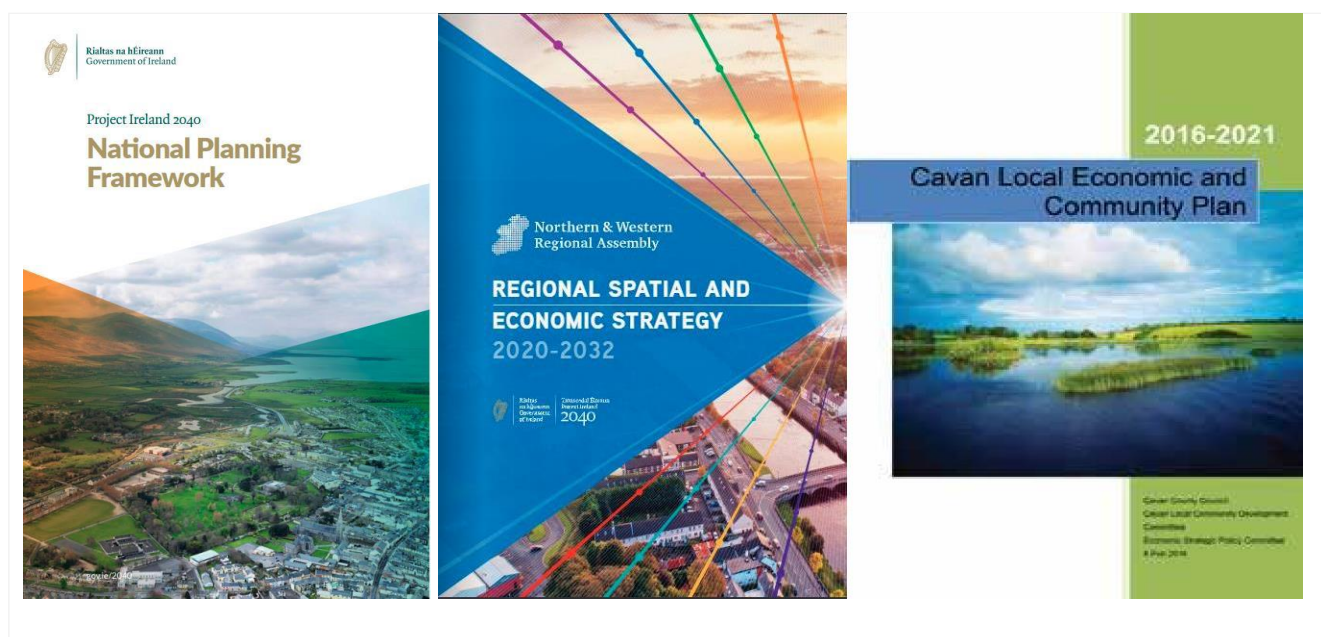
2.0 Introduction

The policy framework for the Retail Strategy for County Cavan is provided at national, regional, and local level. An overview of the key policy framework upon which this Strategy has been produced is set out below.

Under the Planning and Development Act 2000 (as amended), City and County Development Plans, and consequently their retail strategies, are required to be consistent, as far as practicable, with the national planning policies and relevant regional strategies. Since the 2008-2014 Strategy was prepared, several key planning and development documents have been adopted and new population data published by authoritative sources. These all have been considered in the preparation of this Strategy in the following order:

- Project Ireland 2040: National Planning Framework (2018) and National Development Plan (2018-2027)
- Guidelines for Planning Authorities Retail Planning & Retail Design Manual (2012)
- Regional and Spatial Economic Strategy for the Northern and Western Region (2020-2032)
- Cavan County Development Plan 2014-2020
- Cavan Town and Environs Development Plan 2014-2020
- Various other local area plans

Figure. 2.1. Policy Framework - Guidance



2.1 National Level

2.1.1 Project Ireland 2040

The National Planning Framework (NPF) and the National Development Plan 2018-2027 (NDP) are the two pillars of Project Ireland 2040 which replaced the National Spatial Strategy 2002-2020 (NSS) and the National Development Plan 2007-2013 (NDP 2007). The NPF, supported by the NDP, is the Government's high-level strategic plan for shaping the future growth and development of Ireland. The NPF sets out 10 National Strategic Outcomes (NSOs) and 75 National Policy Objectives. The NSOs are the tools that the NPF will use to deliver their goals. Figure 2.2 outlines the ten NSOs as contained in the NPF.

The primary purpose of the NPF is to enable both urban and rural Ireland to accommodate growth while facilitating a shift towards Ireland's regions and cities other than Dublin. The NPF targets a level of growth in the Northern and Western and Southern regions combined, to at least equal that of the Eastern and Midlands region. The pattern of growth is further expanded in the NPF's Implementation Roadmap². The breakdown of population projection in Appendix 2 of the NPF's Roadmap for the County sets out high and low population range targets of 86,000-88,000 for the period up to 2031.

The NPF's policies and objectives are implemented at a regional level through the Northern and Western Regional Spatial Economic Strategy 2020-2032 and at a county level through the Cavan County Development Plan 2022-2028. It is also implemented through other plans and programs at the national and regional level such as the National Climate Change Strategy or the NDP. The NDP sets out the investment priorities that will underpin the implementation of the NPF, through a total investment of approximately €116 billion. Here, it is important to outline that the NSS identified urban centres which comprised Gateways, Hubs, County Towns, Large Towns, and District Towns. It identified Cavan as a Hub-Town. Contrary, the NPF divides the country into three regions. County Cavan is part of the Northern and Western Region.

Figure 2.2. National Strategic Outcomes & Priorities (NPF, 2018)



² National Planning Framework – Implementation Roadmap. Accessible via: <https://npf.ie/wp-content/uploads/NPF-Implementation-Roadmap.pdf>

2.1.2 Guidelines for Planning Authorities Retail Planning 2012

The Retail Planning Guidelines (RPGs) were published in 2012 building on the previous retail guidelines from 2005 now superseded. It is the purpose of the RPG's promoting sustainable retail planning by assisting Planning Authorities in addressing retail development, preparing Development Plans, and in assessing applications for retail developments. They also guide developers in formulating development proposals.

The RPGs emphasize that to ensure proper planning and sustainable development, retail development and activity must follow the settlement hierarchy of the State, including the various Gateway and Hub town locations identified in the NSS 2002-2020³, the Regional Planning Guidelines⁴ and the Core Strategies of Development Plans. It is important to note that the NSS 2002-2020 and the Regional Planning Guidelines for the Border Region 2010 were both superseded following the publication of Project Ireland 2040 (NPF and NDP) and the new regional planning guidelines (RSES). Retail development must therefore be consistent with the NPF and the Regional Spatial and Economic Strategy for the Northern and Western Region and to demonstrate regard for the RPGs.

The RPGs have five key policy objectives, as shown in the figure 2.3 below.

Figure 2.3. Key Policy Objectives (Guidelines for Planning Authorities Retail Planning 2012)

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

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

'Specifically, in relation to retailing, the development plan must be:

- *Evidence-based through supporting analysis and data to guide decision making;*
- *Consistent with the approach of these guidelines; and*
- *Clear and concise with regard to specific objectives and requirements.*

At a minimum, City and County Development Plans must therefore:

- *State the elements of their settlement hierarchy in line with the relevant regional planning guidelines and their core strategy;*
- *Outline the level and form of retailing activity appropriate to the various components of the settlement hierarchy in that core strategy; see district centres below;*
- *Define, by way of a map, the boundaries of the core shopping areas of city and town centres and also location of any district centres (See Section 3.4);*
- *Include a broad assessment (square metres) of the requirement for additional retail floorspace only for those plans in the areas covered by a joint or multi-authority retail strategy (See Section 3.7 for areas not covered by such strategies);*
- *Set out strategic guidance on the location and scale of retail development to support the settlement hierarchy, including where appropriate identifying opportunity sites which are suitable and available, and which match the future retailing needs of the area;*

³ The National Spatial Strategy 2002-2020 was officially replaced by Project Ireland 2040: National Planning Framework and National Development Plan 2018-2027

⁴ The Regional Planning Guidelines for the Border Region 2010 has been replaced by the Northern and Western Regional Spatial and Economic Strategy 2020-2032 adopted in 2020.

- Identify sites which can accommodate the needs of modern retail formats in a way that maintains the essential character of the shopping area;
- Include objectives to support action initiatives in city and town centres; such as:
 - o Mobility management measures that both improve accessibility of retail areas while aiming to develop a pedestrian and cyclist friendly urban environment and vibrant street life; and
 - o Public realm interventions aimed at improving the retailing experience through high quality civic design, provision of attractive street furnishing, lighting and effective street cleaning/business improvement district type initiatives; and
- Identify relevant development management criteria for the assessment of retail developments in accordance with these guidelines.'

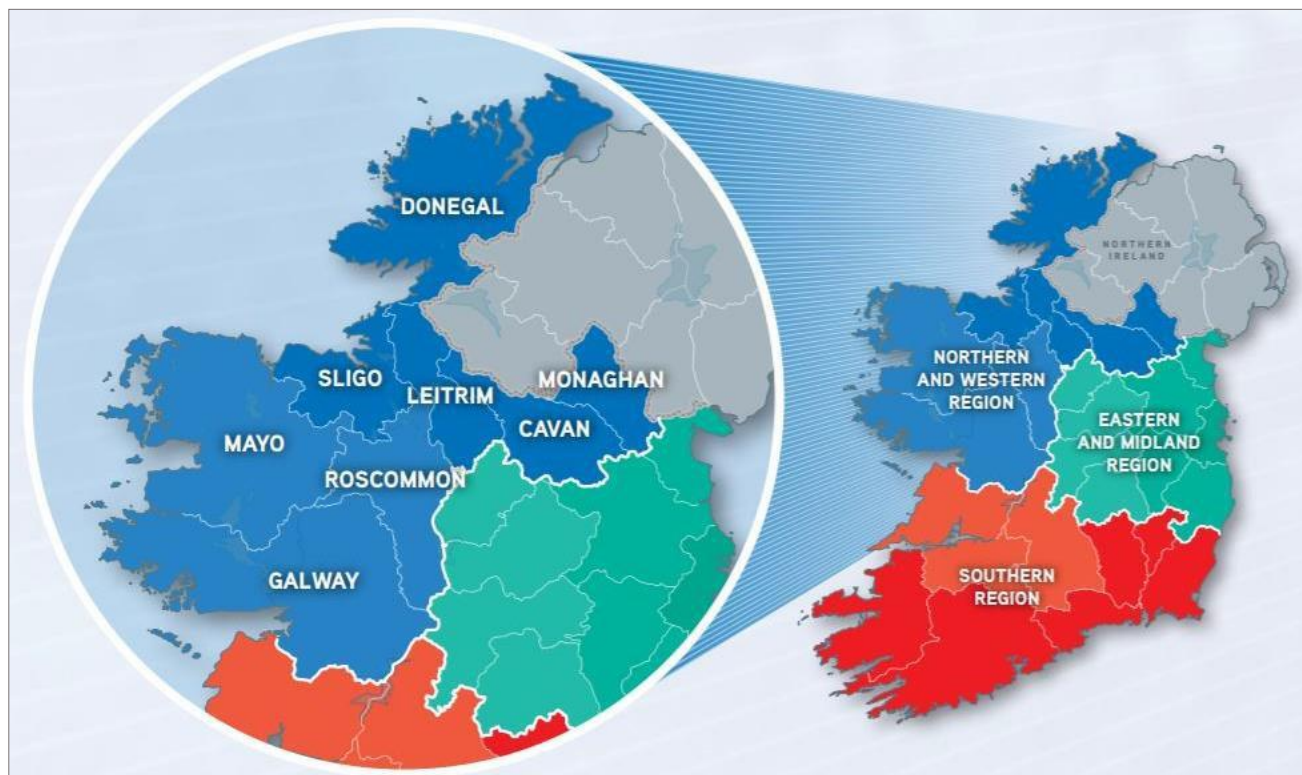
The RPGs are accompanied by a non-statutory Retail Design Manual which sets out the design principles to be used in the formulation of development plan policies and objectives. These are acknowledged and have been given due regard in the preparation of the Strategy.

2.2 Regional Level

2.2.1 Regional Spatial and Economic Strategy 2020-2032

Regional policies and strategies provide the policy link between national policies and guidance documents and local authority planning policies and decisions. The principal guiding document at a regional level is the Regional Spatial and Economic Strategy (RSES) 2020-2032 for the Northern and Western Region (see Figure 2.4). The Strategy replaces the Regional Planning Guidelines for the Border Region 2010.

Figure 2.4. Map of the Northern and Western Region Assembly Area (Regional Spatial & Economic Strategy 2020-2032).



The RSES provides a high-level development framework that supports the implementation of Project Ireland 2040 (NPF and NDP) and the relevant economic policies and objectives within it. The RSES identifies regional assets, opportunities, and pressures and provides appropriate policy responses as Regional Policy Objectives which are necessary to achieve the vision of the Assembly.

The **vision** of the RSES is:

‘To play a leading role in the transformation of this region into a vibrant, connected, natural, inclusive and smart place to work and live.’

The RSES’ aim is about delivering effective regional development for the Northern and Western Region area (NWRA), encompassing Connacht and the Ulster Counties of Cavan, Donegal, and Monaghan (see figure 2.4). The RSES highlights that the region comprises many areas that would be considered predominantly rural within Ireland. Further to this, the counties of Donegal, Leitrim, Monaghan and Cavan all share the only international border within the island, something that possesses its specific challenges.

Due to the scale and diversity of the NWRA the RSES sets out a vision for future growth, priorities and actions that apply at both Sub-Region level and a regional level. The Northern and Western region comprises six different sub-regions. It is outlined within the RSES that Cavan/Monaghan is one of the six sub-regions (see figure 2.5). The RSES settlement strategy identifies Galway Metropolitan Area and three other regional growth centres (Athlone, Letterkenny, and Sligo), eight Key Towns⁵ including Cavan, and other settlements that are smaller than Key Towns.

Figure 2.5. Map of the Sub-Regions (Regional Spatial & Economic Strategy 2020-2032).



⁵ Key Towns: Ballina, Castlebar, Cavan, Ballinasloe, Carrick-on-Shannon, Monaghan, Roscommon and Tuam (RSES, p.40).

In terms of population profile, the RSES notes that the NWRA amounts to approximately 18% of Ireland's total (179,960 persons as of 2016) indicating a population growth of 7.8% between 2002 to 2006 and 7.9% from 2006 to 2011 (RSES, p.14). Figure 8 'Population of the Region 1996-2016' from the RSES shows that County Cavan is the fourth most populated area within the NWRA. It accounted for 13% of the total population growth within the region over the last two decades. In relation to County Cavan, the RSES emphasises it plays a key role between the remainder of the NWRA and the Greater Dublin Area.

Within the Region, the RSES targets at least 40% population growth in the Regional Growth Centres with a further 30% population growth target (minimum) targeted for the Key Towns, such as Cavan Town. The RSES notes that Cavan is well positioned to deliver the principal strategic function within the Cavan/Monaghan sub-region.

Retail Offer

Regarding town centre vitality and retail provision, the RSES states that small towns and villages away from the Greater Dublin Area has continued to experience high vacancy rate, impacted also by the rise of online retailing. It is also noted within the RSES the following **specific policies in respect to the retail sector**:

- *RPO 4.45 To support retail in town and village centres through the sequential approach, as provided within the Retail Guidelines, and to encourage appropriate development formats within the town and village centres*
- *RPO 4.46 To encourage new (and expanding) retail developments to locate close to public transport corridors, to enable sustainable travel to and from our Town and Village Centres, where applicable.*
- *RPO 4.47 To adopt a presumption in favour of the reuse, and restoration of town centre buildings for use as retail space, subject to satisfying other planning criteria and standards.*
- *RPO 4.48 The roll-out of a peer learning programme shall be developed by the NWRA in collaboration with relevant stakeholders. It shall be designed to benefit and be of assistance in supporting the vibrancy, and vitality of the core retail areas of town centres.*

2.3 County & Local Level

2.3.1 Cavan County Development Plan 2014-2020

The Cavan County Development Plan 2014-2020 (Development Plan 2014-2020) states the policies and objectives to guide the proper planning and sustainable development of the County for the 6-year period. The Development Plan 2014-2020 establishes the following vision for the County:

"That Cavan in 2020 will be a place that we all can be proud of; a place where people can have a good quality of life; a better place to live, work and enjoy."

The Development Plan 2014-2020 highlights that the adopted Settlement Hierarchy was devised on the basis of an analysis of population change along with a field study of the retail and service provision available in the towns and villages of the County. The latter underlines the importance of retail provision in the county and related strategy development, which will be intrinsic to the delivery of overall plan objectives across Cavan.

Core Strategy

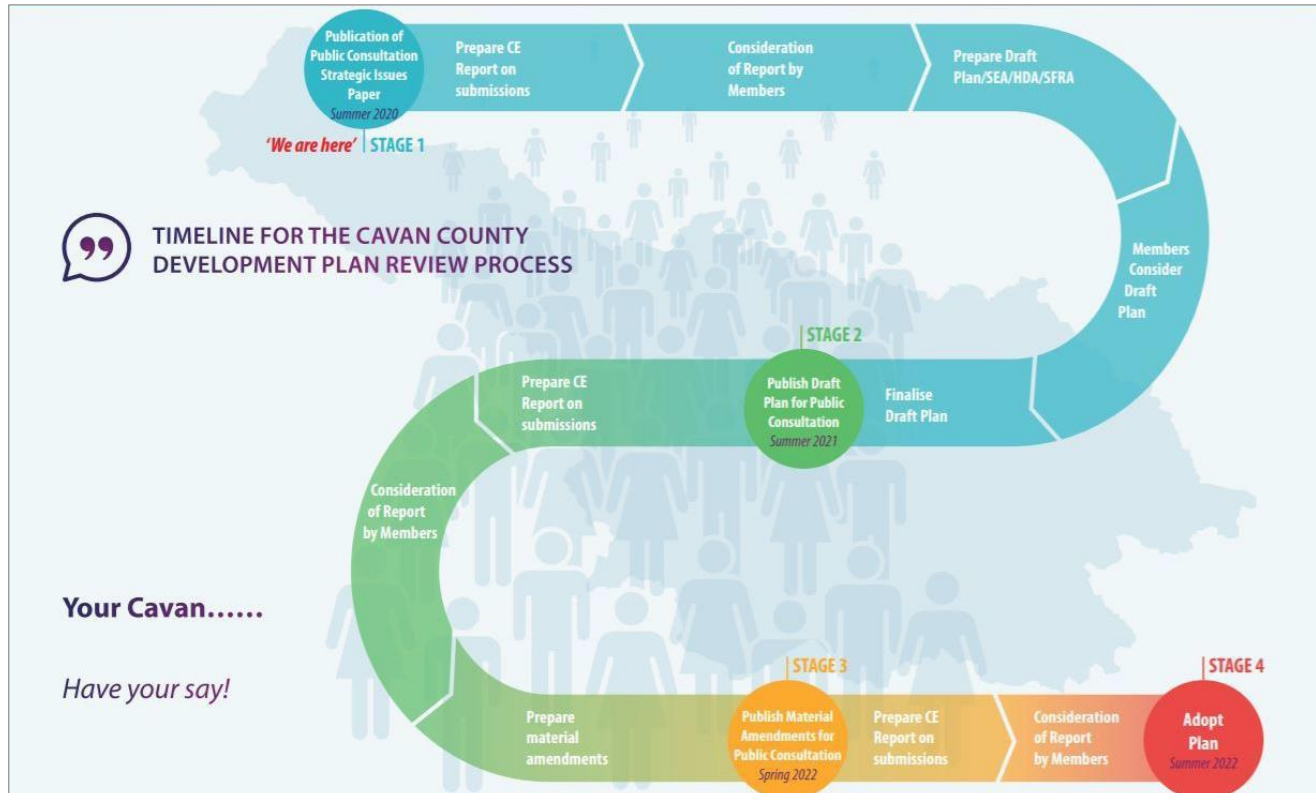
The Development Plan 2014-2020 Core Strategy sets out a clear spatial framework for the delivery of planned growth across the county based on a **six-tiered hierarchy of settlements**. It disaggregates population growth across the different areas translating this into zoned land and housing target requirements. The different tiers are outlined below, as extracted from the Development Plan 2014-2020.

- **Tier One (Principal Town).** Cavan Town, principal town of strategic regional importance.
- **Tier Two (Large Towns).** This tier includes the larger towns in the County acting as drivers of growth: Bailieborough, Ballyjamesduff, Cootehill, Kingscourt and Virginia.
- **Tier Three (Medium Towns).** These are towns serving as essential providers of services: Mullagh, Belturbet and Vallyconnel.
- **Tier Four to Six.** These tiers include Small Towns, Villages and Small Villages.
 - **Tier Four:** Killeshandra, Arvagh, Kilnaleck, Shercock, Ballyhaise and Ballinagh.
 - **Tier Five:** Loch Gowna, Swanlinbar, Blacklion and Butlersbridge.
 - **Tier Six:** Bawnboy, Dowra, Kilcogy, Stradone, Redhills, Mountnugent, Crossdoney and Crosskeys.

The Core Strategy also sets out targeted policies to inform and link together the differing sections of the plan. These policies will be implemented through a combination of objectives within the specific sections of the Development Plan 2014-2020, along with subsequent strategies published by the Planning Department within the lifetime of the development plan. Importantly, measures for the latter include the preparation and implementation of a 'Retail Strategy' for the County, which forms the basis for this report.

Within this, any strategy must have due regard to other mitigating Core Strategy policies including the need to prioritise development within Cavan Town, which has been identified as Key Town in the RSES for the Northern and Western Region, and guide development of towns in a sequential manner, outwards from the core area to maximise the use of existing and future infrastructure provision, promote sustainable development and make better use of underutilised land.

Figure 2.6. Timeline for the Cavan County Development Plan Review Process (Strategic Issues Paper, 2020).



In June 2020, Cavan County Council commenced Stage 1 (Strategic Issues Paper) of the review of the existing Development Plan 2014-2020 by preparing the new Cavan County Development Plan 2022-2028, which will incorporate a Local Area Plan for Cavan Town and Environs. Further stages of the Development Plan review process are outlined in Figure 2.6. The review process will ensure consistency with the national and regional policy objectives of the recently adopted NPF and the RSES for the NRWA, which is expected to result in changes in the Core Strategy and associated tables as well as other amendments to policy and objectives throughout the written statement.

Retail Policy & Objectives

Section 3.10 of the Development Plan 2014-2020 recognises that the retail sector is an important employer and driver of economic growth in the County and contributes to the vitality of towns, especially Cavan Town. The impacts of the recent economic downturn on the sector are highlighted alongside a concentrated need for actions to sustain and improve the retail profile and competitiveness of County Cavan, through the consolidation and enhancement of town centres and settlements and by improving the quality and choice of retail developments on offer. Again, the importance of Cavan Town as the principal retail centre within the county is emphasised, alongside the wider need to tailor retail policy to the unique urban profile of the County in the development of a robust retail strategy.

The Development Plan 2014-2020 includes provision for **4 distinct retail policies** to underpin the envisaged plan-led approach:

- **EDP16** - *To support the continued sustainable development of Cavan Town as the primary retail and service centre in the County and in recognition of its hub status within the Border Region. To promote, strengthen and protect the retail function of all the towns and villages of the county especially the large and medium sized towns.*
- **EDP17** - *Aim to ensure that the retail needs of the County's residents are met within the county.*
- **EDP18** - *To encourage and facilitate the re-use and regeneration of derelict buildings, within town and village cores, for retail uses.*
- **EDP19** - *To ensure that a 'Retail Strategy' is prepared for the County and for Cavan Town & Environs, as a priority.*

In addition to the above-mentioned retail policies, the Development Plan 2014-2020 identifies **7 no. retail objectives**, which includes the aim of achieving high standards and innovation in retail design, general compliance with the RPGs (2012), and the establishment of minimum and maximum retail floorspace requirements for retail warehousing and service stations.

The objectives also include a requirement to consider the sustainable development of tourism-related retail developments in towns or villages and, in exceptional cases, at existing established tourist attractions. Significant weight is attached to the overriding principle of ensuring that retail development be confined to town and village cores within Tier Four and Five towns and that it is strictly controlled in Tier Two and Three towns whereby the presumption will be that new retail development will generally only be permitted within town centres.

2.3.2 Cavan Town & Environs Development Plan 2014-2020

The Cavan Town & Environs Development Plan covers the functional area of Cavan Town and was prepared in parallel with the County Development Plan, recognising the importance of the town's role as the primary centre in the County. The principal aims of the plan include the need to facilitate the economic and social development of the town and to consider a transformational and landuse structure that will provide for its orderly development. The adopted development strategy is centred on a need to support the role of Cavan Town as a regionally important employment, retail and service centre, improving the urban environment, encouraging brownfield and infill development, and strengthening physical and social infrastructure.

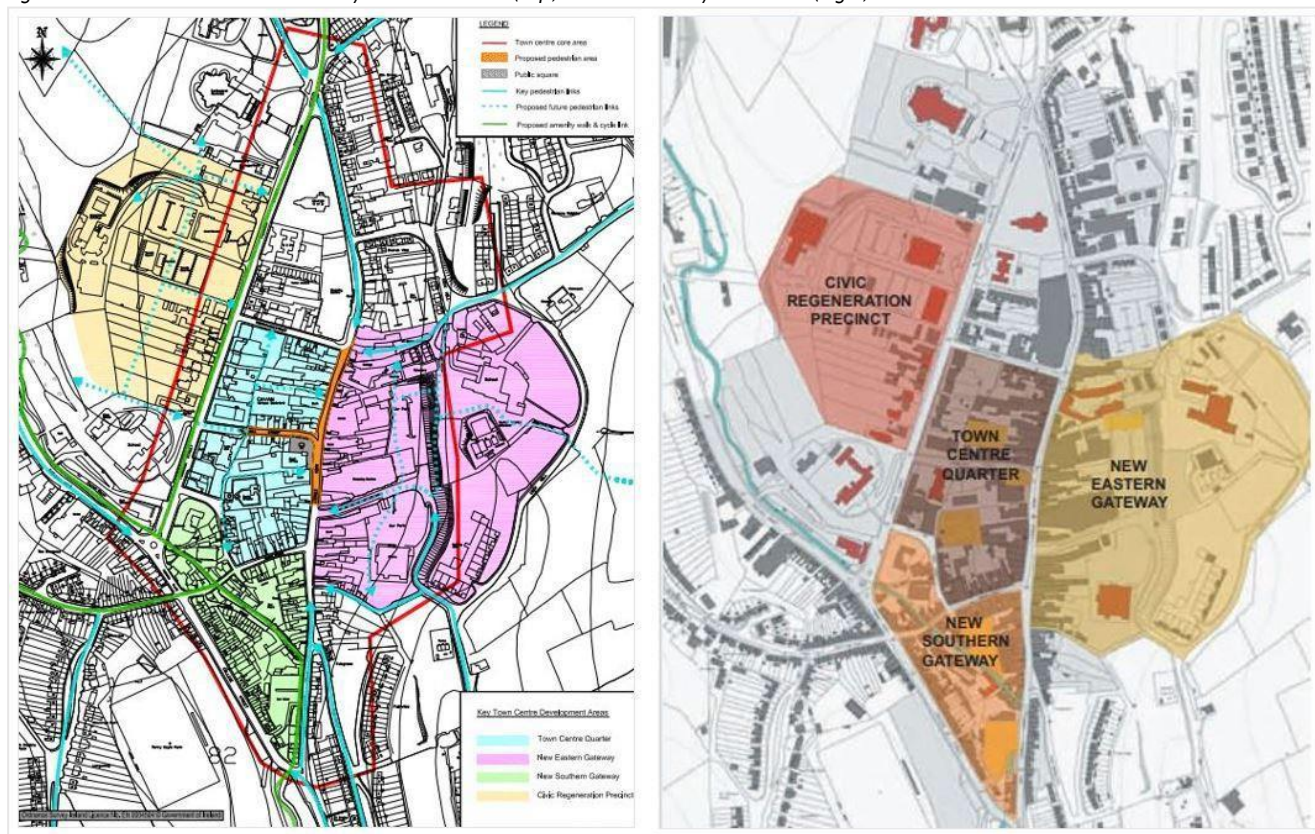
Sustainable economic development is recognised as the lifeblood of the community. The Plan notes that retail is a principal employer, but there has been a general reduction in retail traders since 2009. The Plan identifies opportunities arising from permitted retail development to the west of the town core, which will allow for improved and sustainable transport links, including capacity to accommodate attractive mixed uses, civic spaces, commercial and other uses, as well as a pedestrian priority area. These aspirations are reflected in the different Town Centre Policies which have a strong retail emphasis:

- *TC-P1 To facilitate new town centre development to include a mix of shopping, commercial, community and residential uses in appropriate density development around pedestrian friendly streets and squares with high quality urban design.*
- *TC-P2 Forge a link between planning and design to produce better living environments for people.*
- *TC-P3 Seek to maintain a good mixture of retail units within the town core areas in order to ensure the vitality and viability of the town centre.*

The future development of Cavan Town itself will be guided by a number of planning mechanisms including the Cavan Town Urban Design Framework, a phased approach to the release of zoned lands and the preparation of masterplans for key sites to contribute to the vitality and viability of key centre areas. The development of the town core will be focused on four key areas (see Figure 2.7), namely, the Civic Regeneration Precinct, Town Centre Quarter, new Southern gateway and new Eastern Gateway.

As mentioned previously, Cavan County Development Plan 2014-2020 will be replaced by the next County Development Plan which will cover the period 2022-2028. As there is no longer a Town Council for Cavan Town, there will be no separate Cavan Town Development Plan. It is intended that a local area plan will be required which will replace the Cavan Town & Environs Development Plan 2014-2020. Cavan County Council will manage the process of merging the Cavan Town Local Area Plan into the preparation process of the new Cavan County Development Plan 2022-2028.

Figure 2.7. Town Centre Core Areas – Key Pedestrian Links (Left). Cavan Town Key Four Areas (Right).



2.3.3 Cavan Town & Environs Integrated Framework Plan 2020

The 2008 Cavan Town and Environs Development Plans adopted by the Council also included an Integrated Framework Plan 2020 comprising a transportation study and the aforementioned urban design framework (see Figure 2.7). The transportation study sets out both strategic and area-specific recommendations to co-ordinate land use plans with a tailored transport network. The study establishes plans for a number of pedestrian links, public squares, amenity walks and cycle routes which includes the creation of a pedestrian priority zone on Main Street, Town Hall Street and Bullock Lane, alongside direct access for car traffic to designated car parks located to the east and south of the town centre and the creation of enhanced facilities for town centre deliveries. The priority pedestrian zone has been designed to strengthen links to public transport facilities, and in particular, the bus station on Farnham Street. Implementation of the recommendations would provide for c.1,700 car parking spaces (on and off-street) contributing towards the realisation of envisaged growth targets locally. A Vehicle Control Zone was proposed to be established in pedestrianised areas to accommodate business deliveries between the hours of 7 pm and 11 am.

The Plan also priorities a number of new road links and junction improvements to the town centre core and new development lands. This has contributed to the completion of the €6 million Town Centre Eastern Access project to improve accessibility to the centre and the adjacent multi-storey car park. It involved the construction of three new links road and a new roundabout in Killynebber, Tullymongan Lower and Townparks.

These projects will contribute significantly to the improvement of the town centre shopping environment in Cavan Town and related access. Any future strategy for retail development should have full regard to these proposals or any subsequent revisions of these proposals.

2.3.4 Cavan Local Economic & Community Plan 2016-2021

Cavan's Local Economic and Community Plan (LECP) sets out key strategic goals and related actions needed to support economic and community development over the next 6 years. An action focused document, it cultivates a strong role for Local Government in the achievement of established objectives. The developed economic plan for the county includes a specific goal to "*stimulate town renewal and help revive the retail sector*". This includes two distinct objectives as follows: -

"Objective 8.1: Town/Village Renewal Initiative

- a. *Develop and implement a Town Team Pro-gramme for a number of towns throughout the county. Key stakeholders identified to work collaboratively to develop a shared vision for the economic spatial and social/community development of the towns identified;*
- b. *Develop a project under the Rural Economic Development Zone [REDZ] initiative".*

Under this objective, designated town teams will take responsibility for the preparation and implementation of town rejuvenation plans. In rural areas, opportunities to access REDZ funding from The Commission for the Economic Development of Rural Areas will be explored.

"Objective 8.2: Revival of Retailing

- a. *Examine potential to incentivise the reopening of vacant business premises;*
- b. *Collaborate in facilitating and hosting a regional retail symposium to examine ways to revive and reinvigorate retailing at county and regional level;*
- c. *Investigate potential of a countywide "Shop Local" campaign to support independent retailers;*
- d. *Support Retailers to exploit opportunities presented by online trading;*
- e. *Seasonal initiatives such as Christmas markets (local crafts and food products)".*

A number of targeted measures will be developed under this objective via strong partnership working between Cavan County Council, the Chamber of Commerce, Local Enterprise Office and formulated Town Teams.

2.3.5 Other Reference Documents

The following list includes a host of other guidelines and plans from various statutory bodies which have pertinence for this study and shape the recommendations of the Strategy.

- Cavan Heritage Plan 2006-2011;
- Cavan Town Smarter Travel Scheme;
- Investing for Growth and jobs: Infrastructure Investment Priorities 2010-2016;
- Local Government and Regional Government Reform;
- Smarter Travel – A sustainable Transport Future: A new Transport Policy for Ireland 2009-2020;
- Design Manual for Urban Roads and Streets (2013);
- Urban Regeneration & Housing Act 2015;
- Retail Ireland Town Centre Policy 2012;
- Retail Excellence: A Strategy for Rural Retail 2015: Shaping the Future: Case Studies in Adaptation and Reuse in Historic Urban Environments.

2.4 Policy Summary

A consistent theme across the policy documents discussed in Chapter 2 is the critical role the retail sector plays in achieving economic growth and its contribution to the creation of sustainable town centres. This message is already presented into a set of positive policy objectives in the current Cavan County and Cavan Town Development Plans.

Since the preparation of the previous Retail Strategy 2008-2014 a number of key policy documents have been published. As detailed in Chapter 2, the new RPGs were adopted in 2012, Project Ireland 2040 (NPF and NDP) in 2018 and the RSES for the Northern and Western Region in 2020 replacing the previous Regional Planning Guidelines for the Border Region (2010).

It is intended that the new Cavan County Retail Strategy 2021-2028 will form an integral part of the forthcoming Cavan County Development Plan 2022-2028, which review process commenced in June 2020 (Stage 1 – Strategic Issues Paper), to ensure consistency in approach at a national, regional, and local level. The need for an updated County Retail Strategy is also required to reflect the changing environment for retail development emerging from Brexit or the COVID-19 crisis and an increase in online retailing, and be set within the context of current national, regional and development guidelines and plans. The need for an updated County Retail Strategy is also required to reflect the most-up to date population and retail floorspace information.

CHAPTER 3

Retail Planning Context

Cavan County Retail Strategy

3.0 Introduction

The development of any retail strategy must be rooted in a firm appreciation of the market, with economic outlook and performance, industry operational practices, consumer confidence, geography, and the socio-economic profile of any consumer base key factors in the strategic development of policy in any area. This section establishes an important context in this regard, which should be given weight in any targeted strategy to meet the future retail requirements in the County.

3.1 Market Characteristics

Retail entered 2020 with some positive momentum as 300,000 people were employed in the retail sector making it the single biggest private employer in Ireland (Retail Ireland–Submission to the Minister for Finance, IBEC 2020). The Irish economy and the retail sector had continued to strengthen since 2008, and employment figures increased as a result of COVID-19 restrictions including the decision by the Irish Government to move to Level 5 of the 'Living with COVID-19'⁶ plan.

COVID-19 crisis has dramatically disrupted the retail sector during 2020, with the shock differing massively between brick-and-mortar versus online shops, essential versus non-essential stores, and small versus large retailers. Since early March 2020, many retailers have been asked to close their doors for a prolonged period or allowed only to function intermittently on public health grounds resulting in the loss of turnover. By the end of 2020, the national economy faced enormous challenges by COVID-19 crisis including the introduction of new retail lockdowns in January 2021.

The impact of COVID-19 restrictions in the retail sector has heightened the potential of online shopping and has resulted in an ever-increasing feature of the Irish retail market. 'Click and Collect' and home delivery practices have become very popular across many retail categories, as the only viable option to continue trading during the COVID-19 crisis.

Footfall in Irish retail has fallen more than in other European countries, according to a research published in November 2020 by Retail Ireland, the IBEC group that represents the retail sector⁷. The decline in the number of shoppers on city and town streets can be linked to shoppers' adjusted behaviour, the introduction of social distancing measures and the government's set of restrictions to halt the spread of COVID-19 including the closure of 'non-essential' retailers during the introduction of Level 5 restrictions.

⁶ Living with COVID-19 Plan – Level 5 provides for 'non-essential' retailers to close.

⁷ Footfall in Irish Retail falls more than anywhere in Europe (Ibec, 2020). Accessible via: <https://www.ibec.ie/connect-and-learn/media/2020/11/17/footfall-in-retail-in-ireland-falls-more-than-anywhere-in-europe>

On the positive hand, Retail Ireland's November 2020 Monitor Report⁸ notes the amount of retail sales grew by 1.1% in the months of September to August 2020 relative to the same period in 2019. In addition, an increased spending activity was also reported in the last weeks of September 2020. Retail revenue and spending growth from August to September 2020 are highly relevant from the point of coinciding in terms of time with the relaxing of COVID-19 restrictions.

On another note, Irish consumer confidence rebounded to 65.5 in November 2020 from 52.6 points in October 2020 according to the KBC Bank consumer sentiment index⁹. The positive figures from November may be a result, among other reasons, of the decline in reported COVID-19 cases over the survey period, according to KBC Bank's own survey study. Although the magnitude and intensity of the COVID-19 crisis is unparalleled, the degree of recovery and resilience displayed by the general economy including the retail sector, especially as restrictions ease, is promising. The positive signs of economic recovery reported during the periods of time which the COVID-19 restrictions were relaxed can fairly be interpreted as the form of recovery to be expected for the retail sector, particularly since the rollout of the COVID-19 vaccine among the population started in January 2021.

Unfortunately, some of the challenges the retail sector has faced along 2020 as a result of the COVID-19 pandemic may be expected to continue in parts of the Irish retail sector well beyond this crisis. While some physical shop-based retailers will return to growth, the challenge now for more conventional retailing will be to compete with other retailers who have already embraced online shopping as a mode to operate and to satisfy consumers which personal preference is to purchase goods in one click and be offered a range of home-delivery options.

It seems clear that traditional ways of buying are changing rapidly and the trend towards online shopping will continue once COVID-19 crisis passes. However, a recent research¹⁰ from Banking & Payment Federation Ireland (BPFI) which looks at consumer's current online shopping habits, provides other relevant findings. While consumers are more likely to continue shopping online for goods such as clothes and toys, the survey reveals that Irish adults shopping for groceries, hardware and DIY products as well as newspapers and magazines are less likely to do so online once the current Level 5 restrictions are eased.

As discussed above, it goes without saying that the COVID-19 crisis has had a considerable impact on parts of the Irish retail sector; however, it is expected that the outcome of the vaccination among the population will provide an important basis for the recovery of the sector after the pandemic ends. The retail industry is increasingly dynamic and susceptible to changes. Traditional ways of purchasing are changing and the retail market in Ireland seem to adapt and reflect on these. The following represents a summary of some of the key trends which are expected to define the retail sector characteristics as the sector and society start to rebuild from the altered-environment due to COVID-19 crisis in which Ireland is currently at:

- Traditional high streets and urban centres are no longer just about retail. There is increasing recognition in the sector of the need to better foster and create a leisure experience around retailing to increase 'dwell' times in retail locations and couple shopping with dining, cinema visits etc. as part of a collective visitor experience;
- Impressive shopping environments attract the attention of local, national and international investment, with a greater emphasis now being placed on urban design and quality of public realm;
- The independent retail sector has become increasingly sophisticated in Ireland over the last ten years with a consumer preference to shop local in food categories in particular, balanced with improved trader engagement and the bespoke addressing of customer needs;

⁸ Retail Ireland Monitor, November 2020 (Retail Ireland, Ibec). Accessible via: [https://www.retailireland.ie/IBEC/Press/PressPublicationsdoclib3.nsf/wvRIINewsByTitle/footfall-in-irish-retail-fallen-more-than-anywhere-in-europe-17-11-2020/\\$file/Retail%20Ireland%20Monitor%20-%20November%202020.pdf](https://www.retailireland.ie/IBEC/Press/PressPublicationsdoclib3.nsf/wvRIINewsByTitle/footfall-in-irish-retail-fallen-more-than-anywhere-in-europe-17-11-2020/$file/Retail%20Ireland%20Monitor%20-%20November%202020.pdf)

⁹ Irish Consumer Sentiment (KBC Ireland). Accessible via: <https://www.kbc.ie/blog/consumer-sentiment-surveys/surprise-bounce-in-consumer-confidence-hints-at-st>

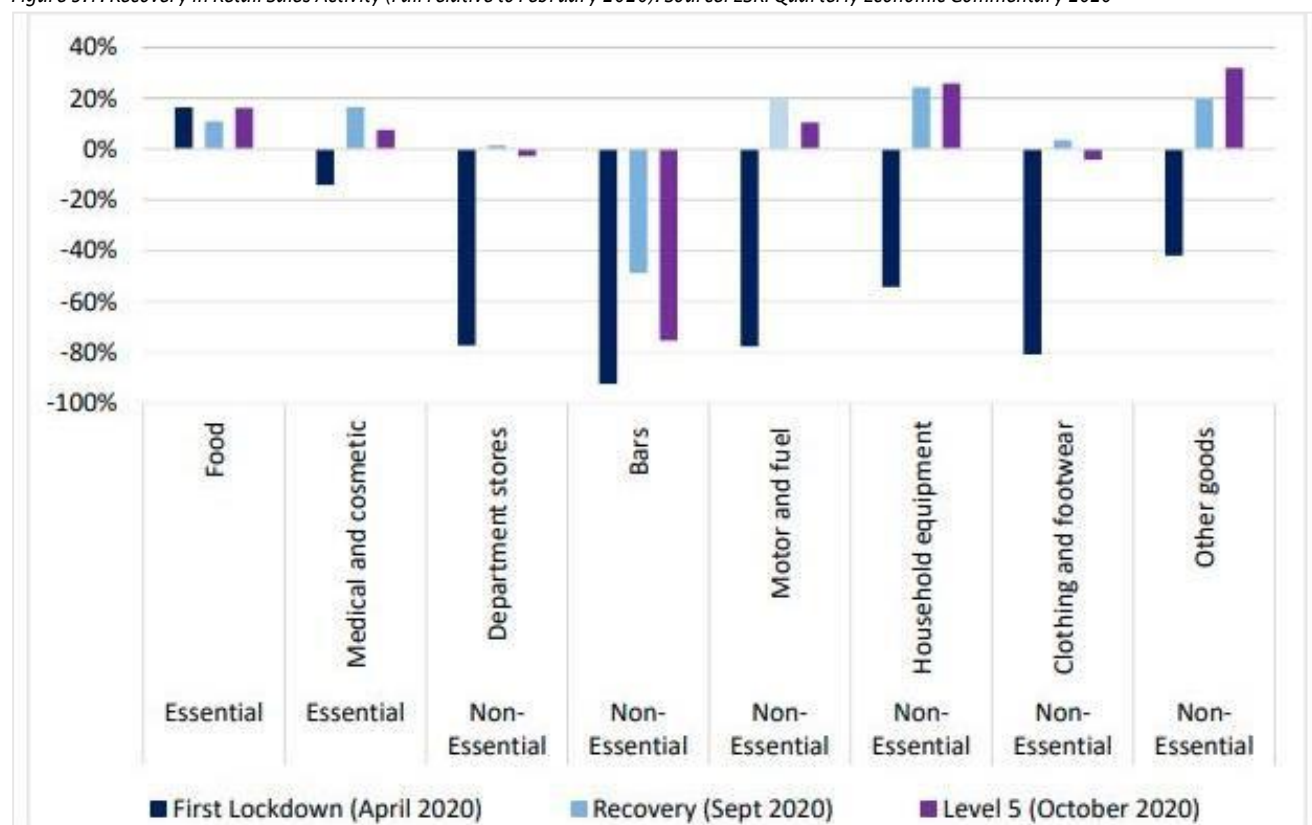
¹⁰ Banking & payments Federation Ireland (May,2020). Accessible via: <https://bpfi.ie/consumers-likely-continue-shopping-online-clothes-electronic-goods-books-covid-restrictions-lifted/>

- Contactless was a popular payment method even before COVID-19 crisis. Figures from the BPFI¹⁰ illustrate that more than 62m payments valued at almost €990m were made in August 2020, accelerating the shift from cash to electronic payments. This uplift in trends is also influenced by banks making more expensive to transact in cash, i.e., with the introduction of ATM transaction charge; and,
- Issues surrounding local business rates and retail rents are key considerations in relation to viability and the reduction of retail vacancy rates across centres. Margins will continue to come under pressure as markets start to rebuild from COVID-19 and retailers adjust to some of the impacts arising from post-Brexit implications and its practical implementation.

3.2 Economic Performance & Outlook

As implementation of Brexit begins in January 2021, coupled with significant uncertainty caused by the COVID-19 crisis, both many constraints and opportunities present themselves for Cavan's economic sustainability. Despite the impact and threats of the COVID-19 crisis and Brexit, the Economic and Social Research Institute¹¹ (ESRI) has forecasted that the Irish economy would increase by 3.4% by the end of 2020 and growing by 4.9% along 2021. Among its growth forecast for 2021, the ESRI envisaged the possibility of a six-week Level 5 lockdown in the first half of 2021, a post-Brexit deal and the rollout of a COVID-19 vaccine among the general population during the second half of the year. The ESRI also has forecasted that unemployment will 14.5% in 2021, decreasing from 20.4%¹² by the end of 2020. Further to this, CSO figures¹³ from the Quarterly National Accounts (Q3 2020) showed a rebound of 11% in GDP following the easing of COVID-19 restrictions during the summer period.

Figure 3.1. Recovery in Retail Sales Activity (Fall relative to February 2020). Source: ESRI Quarterly Economic Commentary 2020



¹¹ ESRI - Quarterly Economic Commentary Winter 2020. Accessible via: https://www.esri.ie/system/files/publications/QEC2020WIN_0.pdf

¹² CSO December 2020. Accessible via: <https://www.cso.ie/en/statistics/labourmarket/monthlyunemployment/>

¹³ <https://www.cso.ie/en/releasesandpublications/er/na/quarterlynationalaccountsquarter32020/>

Figure 3.2. Year-on-Year Changes in retail Sales (seasonally adjusted) by Month. Source: ESRI Quarterly Economic Commentary 2020

	March	April	May	June	July	August	Sept	October
Motor trades	-30%	-81%	-50%	4%	15%	14%	18%	6%
Department stores	-28%	-78%	-54%	-15%	-15%	-4%	6%	-3%
Retail sale of automotive fuel	-15%	-50%	-37%	-17%	-11%	-6%	-10%	-21%
Bars	-58%	-92%	-92%	-82%	-48%	-40%	-50%	-75%
All retail businesses	-11%	-44%	-25%	4%	9%	9%	11%	8%
Retail sale of food	18%	17%	17%	16%	10%	10%	11%	16%
Household equipment	12%	-50%	-20%	20%	23%	26%	30%	31%
Textiles, clothing and footwear	-47%	-82%	-79%	-17%	2%	-2%	3%	-7%
Books, stationery and other goods	-5%	-44%	-3%	19%	16%	14%	16%	32%
Medical and cosmetic articles	14%	-15%	-11%	3%	2%	8%	17%	7%

In terms of the impact of COVID-19 in the retail sector, ESRI notes that *'the rapid and severe decline in expenditure in the first and second quarter of 2020, real time indicators of expenditure such as retail sales data demonstrate the sustained and strong recovery as the economy was reopened'*. Figure 3.1 identifies retail activity trends in relation to the times when restrictions were introduced and eased. The trough is in April 2020, the peak is in September 2020 and October is when the Level 5 lockdown was re-introduced. It is evident that the recovery in retail sales was broad across the different sales activities since the start of the pandemic's restrictions, as shown in Figures 3.1 and 3.2, which gives cause for hope that the recovery continues in 2021.

As noted above, different reports identify the resilience of the Irish economy and a transition towards recovery in the retail sales. Discounting current consensus general growth forecasts leave Ireland with robust GDP growth rates in the short-to-medium term. Cavan's geographic location relative to retail shopping destinations in Northern Ireland means it is particularly susceptible to uncertainties brought about by the implementation of Brexit. It is therefore critical that the developed strategy incorporates sufficient flexibility to positively respond to any unforeseen issues as they arise.

Brexit Implementation – Withdrawal Agreement

Cavan's geographic location relative to retail shopping destinations in Northern Ireland means it is particularly susceptible to uncertainties brought about by 'Brexit'. The practical implications on the wider economy of Brexit are still unclear. Right from the beginning, it was suggested that likely negatives will include a swing in trade balance between Ireland and the UK owing to slower UK growth. A review of national trends and indicators in respect of Ireland and the UK's relationship from the CSO¹⁴ confirms a national fluctuation of exports to other countries within the last two years.

County Cavan's geographic position adjacent to the border within the EU may translate onto economic opportunities in the form of employment due to the relocation of businesses. In this regard, it will be critical that the County positions itself as a strategic gateway hub by the northern border. the County has a relatively even distribution of its workforce across industry sectors and may also benefit from this.

In summary, it is expected that a period of restructuring will be followed by an eventual stabilisation which may bring opportunities to the County in the form of employment due to relocation of businesses, or growth as an economic or transport hub. It is therefore critical that the developed strategy incorporates sufficient flexibility to positively respond to any unforeseen issues as they arise as the post-Brexit agreement starts to be implemented.

¹¹ CSO. Accessible via: <https://www.cso.ie/en/interactivezone/visualisationtools/brexitindicators/#>

COVID-19 Crisis

COVID-19 represents the largest economic challenge faced nationally and has had a considerable impact for Cavan's local economy. In the face of an unprecedented crisis, many businesses, including those in retail, have been asked to close their doors. According to the CSO's Business Impact of COVID-19 Survey¹⁵ 2.5% of businesses stated they had ceased trading temporarily, with 33% trading at partial capacity and a further 1.2% have ceased permanently. In line with this, the seasonally adjusted national unemployment rate had reached 7.5% in November 2020.

As January 2021, the government has created a COVID-19 Vaccine Taskforce and the priority groups, which include people aged 65 years and older and frontline healthcare workers, have commenced to get the COVID-19 vaccine. With the roll out of the vaccine across the State and the EU from early January 2021, there may be a return to a somewhat pre-COVID-19 influenced economic environment which is expected to reduce unemployment and to contribute to the recovery in retail sales in the near future.

3.3 Demographic & Socio-Economic Profile

Retail facilities and services are used by people and an appreciation of the current demographic profile and character of the study area is required to understand local usage and appropriately plan for future retail provision.

The Cavan County Development Plan Core Strategy provides statistical information on the composition and characteristics of different settlements in the area. It is not the purpose of this report to replicate this, rather, an effort has been made to review and update relevant retail-related datasets for the study area that may frame and shape strategy considerations. This has also extended to an examination of spatial relationships between defined retail centres and surrounding areas.

3.3.1 Regional Context

Following on from the enactment of the Local Government Reform Act 2014 a number of changes have been made to the regional structures in Ireland, where the eight regional authorities were dissolved. Three new Regional Assemblies (RA) came into effect on 1st January 2015, namely the Southern RA, the Eastern & Midland RA and the Northern & Western RA. County Cavan is a member of the NWRA among with 7 other counties (See. Table 3.1)

Table 3.1. Comparison Population Growth & Change (%) 2006-2016

AREA	Population			Population Change %		
	2006	2011	2016	2006-11	2011-16	2006-16
Cavan	64,003	73,183	76,176	14.3	4.1	19.0
Monaghan	55,997	60,483	61,386	8.0	1.5	9.6
Leitrim	28,950	31,798	32,044	9.8	0.8	10.7
Mayo	123,839	130,638	130,507	5.5	-0.1	5.4
Galway	231,670	250,653	258,058	8.2	3.0	11.4
Sligo	60,894	65,393	65,535	7.4	0.2	7.6
Donegal	147,264	161,137	159,192	9.4	-1.2	8.1
Roscommon	58,768	64,065	64,544	9.0	0.7	9.8
Northern & Western Region	771,385	837,350	847,442	8.6	1.2	9.9
State	4,239,848	4,588,252	4,761,865	8.2	3.8	12.3

¹⁵ CSO website: <https://www.cso.ie/en/releasesandpublications/er/bic19/businessimpactofcovid-19survey27jul23aug2020/>

The population within the NWRA amounts to approximately 18% of Ireland's total. From 1996 to 2016. The Region has seen steady growth in population. This growth was nearly 10% over the inter-census period between 2006 to 2016. Over the same period, County Cavan also grew but at a higher level. From table 3.1 below, it becomes clear that County Cavan has exhibited positive population growth over the last two intercensal periods relative to its neighbours, as well as that experienced in the Region and the State as a whole. The population increased by 19% over the period between 2006-2016, comparable to an average 9.9% growth across the NWRA and 12.3% increase nationally. The County had an additional 23,232 persons recorded as living within it, compared to 1996, and extra 12,173 compared to 2016.

The RSES seeks to foster, structure and focus development potential to build a competitive and attractive region. The RSES recognises the proximity to Northern Ireland and the interconnectivity of services, industry and communities between two national economies. It is evident that in the specific case of Cavan, the presence of strategic road linkages such as the N3, N55, N54, N87, A3 and A509 have been a key proponent in population growth. This is evidenced in figure 3.4 which illustrates more pronounced patterns in the 10%, 20% and +20% deciles in Cavan proximate to key nodes comparable to adjacent counties Monaghan and Leitrim.

The strength of Cavan Town itself as a Key Town in the Region is underlined by its own exponential growth between 2006 and 2016, whereby the population increased by 38.4% during this time (See Table 3.2). This has included consistent growth rates of 29.5% between 2006 and 2011 and 6.9% growth between 2011 and 2016. These trends compare very favourably with that exhibited at both regional and state levels during this time.

Table 3.2. Actual Population and Change (%) 2006-2016

AREA	Population			Population Change %		
	2006	2011	2016	2006-11	2011-16	2006-16
County Cavan	64,003	73,183	76,176	14.3	4.1	19.0
Cavan Town	7,883	10,205	10,914	29.5	6.9	38.4
Northern & Western Region	771,385	837,350	847,442	8.6	1.2	9.9
State	4,239,848	4,588,252	4,761,865	8.2	3.8	12.3

3.3.2 County Profile

Geographic location and scale of population plays a considerable part in the retail role and function of different settlements in County Cavan. The retail hierarchy for the County, as outlined in Chapter 2 of this report, confirms Cavan Town's role as the primary centre, a position which has been reinforced by recorded population growth over the last two inter-censal periods. Census figures indicate Cavan Town had a population of 7,883 in 2006 compared to 10,914, a 38.4% increase (see Table 3.2).

The Census of population 2016 Electoral District (ED) findings also present some interesting trends with respect to the distribution of population across Cavan. Nominal levels of population growth were recorded in Tier Two (large) towns; for example, Ballyjamesduf (3.6%), Bailieborough (6.0%) or Kingscourt (7.4%), with a more marked uplift of 16% experienced in Virginia.

Noticeably, a higher population growth rate was registered in the designated Tier Three (medium) settlement of Mullagh (18.6%), Ballyconnell with a rate of 4.1%, and the Electoral Division (ED) encompassing Belturbet experiencing 9.14%. Furthermore, growth in relation to the latter two settlements was also supplemented by increases in the adjacent EDs of Ardue (17.98%), Kilconny (13.99%) and Grilly (20.35%). Clearly, proximity to the border, Cavan Town and the A509 and A34 routes which serve Enniskillen are key influencing factors with respect to increased levels of performance here.

Figure 3.3. % Population Change 2011-2016 (Eds). (AIRO – Census 2016 Results)

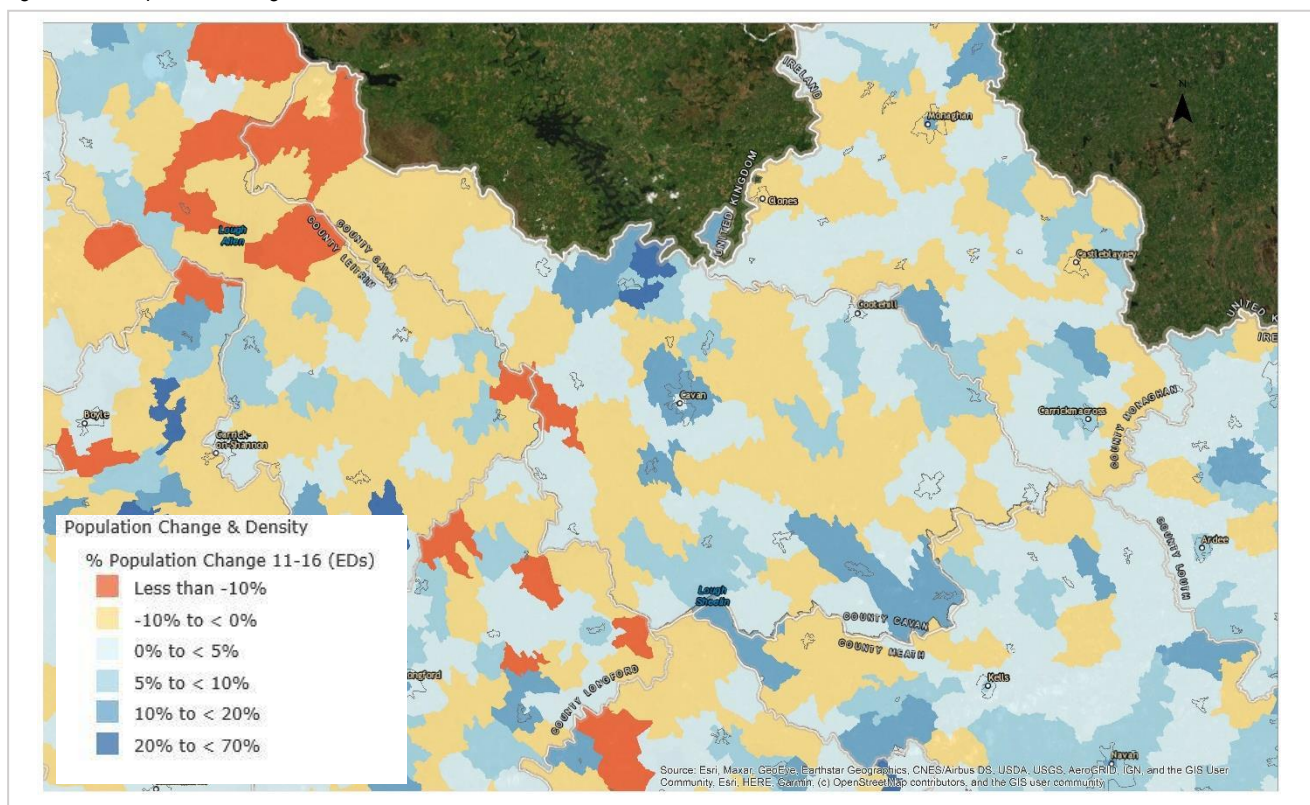
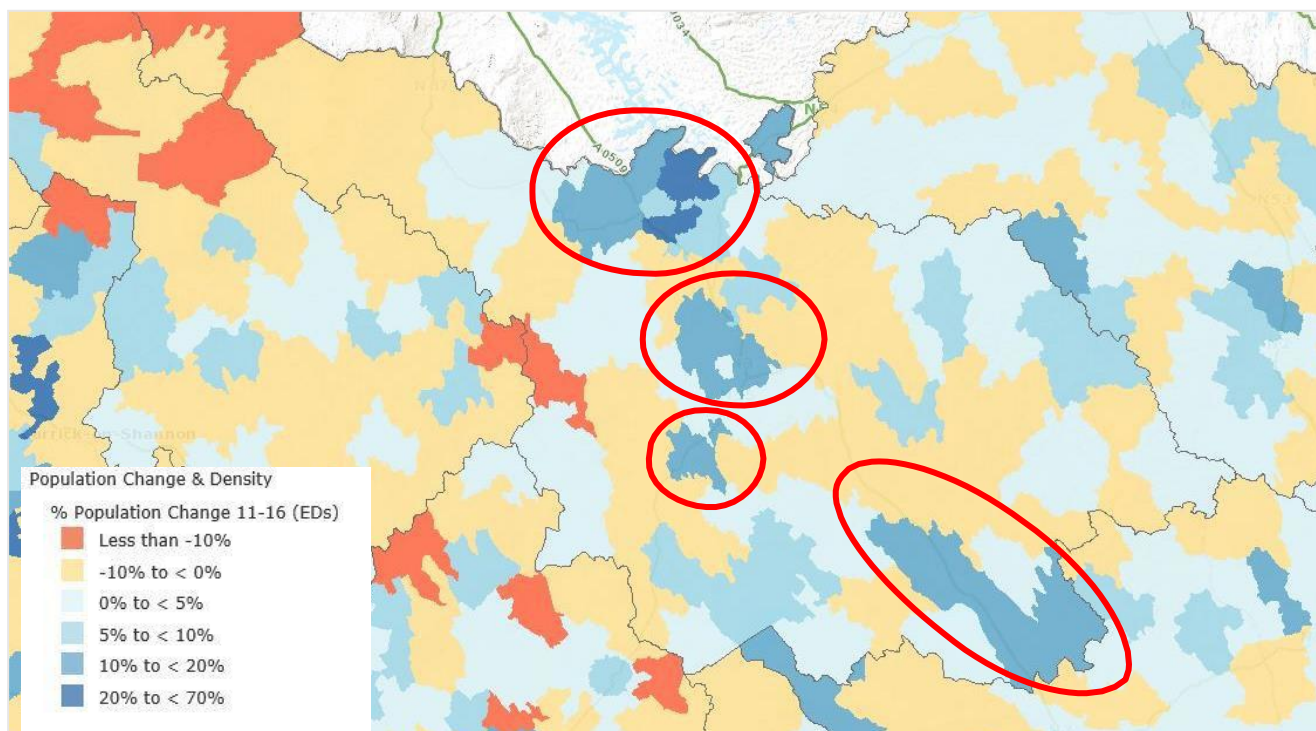


Figure 3.4. Key areas. Key population growth areas Co. Cavan 2011-16 (AIRO – Census 2016 Results).

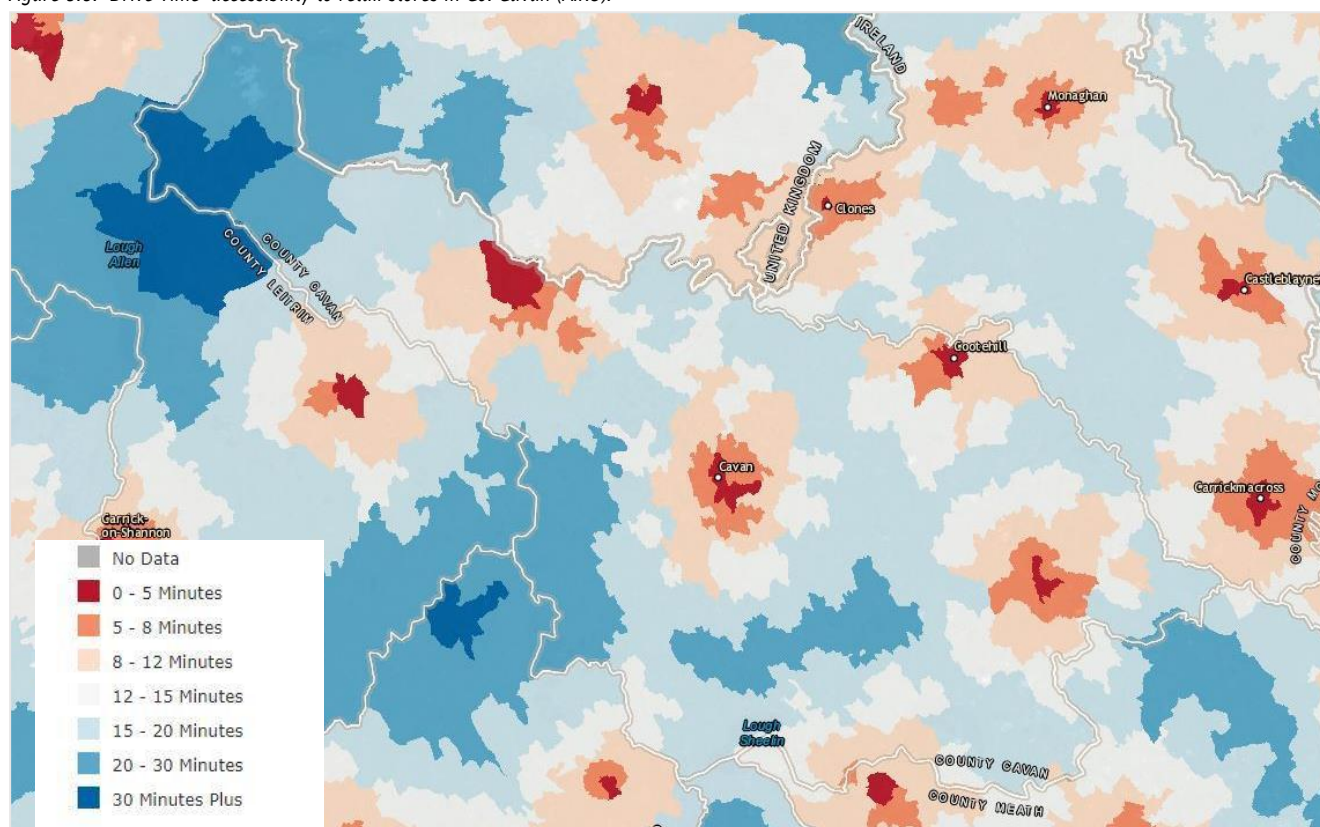


Cavan is predominantly a rural county, and this is particularly reflected in the number of settlements of under 300 persons, which include small villages such as (Tier Five) Lough Gowna (-7.5%), Swanlinbar (-1.9%), Blacklion (-15.3%) and Butlersbridge (-2.1%). These areas experienced the highest concentrations of population decline in the county since 2011, which can be attributed in part to the more remote location and/or uplands character of these settlements.

Alongside the distribution of population in the County, the accessibility of retail services from different settlements is of particular interest to this Strategy. A review of 2012 'drive-time' accessibility data¹⁶ for vertically affiliated¹⁷ and discounted retail stores (collectively grocery stores) confirms, as expected, that the highest concentration of such stores in the county are in Cavan Town (see Figure 3.5). With the exception of other settlements such as Ballyconnell, Cootehill and Baileborough, which on average have stores within a 0–8-minute travel time of their populations, 12 to +20 minute distances are more commonplace in the County.

Overall, the demographic distribution of population provides an indication of where Cavan is experiencing development pressures. Retail policy will need to be aligned to best serve expanding areas, whilst attempts should be made to curtail a loss of services in areas of population decline.

Figure 3.5. 'Drive Time' accessibility to retail stores in Co. Cavan (AIRO).



¹⁶ Produced by AIRO – All-Island Research Observatory

¹⁷ Vertically-integrated retailers own and operate multiple retail outlets, while affiliated retailers typically own and operate one retail outlet under a retail brand or fascia. Accessible via: <https://airo.maynoothuniversity.ie/mapping-resources/airo-census-mapping/national-viewers/drive-time-accessibility-mapping>

3.3.3 Socio-Economic Status

Socio-economic trends are key indicators of retail performance in an area providing insights on consumer population catchment, related lifestyle practices, income and available spending data, as well as potential retail market opportunities.

In 2016, County Cavan had a slightly below average percentage of persons 'at work' based on state figures, with approximately 1.3% more of its population unemployed. This was offset in part by marginally higher percentages in the 'looking after the family home'. The 9.2% unemployment figure was largely reflective of the economic climate at the time of the census. As discussed in Section 3.2, unemployment rate has increased since the start of the COVID-19 crisis, however, this is expected to decrease according to most recent forecasts.

According to the CSO data from 2016, the two largest employment sectors in County Cavan are 'Professional services' and 'Commerce and trade', providing employment for 6,419 and 5,993 workers respectively. Respectively, these sectors equate to 20% and 21% of those at work in 2016. However, the relative size of these two industries is smaller in County Cavan when compared to the national rate and the rate in neighbouring and 'border' counties, at 24% and 23% respectively. Reflective of the county's rural nature and historic economic trends, 'agriculture, forestry and fishing' industry is particularly strong, employing over 11% of the working population in County Cavan, compared to a national average of 4%.

Table 3.3. Population Employment (over 15 years) Status in County Cavan 2016

AREA	County Cavan		State	
	No.	%	No	%
At Work	30,398	51.9	2,001,953	53.3
Unemployed	5,413	9.2	297,396	7.9
Student	6,014	10.3	427,128	11.4
Looking After Family Home	5,545	9.5	305,556	8.1
Retired	8,464	14.5	545,407	14.5
Other	2,720	4.6	177,873	4.7

Age profile is an important factor because personal expenditures change as individuals grow older and progress is made through family life cycles. CSO 2016 census figures regarding age groups provide (see table 3.4 and 3.5) a useful cross-section of Cavan's population profile, disaggregated at county and principal town level. The distribution of the county-wide population across the different age cohorts is broadly in line with national and regional trends, however, significant variations exist in Cavan Town with increased representation in the 0-4 years and 25-34 years cohorts. It is very evident that a higher proportion of the urban population is within the typical family formation years which can give rise to increased levels of convenience spending on food and other household necessities.

A younger population profile is also often used as a barometer in relation to demand for online shopping and home delivery services which are becoming more prevalent in urban areas. Conversely, market research suggests that consumer spending in pharmacies and on medical products are generally higher in areas with larger elderly populations. As outlined in the Cavan County Development Plan 2014-2020, Cavan has a higher percentage of its population within the age dependency groups than in the region and the state.

Table 3.4. Age Group Profile. Cavan Town (CSO Census 2016)			
All ages	Cavan Town	10914	%
0 - 4 years	Cavan Town	1045	9.6
5 - 12 years	Cavan Town	1428	13.1
13 - 18 years	Cavan Town	789	7.2
19 - 24 years	Cavan Town	621	5.7
25 - 34 years	Cavan Town	1864	17.1
35 - 44 years	Cavan Town	1890	17.3
45 - 54 years	Cavan Town	1115	10.2
55 - 64 years	Cavan Town	858	7.9
65 - 74 years	Cavan Town	665	6.1
75 years and over	Cavan Town	639	5.9

Table 3.5. Age Group Profile. County Cavan (CSO Census 2016)			
All ages	Cavan	76176	%
0 - 4 years	Cavan	5725	7.5
5 - 9 years	Cavan	6301	8.3
10 - 14 years	Cavan	5596	7.3
15 - 19 years	Cavan	5215	6.8
20 - 24 years	Cavan	3525	4.6
25 - 29 years	Cavan	3989	5.2
30 - 34 years	Cavan	5420	7.1
35 - 39 years	Cavan	5813	7.6
40 - 44 years	Cavan	5493	7.2
45 - 49 years	Cavan	5291	6.9
50 - 54 years	Cavan	4963	6.5
55 - 59 years	Cavan	4468	5.9
60 - 64 years	Cavan	3913	5.1
65 - 69 years	Cavan	3445	4.5
70 - 74 years	Cavan	2571	3.4
75 - 79 years	Cavan	1818	2.4
80 - 84 years	Cavan	1399	1.8
85 years and over	Cavan	1231	1.6

Advanced educational attainment is often associated with perceptions of increased income levels among retailers, but this should be qualified in relation to retail type i.e. boutique fashion retailer or discount retail outlet. In 2016¹⁸, 24.4% of Cavan's adult population had a third level degree qualification or higher comparable to a 33.4% state average. This attainment rate aligns closely with some of the county's neighbours: Donegal (26%) and Monaghan (24.9%). However, it is outperformed by other counties, such as Leitrim (28.8%) and Westmeath (29.9%).

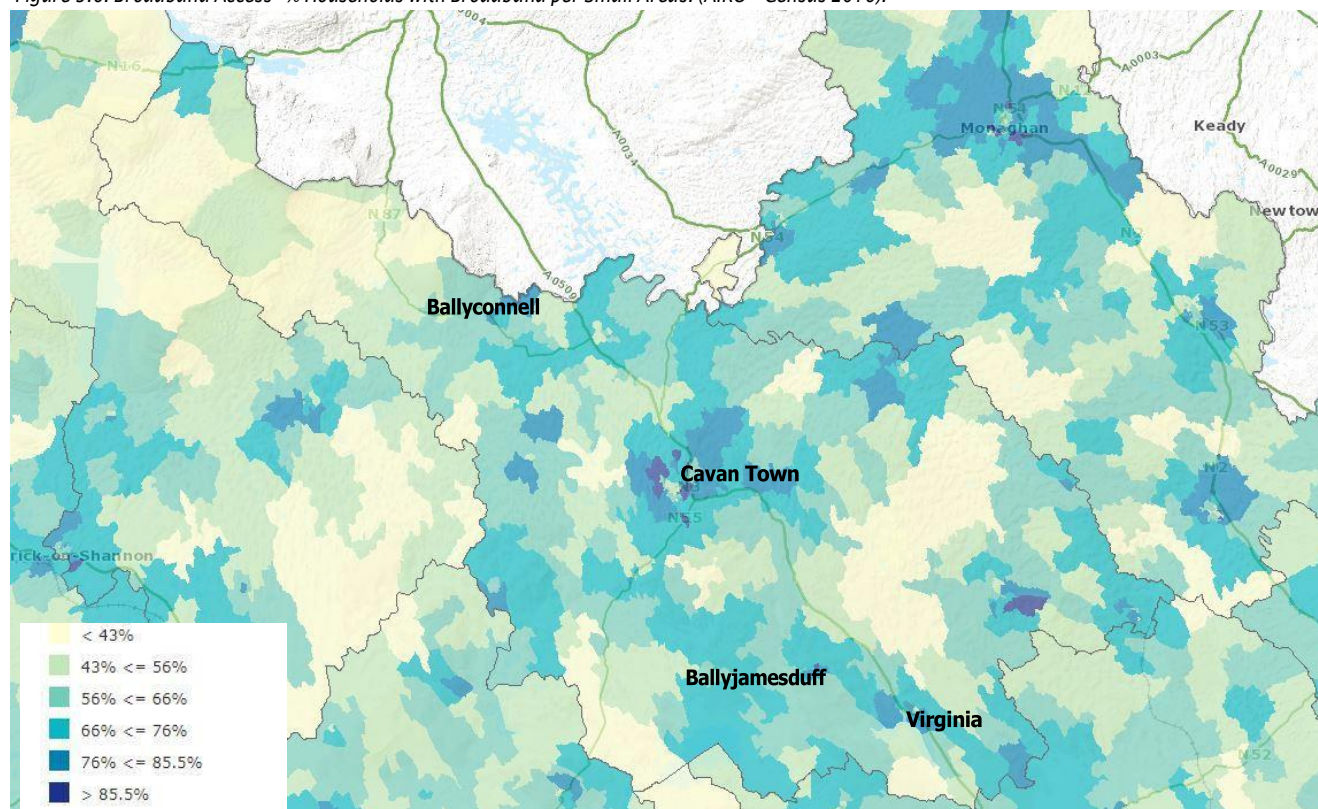
As discussed earlier, online shopping has become increasingly widespread across convenience, comparison and bulky goods retail categories, with trader investment in online operations increasing exponentially each year. A key determinant in the success or otherwise of online sales in an area is the level of broadband penetration and the logistical servicing of such areas. County Cavan benefits from a strong location relative to strategic road networks which assists greatly in terms of distribution for the latter. Figure 3.6 below illustrates trends in broadband access across the county

¹⁸ Education Attainment (CSO Census 2016). Accessible via: <http://airomaps.nuim.ie/id/Census2016/>

based on 2016 census data. It depicts concentrated levels of usage centred upon the main urban, as well as suburban settlements surrounding Cavan, Ballyjamesduff, Virginia, and Kingscourt, as well as along the N3 strategic road corridor. The availability of broadband technology is not evenly distributed in the county, with reduced levels of uptake in the west and northwest of the county.

In theory, a real higher disposable income rate gives consumers greater retail purchasing power. Figures from the CSO statistical data on County Incomes and Regional GDP¹⁹ confirms that the average disposable income in the NWRA region was €17,898 in 2016, up from from a figure of €17,304 in 2016. Total household income for Cavan was at 18.102€ per person in 2016 which is higher than the regional average. Regionally, counties like Donegal, Monaghan and Roscommon have lower estimated disposable income rates than Cavan.

Figure 3.6. Broadband Access - % Households with Broadband per Small Areas. (AIRO - Census 2016).



3.4 Consideration of Retail Context & Trends

Analysis of recent changes and forecasts for the retail sector, such as those discussed in Section 3.2 points towards a gradual improvement in the markets over the lifetime of the Strategy and coupled with population and income growth this suggests a more positive outlook for the retail sector in the County. However, this growth must be considered in the context of a changing 'shopping environment' and other challenges to the sector (i.e. COVID-19 vaccine rollout). Retail policy will need to be aligned to best serve expanding areas, whilst attempts should be made to curtail a loss of services in areas of population decline.

¹⁹ <https://www.cso.ie/en/releasesandpublications/er/cirgdp/countyincomesandregionalgdp2016/>

CHAPTER 4

SHOPPING PATTERNS

Cavan County Retail Strategy

4.0 Introduction

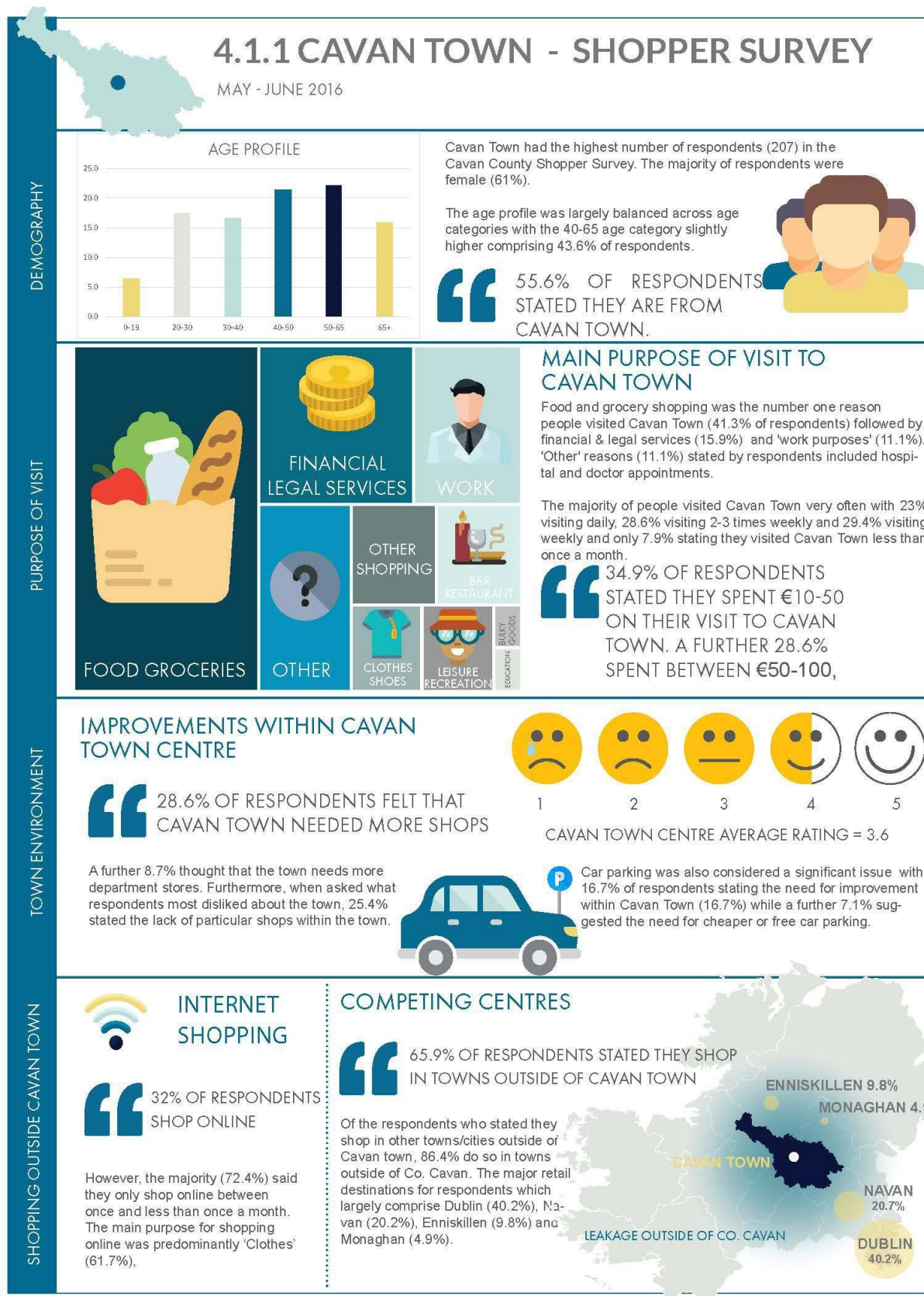
Two surveys were undertaken in 2016 to inform this Retail Strategy. A survey of 382 shoppers in the town centres of Cavan town, Bailieborough, Virginia, Ballyjamesduff, Kingscourt and Cootehill. An online survey of almost 300 households in the County. For succinctness, the more salient responses emerging from the surveys are detailed in the sections below.

In many Retail Strategy Studies the Survey or Study Area often does not follow the boundaries of the County in question. For Cavan, it was estimated that the area of influence of Cavan Town and the Tier 2 towns for convenience and comparison shopping would not extend well beyond the boundaries. The results of the Shoppers Survey confirmed the appropriateness of this area.

4.1 Shopper Survey

The Shopper Survey was carried out in June 2016 within the Tier 1 and Tier 2 towns, Shoppers were queried in relation to a host of topics, but primarily on aspects of the details of their shopping trip that day. The following provides an individual fact sheet which establishes the shopping patterns within the survey towns, as listed below, and the key issues raised by respondents.

- *Cavan Town.*
- *Ballyjamesduff.*
- *Virginia.*
- *Bailieborough.*
- *Kingscourt.*
- *Cootehill.*

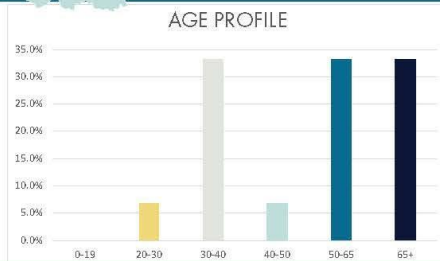


4.0 SHOPPING PATTERNS

4.1.2 BALLYJAMESDUFF - SHOPPER SURVEY

MAY - JUNE 2016

DEMOGRAPHY



The age profile of respondents within the Ballyjamesduff Shopper Survey demonstrated a high percentage (66%) of respondents in the 50+ age categories while only 6.7% were within the 0-30 years age category. 60% of those who participated in the survey were male.



53.3% OF RESPONDENTS STATED THEY WERE FROM BALLYJAMESDUFF.



PURPOSE OF VISIT



MAIN PURPOSE OF VISIT TO BALLYJAMESDUFF

Food and grocery was the number one reason people visited Ballyjamesduff (33.3%) followed by work purposes (20%). Also significant, was 'leisure and recreation' (13.3%) and 'Other Shopping' (13.3%).

The majority of people visited Ballyjamesduff very often with 40% visiting daily, 33.3% visiting 2-3 times weekly and 13.3% visiting weekly. 13.3% stated they visited Ballyjamesduff less than once a month.



40% OF RESPONDENTS SPENT €1-10 ON THEIR VISIT TO BALLYJAMESDUFF. A FURTHER 28.6% SPENT BETWEEN €50-100

TOWN ENVIRONMENT

IMPROVEMENTS WITHIN BALLYJAMESDUFF TOWN CENTRE

33% OF RESPONDENTS FELT THAT BALLYJAMESDUFF TOWN NEEDED MORE SHOPS

When asked what they disliked most about Ballyjamesduff, respondents also highlighted the lack of particular shops and a lack of shop diversity (33.3%).



BALLYJAMESDUFF TOWN CENTRE AVERAGE RATING = 3.5



Other potential improvements referred to, include the need to improve the transport and pedestrian facilities within the town. A further 33.3% made particular reference for the need for better public transport, greater traffic safety measures.

SHOPPING OUTSIDE CAVAN TOWN



INTERNET SHOPPING



27.7% OF RESPONDENTS SHOP ONLINE

However, all respondents (100%) stated they shop online less than once a month. The main items purchased online by respondents was 'Clothes' (75%).

COMPETING CENTRES



93.3% OF RESPONDENTS STATED THEY SHOP IN TOWNS OUTSIDE OF BALLYJAMESDUFF

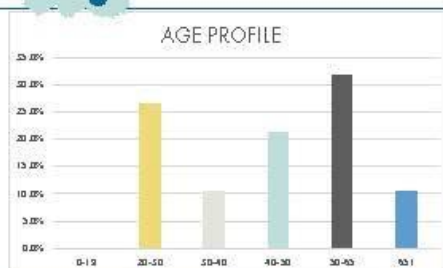
Of the respondents who stated they shop in other towns/cities outside of Ballyjamesduff, only 8.7% do so in towns outside of Co. Cavan. The only retail destination outside the county stated by respondents was Oldcastle (8.7%).



4.1.3 VIRGINIA - SHOPPER SURVEY

MAY - JUNE 2016

DEMOGRAPHY



The age profile of respondents within the Virginia Shopper Survey demonstrated a high percentage (52.7%) of respondents within the 40-59 age category. A further 26.3% of respondents were within the 20-30 age category. 52.6% of respondents were female.



52.6% OF RESPONDENTS STATED THEY WERE FROM VIRGINIA.



PURPOSE OF VISIT



MAIN PURPOSE OF VISIT TO VIRGINIA

'Food and grocery' was the number one reason people visited Virginia (41.1%) followed by 'leisure and recreation' and 'work', both 15.8%. Respondents also visited for 'other' purposes (15.8%), 'other shopping' (5.3%) and 'bar & restaurants' (5.3%).

A large proportion (42.1%) of people visit Virginia daily, 31.6% visited 2-3 times weekly while 21.1% visited weekly. Only 5.3% stated they visited the town less than once a month.



47.4% OF RESPONDENTS SPENT €10-50 ON THEIR VISITS TO VIRGINIA. A FURTHER 36.8% SPENT BETWEEN €1-10 DURING THEIR VISIT.

TOWN ENVIRONMENT

IMPROVEMENTS WITHIN VIRGINIA TOWN CENTRE

26.3% OF RESPONDENTS FELT THAT VIRGINIA TOWN CENTRE NEEDED MORE SHOPS

When asked 'what respondents most disliked about the town centre, 31.6% stated the lack of particular shops and a further 15.8% stated the lack of shop diversity.

Traffic, transport and parkings were significant issues highlighted by respondents within the Virginia shopper survey.



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VIRGINIA TOWN CENTRE AVERAGE RATING = 3.6

42.2% of respondents stated parking and access by car needed improvement within the town centre. Respondents specifically referred to the need to improve pedestrian crossings at traffic lights.



SHOPPING OUTSIDE CAVAN TOWN



INTERNET SHOPPING



31.6% OF RESPONDENTS SHOP ONLINE

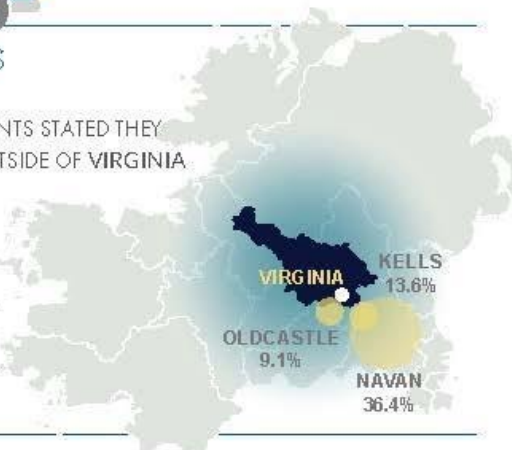
66.7% of respondents stated they shop online on a monthly basis, while 33.3% stated they shop online weekly. The main reason for shopping online was due to 'no travel' involved. 83.3% stated they purchased clothes online.

COMPETING CENTRES



65.9% OF RESPONDENTS STATED THEY SHOP IN TOWNS OUTSIDE OF VIRGINIA

Of the respondents who stated they shop in other towns/cities outside of Virginia, 59.1% do so in towns outside of Co. Cavan. The retail destinations of choice for the respondents in Virginia include Navan (36.4%), Kells (13.6%) and Oldcastle (9.1%).

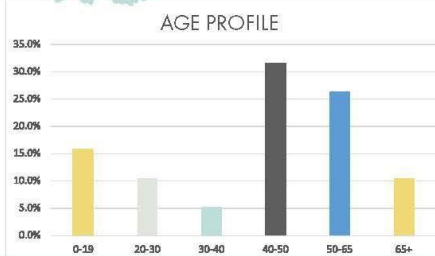


4.0 SHOPPING PATTERNS

4.1.4 BAILIEBOROUGH - SHOPPER SURVEY

MAY - JUNE 2016

DEMOGRAPHY



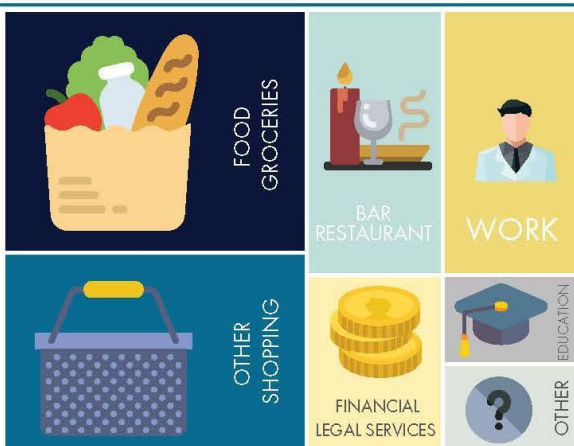
The age profile of respondents within the Bailieborough Shopper Survey demonstrated that the highest percentage of respondents (57.9%) were within the 40-65 age category. Unlike the other survey towns, the 0-19 age category was well represented at 15.8%. 75% of respondents were female.



42.9% OF RESPONDENTS STATED THEY WERE FROM BAILIEBOROUGH



PURPOSE OF VISIT



MAIN PURPOSE OF VISIT TO BAILIEBOROUGH

'Food and grocery' was the number one reason people visited Bailieborough (28.6%) followed by 'other shopping' (23.8%). Also significant was visits for 'bar & restaurants' and 'work', both comprising 14.3% of respondents.

The majority of people visited Bailieborough very often with 66.6% visiting daily or 2-3 times a week and 19% visiting weekly. 14.3% stated they visited less than once a month.



47.6% SPENT BETWEEN €10-50 ON THEIR VISIT TO BAILIEBOROUGH. A FURTHER 19% SPENT BETWEEN €1-10. 14.3% STATED THEY SPENT MORE THAN €100 ON THEIR VISIT

TOWN ENVIRONMENT

IMPROVEMENTS WITHIN BAILIEBOROUGH TOWN CENTRE

“MORE SHOPS (19%) AND LESS VACANCY (19%) WAS STATED AS THE MAIN IMPROVEMENTS NEEDED IN THE TOWN CENTRE.

14.3% stated 'other' reasons which included the need for initiatives to help local shops and stated the need for a cleaner town centre. When asked what they most disliked about the town centre 38.1% stated the lack of particular shops and shop diversity.



BAILIEBOROUGH TOWN CENTRE AVERAGE RATING = 3.6

Car parking provision was stated as a dislike by 19% of respondents with a further 33%, stating a lack of parking was significant issue they disliked about the town.

However, it is notable that a significant amount of respondents (19%) stated the town did not require any further improvements.

SHOPPING OUTSIDE CAVAN TOWN

INTERNET SHOPPING

“42.9% OF RESPONDENTS SHOP ONLINE

66.6% of respondents stated they shop online monthly or less often, while 33.3% stated they shop online weekly. Clothes (55.6%) was the main item purchased online. The main reason for shopping online stated was due to 'better value' of products (33%).

COMPETING CENTRES

“81% OF RESPONDENTS STATED THEY SHOP IN TOWNS OUTSIDE OF BAILIEBOROUGH

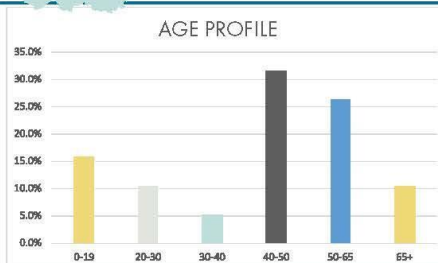
Of the respondents who stated they shop in other towns/cities outside of Bailieborough, 30.2% do so in towns outside of Co. Cavan. The retail destinations outside Co. Cavan which were identified by respondents include Navan (18.6%), Kells (11.6%) and Carrickmacross (7%).



4.1.5 KINGSCOURT - SHOPPER SURVEY

MAY - JUNE 2016

DEMOGRAPHY



Similar to Bailieborough there was a high number of respondents within the younger age categories. 32.3% of respondents were within the 0-19 years age category and further 22.6% within the 20-30 age category.



64.5% OF RESPONDENTS STATED THEY WERE FROM KINGSCOURT



PURPOSE OF VISIT



MAIN PURPOSE OF VISIT TO KINGSCOURT

'Leisure & recreation' was the number one reason people visited Kingscourt (25.8%) followed by 'work' (22.6%) and 'bar & restaurants' (19.4%). Interestingly, 16.1% of respondents were visiting Kingscourt for 'food & grocery purposes'.

The majority of people visited Bailieborough very often with 90.3% visiting weekly (32.3% visiting daily). Only 9.7% stated they visited less than once a month.



41.9% OF RESPONDENTS STATED THEY SPENT BETWEEN €10-50 ON THEIR VISIT TO KINGSCOURT. A FURTHER 38.7% SPENT BETWEEN €1-10.

TOWN ENVIRONMENT

IMPROVEMENTS WITHIN KINGSCOURT TOWN CENTRE

MORE SHOPS (48.4%) WAS STATED AS THE MAIN IMPROVEMENT NEEDED IN THE TOWN CENTRE.

When asked what respondents most disliked about Kingscourt, 32.3% stated the 'lack of particular shops' and 25.8% stated a 'lack of shop diversity'. A further 6.5% stated the 'poor environment'. However, 19% also stated there was 'nothing' they disliked about Kingscourt.



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KINGSCOURT TOWN CENTRE AVERAGE RATING = 2.8



Transport and parking were also issues cited by respondents. 16.1% of respondents highlighted the need to improve 'car parking' and 'access by car'.

SHOPPING OUTSIDE CAVAN TOWN

INTERNET SHOPPING

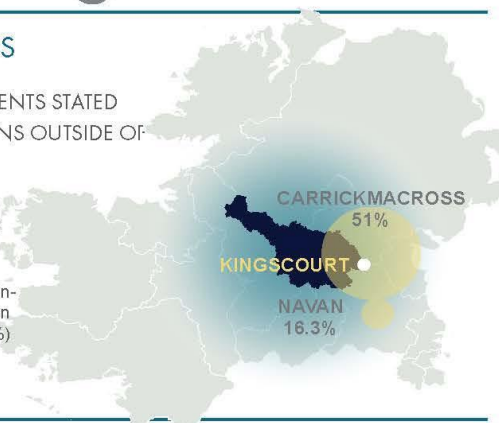
45.2% OF RESPONDENTS SHOP ONLINE

64.3% of respondents stated they shop online monthly or less often. 21.4% stated they shop online fortnightly and 14.3% shop online on a weekly basis. Clothes (92.9%) was the main items purchased online. 'Better value products' (42.9%) was cited as the main reason for shopping online. 21.4% stated they shop online due to the fact that 'no travel is involved'.

COMPETING CENTRES

96.8% OF RESPONDENTS STATED THEY SHOP IN TOWNS OUTSIDE OF KINGSCOURT

Of the respondents who stated they shop in other towns/cities outside of Kingscourt, 83.7% do so in towns outside of Co. Cavan. Notable retail destinations stated by respondents include Carrickmacross (51%), Navan (16.3%), Dublin (6.1%), Ardee (6.1%) and Dundalk (4.1%).

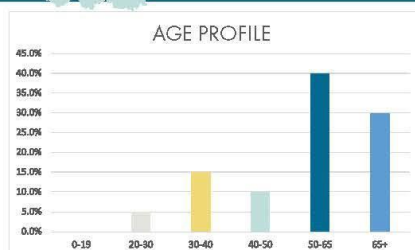


4.0 SHOPPING PATTERNS

4.1.6 COOTEHILL - SHOPPER SURVEY

MAY - JUNE 2016

DEMOGRAPHY



The age profile of respondents within the Cootehill Shopper Survey demonstrated a high percentage (70%) of respondents were within the 50+ years age category. A further 15% surveyed were within the 40-50 age category while only 5% were within the 20-30 age category. No respondents were within the 0-19 age category.

55% OF RESPONDENTS STATED THEY WERE FROM COOTEHILL



PURPOSE OF VISIT



MAIN PURPOSE OF VISIT TO COOTEHILL

'Food and grocery' was the number one reason people visited Cootehill (45%), followed by 'bars & restaurants' (20%). Also significant were visits for 'leisure & recreation' (15%) and 'other' purposes (15%).

A high percentage of people visited Cootehill very often, with 50% visiting daily or 2-3 times a week and 20% visiting weekly. 15% stated they visited less than once a month.

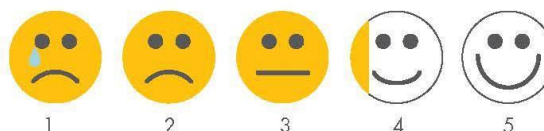
35% OF RESPONDENTS STATED THEY SPENT BETWEEN €50-100 ON THEIR VISIT TO COOTEHILL. A FURTHER 50% SPENT BETWEEN €1-50. 5% STATED THEY SPENT MORE THAN €100.

TOWN ENVIRONMENT

IMPROVEMENTS WITHIN COOTEHILL TOWN CENTRE

60% OF RESPONDENTS STATED THE NEED FOR MORE SHOPS WITHIN COOTEHILL

Further to this, respondents largely placed emphasis on the choice and quality of retail within the town. When asked what respondents most disliked about Cootehill, 40% stated the 'lack of shop diversity'. A further 20% of respondents stated 'other' reasons as a reason why they disliked Cootehill and made particular reference that shopping in Cootehill is too expensive.



COOTEHILL TOWN CENTRE AVERAGE RATING = 3.2

In terms of further improvements, 10% stated the town needs 'less vacancy' and stated they disliked that the town had a lack of diversity of shops (10%).

When asked what they most disliked 20% of respondents stated 'other' and made particular reference to need to improve anti-social behaviour in the town.

SHOPPING OUTSIDE CAVAN TOWN



INTERNET SHOPPING



20% OF RESPONDENTS SHOP ONLINE

Respondents who shop online do so on a monthly basis (50%) and fortnightly (50%). Clothes (75%) was the main item purchased online. The main reason for shopping online was stated as being down to 'cheaper' products (50%).

COMPETING CENTRES



90% OF RESPONDENTS STATED THEY SHOP IN TOWNS OUTSIDE OF COOTEHILL

Of the respondents who stated they shop in other towns/cities outside of Cootehill, only 12.5% do so in towns outside of Co. Cavan. The retail destinations outside Co. Cavan stated by respondents include Monaghan (9.4%) and Carrickmacross (51%).

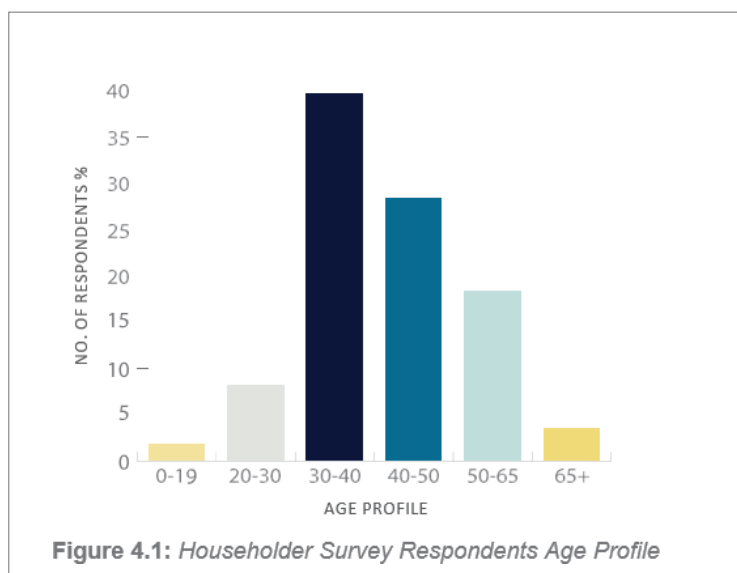


4.2 Householder Survey

The Household Survey was carried out in July and August 2016, with a sample drawn from the County Study Area with the aim to provide an overview of the County. The central aim was to establish resident's shopping patterns for different types of retailing. The survey was conducted online together with quota controls, yielding 291 useable responses. The results were disaggregated into the Belburet, Ballyjamesduff and Bailieborough Electoral Areas (EA's), and responses from non-residents were not accepted.

Age Profile

As part of the Householder Survey respondents were asked which age category they fit into. Figure 4.1 below demonstrates that respondents were largely comprised of people within the 30-65 age category (86.5%). . The 0-30 age category only comprised 10% of the respondents while 65+ comprised only 3.5%. The dominant age category for the survey is significant in that it encompasses the age category with the highest retail spend.



4.2.1 CAVAN TOWN EA - HOUSEHOLD SURVEY

TOTAL NO. OF RESPONDENTS: 118

RETAIL CENTRES IN CO. CAVAN AND BEYOND



RETAIL CENTRES IN COUNTY CAVAN AND BEYOND

The figure to the left demonstrates where people from Cavan Town EA shop and the distribution of that shopping by general retail type. These results show that people are not prepared to travel far for supermarket shopping and in the majority of cases people travel to the nearest town to carry out their main grocery shopping. 85.6% of respondents stated Cavan Town as their main grocery shopping destination, while Virginia, Ballyconnell and Enniskillen were also stated as convenience shopping locations. The survey of Cavan Town EA also demonstrates that there is a limited amount of leakage in terms of supermarket shopping outside the county with only 1% of respondents shopping in supermarkets outside the county. 80.5% of respondents use the car as their mode of transport for food and grocery shopping while only 7.6% walk. 11.9% did not respond on this.

Respondents in Cavan Town EA were asked where they would normally go for comparison shopping (e.g. clothes, shoes, books). Although Cavan Town had the highest percentage of respondents (39.8%), the Dublin region closely followed with 34.7% of respondents stating Dublin as their main comparison shopping location. This represents considerable leakage outside Cavan. A further 10.2% of respondents stated 'other towns in the Republic of Ireland' and 5.1% stated 'other town/city in Northern Ireland'.

Respondents were asked where they undertake their main bulky goods shopping. The majority of respondents stated Cavan Town (61.9%) as their main bulky goods shopping location. However, there is considerable leakage outside of the county with 13.6% stating Dublin, 10.2% stating other town/cities in Republic of Ireland and 3.4% stating other town/cities in Northern Ireland. This represents significant leakage with 27.1% of respondents undertaking their main 'bulky goods' shopping outside of Co. Cavan.



CONVENIENCE SHOPPING

As highlighted above, the majority of people in Cavan Town EA undertake their grocery shopping in Cavan Town, and other towns within close vicinity. The main reasons by respondents as to why they chose these destinations included 'close to home' (52.5%) and 'good value for money' (18.6%). 71.2% of respondents stated they undertake their regular food and grocery shopping four or more times per month. Only 2.5% of respondents carry out their grocery shopping once a month.



COMPARISON SHOPPING

Comparison shopping locations are more varied and include considerable leakage outside the county. The main reasons respondents choose their comparison shopping locations includes the 'wide choice of goods' (22%), 'range of shops available' (21.2%) and 'close to home' (22.9%). 34.7% of respondents stated they carried out their comparison shopping once a month and further 44.9% stated they undertake their comparison shopping less than once a month.



BULKY GOODS SHOPPING

In terms of bulky goods, the majority of respondents shop in Cavan Town. Respondents main reason for shopping at these bulky good locations include 'close to home' (39%) and 'support local business' (14.4%). Other respondents stated the 'wide choice of goods' (12.7%) and 'good value for money' (10.2%) as reasons for their chosen location.

TOP-UP SHOPPING

Respondents were also asked in relation to top-up shopping. When asked where respondents carry out their main 'top-up shopping', 45.8% stated within a 'multiple retailer within your locality (e.g. Lidl, Supervalu)' while 43.2% stated 'independent retailer within your locality (e.g. local shop owner)'. 70.3% of respondents carry out their 'top-up shopping' between one and three times a week while 8.5% undertake 'top-up shopping' on a daily basis. 75.4% of respondents conduct their 'top-up shopping' by car, while a further 14.4% walk.

HOW SATISFIED ARE YOU WITH THE SHOPPING FACILITIES WITHIN YOUR CHOSEN RETAIL DESTINATION?

■ Comparison Shopping ■ Convenience Shopping ■ Bulky Goods

Residents were asked how satisfied they were of their chosen retail destination, predominantly been that of Cavan Town, in terms of its convenience, comparison and bulky goods offerings. The table demonstrates that across all three retail types residents responded similarly.

76.3% of residents stated that that they were either 'very satisfied' or 'satisfied' of the 'main food and grocery shopping' facilities. Only 3.4% of respondents stated dissatisfied. 66.1% of residents stated that were either 'very satisfied' or 'satisfied' of the 'comparison shopping' within their chosen retail destination while 16.1%. Only 3.4% stated they were 'very dissatisfied'. 66.9% of residents stated that were either 'very satisfied' or 'satisfied' of the 'bulky goods' within their chosen retail destination. Only 0.8% stated they were very dissatisfied.



RETAIL ANALYSIS

RETAILS SATISFACTION

4.2.2 BELTURBET EA - HOUSEHOLD SURVEY

TOTAL NO. OF RESPONDENTS: 100

RETAIL CENTRES IN CO. CAVAN AND BEYOND



RETAIL CENTRES IN COUNTY CAVAN AND BEYOND

Similar to Cavan Town Electoral Area, the Belturbet Electoral Area demonstrates that the majority of people do not travel far for their main food and grocery shopping. 61.7% of respondents stated Cavan Town as their main grocery shopping destination, while 17% stated Ballyconnell and Ballinagh as their main convenience shopping locations. The survey of Belturbet EA also demonstrates that there is a limited amount of leakage in terms of supermarket shopping outside the county with 6.4% of respondents shopping outside the county specifically Derrylin, Co. Fermanagh and Ballinamore, Co. Leitrim. 78.7% of respondents use a car as their mode of transport for food and grocery shopping, while only 4.3% walk and a further 2.1% use bus services.

Respondents were asked where they would normally undertake their comparison shopping (e.g. clothes, shoes, books). Cavan Town was stated as the most frequented with the highest percentage of respondents at 41.3%. There is significant leakage outside of Cavan towns particularly towards the Dublin Region with 17.4% of respondents carrying out their comparison within the GDA, representing significant leakage outside of the county. A further 8.7% of respondents stated they undertook their comparison shopping in other towns/city's in the Republic of Ireland and a particularly high percentage of respondents stated 'other town/city in Northern Ireland' (19.6%).

Respondents were asked where they undertake their main bulky goods shopping. The majority of respondents stated Cavan Town (56.5%) and 6.5% stated 'other towns in Co. Cavan', as their main bulky goods shopping destination. However, there is considerable leakage outside of the county with 6.5% stating Dublin, 4.3% stating other town/city in Republic of Ireland and 13% stating other town/city in Northern Ireland.



CONVENIENCE SHOPPING

The majority of respondents from the Belturbet EA, undertake their grocery shopping in Cavan Town, and other towns within close vicinity of the area. The main reasons given for the choice of these destinations included 'good value for money' (31.9%), 'close to home' (21.3%) and the 'wide choice of goods' available. 61.7% of respondents stated they undertake their regular food and grocery shopping four or more times per month. Only 6.4% of respondents carry out their grocery shopping once a month.



COMPARISON SHOPPING

Cavan Town is the most popular location respondents undertake comparison shopping, although there is also considerable leakage outside the county. The main reasons respondents choose their comparison shopping locations included, 'close to home' (27.7%) (most likely relating to Cavan Town) and the 'wide choice of goods' (19.1%). 70.2% of respondents stated they undertake their comparison shopping once or less than once a month.



BULKY GOODS SHOPPING

In terms of bulky goods, the majority of respondents from Belturbet EA shop in Cavan Town. Respondents main reason for shopping at these bulky good locations include been 'close to home' (31.9%) and 'good value for money' (21.3%). Other respondents stated the need to 'support local business' (14.9%) and 'quality of goods available' (10.6%) as reasons for their chosen location.

TOP-UP SHOPPING Respondents were also asked in relation to top-up shopping. When asked where respondents carry out their main 'top-up shopping', the majority (53.2%) undertake their 'top-up shopping' at an 'independent retailer' within their locality, while a further 27.7% undertake their 'top-up shopping' within 'multiple retailer' within their locality. 44.7% of respondents carry out their 'top-up shopping' between one and two times a week while 4.3% shop up to six times a week. The most popular method of travel for 'top-up shopping' is by car (72.3%), followed by walking (12.8%).

HOW SATISFIED ARE YOU WITH THE SHOPPING FACILITIES WITHIN YOUR CHOSEN RETAIL DESTINATION?

■ Comparison Shopping ■ Convenience Shopping ■ Bulky Goods

Residents were asked how satisfied they were of their chosen retail destination, predominantly been that of Cavan Town, in terms of its convenience, comparison and bulky goods offerings. The table demonstrates that across all three retail types residents responded similarly.

70.2% of residents stated that that they were either 'very satisfied' or 'satisfied' of the 'main food and grocery shopping' facilities. Only 2% of respondents stated very dissatisfied. 68.1% of residents stated that were either 'very satisfied' or 'satisfied' of the 'comparison shopping' within their chosen retail destination while 10.6% stated they were 'dissatisfied'. 65.9% of residents stated that were either 'very satisfied' or 'satisfied' of the 'bulky goods' within their chosen retail destination. Only 2.1% stated they were 'dissatisfied'.

VERY SATISFIED	😊
SATISFIED	🙂
NEITHER SATISFIED NOR DISSATISFIED	😐
DISSATISFIED	☹️
VERY DISSATISFIED	😞
NO RESPONSE	👤

RETAIL SATISFACTION

4.2.3 BALLYJAMESDUFF EA - HOUSEHOLD SURVEY

TOTAL NO. OF RESPONDENTS: 74

RETAIL CENTRES IN CO. CAVAN AND BEYOND



RETAIL CENTRES IN COUNTY CAVAN AND BEYOND

The majority of respondents within the Ballyjamesduff EA undertake their main food and grocery shopping within Cavan Town (51.4%) although this is below the levels within Belturbet EA and Cavan Town EA. This is followed by Bailieborough (12.2%) and Virginia (9.5%). However, there is significant levels of residents undertaking convenience shopping outside of the county, with 13.5% of respondents stating they carried out their main food and grocery shopping in Oldcastle (4.1%) and Kells (8.1%). This may be a geographic factor with the relative ease of access to these locations from the Ballyjamesduff EA along the N3. 83.8% of respondents use a car as their main mode of transport for food and grocery shopping while only 2.7% walk.

Respondents were asked where they would normally undertake their comparison shopping (e.g. clothes, shoes, books). Although Cavan Town had a high percentage of respondents undertaking their main comparison shopping (27%), the Dublin Region dominates as the main location respondents carry out their comparison shopping (40.5%). A further 17.6% of respondents undertake their comparison shopping in 'other towns/city' in the Republic of Ireland or Northern Ireland. Hence there is significant leakage outside of the County with 57.1% of respondents undertaking their main comparison shopping outside Co. Cavan. This may be due to the areas geographic location in the south of the county and access to Blanchardstown Shopping Centre within an hours drive along the N3/M3 national road and motorway.

Respondents were asked where they undertake their main bulky goods shopping. 29.7% of respondents stated they undertake their main 'bulky goods shopping' in Cavan Town. However this is parallel with the percentage of respondents stating they undertake their main 'bulky goods shopping' in the Dublin Region with 29.7%. A further 18.9% stated 'other town/city in Republic of Ireland' (16.2%) and 'other town in Northern Ireland' (2.7%). Only 8.1% of respondents stated 'other town in County Cavan'. This also represents a very high leakage outside of Cavan County for 'bulky goods shopping' with 48.6% shopping outside of the County.



CONVENIENCE SHOPPING

The majority of respondents from the Ballyjamesduff EA, undertake their grocery shopping in Cavan Town, and other towns within close vicinity of the area. The main reasons respondents gave as to why they chose these retail destinations included 'good value for money' (37.8%), 'close to home' (20.3%) and the 'wide choice of goods' available (13.5%). 67.6% of respondents stated they undertake their regular food and grocery shopping four or more times per month. Only 2.7% of respondents carry out their grocery shopping once a month.



COMPARISON SHOPPING

Dublin is identified as the main location respondents undertake their comparison shopping, although Cavan Town is also significant. The main reasons respondents choose their comparison shopping locations include, the 'wide choice of goods' (33.8%), 'range of shops available' (21.6%) and 'close to home' (16.2%). 76.6% of Respondents stated they undertake their comparison shopping once or less than once a month, while only 5.4% respondents undertake this four or more times a month.



BULKY GOODS SHOPPING

In terms of bulky goods, respondents from Ballyjamesduff EA main shopping location is largely split between Cavan Town and the Dublin Region. Respondents main reason for shopping at these bulky goods locations included the 'wide choice of goods' (28.4%), 'good value for money' (21.6%) and 'close to home'.

TOP-UP SHOPPING When asked where respondents carry out their main 'top-up shopping', the percentage of people shopping in 'independent retailers' and 'multiple retailers' is split, each with 43.2% of respondents. 25.7% of respondents carry out their 'top-up shopping' once a week, a further 24.3% undertake this three times a week and 5.4% undertake this daily. The most popular method of travel for 'top-up shopping' is by car (73%) followed by walking (14.9%).

HOW SATISFIED ARE YOU WITH THE SHOPPING FACILITIES WITHIN YOUR CHOSEN RETAIL DESTINATION?

■ Comparison Shopping ■ Convenience Shopping ■ Bulky Goods

Residents were asked how satisfied they were with their chosen retail destination, which largely includes Cavan Town and the Dublin Region, in terms of its convenience, comparison and bulky goods offerings. The table demonstrates that across all three retail types residents responded similarly.

66.2% of residents stated that they were either 'very satisfied' or 'satisfied' of the 'main food and grocery shopping' facilities. Only 4.1% of respondents stated 'dissatisfied' or 'very dissatisfied'. 68.9% of respondents stated that they were either 'very satisfied' or 'satisfied' with the 'comparison shopping' within their chosen retail destination while only 4.1% stated they were 'dissatisfied'. 63.5% of residents stated that they were either 'very satisfied' or 'satisfied' with the 'bulky goods' within their chosen retail destination. Only 4.1% stated they were 'dissatisfied'.



RETAILSATISFACTION

4.2.4 BAILIEBOROUGH EA - HOUSEHOLD SURVEY

TOTAL NO. OF RESPONDENTS: 45

RETAIL CENTRES IN CO. CAVAN AND BEYOND



RETAIL CENTRES IN COUNTY CAVAN AND BEYOND

The majority of respondents within the Bailieborough EA undertake their main food and grocery shopping within Bailieborough (27.7%), Cavan Town (17.8%) and Cootehill (15.6%), with a further 6.6% in other towns in Co. Cavan, including Shercock and Kingscourt. However, there is significant levels of convenience shopping outside of the county, with 22.2% of respondents stating they undertake their main food and grocery shopping in towns which include Carrickmacross (15.6%), Dundalk (4.4%) and Kells (2.2%). Again, geographic factors may influence residents of Bailieborough EA shopping outside the county, with Carrickmacross highly accessible from the eastern side of the county. The main mode of transport within Bailieborough EA used by respondents for shopping is by car 82.2% followed by walking (6.7%). No respondents stated that they undertake their convenience shopping by public transport.

Respondents were asked where they would they normally undertake their comparison shopping (e.g. clothes, shoes, books). 17.8% of respondents undertake their comparison shopping in Cavan Town and a further 8.9% do so in other towns in Co. Cavan. However, the Dublin Region is the most attractive location for comparison shopping, with 22.2% shopping there. More significantly, 37.8% of respondents undertake their comparison shopping within 'other town/city in Republic of Ireland' and 2.2% within Northern Ireland, representing a high level of leakage outside of the county.

Respondents were asked where they undertake their main bulky goods shopping. Although a significant percentage of respondents undertake their 'bulky goods' shopping in Cavan Town (22.2%) and further 6.7% in other towns in Co. Cavan, the majority of respondents (59.9%) stated towns or cities outside of county Cavan. This includes 22.2% of respondents shopping within Dublin, 33.3% in 'other town/city in Republic of Ireland' and 4.4% in 'other town/city' in Northern Ireland. This represents a significant leakage for bulky goods shopping outside of the county.



CONVENIENCE SHOPPING

Respondents from Bailieborough EA, undertake their grocery shopping in the retail centres outlined above. The main reasons by respondents as to why they chose these destinations includes 'close to home' (33.3%) and the 'good value for money' (22.2%). 64.4% of respondents stated they undertake their regular food and grocery shopping four or more times per month. Only 2.2% of respondents carry out their grocery shopping once a month.



COMPARISON SHOPPING

Although Cavan Town is a sizeable comparison retail centre, Dublin and other towns outside of Co. Cavan have the largest draw for residents of Bailieborough EA. The main reasons respondents choose their comparison shopping locations include, the 'range of shops available' (31.1%), the 'wide choice of goods' available and due to being 'close to home'. 75.5% of respondents stated they undertake their comparison shopping once or less than once a month while only 44% respondents undertake this three times a month.



BULKY GOODS SHOPPING

In terms of bulky goods, respondents from Bailieborough EA undertake this shopping in Cavan Town, the Dublin Region and other towns outside of Co. Cavan. Respondents main reason for shopping at in these retail centres include the 'wide choice of goods' (24.4%) and 'good value for money' (20%) and 'close to home'.

TOP-UP SHOPPING When asked where respondents carry out their main 'top-up shopping', 44.4% of respondents undertake their top-up shopping in multiple retailers within their locality and further 40% within independent retailers within their locality. 37.8% of respondents carry out their 'top-up shopping' 3-4 times a week, while 8.9% do so everyday. 40% undertake top-up shopping everyday. The most popular method of travel for 'top-up shopping' is by car (68.9%) followed by walking (20%).

HOW SATISFIED ARE YOU WITH THE SHOPPING FACILITIES WITHIN YOUR CHOSEN RETAIL DESTINATION?

■ Comparison Shopping ■ Convenience Shopping ■ Bulky Goods

Residents were asked how satisfied they were with their chosen retail destination, which largely includes Bailieborough, Cavan Town and the Dublin Region, in terms of its convenience, comparison and bulky goods offerings. The table demonstrates that across all three retail types residents responded similarly.

71.1% of residents stated that they were either 'very satisfied' or 'satisfied' of the 'main food and grocery shopping' facilities. Only 2.2% of respondents stated 'dissatisfied'. 64.4% of residents stated that they were either 'very satisfied' or 'satisfied' of the 'comparison shopping' within their chosen retail destination while only 4.4% stated they were 'dissatisfied' or 'very dissatisfied'. 62.3% of residents stated that they were either 'very satisfied' or 'satisfied' of the 'bulky goods' within their chosen retail destination. No respondents stated they were 'dissatisfied' or 'very dissatisfied'.



4.3 County Cavan Summary

The Cavan County Shopper Survey and Householder Survey are a good indication of the level of retail leakage the county is experiencing. The Shopper Survey indicates significant leakage outside of County Cavan, primarily towards retail centres located along the periphery of the county which includes, Carrickmacross, Enniskillen, Navan, Monaghan Town and the Dublin Region. Respondents stated they undertake both grocery and clothes shopping within these retail centres.

The Householder Survey provides a more detailed analysis of retail leakage outside of Co. Cavan including the types of retail shopping respondents undertake in these locations. In terms of convenience shopping (food and grocery), people do not generally travel far for groceries. 16.8% of respondents from Co. Cavan undertake their main food and grocery shopping outside of Co. Cavan. The main convenience retail centres outside Co. Cavan and visited by respondents for convenience shopping include, Enniskillen, Ballyconnell, Derrylin and Ballinamore. These are primarily frequented by residents from Cavan Town EA and Belturbet EA. Convenience retail locations serving residents of Ballyjamesduff EA and Bailieborough EA include Oldcastle, Kells, Carrickmacross and Dundalk.

The level of retail leakage outside of Cavan County for comparison shopping is significant. 53.2% of residents surveyed undertake their main comparison shopping outside of the county. The levels of comparison shopping occurring outside of Co. Cavan varies across the county. The south of the county including Ballyjamesduff EA and Bailieborough EA have high rates of residents undertaking their comparison shopping in the Dublin Region and many of these respondents may work in this area. This is likely due to the areas geography or adjacent position to transport corridors along the N3 national road and M3 motorway. Residents from northern areas of the county are less inclined to travel to outside the county comparison retail centres as Cavan Town is their most popular destination. Nonetheless, there is still considerable leakage outside of the county from these areas.

Similar to the pattern of comparison shopping, there is significant leakage of bulky goods shopping outside of Co. Cavan. 37.3% of respondents within the survey undertake their bulky goods shopping outside of Co. Cavan. Most residents within the Cavan Town EA and Belturbet EA undertake their bulky goods shopping within Cavan Town. However, residents in southern areas of the county are more inclined to venture outside of the Co. Cavan to other towns or cities (e.g. Navan) and the Dublin Region.



4.3.1 Internet Shopping

The respondents were asked in both the shopper survey and the household survey if they had purchased goods over the internet. The shopper survey largely demonstrated reasonably low levels of online shopping with 36.5% of respondents stating 'yes'. The majority of respondents within the shopper survey stated that they undertake online shopping 'once' or 'less than once a month'. The most common items purchased online by respondents is clothes, due to the better value of products available.

Unlike the shopper survey, the householder survey demonstrated a high percentage of respondents who are undertaking online shopping (74.4%). The graph adjacent highlights that respondents largely carry out comparison shopping when shopping online. This is followed by bulky goods with 14.4% of respondents, and convenience goods with 13.9% of respondents. 15.6% of respondents stated that they did not shop online. Despite the high percentage of respondents who shop online, the graph adjacent demonstrates the number of respondents who shop online, do so, only once or twice a year (49%). 21.6% stated they shop online 'once a week' or 'once every fortnight'.

4.3.2 Impact of Brexit in Shopping Patterns

Respondents within each EA were asked would 'Brexit' impact their shopping patterns (July 2016). Overall, residents stated 'yes' when asked if Brexit would alter their shopping habits, including a large portion of residents willing to consider shopping over the border. Reasons included; difference in currency and good value for money. However, respondents also highlighted their concerns relating to local businesses and potential difficulties in the ease of travel subject to Brexit. Further concerns cited include the possibility of a rise in price of goods imported from Britain.

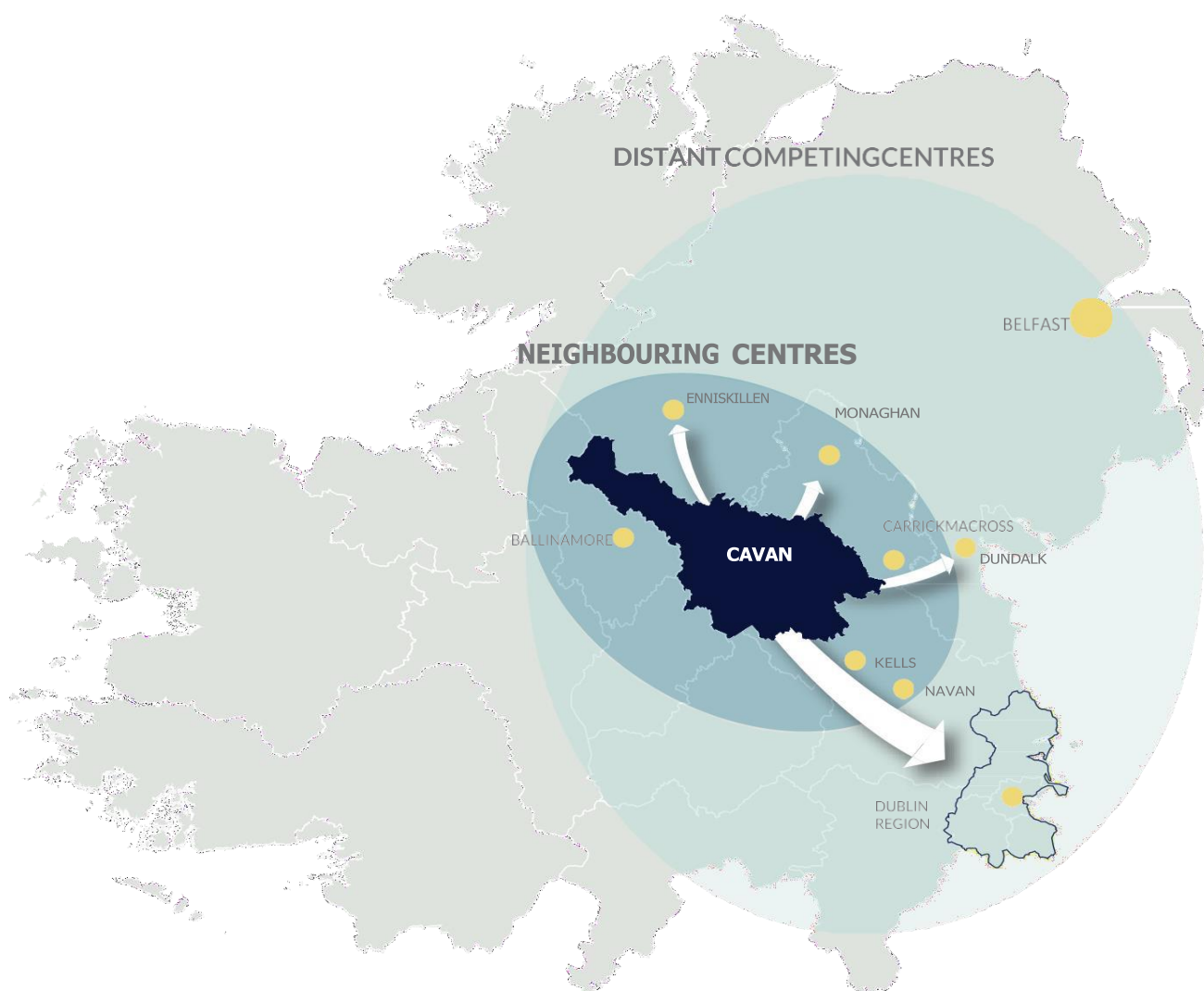
CHAPTER 5

Competing Centres

Cavan County Retail Strategy

5.0. Introduction

The retail industry is highly competitive and Cavan's location relative to national and regional transport linkages including the N3, N55, N54, N87, A3 and A509 makes adjoining and wider urban centres attractive and accessible. Centres such as Carrickmacross, Enniskillen and Monaghan Town are located within relatively close proximity to county boundaries, while in a more regional sense, Dundalk and Blanchardstown are less than a 2-hour drive east of the county. Based on this there is significant scope for retail leakage to competing centres in relation to convenience, comparison and bulky goods. The susceptibility for same is largely borne out of geography - the closeness of these centres to different settlement populations, and the quality and extent of the available retail offer across the different retail categories. Below we assess the appeal of competing centres outside the County and their potential implications for Cavan County. The centres chosen are based on discussions on the ground during compilation of the floorspace survey and the feedback received as part of the household and shopper surveys.



5.1 Neighbouring Centres

5.1.1 Carrickmacross

Carrickmacross is a busy market town situated less than 9km from the boundary with County Cavan and approximately a 55-minute drive from Cavan Town. It has a population of 5,032 according to census data for 2016²⁰, significantly more than that of any of Cavan's tier 2 towns. The town has a reasonable retail base that draws in trade from a catchment that includes area within County Cavan as outlined within the Monaghan Retail Strategy 2016-2022²¹. The main focus of convenience shopping in the town centre is O'Gorman's SuperValu on Main Street. On the outskirts of the town there is a Lidl and an Aldi. Overall, there is a very good selection of convenience retail available in Carrickmacross, which appears to be the main trade draw from Cavan County. Carrickmacross attracts shoppers from the east and north east of the county, particularly Kingscourt which is only 12km to the west.

5.1.2 Monaghan Town

Monaghan Town is the county town of Monaghan and its most populous settlement with 7,678 residents as of the 2016 census²⁰. It is located at the intersection of the N2, N12 and N54 national routes, making it highly accessible by private motor vehicle. Monaghan town is located approximately 23km from the north-eastern boundary of Cavan County, a 50-minute drive from Cavan Town via the N54 national road or the R188 regional road through Cootehill. It has a similar retail base to Cavan town but approximately half the retail floorspace.

Within the town centre there is a Dunnes Stores, a SuperValu, a Tesco and a Lidl. There are a number of retail parks in the vicinity of the town offering a range of comparison and bulky goods. Given the fact that most of the main retailers operating in Monaghan town also have stores in Cavan town or there are similar alternatives, it is expected that for the most part geography will be the main draw for Cavan residents visiting Monaghan town regularly for shopping. As a consequence, the residents of the Cootehill area are likeliest to visit Monaghan town for shopping.

5.1.3 Kells

Kells is in northeast County Meath and is therefore located close to the boundary with County Cavan. In 2016 the census²⁰ of population revealed that Kells had a population of 6,135 persons making it a larger settlement than any of the Tier 2 towns in Cavan. Positioning on the M3/N3 bypass results in the town being accessible from Dublin and within 20-minute drive of Virginia and 30-minute drive of Ballyjamesduff.

Kells is an important tourist destination given its location proximate to various ancient monuments and historical sites. Convenience retailing in Kells is primarily provided from SuperValu and Aldi and in terms of comparison retailing the town primarily comprises local independent retailers. Based on the responses from the Householder and Shopper Surveys, Kells picks up a reasonable amount of customers from the south Cavan area, some of which is likely to arise from passing commuter traffic.

5.1.4 Ballinamore

Ballinamore is a medium-size town in west Leitrim, located approximately 8km from the boundary with County Cavan and 40km from Cavan town. According to the CSO its population in 2016 was 914 persons, but it does have a service function to cater for a sizeable rural catchment.

²⁰Census 2011 combined data from the former legal and environs of Carrickmacross, Monaghan town, and Kells, Census towns which previously combined legal towns and their environs, such as the above-mentioned ones, have been newly defined using the standard census town criteria (with the 100 metres proximity rule) for the purpose of Census 2016.

²¹ Monaghan County Council (2016) Monaghan County Retail Strategy 2016-2022. Accessible at <http://www.monaghan.ie/en/media/monaghanie/content/files/pdf/planning/developmentplan2013-2019/MCCDraftRetailStrategy.pdf>

The bulk of the convenience retail is provided by the SuperValu and the Tesco store and there are several small independent convenience retailers. Ballinamore is likely to attract convenience shoppers from villages and rural areas in the northwest of county Cavan, primarily by virtue of the Tesco store which is located in the town. The nearest other Tesco stores are in Cavan Town and Carrick-on-Shannon.

5.1.5 Navan

Navan is the county town of Meath and had a recorded population of 30,173 in the 2016 census²². It is located 34km from the boundary with County Cavan, 66km from Cavan Town. The car journey between Cavan Town and Navan can be completed in under an hour via the N3 and M3. This is well within the distance consumers are willing to travel for comparison and bulky goods shopping, making Navan a potentially large draw from Cavan County. There are several large convenience retailers in Navan including Tesco, SuperValu, Dunnes Stores, Lidl, Aldi and Marks & Spencer. Navan is occupied by a number of the comparison multiples which operate from shopping centres such as Navan Town Centre and Johnstown Shopping Centre. There are a number of retail parks on the outskirts and in the town environs containing many bulky goods retailers, as well as some comparison shops. Overall, Navan has a very strong retail offering and this combined with its proximity to the south of Cavan makes it a major competing centre. Respondents to the shopper survey in four of the tier 2 towns confirmed this, with higher incidence relative to proximity to Navan.

5.1.6 Enniskillen

Enniskillen is the retail and administrative centre for County Fermanagh and has a substantial number of convenience and comparison retail shops, including multiples, high-street stores and small independent traders. Located in Northern Ireland, Enniskillen is approximately 45-minute drive of Cavan Town via the N3 and A509 roads. Enniskillen hosts the Erneside Shopping Centre anchored by Marks & Spencer and Next. The town has an extensive convenience and comparison retail base including numerous 'high-street' brands, the Buttermarket (Arts and Crafts market) and major supermarkets, such as Asda, Lidl, Iceland and Tesco. Enniskillen is easily accessible from all parts of Cavan via the N3, N16 and N55 national routes, but is a short drive for all areas in north County Cavan.

Attraction of retail spend to Enniskillen from Cavan and other parts of the Republic of Ireland fluctuates based primarily on changes in sterling-euro currency exchange rates and the fact that some of the large multiples are located here. The recent drops in the value of the Sterling currency observed since Brexit' vote is likely to have increased retail leakage north of the border, although there have been little media reports on this issue to date. Over the lifetime of this Retail Strategy, it will be important to plan appropriately for such currency fluctuations.

5.2. Distance Competing Centres

5.2.1 Dundalk

Dundalk is the county town of Louth, located 34 km from Cavan County and 75km from Cavan Town. As such it is within a reasonable drive of all eastern parts of the County. Dundalk is accessible from Cavan via the 162 and 166 bus routes. The population of Dundalk is 39,004 according to the 2016 census²² and there are several large convenience stores in the town centre and on the outskirts. However, the biggest draw to Dundalk from Cavan shoppers would be with respect to the wide variety of comparison shopping available in the town centre, particularly within shopping centres, such as the Marshes Shopping Centre. There are also plenty of bulky goods shops around the periphery of the town. Dundalk provides an alternative comparison-shopping destination to residents of the east of County Cavan. The presence of

²² Census 2011 combined data from the former legal and environs of Navan and Dundalk, Census towns which previously combined legal towns and their environs, such as the above-mentioned ones, have been newly defined using the standard census town criteria (with the 100 metres proximity rule) for the purpose of Census 2016.

several international clothes retailers such as New Look and River Island, makes Dundalk's an alternative shopping destination for shoppers from Cavan.

5.2.2 Greater Dublin Area

Dublin City is approximately 76km from Cavan County and 113km from Cavan Town. The N3 national road and M3 motorway make the capital highly accessible from Cavan town, particularly the necklace of shopping centres along the M50. Dublin is approximately a 1 hour 40-minute drive from Cavan Town, but eastern parts of the county are approximately an hour's drive of retail destinations such as Blanchardstown and Liffey Valley Shopping Centres. These retail centres are a major retail destination offering shoppers the opportunity to visit the stores of major multiples, both national and international, under one roof. Within the environs of these shopping centres there is also an expansive array of bulky goods retailers. The retail services offering in these shopping centres is also a major draw with large cinemas and a variety of restaurants, cafes and other attractions to entertain visitors. The Greater Dublin Area also contains a number of other major retail destinations such as Dublin City Centre itself, Dundrum Town Centre, Swords Pavilions and the Square in Tallaght. It is likely that Dublin will always be a common destination for commuters to the capital and for shoppers looking for comparison goods retailers that do not have presence in Cavan or closer centres.

5.2.3 Belfast

Belfast is located 159km from Cavan Town and is approximately a two-hour drive via the N54, A4 and M1 motorway. Bus Éireann route 65 connects Cavan with Belfast. Belfast City Centre is the largest shopping location in Northern Ireland and one of the largest shopping destinations on the island of Ireland. The City Centre's shopping is spread across an expansive area, comprising a mix of traditional high-streets and modern shopping centres. Castlecourt and Victoria Square are the largest shopping centres in the city with the Castlecourt anchored by Debenhams, and Victoria Square anchored by House of Fraser. The traditional high streets also comprise a wide range of independently owned and multiple comparison retailers. There is a number of large retail parks with bulky goods stores located conveniently to motorway intersections. The major attraction of Belfast for shoppers from Cavan County, would be for comparison shopping and as with Enniskillen, the degree to which Belfast acts as a draw from County Cavan depends heavily on exchange rates.

CHAPTER 6

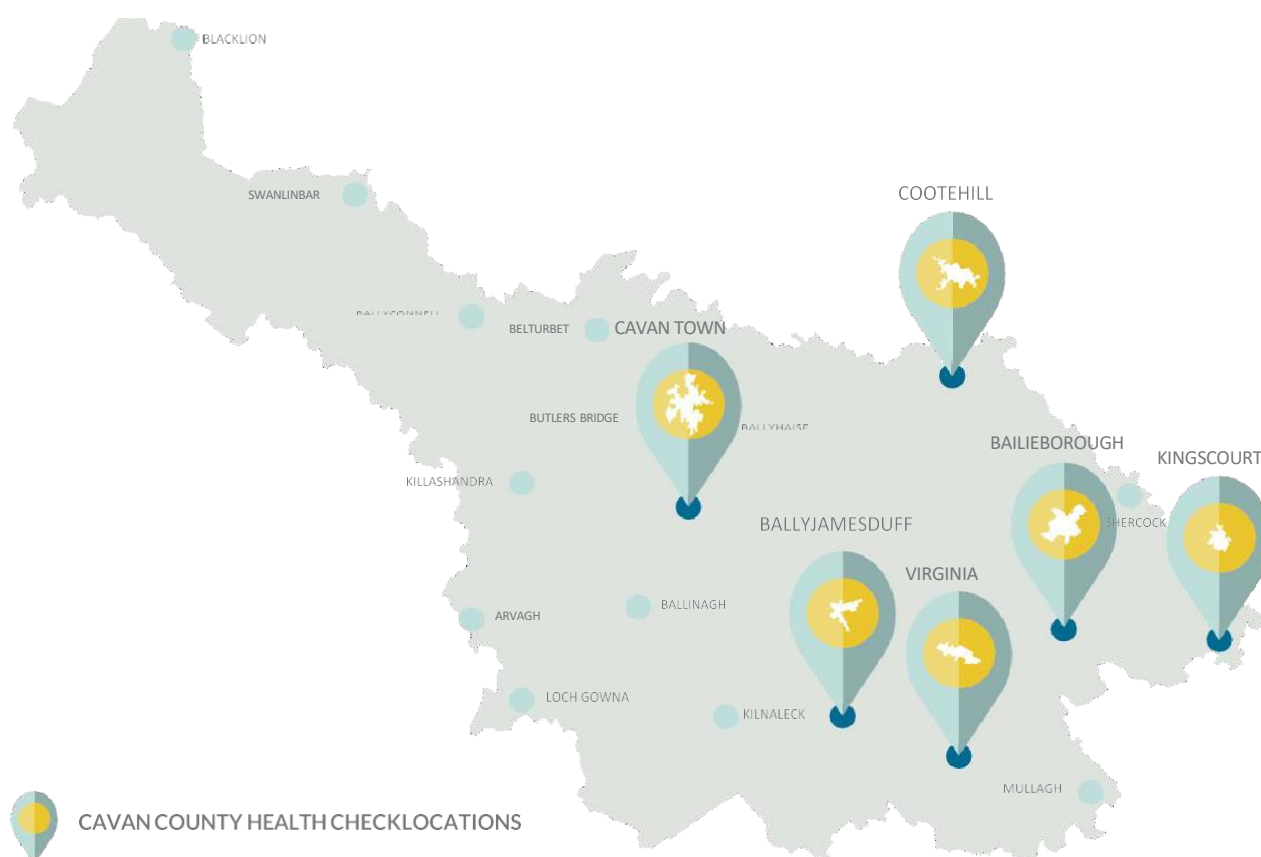
Health Checks

Cavan County Retail Strategy

6.0 Introduction

Retailing and the provision of retail services is one of the primary functions of any urban settlement. The Retail Planning Guidelines emphasise the importance of setting retailing activities within an established settlement hierarchy. Each of the larger settlements and an expansive number of smaller settlements within County Cavan have been assigned a position within the settlement hierarchy.

The County Retail Hierarchy does not strictly need to align with the settlement hierarchy, and it would not appear pertinent to refer in detail to each settlement where they only serve a very limited retail function. Section 8.1.1. of this Strategy provides the rationale behind the Retail Hierarchy proposed for the County, based on extensive evidence collated as part of the preparation of the Retail Strategy.



It is essential to also identify the opportunities and constraints for retailing within the recognised centres. A key message of the Retail Planning Guidelines is the enhancement of the vitality and viability of town centres in all their functions through sequential development. To apply this to Cavan, the Retail Planning Guidelines outline that this should involve an examination of the existing centres against criteria, which contribute to the vitality and vibrancy of a centre: -

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

The following appraisals have been undertaken to evaluate the retail functions of the main urban settlements of County Cavan, assessing the attraction, accessibility, and amenity of each centre with the aim of making evidence-based recommendations regarding future actions for their improvement. These actions will be formulated to reinforce the existing retail offering within each of the towns, and where possible expand it in a sustainable manner, through the suggestion of issues to be addressed or measures to be continued or extended. Health checks also draw on feedback received during the Shopper Surveys.

Detailed assessment of floor area, retail mix and occupancy levels (Floorspace Survey) has been undertaken for the entire County, providing a comprehensive overview of the current status of retailing in the County. While the previous 2008 Retail Strategy included floorspace data, comparative assessment of 2016 data with 2008 data was not feasible, as the methods of survey did not align. The methodology used in this floorspace survey generally involved a calculation of the net floorspace for over 1,400 retail or retail service premises within the County.

6.1. Cavan Town

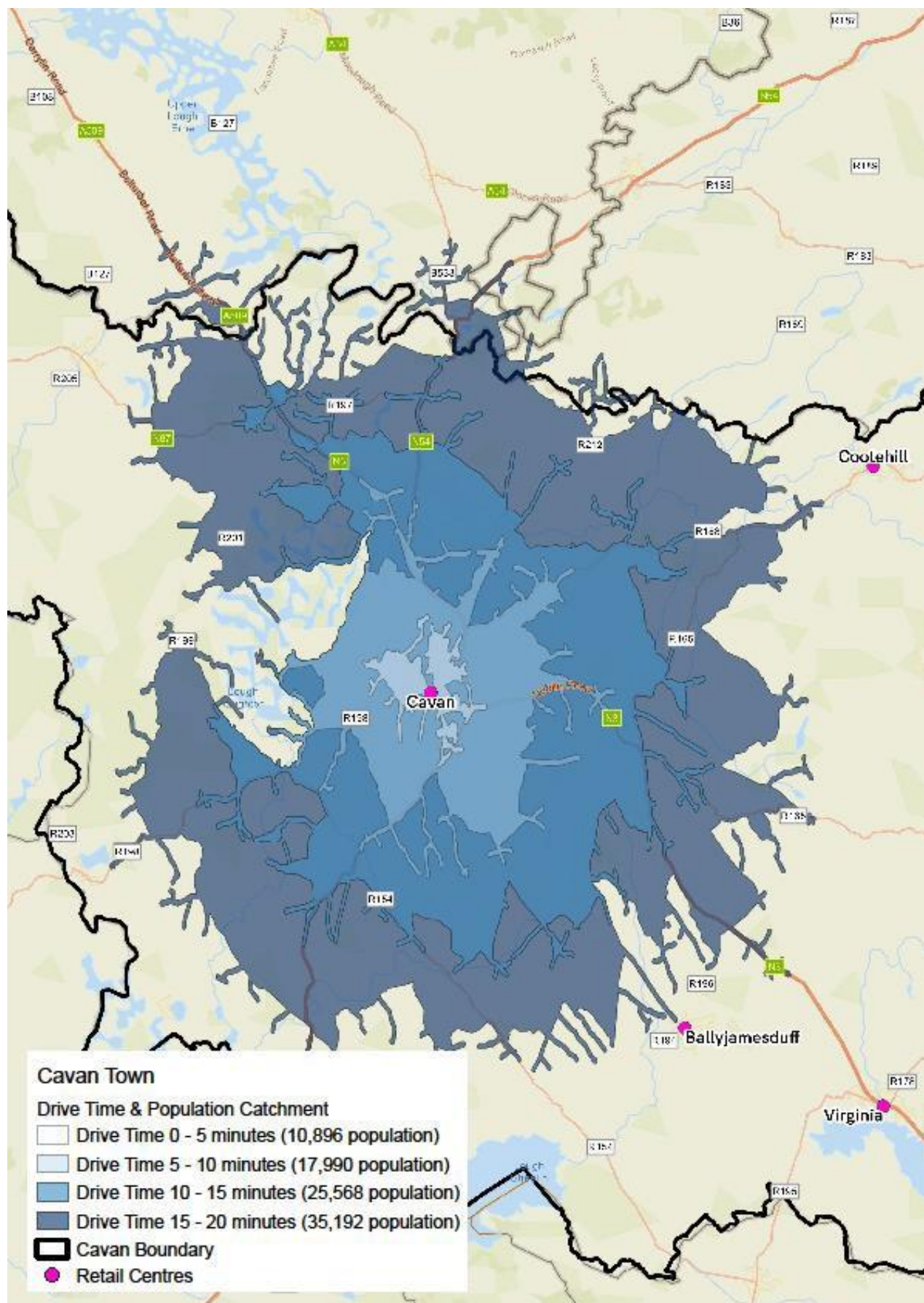
In 2016, Cavan Town had a population of 10,914 people according to 2016 census data from 10,205 people in previous 2011 census²³. It is important to note that Cavan Town settlement's boundary changed between censuses 2011 and 2016, therefore population growth comparison is not advisable. Despite changes in the standard census town criteria Cavan Town remains as the largest town in the County and the only Tier 1 town in the County Settlement Strategy.

Its size and function are also recognised in the RSES for the Northern and Western Region in which is categorised as a Key Town. The town is centrally positioned in the County, making it an ideal location to serve as the administrative centre for the County.

Based on the Census of Ireland 2016 Small Areas data, it is estimated that there are approximately 17,990 persons within a 10-minute drive of Cavan Town centre. By reviewing the Electoral Divisions encompassing Cavan Town and its immediate environs, 2016 Census data shows that the population has increased over the 2011-2016 period. These levels seem to be slightly above the anticipated levels set in the NPF.

²³ Census 2011 combined data from the former legal and environs of Cavan. 80 legal towns including were abolished under the Local Government Reform Act 2014. For the purpose of Census 2016, Census towns which previously combined legal towns and their environs have been newly defined using the standard census town criteria (with the 100 metres proximity rule).

Figure 6.1. Cavan Town Drive Times & Population Catchment.



Research²⁴ was undertaken in 2012 by Retail Excellence Ireland to rank 100 towns and cities in Ireland based on visitor and stakeholder perceptions of a variety of issues including retail mix, streetscape, parking, safety and security, attractions, events and image. Cavan Town was placed in the second highest quartile based on opinion collated, highlighting that the town is in a strong position to develop and grow as a retail destination. While undertaking the Shopper Survey in Cavan Town shoppers were generally quite satisfied with the town centre as a shopping destination and this would tend to align with the results of the Retail Excellence Ireland survey.

According to a 2015 local media report, Cavan town and the wider county area does not perform as well as other parts of Ireland in attracting overseas visitors to the area with the local economy heavily reliant on visitors from elsewhere in Ireland²⁵.

Recent studies by GeoDirectory²⁶ relating to the occupancy of retail units in town centres, indicate that Cavan town has an average level of commercial and retail vacancy compared to other towns in the Ulster region. GeoDirectory's Geoview Commercial Property reports provide a geographical overview of commercial building stock and corresponding vacancy rates in Ireland since 2013. The latest Geoview report²⁷ contains data collected in December 2019 and is thus pre-COVID-19. By the end of 2019, prior COVID-19 hit Ireland and several restrictions limiting the retail activity were put on place, the County's commercial vacancy²⁷ was at 12.7%, which represented a decline -0.03% from previous year survey.

Results of the Shopper Survey revealed that shoppers to Cavan Town did not consider the issue of vacancy to be a major problem in the town. Analysis of the results suggests that their greatest desire for the town would be for an increase in shopping diversity.

6.1.1 Attractions

Cavan Town performs an important retail function for the County, with a limited retail base located outside the County town and very few of the national or international multiple's located in other centres within the County. The historic core of the town continues to be occupied by the vast majority of retailers in the town, although there is a comparatively high representation of large-scale out-of-town retail parks and large stores on the fringes of the town which attraction forces and erosive competition continue to put pressure on the town centre retailers' viability. Areas within the town do not readily lend themselves towards large-scale retail development primarily due to topography, with most of the multiple retailers preferring to operate from large, single-level floor plates. There has been minimal expansion in retailing within recent years with a number of large projects on hold, despite having received planning permission.

The primary retail street is Main Street which runs in a north-south direction through the town, while the main administrative and commercial core is centred along Farnham Street running parallel with Main Street. While retail services are distributed throughout the town centre, there is a notable concentration of restaurants and public houses in the Bridge Street and adjoining Main Street area. Paved streets and safety bollards along Bridge Street serve well in restricting illegal parking and creating a pleasant streetscape.

Convenience Shopping

Each of the main convenience operators have presence within Cavan town, although only Dunnes Stores and Tesco operate from the town centre area. Although Tesco was granted planning permission to build a new store on the eastern edge of the town centre (Cock Hill), however this has not been materialised yet²⁸. Within the peripheral parts of the town other large convenience operations include two Supervalu stores, Aldi on Dublin Road and a Lidl at Creighan on the

²⁴ Sunday Independent Supplement (October 2012) The 100 Best Towns and Cities in Ireland. Accessible at http://www.retailexcellence.ie/images/uploads/downloads/Sunday_Independent_Supplement_-_Best100_Towns_-_Cities.pdf

²⁵ Anglo-Celt (2015)' Recovery in local tourism supported by tourism VAT rate'. Accessible at <http://www.anglocelt.ie/news/roundup/articles/2015/07/24/4039108-recovery-in-local-tourism-supported-by-9tourism-vat-rate->

²⁶ GeoDirectory's reports, published on a bi-annual basis, relies solely on the GeoDirectory database of commercial points of information.

²⁷ GeoDirectory. Q2 2020 Geoview Commercial Property Report. Accessible via: [https://www.geodirectory.ie/getattachment/Knowledge-Centre/Reports-Blogs/Commercial-Vacancy-Rate-Rises-to-13-5/GeoDirectory_GeoView_Commercial_Issue_19-\(1\).pdf?lang=en-IE](https://www.geodirectory.ie/getattachment/Knowledge-Centre/Reports-Blogs/Commercial-Vacancy-Rate-Rises-to-13-5/GeoDirectory_GeoView_Commercial_Issue_19-(1).pdf?lang=en-IE)

²⁸ Cavan County Council Planning Ref 17473. Extension of Duration of Planning Reg No. 11991992 granted. Expiry date 13/01/2023. Accessible via:

<http://www.eplanning.ie/CavanCC/AppFileRefDetails/17473/0>

Athlone Road. There is also a reasonable selection of speciality and smaller convenience shops spread through the town, some of which form part of service stations. Given this concentration of retailers, many of which are absent from neighbouring towns, Cavan town is likely to draw retail trade from a sizeable catchment and the feedback received in the Household and Shopper Survey confirms this. Table 6.1 provides a detailed summation of retail floorspace and unit types within the town in 2016.

Comparison Shopping

There is a reasonable selection of comparison retailers operating from Cavan town, reflective of the monomodal nature of the County in this regard. Within the town centre there are jewellers, bookshops, florists, electrical and hardware shops, pharmacies, charity shops and multiple clothing and shoe shops. Most of these shops are independently owned, with a comparatively low representation from the large multiples for a town of this size and catchment. The retail parks on the outskirts appear to have attracted a greater proportion of the multiple retailers. Levels of vacancy on the town centre primary streets is quite low, with a greater level of vacancy noted in the outer fringes and on secondary town centre streets where footfall is limited.

Reflective of the retailing primacy of Cavan town within the County, the town is provided with 4.3 sq.m. of occupied retail and related floorspace per person in the town, which is well above the average for other census towns in Cavan County (2.1 sq.m. per person). This is indicative of the important service function the town provides to its hinterland and is reflective the representation of the main convenience retailers in the town, more so than the comparison retailing base based on the Survey results.

Comparison & Convenience Shopping - Conclusions

Reflective of the retailing primacy of Cavan town within the County, the town is provided with 4.3 sq.m. of occupied retail and related floorspace per person in the town, which is well above the average for other census towns in Cavan County (2.1 sq.m. per person). This is indicative of the important service function the town provides to its hinterland and is reflective the representation of the main convenience retailers in the town, more so than the comparison retailing base based on the Survey results.

Table 6.1. Cavan Town Retail Floorspace 2016 (sq.m net)

	Cavan Town 2016		
	Sq.M.	Number	No. as %
Convenience	11,758	32	9.4
A Comparison	27,788	142	41.6
<i>Mainstream Comparison</i>	13,686	114	33.4
<i>Bulky Comparison</i>	14,102	28	8.2
Retail Services	6,294	116	34.0
Total Occupied	45,840	291	85.3
Total Vacant	6,211	50	14.7
Total Retail Floorspace	52,051		

Bulky Goods and Retail/Business Parks

The bulk of retail parks are located on the southern side of the town leading towards Ballinagh and Dublin. These are of varying scale, uses mixes and have varying levels of occupancy, but each have extensive free car parking. These retail parks specialise mainly in comparison and bulky goods, although a number of these include retail services (restaurants), while others serve as business parks, primarily for employment purposes.

- **Corlurgan Business Park.** Corlurgan Business Park is situated on the N55 leading south towards Ballaugh. It contains three bulky goods retailers, Erne Tiles, Cavan Net Computers and a Home and DIY Centre. It also includes some non-retail uses, such as a vet clinic and a children's activity centre.
- **Pullamore Retail Park.** Pullamore Retail Park is located in the townland of Pullamore on the N3, southeast of Cavan Town. Its retail offering comprises mostly of bulky goods provided by Luxor Lighting and Breffni Electric. It also has a service station shop which provides convenience goods and a drive-thru McDonald's restaurant.
- **Kilmore Business Park.** Kilmore Business Park is located on the N3 Dublin Road. It specialises entirely in bulky goods and is not intended to accommodate comparison and convenience retail uses.
- **Cavan Retail Park.** Cavan Retail Park is situated on the Dublin Road south-east of Cavan Town centre. The retail offering is split between comparison and bulky goods.
- **Lakeland Retail Park.** Lakeland Retail Park is located on the southeast town environs and would also appear to serve a neighbourhood centre function given the fact that it is anchored by Tarpey's SuperValu. Woodie's DIY and Halfords generally sell bulky goods from this Retail Park, while Lifestyle Sports, Toymaster and Heaton's sell comparison goods and some bulky goods elements. KFC provides a retail service function within the retail park.
- **Breffni Retail Park.** Breffni Retail Park is located on the Dublin Road, near the town centre, containing three retail units. The largest of these is McIntyre's Furniture and Carpet World. The other two units are occupied by Maguire Tiles and Bathrooms and Paco clothing outlet.
- **Moynehall Retail Park.** Moynehall Retail Park is located on the Ballinagh Road, south of the town centre. Woodford Motor Factors and Erika's Fashions, primarily comparison retailers operate from this Park, while Clarke's of Cavan, Budget Tiles and HomePro sell bulky goods.
- **Newcourt Shopping Centre.** The Newcourt Shopping Centre is located off Church Street and specialises in comparison retailing. An auctioneer's office and computer repair shop provide a retail services element. Retailers within Newcourt are generally small independent businesses.

Leisure & Recreation

The Odeon Cinema just off Main Street offers movie entertainment on a daily and nightly basis. Kingspan Breffni Park, the home of Cavan GAA is located just off the Dublin Road. It has an overall capacity for 32,000 with a 6,000 seated capacity and regularly draws large attendances. There are many bars and restaurants within the town centre and the town is reasonably well served by hotels and B&Bs within the town and its immediate environs.

6.1.2 Accessibility

Cavan town is the administrative capital of County Cavan and is strategically located on the N3 corridor with reasonably good transport linkages to Dublin and Belfast and with other counties along the border. The N3 national route runs within one- kilometre of the town centre and ensures that the bulk of passing traffic bypasses the town centre. Cavan town is 32km from Bailieborough, 30km from Virginia and 23km from Cootehill providing ease of access for a sizeable population catchment.

Despite having a rich history of rail services, Cavan does not presently have any operating commuter railways. The N3 national route connects with the M3 motorway at Virginia allowing for 1 hour 30-minute drivetime to the country's capital 114km to the southeast. Bus Éireann operate a bus station from Farnham Street, which provides regular services to all of the key support towns (routes 65, 109, 109A, 111, 162, 166, 175 and 465) and a reasonable level of accessibility for public transport users. Pay and display parking is managed in the town centre area with one-way traffic controls on a number of the town centre streets.

In addition, there is a multi-storey car park on Cock Hill and an underground car park below Dunnes Stores on Church Street. Surface-level off-street car parking is also available between Main Street and Cock Hill, off Bridge Street, off Farnham Street and to the rear of College Street. All the retail parks outside of the town centre offer free parking to customers. Recent infrastructural developments include the Cavan Town Eastern Access Route including cycleways, which was completed in May 2013 facilitating an alternative route through the town centre, while potentially opening up new areas of the town for development.

6.1.3 Amenity

Cavan town is positioned close to a host of natural resources and serene landscapes, which makes it an ideal base for various outdoor activities. Nearby Killykeen Forest Park provides scenic country walks and Lough Oughter is a popular fishing and water sport destination. There are two 18-hole golf course to the northwest of the town, County Cavan Golf Club and Farnham Estate. As the N3 national route bypasses the town centre, this ensures the vast bulk of passing traffic can be diverted from the town centre.

6.1.4 Actions

Central Spine

Cavan County Development Plan supports the development of Cavan Town as a 'Hub' for the region and includes Cavan Town as the on Tier 1 town in the Plan's settlement strategy, focussing on developing the Hub as the principal town in the county. Cavan Town is a reasonable scale shopping destination within the County and its wider area and any actions to address retailing in the town needs to be particularly mindful of the strategic role the town performs and the current retailing environment and context.

The town comprises a comparatively high number of retail parks relative to its scale, and these are disjointed and largely disconnected from the town core, representing a real threat to the vitality of more central areas within the town centre. This ultimately diverts trade from the town centre and does not add to the overall shopping experience within the town centre, particularly where units are used for the sale of convenience and comparison goods. Furthermore, these retail parks ultimately increase traffic flows in the wider town road network given the increased level of car trips needed to visit them. Future retail development needs to be rechannelled into the town centre.

While it is recognised that there are topographical restrictions to achieving this, the channel of level land broadly running along Farnham Street and Main Street needs to form the backbone to the retail centre and these lands need to be used in an efficient manner. Site accumulation may be necessary to identify suitable sites within this channel that could cater for future demand in a sequential manner. In planning for growth in the town centre, the Council should allocate sufficient sites and expansion areas to meet identified need; and where necessary use compulsory purchase powers to bring forward important sites.

This continuing development of Cavan as a retail destination will require flexibility in bringing forward key sites within the town core area. It will also necessitate encouragement of the provision of high-quality retail units to provide for the needs of modern retailers and to facilitate the provision of a good mix of offer to the local and surrounding population. The 'Masterplan' lands identified in the Development Plan within the central block surrounded by Bridge Street, Farnham Street, Thomas Ashe Street and Main Street offer the most appropriate opportunity site for expansion of retailing within the town centre in this regard.

Integrated Land Use and Transport Strategy

The opening of the Cavan Town Eastern Access Route significantly increases the opportunity to divert traffic away from the southern end of Church Street and off the main shopping streets. It is noted that there have been several significant changes in the town centre traffic management system and urban framework, some of which appear to have been proposed within the Cavan Town & Environs Integrated Framework Plan 2020, while others were not included in the Plan.

These changes and the opening of the eastern bypass access road, and the construction of a new Tesco Ireland Ltd²⁹ store in the foreseeable future, will have a major bearing on the ability and rationale to follow through the measures set out within the 2008 Integrated Area Plan.



A revised Integrated Area Plan including Urban Design Framework is encouraged to address the present situation, including extant planning permissions, the guidelines within the Design Manual for Urban Roads and Streets, improved synergies with the bus terminal and new Tesco site (including way-finding) and other matters raised below.

Car Parks

Many of the surface level off-street car parks are located on steeply sloping ground with minimal landscaping to break up these spaces and with poor surface treatments. All of this makes it difficult to safely move through these spaces and as a consequence ensures other more accessible locations within the town, including on-street areas, are more attractive for parking purposes. Given the likely catchment and alternative transport, these car parks are vital in enabling the town to develop into a better performing retail destination and some level of upgrade to these facilities is warranted, particularly public facilities and those with potential to accommodate additional car parking based on more efficient layouts.

Pedestrian Priority

The previous 'Integrated Plan' for Cavan Town and environs, introduced proposals to pedestrianise an area within the town centre. Such proposals can often prove costly and extremely difficult to implement and achieve for a variety of reasons. It is recognised that the streets in and around Cavan town centre are generally quite narrow, a reflection of the fact that they were not laid out to accommodate contemporary traffic flows.

Footfall in and around the main town centre streets is moderate, which may in itself be as a result of the positioning of car parks. However, for a retail centre of this scale, layout and context, it may be difficult to justify complete pedestrianised street sections. The Shopper Survey feedback did not highlight pedestrianisation as an improvement in the town centre.

A more rationale and readily achievable approach to improving the shopping environment would be to increase pedestrian priority, but this does not have to impinge on the ability for vehicles to move through this space. Current use of double-yellow lines to restrict parking can only invariably work if these areas are constantly monitored. Studies show that where residual space for car parking exists it will invariably be used, particularly to satisfy a temporary need. Better use of these spaces is required to improve their appearance and overall aesthetic.

²⁹ Cavan County Council Planning Ref 17473. Extension of Duration of Planning Reg No. 11991992 granted. Expiry date 13/01/2023. Accessible via: <http://www.eplanning.ie/CavanCC/AppFileRefDetails/17473/0>

A more coherent approach to use of these urban spaces is necessary and this should rule out the ability for illegal on-street parking (on double-yellow) lines, while still catering for landscaping, including trees, loading bays, tax ranks but ultimately making pedestrian movement a priority and safer. This will have a major benefit in improving the overall functioning and appearance of the main shopping streets.

An urban environmental improvement scheme is needed to identify where this can be implemented while maintaining the one-way traffic system. Wider traffic control measures would also need to be implemented to restrict certain vehicles from entering these pedestrian-priority spaces.

While understanding the need to prioritise funding for public realm improvement works, should pedestrian priority measures be proceeded with over the lifetime of this Strategy, the area marked for pedestrianisation in the 'Integrated Plan' from 2008 should take priority (i.e. Town Hall Street and Main Street).

Monitoring Vacancy

While the level of vacancy within the town is very much the norm for a town of this size, continued monitoring of the situation is advisable to ensure planning policy can better understand and address any emerging situation, particularly the risks relating to the vitality of the town centre and retailing within it. The level of vacancy in the outer retail parks should be less of a concern from a planning perspective while focusing on the viability and vitality of the town centre retail's core. These lands and buildings are more readily adapted for alternative purposes and consolidation of retailing into a fewer retail parks would also open up the possibility of an increased level of retail activity within Cavan town centre.

Managing service station retailing

Existing fuel service stations on the main routes serving the town have potential to impact on the vitality and viability of neighbouring retail centres. A number of these stations are well outside the town boundaries and include café areas with associated seating and even an element of comparison goods floorspace. Future development of service stations outside the town centre or any defined neighbourhood centres, including their extension for retailing purposes should only occur in strict compliance with the requirements of the Retail Planning Guidelines 2012, including the '100sq.m. limitation'.

Shopping Initiatives

Town-centre management is key to ensuring these urban spaces continue to evolve and adapt to changing shopping patterns and demands. While the Chamber of Commerce is quite active in the town and wider area, an initiative such as the Business Improvement District (BID) scheme could be pursued to develop and implement a series of new and additional initiatives designed to further promote and improve the trading environment within the town boundary.

Convenience Space

Each of the main convenience supermarket operators have at least one presence in the town, indicative of the expanding role of the town serving the convenience shopping demands of the town catchment. Considering the existing permission for a new Tesco store at Townspark on the eastern access road, there will be limited additional capacity for convenience large-scale retail space.

Proposals for convenience retailing in Cavan Town must be considered in the context of the existing retail provision within the neighbouring towns, particularly those subject of health checks below. There would appear a greater necessity to distribute convenience floorspace growth beyond Cavan town into the other main retail centres, based on the feedback from surveys.

6.2 Larger Towns

Outside Cavan Town (Tier 1), the five tier 2 support towns of Ballyjamesduff, Virginia, Bailieborough, Kingscourt and Cootehill are of significance in terms of retail, due to their size, location or acknowledged importance in the Development Plan. These towns have similar populations but perform slightly differing roles in retail terms. Not all of these tier 2 towns have a substantial convenience retail base to serve the weekly shopping needs of their hinterland. It is apparent that there is some overlap in the associated catchments of these towns.

6.2.1 Ballyjamesduff

Ballyjamesduff is recorded as having a population of 2,661 in 2016, making it the second largest of the Tier 2 towns in Cavan. The town experienced a population increase of 3.6% over the 2011 to 2016. Despite the town has experienced a rapid population growth from early 2000s, with increases of 94%, 52% and 3.6% during the intercensal periods of 2002-2006, 2006-2011 and 2011-2016 respectively, the town's commercial and retail base has not increased proportionally.

Attractions

Convenience retailing in the town centre is mostly provided by small stores, with Rodney's Centra and O'Reilly's Gala being the largest of these. There is also a large convenience store located outside the town centre; MACE at Skelly's garage. There is a small number of comparison shops in the town centre forming a narrow base for this type of shopping in the town and this corresponds with the shopper survey results, which reveals the town primarily serves a convenience and services function. There are numerous public houses, takeaways and restaurants, as well as barber shops and hairdressers located in the town. The Ulster Bank and Credit Union provide financial services in the town. The overall provision of retailing within Ballyjamesduff is quite narrow, but generally reflective of its role as a support service town. The town hosts a regular agricultural mart which draws in trade to the town from a wide catchment.

The Percy French statue fronting the Courthouse Square is an attractive feature within the streetscape and a subtle reminder to visitors and residents of the association of this songsmith and poet with the town. Ballyjamesduff is quite close to Lough Sheelin, which is a popular trout fishing destination and Cavan County Museum is located on the Virginia Road immediately south of the town. This museum holds regular exhibitions and is dedicated to portraying the history of the county.

Accessibility

Ballyjamesduff is primarily accessed by car via the R194 and R196 regional routes. Both of these roads lead towards the N3 national route. In turn the N3 national route allows easy access to Virginia and Cavan Town and also joins with the M3 motorway leading towards Dublin. The 187 bus service serves the town with 4 times daily connections to Kells and Oldcastle. On-street parking in the town centre is free, with extensive parking along Chapel Street. Land levels in the town centre rise steadily moving away from the Inny river. Access by foot is reasonably attainable, but haphazard parking can often making crossing roads difficult and this issue also emerged during the Shopper Survey. Ballyjamesduff has an extensive rural hinterland with limited access for pedestrians and cyclists, which results in residents and visitors having to rely heavily on private vehicles to access the retail centre.

Amenity

Street corners and traffic islands are well-decorated with flowerpots bringing life to these spaces and making a traffic barrier. The courthouse and statue of Percy French at the corner of Chapel Street and Granard Street provide a central focus for the town, however, it would benefit from landscaping intervention with some element of softening. The street layout generally comprises very wide street spaces, which allow for extensive on-street parking and plenty of space for vehicular traffic, but this can often be to the disadvantage of pedestrians.

Assessment

While paving in the areas fronting the market house space is in a good state, footpaths are in very poor condition in various locations throughout the town centre and there is numerous derelict properties, detracting from the overall shopping experience and visual appearance of the town. Many of the businesses operating in Ballyjamesduff use an abbreviation of the town name, 'BJD', which instils a sense of local identity and branding.

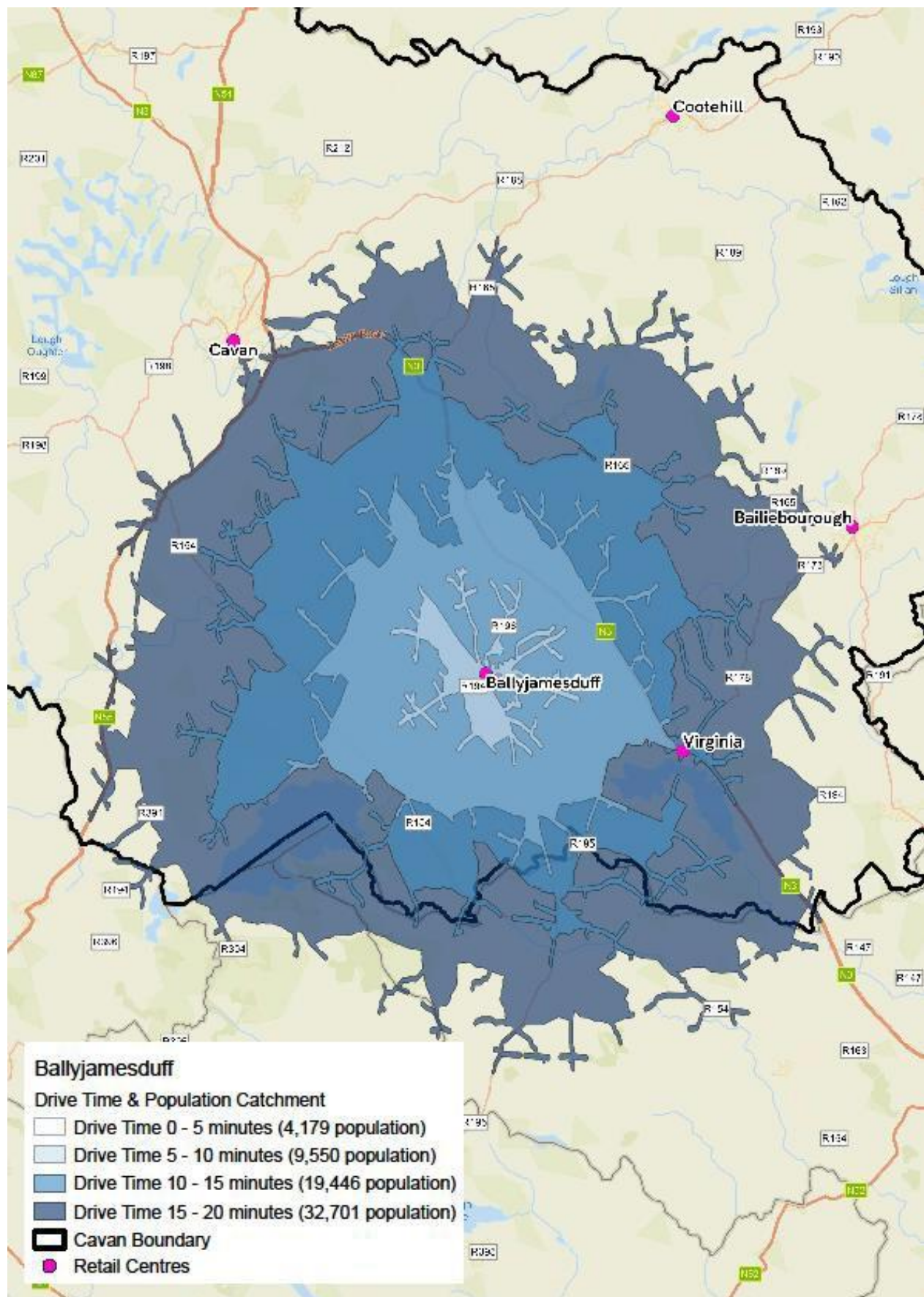
Based on the Census of Ireland 2016 Small Areas data, it is estimated that there are approximately 9,550 persons living within a 10-minute drive of Ballyjamesduff (see figure 6.2). Ballyjamesduff has one of the lowest levels of vacancy of all the urban centres surveyed for this Strategy. However the town contains only 0.88sq.m. of occupied retail floorspace per resident (compared with 4.20sq.m. for Cavan Town) suggesting the town has limited draw from the neighbouring hinterland.

The 2008 Retail Strategy identified a need to develop the retail function of Ballyjamesduff, in order to provide for the needs of a rapidly growing population. In the interim the town has continued to experience rapid population growth, but the retail base has not expanded proportionally. In recent years permissions for major retail development on the northern side of Ballyjamesduff, were refused by An Bord Pleanála.

Surveys undertaken as part of this Strategy suggest extensive retail leakage to Cavan town and Virginia in particular. There appears scope for additional convenience retailing in the town centre to minimise the degree of leakage to other centres and eliminate the need to travel to other towns for weekly shopping. Such future retailing floorspace in Ballyjamesduff would be best located in the town core, particularly drawing from the conclusions of recent planning decisions. See Table 6.2 below for breakdown of all retail floorspace in Ballyjamesduff.

Table 6.2. Ballyjamesduff Retail Floorspace 2016 (sq.m net)			
	Ballyjamesduff 2016		
	Sq.M.	Number	No. as %
Convenience	516	12	15.2
A I Comparison	806	22	27.8
Retail Services	1,043	35	44.3
Vacant	473	10	12.7
Total Retail Floor Space	2,838	79	100.0

Figure 6.2. Ballyjamesduff Drive Times & Population Catchment.



Actions

Parking is quite haphazard in the town and this often restricts pedestrian movement and creates a traffic hazard. Some cars park in parallel positions, while others park in a perpendicular alignment. Road markings and improved road surfacing and lipped pavements with bollards would address this and improve safety. There appears to be extensive on-street car parking, wide footpaths and whilst there is some tree planting, additional soft landscaping would be welcomed into the streetscape.

The Shopper Survey highlighted concerns regarding traffic in the town. While it is recognised that heavy goods vehicles need to pass through the town centre as there is no bypass route or a wider diversion strategy, this and the width of the road makes it difficult for pedestrians to cross. The lack of road markings makes it difficult to understand who actually has priority crossing some of the wide town centre streets. There is no footpath along the southside of Granard Street between BJD Electrical and Brady Solicitors creating a precarious situation for pedestrians and road users.

A number of the shops in Ballyjamesduff are noted to have signage out of character with their associated building façade and this has potential to undermine the character of the area.

Promote the development of key opportunity sites in the town centre and in particular the existing prominent derelict sites.

There would appear to be some scope for additional convenience retail within the town, particularly aimed at providing additional opportunities for undertaking weekly shopping. The previous 2008 Retail Strategy also noted this and in turn this may act as a catalyst for further development in the town. An additional convenience retail facility would best be sited in a location that could provide footfall along the main shopping streets and based on robust sequential testing. An opportunity site would appear to be located towards the rear of Anne Street and Chapel Street, close to the town core. Access to this area for cars and pedestrians needs to facilitate cross-visitation with other services in the town centre and the development would need to be sensitive to the historic urban fabric.



6.2.2 Virginia

Virginia had a population of 2,648 in 2016 according to the CSO, a change of 366 persons or 16.0% compared to 2011 census data. This is the highest rate of increase in population experienced by the Tier 2 towns of Cavan. The town is set just north of Lough Ramor, 30km southeast of Cavan Town and in the southeast of the County. Records indicate that Virginia was founded in 1612 by John Ridgeway as part of the Ulster Plantation and was named for Queen Elizabeth I. Glanbia and Fleetwood paints both have factories in Virginia and along with agriculture these are the primary economic drivers for the town. Good accessibility from Virginia to Dublin results in extensive numbers of residents commuting to the capital for their employment and education needs and this is noticeable in daily traffic flows.

Attractions

McEvoy's SuperValu and Lidl Ireland Ltd³⁰, which opened in December 2016, on the Ballyjamesduff Road are the primary location for convenience shopping. In addition, there are several smaller independently-owned convenience shops in the town centre such as Skelly's, E. O'Reilly & Son and Michael McEnaney Butchers. Based on surveys undertaken for this Strategy and in comparison, with other Tier 2 towns, less people in Virginia travel to other towns for grocery shopping. Considering the scale of the town, there is a reasonable range of comparison shopping, with much of this is located in the Virginia Shopping Centre. There are multiple pharmacies, clothing, charity and book shops as well as a pet shop, a hardware store and a gift shop. There is a wide selection of retail services on offer, including hairdressers, beauticians, takeaways, bars and a Credit Union. Virginia boasts the only professional performance space in Cavan County, The Ramor Theatre. The town hosts several annual festivals that draw in visitors such as the Virginia Street Fair and the Virginia Pumpkin Festival.

Accessibility

Virginia is well-positioned on the N3 national route, a strategic transport corridor to Dublin from county Cavan. Moreover, Cavan County Council is progressing the development of N3 Virginia bypass scheme³¹ which will improve the existing N3 section from Denver (Co. Meath) to the existing N3 north of Virginia town.

Its location on a transport corridor and only 77km from Dublin, makes the capital readily accessible and the town benefits from passing trade because of this. However it also creates a traffic congestion problem in the town centre, which detracts from the overall shopping experience. Traffic congestion was flagged as a primary issue raised by shoppers to Virginia as part of the Shopper Survey. Passing articulated trucks rumble through the town continuously, disturbing the shopping environment and road surface. This also makes it an unnerving experience to crossroads, although raised crossing points are available in areas as these serve dual purpose in restricting traffic speeds and providing greater priority for pedestrians. Higher traffic speeds through the town are noticeable during off-peak periods.

The location of Virginia also makes it more readily accessible for locals to shop in Kells and Navan, located 19km and 34km respectively to the southeast. The 109 and 187 bus services stop in Virginia providing frequent daily connections to neighbouring towns. Free car parking is available on-street, in rear car parks off the main street and at the Virginia Shopping Centre. In the shopper survey, respondents in Virginia were more likely to identify the 'lack of parking' as an issue when compared with the respondents from any other town surveyed. This is similar to the results of the survey taken in Virginia as part of the 2008 Retail Strategy. Virginia's compact linear layout and fairly level topography allows all parts of the town to be easily accessible on foot.

³⁰ Amendment to the scheme under planning ref. 16156 a reduced net retail sales area of 1,421 sqm (previously approved 1,469 sqm under planning permission 15175).

³¹ In January 2021, Cavan County Council in association with Transport Infrastructure Ireland commenced an online Public Consultation in respect of the N3 Virginia Bypass scheme. Accessible via: <http://www.cavancoco.ie/n3-virginia-bypass.htm>

Amenity

Virginia has a pleasant shopping environment with most of the shopfronts being very well maintained, including a number of exemplary traditional shopfronts. There is an attractive green area fronting and leading to the Church of Ireland at the top of the Main Street. The town contains an impressive assembly of historic buildings which are generally in good condition and add to the character of the town. Unfortunately, the town turns its back on the river Blackwater and any redevelopment of the Masterplan area outlined in the Development Plan could potentially consider a road running parallel and adjacent to the river to address this.

Virginia has a low level of vacancy compared with similar-sized towns in Cavan. The town contains 1.8sq.m. of occupied retail floorspace for each resident based on 2016 census data. Virginia has the highest convenience floorspace provision outside of Cavan Town, with the bulk of this being provided by McEvoy's SuperValu and Lidl. A large proportion of the floorspace in Virginia is devoted to traditional retail services including a variety of eateries and public houses located centrally onto Main Street.

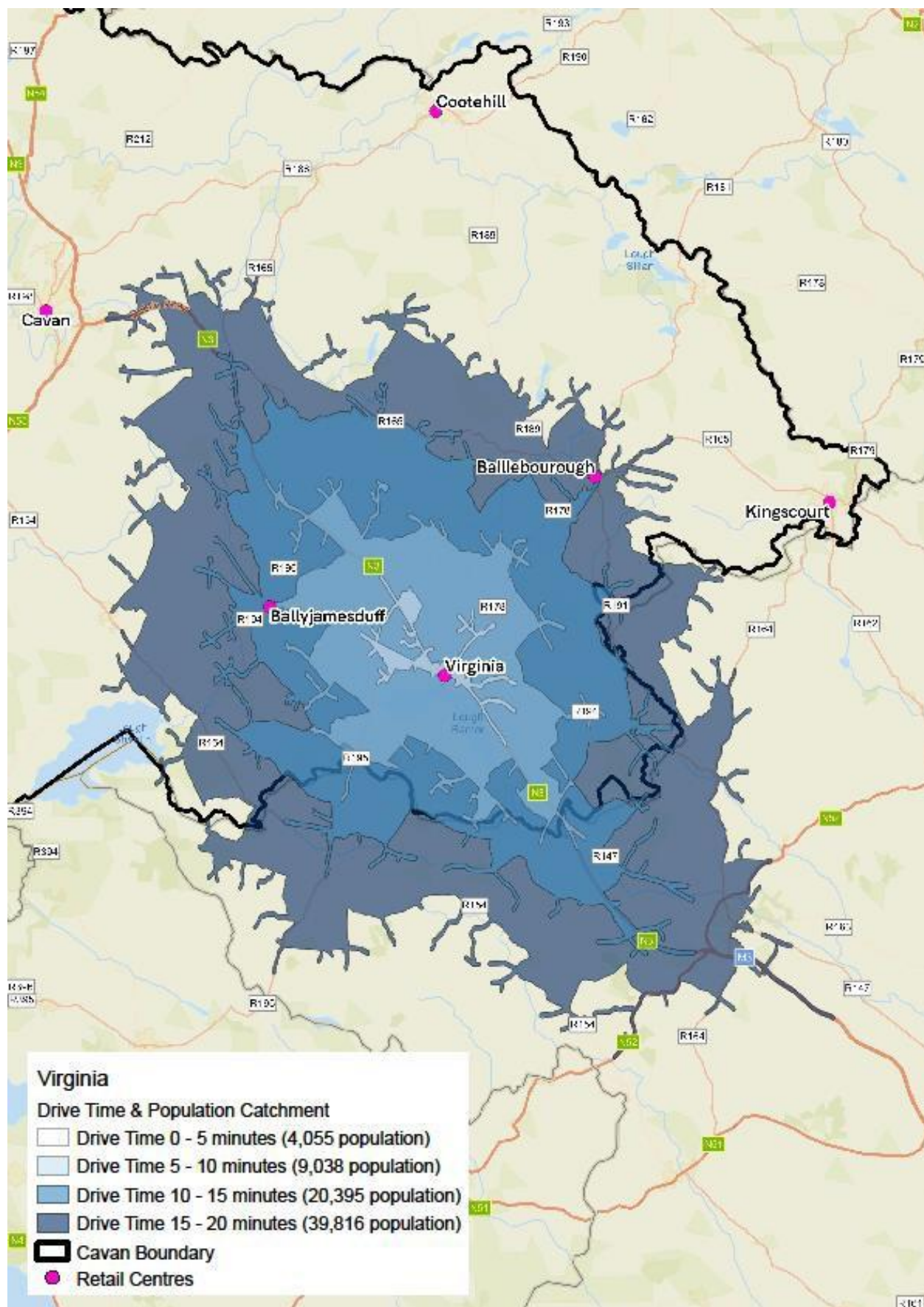
The previous 2008 Retail Strategy noted that "there is strong market interest in the town with a large retail development on the Ballyjamesduff Road", as reflected by the opening of the new Lidl store on the Ballyjamesduff in December 2016. See table 6.3 below for a breakdown of retail floorspace in Virginia. Based on the Census of Ireland 2016 Small Areas data, it is estimated that there are approximately 9,038 persons within a 10-minute drive of Virginia (see figure 6.3). The town benefits significantly from passing trade.

Table 6.3. Virginia Retail Floorspace 2016 (sq.m net)

	Virginia 2016		
	Sq.M.	Number	No. as %
Convenience	2884 ³²	9 ³²	10.2
A Comparison	951	27	30.7
Retail Services	1,157	41	46.6
Vacant	233	11	12.5
Total Retail Floorspace	5,225	88	100.0

³² Figure includes Lidl Ireland Ltd in the Ballyjamesduff Road opened in December 2016.

Figure 6.3. Virginia Drive Times & Population Catchment.



Actions

Narrow arched laneways in the town are often used to access rear parking areas, but these traverse pathways and can create a hazard. While parking is the second most important issue for residents and visitors to the town based on the Shopper Survey (second to traffic congestion), there is a need to control the number of access points to rear parking areas. Provision of additional parking to the rear of units can often lead to severe reductions in footfall on the main streets. Careful consideration of large-scale proposals for parking to the rear is needed; a balance needs to be struck in meeting parking demand and retaining the primacy of the front street parade.

A number of pavements within the town centre are uneven and pavements need replacing and refitting in various locations along the main streets. High traffic volumes have resulted in road markings fading throughout the town and these will need continued replenishing based on current traffic volumes.

High levels of passing traffic and a significant catchment have resulted in the town growing as a retail centre. Any potential for additional retailing needs to be strategically located to create footfall on the main shopping streets and encourage cross-visitation.

The traditional shop environment is suffering as a result of the traffic volumes, including passing heavy goods vehicles. The projected bypass of the N3 national route from the town centre, which is currently at consultation stage, should provide significant opportunity to improve the overall shopping environment and experience along Main Street. It is also worth considering the level of passing trade which the bypass will likely take with it once constructed and the fact that this may be a double-edged sword for retailing. However, on balance and given the continued growth of the town and catchment population based on preliminary census data, the bypass is considered an essential infrastructure required to allow the town to develop in a sustainable manner.

The possibility of creating a civic focal point with seating and landscaping should also be investigated as at present there is no space performing this function along the main streets. With the construction of the bypass, this should provide for additional free-up space which would allow for further civic uses while contributing to the revitalisation of the town centre.

6.2.3 Bailieborough

Bailieborough is the most populous tier 2 town in the county with 2,683 residents in 2016, representing an increase of 153 persons or 6.0% since 2011. The surrounding area is known for its forests and lakes, the closest of which is Bailieborough Lough to the west of the town. The town was founded during the Ulster plantation with a street fabric to reflect this. Bailieborough is situated in a central location within the County, reasonably close to all of the other major towns in Cavan and linked with them by a network of regional roads. Lakeland Dairies, Bailieborough Foods, Tesco, bathroom supplier Flair International and cream liqueur manufacturer Terra Limited are the largest employers in the area. The latest Geoview survey³³ shows an increase in retail/commercial property vacancy to 21.5% compared to 19.0% in the previous period of the survey.

Attractions

The Tesco store on the northeast side of the town is the main convenience shopping destination with extensive surface-level parking. It would be expected that this retail store attracts customers from an extensive catchment. Tesco's largest competitor in the town is Harris' Super Valu in the town centre. Bailie Stores, Hall's Newsagent and the Daybreak at Barrack Street Service Station also provide convenience retail. Bailieborough boasts a fairly wide range of comparison retail for a town of its size.

³³ GeoDirectory. Q2 2020 Geoview Commercial Property Report. Accessible via: [https://www.geodirectory.ie/getattachment/Knowledge-Centre/Reports-Blogs/Commercial-Vacancy-Rate-Rises-to-13-5/GeoDirectory_GeoView_Commercial_Issue_19-\(1\).pdf?lang=en-IE](https://www.geodirectory.ie/getattachment/Knowledge-Centre/Reports-Blogs/Commercial-Vacancy-Rate-Rises-to-13-5/GeoDirectory_GeoView_Commercial_Issue_19-(1).pdf?lang=en-IE)

There are multiple pharmacies, florists, motor factors, clothes, charity and hardware shops, along with a jeweller's, pet shop, gift shop and bicycle shop. Bailieborough has an abundance of hairdressers and beauticians, takeaways, pubs, restaurants and bookmakers. Overall, there is a relatively solid retail services presence.

Accessibility

Bailieborough is situated at the confluence of three regional roads, the R165, R178 and R191, making it an important retail centre for the surrounding area. The town is 32km from Cavan, 13km from Virginia and 12km from Kingscourt. The 108-bus service serves the town, providing three times daily connections to Kells. The 166-bus service connects Bailieborough with Cavan town on Tuesdays and Thursdays. Parking in the town centre is primarily via paid on-street parking, with a rear car park off Thomas Street and, as mentioned previously, extensive car parking serving Tesco.

Pathways within the town centre were generally in good condition and the roads markings and surfacing appeared to have been subject of recent replenishing. The change in level between the Tesco area and the town centre serves as a deterrent for cross-visitation. With paid on-street parking in the town centre, it would appear more of an incentive to utilise free parking where available. This impacts on the viability of the town centre and the Shopper Survey highlighted that the lack of parking is the greatest dislike for shoppers to the town.

Amenity

There are numerous flowerpots and hanging baskets in the Market Square area fronting the Market House, which add to the appearance of this area and make it an attractive public space. Bailieborough Regeneration Group has installed a fine mural within the town centre, and there are numerous examples of traditional shopfronts, including Crossan's and The Medical Hall.

There are several lakes located in the vicinity which are used for sports and recreation, including angling. There is a large leisure centre on Chapel Road with a swimming pool, gym and associated facilities. The town is also served by various walks through neighbouring forests and lakesides.

Assessment

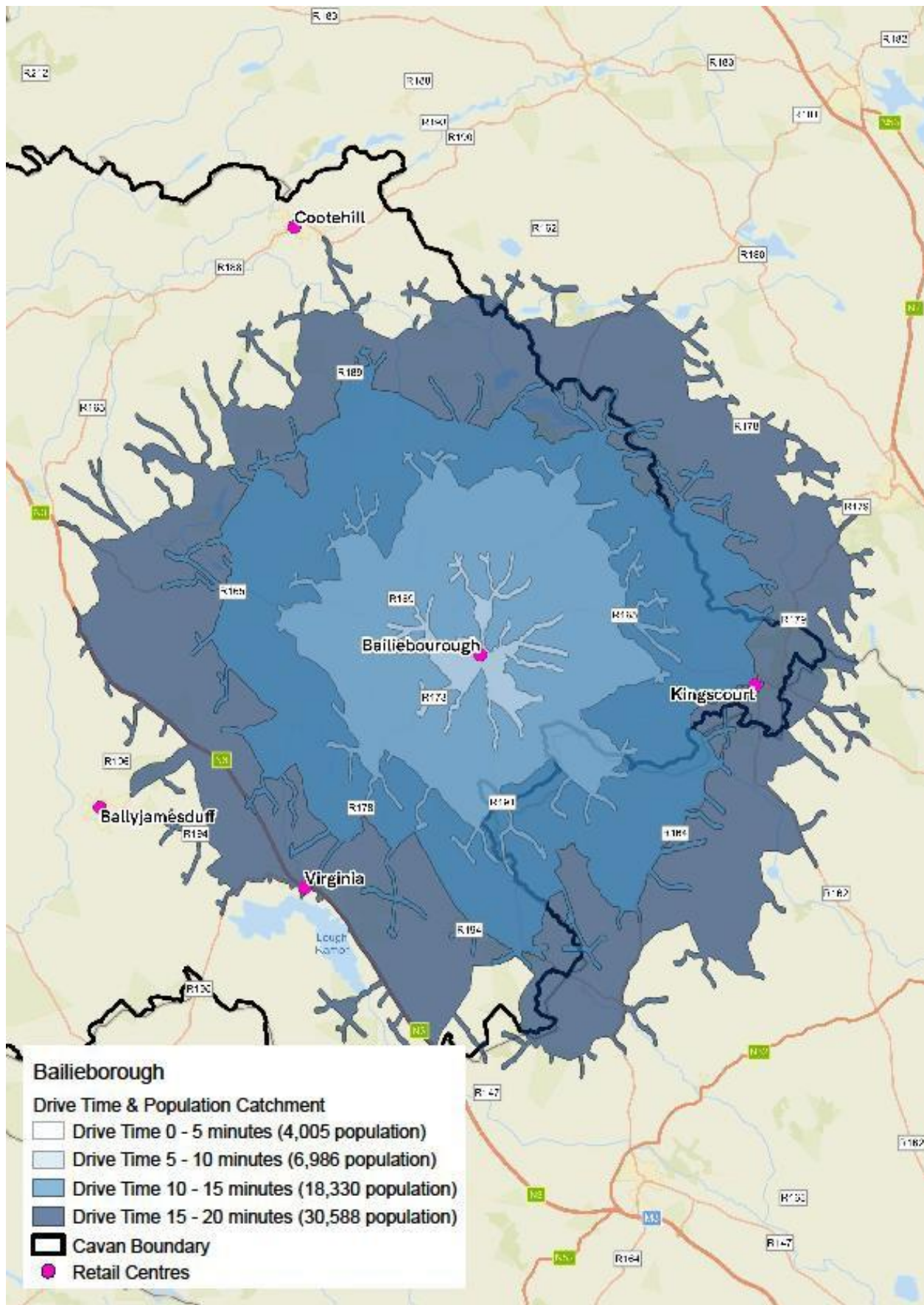
At 23.6%, Bailieborough has the highest rate of vacancy of all of the tier 2 towns in Cavan and this issue is picked up in the Shopper Survey, as shoppers highlight this as the primary item for improvement in the town. The town contains 1.17 sq.m. of occupied retail floorspace per person. Bailieborough has a relatively large amount of convenience floorspace provided by a relatively small number of retailers and the town has a large number of independent retailers selling comparison goods. See Table 6.4 below for breakdown of all retail floorspace in Bailieborough. According to the results of the shopper survey, the extent of retail leakage in Bailieborough is less than that of Cootehill, Kingscourt and Ballyjamesduff. The Tesco store that opened in December 2008 is likely to be a significant contributing factor to this.

Based on the Census of Ireland 2016 Small Areas data, it is estimated that there are approximately 6,986 persons within a 10-minute drive of Bailieborough (see figure 6.4).

Table 6.4. Bailieborough Retail Floorspace 2016 (sq.m net)

	Bailieborough 2016		
	Sq.M.	Number	No. as %
Convenience	1,349	9	8.2
A Comparison	910	30	27.3
Retail Services	893	45	40.9
Vacant	861	26	23.6
Total Retail Floorspace	4,013	110	100.0

Figure 6.4. Bailieborough Drive Times & Population Catchment.



Actions

Proposals for additional commercial space should be mindful of the growing levels of vacancy in the town and the fact that Bailieborough had the highest retail vacancy floorspace in the county in 2016 of the Tier 1 to Tier 2 towns. This continues to be the trend in 2019, according to the Geoview's figures. Considering the results of the floorspace study, new retail offering would be best facilitated in the town centre where vacancy is highest.

Road markings were re-laid on the main streets in 2016, although some motorists appear to continue ignore the markings. Measures may need to be employed to address this and ensure that markings are understood and used by motorists.

Heavy goods vehicles continue to rattle through the town, impacting negatively on the shopping experience. Traffic management measures may need to be ramped up to address this issue, in particular restricting access onto Main Street.

Promote greater synergy between the town centre and Tesco development, which represents the key retail attraction to the town.

Parking would appear to be a concern for some shoppers in the town centre area. As parking is free in other parts of the town and 'pay and display' within the town centre, this does not provide an even field for retail competition.

6.2.4 Kingscourt

According to the CSO, Kingscourt had a population of 2,499 persons in 2016 compared to 2,326 in 2011, a change of 7.4%. This is the second highest rate of increase in population experienced by the Tier 2 towns of Cavan. Located in the vicinity is Cabra Castle which was built in the 19th century and is now used as a luxury hotel. Kingscourt dates back to the time of the Ulster Plantations. Located in the southeast corner of County Cavan, Kingscourt is located only 1km from the boundary with County Meath and is also close to the boundary with County Monaghan and County Louth.

Kingscourt is not directly served by a national road, but it is situated at the meeting point of three regional routes the R162, R164 and R165. The location of the town on the south-eastern edge of the county and only 82 km from Dublin, dictates that many residents commute to the capital on a daily basis. The 107 and 166 bus routes provide public transport links to neighbouring towns, with the 107 servicing Kingscourt 4 times daily on weekdays and connecting with Navan. Sillan Tours and Royal Breffni Tours also operate private bus services to and from Kingscourt. The wide main streets allows for extensive on-street parking, which is free to use. There is also free car parking to the rear of the SuperValu store.

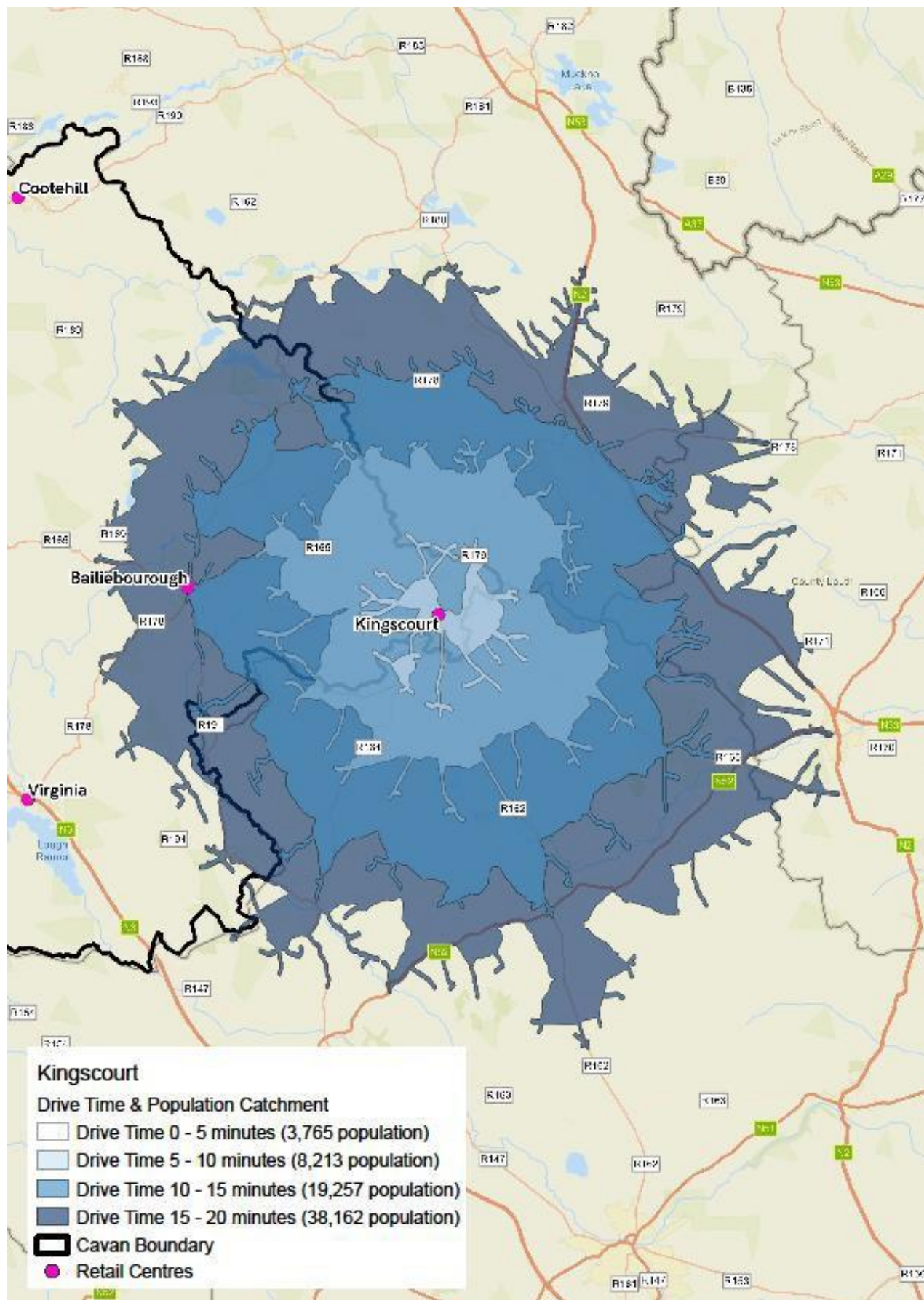
For the most part, respondents to the shopper survey felt that the overall availability of parking was adequate. Land levels in the town centre slope gradually downwards from south to north making it quite accessible for pedestrians, although the roundabout junction at the centre of the town can be difficult to traverse.

Attractions

The majority of convenience shopping in Kingscourt is provided by SuperValu, which is also the largest retailer within walking distance from Kingscourt's Main street. There are also local independent retailers and market stalls which are set out on Thursdays. In 2016, SuperValu moved from its location on Church Street to a new store on the Kells Road³⁴. Kingscourt contains a reasonable range of comparison shops operated by local independent retailers. The town also contains a reasonable provision of retail services offering, including public houses, takeaways and hairdressers in particular.

³⁴ Cavan Co Co planning reg. ref. 14107, permission for a SuperValu including 929 sqm in net retail sales area.

Figure 6.5. Kingscourt Drive Times & Population Catchment.



Amenity

The flower beds and trees lining the intermediary strip along the Main Street give Kingscourt a unique and scenic aesthetic. As the trees within this strip mature, this will create an improved setting for the town centre and this treatment could potentially be considered for other similar-size main streets within the County. The expansive streets provide a pleasant open shopping environment with good accessibility. Roughly a mile north of the town is Dún na Rí Forest Park with its impressive scenery and picturesque walks. A new secondary school recently opened in the town.

Based on the Census of Ireland 2016 Small Areas data, it is estimated that there are approximately 8,213 persons within a 10-minute drive of Kingscourt (see figure 6.5).

Assessment

The main provider of convenience goods in Kingscourt is the SuperValu which store was relocated at the Kells Road in 2016. Kingscourt has a notable lack of convenience floorspace for a town of its size, however the new supermarket currently under construction will help to address this. Despite this, a sizeable proportion of shoppers to the town travel to other towns for their convenience shopping according to the Shopper Survey. Kingscourt has a low proportion of mainstream comparison, but a high proportion of bulky comparison retailing relative to similar-size towns in Cavan.

The town has a moderate level of vacancy when compared with the other Tier 2 towns surveyed. There is 1.6 sq.m. of retail floorspace for each person living in the town based on 2016 population data. Given the low levels of convenience and comparison shopping in the town, the proximity to other competing centres and the commutable distance to Dublin, it is likely that there is a reasonably high level of retail leakage from the town at present. This is consistent with the findings of the 2008 Retail Strategy and confirmed in the Shopper Survey undertaken as part of this Strategy with high numbers shopping in other towns for convenience shopping purposes. See table 6.5 below for breakdown of all retail floorspace in Kingscourt.

Actions

Kingscourt includes an impressive market square space located centrally within the town, however, this space is currently dominated by car parking, despite the fact that there is extensive available parking throughout the town along the main thoroughfares. A more impressive functional urban space could be made of this area by removing the parking and creating a landscaped plaza, serving as a focal point for the town. A similar approach to that taken in Ballyconnell could be considered.

Considering the current dynamics of the economic recovery, the location of Kingscourt within commuting distance of Dublin, is likely to increase the potential for the town to grow. An increase in population will have a commensurate increase in demand for retail and related services and it is vital that this demand is met in a sequential manner and in the context of extant permissions.

Paths in the area fronting Gartlan's Bar are in poor state and are in need of upgrading. There are also a number of dilapidated structures along the main streets and these portray a poor image for the town and detract from the visual appearance.

The Council should promote linkages between the retail development on the Kells Road at an edge of centre location.

Heavy goods vehicles and high volumes of traffic converge in the centre of the town. Crossing in this area for pedestrians and others is difficult and some form of traffic management measures should be implemented, including improved pedestrian crossing points and incorporating measures supported in the Design for Urban Roads and Streets.

The intermediary strip along the Main Street should be maintained and advertisement signage should be removed and resisted from this space on traffic safety and visual amenity grounds.

Table 6.5. Kingscourt Retail Floorspace 2016 (sq.m net)

	Kingscourt 2016		
	Sq.M.	Number	No. as %
Convenience	1,364 ³⁵	15	17.2
A Comparison	1,236	22	25.3
Retail Services	1,033	37	42.5
Vacant	496	13	14.9
Total	4,129	87	100

6.2.5 Cootehill

Cootehill is located 22km east of Cavan Town 3km west of the boundary with County Monaghan and south of Bellamont Forest and Dromore Lough. The town of Cootehill had a population of 1,853 persons in 2016 according to the CSO, making it the smallest of Cavan's Tier 2 towns. Cootehill settlement boundary changed between Census 2011 and 2016. Census towns which previously combined legal towns and their environs such as Cootehill have been newly defined using the standard census town criteria (with the 100 metres proximity rule). The former legal town and environs of Cootehill had a population of 2,123 in 2011. As Cootehill boundaries changed between 2011 and 2016 censuses, direct comparison in respect of population changes is limited. According to the latest Geoview survey the vacancy rate for the town is well above the regional average, at 20.7%

Attractions

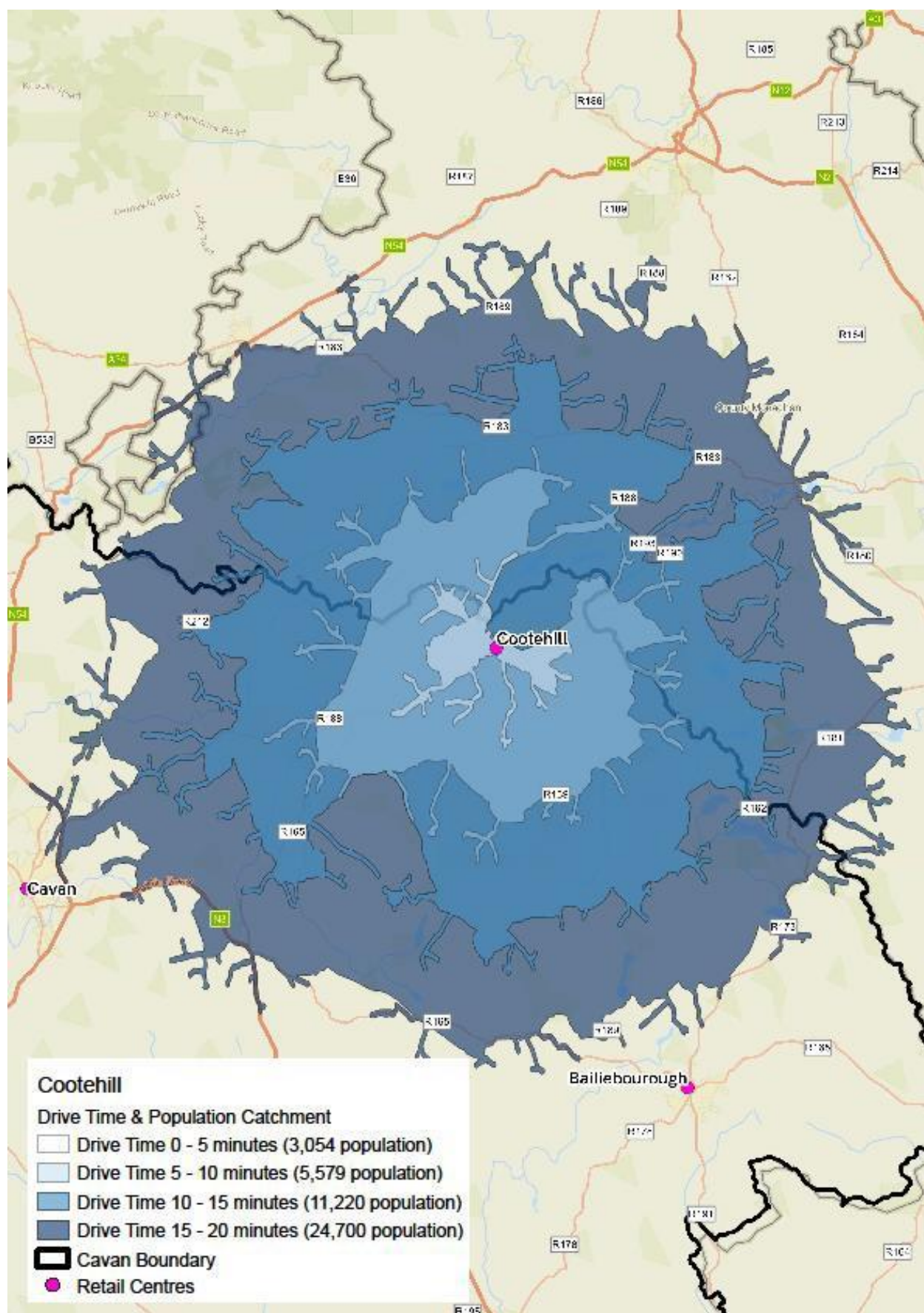
Convenience shopping is provided by several small independent retailers in the town, with Foy's SuperValu on Market Street the largest convenience store. The town centre comprises a reasonable range of comparison shops operated by independent operators. Similar to Bailieborough, Cootehill has a comparatively high number of retail services, such as hairdressers and beauticians; the importance such services in attracting custom into the town centre should not be underestimated. There is also a wide selection of public houses and restaurants/cafes offering retail services within the town.

Accessibility

Cootehill is not serviced by a national route and is primarily accessible via two regional roads, the R188 and the R190. The distance from the nearest national route reduces accessibility to the town compared with the other tier 2 towns in Cavan. Bus Éireann route 166 and 177 provide regular daily connections with Cavan town and Monaghan. The town is set out on relatively level ground with the main streets quite wide, resulting in an environment that is reasonably accessible for pedestrians and others. On-street parking is available along the main thoroughfares and there are car parks on Chapel Lane and to the rear of Market Street. Cootehill is almost equidistance from Cavan town and Monaghan town and these retail centres are expected to draw extensive custom from the Cootehill catchment for comparison and convenience shopping. This is confirmed in the responses received for the Shopper Survey.

³⁵ Figure includes additional Sq.m from new SuperValu including 929 sq.m (previous SuperValu included 300 sq.m).

Figure 6.6. Cootehill Drive Times & Population Catchment.



Amenity

The area along the main street including White's Hotel and a collection of historic buildings form an impressive urban space, with the Church of Ireland enclosing the vista along the Main Street. This is reflected in the inclusion of the Lower Market Street as an Architectural Conservation Area in the County Development Plan.

Shopfronts in the town are generally in good condition with a mix of ages, a fairly consistent approach and some fine traditional examples.

Similar to Virginia, the arched narrow laneways leading to the rear of shops and properties along Main Street are an interesting architectural feature, but care should be taken not to overly intensify use of these access points for vehicular purposes, given the conflict with pedestrian movements.

Footpaths along the main shopping streets are quite wide, however, footpaths in some parts of the town, including Bridge Street, are in need of repair.

Heavy goods vehicles pass through the main streets of the town, and as they pass in lower gears and over the pedestrian crossing, the noise from these vehicles is amplified further.

Based on the Census of Ireland 2016 Small Areas data, it is estimated that there are approximately 5,579 persons within a 10-minute drive of Cootehill, which suggests Cootehill has the lowest population catchment of the Tier 2 towns within 10-minute drive of the town centre (see figure 6.6).

Assessment

Cootehill is the only Tier 2 town in Cavan County with a significantly higher proportion of mainstream comparison shopping over convenience shopping. This comparison floorspace is generally contained within a large number of small independent retailers. Compared with the other Tier 2 towns, Cootehill contains a moderate to low level of retail vacancy and 1.8sq.m. of occupied retail floorspace per resident based on 2016 census figures. When compared with the other Tier 2 towns, this suggests Cootehill is more reliant on its immediate hinterland for custom or that its retail floorspace does not perform as well as the other Tier 2 towns. See table 6.6 below for breakdown of all retail floorspace in Cootehill.

The Shopper Survey highlighted that many shoppers consider that the town centre needs a greater variety of shops, with a high portion of respondents in Cootehill indicating that they regularly visit Cavan Town for convenience shopping. Cootehill's location at the eastern edge of Cavan also makes leakage into Monaghan very likely.

Actions

Parking dominates the front street area in the main shopping core. Additional soft landscaping possibly involving street trees, breaking up these spaces will improve the attractiveness of this area and help absorb vehicular noise. Traffic management measures could redirect some traffic, including heavy goods vehicles away from the town centre, possibly along New Line allowing for a more pleasant shopping environment along the main street.

The floorspace survey suggests that there is only one main convenience operator in the town, supplemented by a host of smaller convenience stores and butchers. It will be important to monitor this balance, particularly considerate of any legacy issues and the need to ensure that the shopping requirements of the catchment are being met.

Similar to Ballyjamesduff, there would appear to be some scope for additional convenience retail within the town, particularly aimed at addressing the extent of retail leakage to other neighbouring centres. An additional convenience retail facility would be best sited in a location that could provide footfall along the main shopping streets, while being sympathetic to the architectural heritage.

Table 6.6. Cootehill Retail Floorspace 2016 (sq.m net)

	Cootehill 2016		
	Sq.M.	Number	No. as %
Convenience	663	11	11.1
A I Comparison	1,417	30	30.3
Retail Services	1,410	44	44.4
Vacant	473	14	14.1
Total	3,963	99	100.0

6.3 Medium-size Centres

Below we review the health of two other centres which were found to perform substantial retail service functions broadly on par with the Tier Two towns. Considering their catchment population and retail offer it is important to review these centres in order to provide a more comprehensive and evidence-led Strategy. Furthermore, this review is undertaken in recognition of the pivotal role that smaller centres play in sustaining local communities and in reducing the need to travel extended distances, particularly for convenience shopping. While Mullagh is a Tier 3 centre, it is excluded from the detailed assessment directly below, as its retail function is akin to a lower tier centre.

6.3.1 Belturbet

Belturbet is positioned along the River Erne, just off the intersection of the N3 and N87 national roads. The Tier 3 town is only 4km from the border with Northern Ireland and 36km from Enniskillen. Positioning closer to the border is likely to increase the potential for retail trade with Northern Ireland, and the recent decline in the value of Sterling is more likely to increase leakage rather than draw. As a consequence, it is likely that town's such as Belturbet are even more susceptible to fluctuations in currency. Belturbet's population decreased marginally over the 2011 to 2016 period to 1,369 from 1,407. Tourism is an important industry in the area, with boating and fishing on the River Erne being an important attraction.

Attractions

Convenience food retailing in Belturbet is primarily provided by Donohue's Centra. MACE, Gala and McGurran's Butchers. These are relatively small convenience stores and anecdotal evidence suggests locals regularly travel out of town for weekly shopping. There is a limited selection of comparison retailing within the town and bulky goods stores in the Belturbet Business Park to the northeast of the town. Belturbet Farmers' Market takes place on Fridays during the months of May to October at the village hall carpark, while a car boot sale takes place at the Railway Station on the last Sunday of every month.

Accessibility

Belturbet is approximately 14km north of Cavan town along the N3 national route. Enniskillen to the north is approximately a 30-minute drive along the N3 and A509 roads. Extensive on-street car parking is available throughout the town centre. Bus Éireann route 30 operates regularly from the town connecting with Cavan town and various other towns in Cavan. A steep incline moving away from the river Erne along Bridge Street makes it difficult for pedestrians to move through this part of the town.

Accessibility

The town and immediate environs host numerous recreational and sporting activities both on land and on water. The main railway station building in the town has been converted to a museum in recent years, with meeting spaces including a conference hall. The market house and post office are very well presented in the town square, including flower beds, sculptures and seating adding to the attractiveness of this urban space. Finger post signage in the town is in good order.

Assessment

Belturbet has a large amount of convenience floorspace for a tier 3 town, with the majority of this being provided by Donohue's Centra in the Erne Hill Shopping Centre. Having the largest convenience retailer located outside the town centre can reduce footfall thereby not facilitating cross-visitation with other town centre retailers and encouraging additional car journeys.

Belturbet has a sizeable amount of vacant retail floorspace with over 36.2% of units unoccupied. Vacant units are concentrated along the secondary streets and steeper sloping streets where footfall is limited. Our survey suggests that Belturbet has 1.61 sq.m. of occupied retail floorspace per resident which may suggest that the town is more reliant on its rural catchment for retail custom. See table 6.7 below for breakdown of all retail floorspace in Belturbet.

The Belturbet bypass route was completed in 2014 well after the previous Retail Strategy was prepared. This may also have impacted retailing in the town with a reduction in passing trade. The new bypass and roads infrastructure will also make it much easier to access other neighbouring centres for retail purposes. Steep topography in some parts of the town centre and the location of large shops outside the town centre may undermine the viability and vitality of the town centre.

Table 6.7. Belturbet Retail Floorspace 2016 (sq.m net)

	Belturbet 2016		
	Sq.M.	Number	No. as %
Convenience	1,104	3	3.7
A Comparison	1,103	14	17.5
Retail Services	1,116	34	42.5
Vacant	1,239	29	36.2
Total	4,562	80	100.0

Actions

Movement along Main Street is restricted for pedestrians by virtue of narrow footpaths with some trip hazards noted, while movement for cars is restricted due to the two-way traffic system. A one-way looped traffic management system may allow for more car parking along Main Street, while also providing scope for wider footpaths, landscaping and overall a more pleasant shopping environment. This would also allow for greater pedestrian priority in the market square space, which is currently dominated by carriageway. Despite being an attractive part of the town and well-maintained, this area would benefit from a reduced level of traffic and reduced road coverage.

The loss of the railway station in 1959 and the gradual decline in services prior to that would have impacted on the town significantly in economic terms. However, the town did find a way to survive following this. With the recent loss of passing trade with the advent of the bypass it is important that the town now reconsiders the direction it must go in including what functions it aims to meet and how best to achieve this. The retail core is spread out over numerous streets and over 600 metres distance from the bottom of Bridge Street to the east end of Holborn Hill.

External factors have likely led to the contraction of the retail base in Belturbet, with high concentrations of vacancy in the town centre and new stores emerging and extending on the periphery of the town. Consideration should be given to the need for greater consolidation of the town centre, which will make urban environmental improvements more feasible to achieve over a reduced space. Extensive areas on the eastern side of the town are currently zoned 'town core' but would more appropriately fall under an 'existing residential' zoning, as they largely comprise residential properties.

Given the recent bypassing of the town, preliminary census results and previous census data revealing a population decline, it is unlikely that there will be significant demand for additional retail space in the town. Should this trend reverse, site accumulation of town centre properties would provide a more sustainable location for retailers than more peripheral edge of town locations.

6.3.2 Ballyconnell

Ballyconnell is situated at the intersection of the N87 national route and the R205 regional road, at the foot of Slieve Rushen and approximately 2km from the border with Northern Ireland. The Woodford River a canalised waterbody forming part of the Shannon-Erne waterway, runs through the town. Historically, Ballyconnell is noted to have originally developed as a crossing point over the Woodford River.

The commercial function of the canal is no longer primarily for moving goods, as it serves as a tourism attraction to the town, with many cabin cruisers stopping here. Ballyconnell is also home to a cement factory, a plastics factory and an animal feeds plant. These businesses along with services and tourism provide the vast majority of employment in the town. As the larger towns are concentrated in the east and centre of the county, Ballyconnell is an important service provider for those living in northwest Cavan. The population of Ballyconnell in 2016 census was 1,105 according to the census data, which represented an increase of 44 persons or 4.1% since 2011.

Attractions

The vast majority of convenience shopping in the town is provided by Donohue's Supervalu and Kennedy's supermarket with some smaller stores including Crowe's Butchers. Kennedy's Hardware accounts for a sizeable proportion of the comparison floorspace in Ballyconnell. There are numerous craft, gift and fish tackle shops in the town, largely aimed at the tourist trade and reflective of this element of the town's function. The Woodford river channel incorporates pleasant walks, but unfortunately the town largely turns its back on this water body.

Outdoor activities feature prominently in the array of attractions to the town, including walks, angling, biking and watersports. The Ballyconnell Loop is a walking route that runs adjacent to both woodlands and lakesides. There are several notable archaeological sites in the vicinity, including a fort at Ballyhugh. Ballyhugh also includes an arts and culture centre, which hosts regular workshops on traditional Irish music, dancing and crafts.

Accessibility

Ballyconnell is serviced by Bus Éireann route 465 on Tuesdays, while private bus services provide other connecting services towards Cavan Town and Dublin. The N87 national road connects with the N3 national road 7km to the southeast of Ballyconnell, providing convenient access to Cavan town and other local centres. On-street car parking is available in the town centre and the larger stores have their own off-street car parks. The town is quite accessible on foot with footpaths generally in good order. Pedestrian movement over the river is well served by the pedestrian bridge.

Amenity

Shopfronts within the town are generally in good shape with some impressive traditional and modern examples. The redeveloped urban space fronting the market house is well-maintained and a good focal point for the town and the removal of car parking from this space has made a significantly improvement to this space.

Assessment

Ballyconnell has reasonable quantum of convenience shopping floorspace for a town of its size. The bulk of this is provided by Donohoe's Supervalu and Kennedy's supermarket. The retail vacancy rate in the town overall is relatively high at 25%. As would be expected for a town of this size, the quantum of mainstream comparison and bulky goods floorspace is quite low with many of these businesses concentrating in alternative larger retail centres, such as Cavan town. Based on the floorspace survey and the 2016 census data, the town of Ballyconnell comprises approximately 2.96 sq.m. of occupied retail floorspace for each resident. Residents from the Ballyconnell area would invariably also use Cavan town and Enniskillen for shopping and to a lesser extent Derrylin and Ballinamore. See table 6.8 below for breakdown of all retail floorspace in Ballyconnell.

Table 6.8. Ballyconnell Retail Floorspace 2016 (sq.m net)			
	Ballyconnell 2016		
	Sq.M.	Number	No. as %
Convenience	1,132	7	9.7
AI Comparison	1,096	18	25
Retail Services	1,051	27	37.5
Vacant	468	18	25
Total	3,747	70	100.0

Actions

Finger post signage in the town may need reviewing and monitoring, particularly at the junction of N87 with the R205 at Main Street. Furthermore, high-level wiring at the main junction of the town dominating the skyline detracting from the appearance of this space.

The Council should encourage additional café, restaurant and gift / tourist shops in the town centre in order to attract tourists to the town centre and provide a link with the retail provision in the town.

The space fronting the markethouse is well landscaped but could do with some softening possibly in the form of planters. There are some prominent buildings within the town falling into a poor state and measures need to be implemented to ensure that they do not detract further from the visual appearance of the town.

A bypass of the town from the Ballyconnell Business Park end to Annagh Industrial Estate allows traffic to divert away from the town centre including the Woodford river crossing and Main Street. However, traffic volumes continue to be quite high at the intersection of the R205 with the N87, particularly with heavy goods vehicles. This junction presents a difficult crossing point for pedestrians and some improvement works are needed to better manage traffic flows and improve pedestrian movement. Traffic speeds within the town centre and moving towards this junction were quite high suggesting some additional traffic calming measures are needed to manage this.

Vacant units were noted along the bypass and it would be in the interests of the viability and vitality of the town that these are not used in the future for retailing purposes (other than bulky goods).

6.4 Villages & Rural Areas

Small villages and rural shops play an important role in the local economy and their cumulative retail floorspace should not be underestimated, and this floorspace should be considered as part of any retail strategy to accurately portray the retail landscape of the County. This Retail Strategy incorporates a review of all villages and rural areas within the County.

A number of the villages perform important retail functions despite their comparatively low census-defined population. Their retail function is indicative of the population catchment they draw from rather than their immediate 'urban' population.

A visual survey of these areas suggests that very little has changed since the previous Strategy was prepared in 2008, while some businesses have been replaced, including pubs and mainstream comparison traders with a proliferation of retail services including take-aways and hair salons/beauticians into smaller centres and some comparison shopping including charity shops and pharmacies. It is also apparent that bulky goods traders do operate from these areas, primarily in the form of hardware shops, builders' merchants and agricultural providers. As such they perform a vital service for their immediate largely rural customer base.

Attractions

The retail offer within the tier 4, tier 5 and tier 6 settlements varies considerably, and the extent of retail provision does not often match the size of the immediate urban population. For example, Arvagh, Dowra, Lough Gowna and Blacklion have fairly substantial levels of retail and retail service floorspace relative to their urban population. There is also great disparity between the retail categories within these settlements, with some villages serving purely a convenience and service function, while others such as Ballinagh and Arvagh containing a strong mix of retail floorspace, including comparison floorspace. Clearly each of these centres serve a different purpose, have differing functions and this is largely dictated by their location relative to other centres and their historical and physical context. There are no large supermarkets (over 400sq.m. net floorspace) within rural villages and the countryside, consequently, weekly shopping for most households is likely to be undertaken in larger centres.

Convenience and comparison retail floorspace outside the medium and large towns provides an important social and economic function to their respective catchments. These facilities reduce the necessity for rural dwellers and village residents to travel long distances to shop and access essential products and services.

Accessibility

Many of the smaller centres in the County are not served by frequent bus services, with the exception of those located along national primary route corridors. TFI Local Link Cavan Monaghan operate a rural transport project in the county with minibuses traveling along specified routes serving persons with travel passes. Most of the weekly TFI Local Links bus services connect with Cavan town, although, there is an expansive service offering to most towns in the County and beyond. The primary access to villages and rural areas is via private motor vehicle, cycling and walking.

Most villages are of a scale and orientation that allows for ease of access for pedestrians to retail and related services. Car parking is rarely an issue, other than during large community events, and is usually freely available adjacent to retailers.

In smaller villages and at rural crossroads, many premises will often include a number of business arms sharing occupancy under one roof, including convenience stores, pubs, restaurants and B&Bs.

Amenity

Many of the villages in Cavan County are characterised by attractive and well-maintained traditional shopfronts and coupled with the backdrop of the drumlin belt, this can present an attractive setting for these villages. While their rurality alone is often a draw to these locations, each of the villages and rural areas have their own natural amenities and resources.

Table 6.9. Cavan Villages & Rural Areas Retail Floorspace 2016 (sq.m net)³⁶

	Cavan Retail & Rural Areas 2016		
	Sq.M.	Number	No. as %
Convenience	1,809	38	14.6
A Comparison	3,563	45	17.3
Retail Services	4,676	113	43.5
Vacant	2,588	65	25.0
Total	12,636	260	100.0

Table 6.10. Arvagh Retail Floorspace 2016 (sq.m net)

	Arvagh 2016		
	Sq.M.	Number	No. as %
Convenience	454	7	15.6
A Comparison	1,094	9	20.0
Retail Services	684	22	48.9
Vacant	141	7	15.6
Total	2,373	45	100.0

Table 6.11. Ballinagh Retail Floorspace 2016 (sq.m net)

	Ballinagh 2016		
	Sq.M.	Number	No. as %
Convenience	687	3	8.1
A Comparison	556	10	27.0
Retail Services	574	19	51.4
Vacant	185	5	13.5
Total	2,002	37	100.0

Table 6.12. Killeshandra Retail Floorspace 2016 (sq.m net)

	Killeshandra 2016		
	Sq.M.	Number	No. as %
Convenience	252	5	11.1
A Comparison	350	5	11.1
Retail Services	536	14	31.1
Vacant	509	21	46.7
Total	1,647	45	100.0

³⁶ Excludes retail floorspace in Cavan Town, the Tier 2 towns and the villages of Belturbet, Ballyconnell, Arvagh, Ballinagh and Killeshandra.

Assessment

Convenience retailers throughout villages and rural areas, vary in size and catchment population. Comparison retailers in the more peripheral parts of the County primarily include a mix of pharmacies, gift shops and agricultural supplies or hardware, although there are some independent clothes and shoe shops in the larger villages. A significant quantum of floorspace in rural areas and rural villages, arises from agricultural suppliers and merchants, primarily serving the local farming clientele. It is important to recognise the extent of retail services provision in villages and rural areas. While much of the provision comprises of post offices and public houses, as mentioned above they perform important social and economic functions for local residents.

Vacancy rates vary considerably between villages. Ballinagh (13.5%) and Arvagh (15.6%) have relatively low vacancy rates, on a par with the large towns in the County. In contrast, Killeshandra has a vacancy rate of 46.7% which is extremely high. Arvagh and Ballinagh saw their populations rise by 8.2% and 22.2% respectively and this likely to be a major contributory factor in differences in vacancy levels.

The floorspace survey revealed very little use of the upper floors for retail or other purposes and the overall unit vacancy rate in the smaller villages and rural area stood at 25% in 2016.

6.5 County Unit & Floorspace Provision

While the primacy of Cavan Town dominates the retail offering in the County, it is clear from the surveys undertaken as part of this Strategy that there is a reasonable distribution of retail and related businesses within local services centres. Reflective of the sizeable portion of the County population residing in rural areas, there is also a considerable portion of retail businesses and services operating in villages and rural areas. While market dynamics may heavily influence the geography of retail, retail planning policy needs to be prepared mindful of the fact that rural areas have suffered greater loss of retail than urban areas. Review of the number of businesses and the floorspace associated with same will provide the backbone for the County retail hierarchy, which does not necessarily have to strictly align with the County settlement hierarchy and can inform future settlement hierarchies.

Bailieborough (110 retail units) serves as the second largest centre for Cavan County in terms of the number of retail and related businesses, followed by the other key support towns of Virginia, Ballyjamesduff, Kingscourt and Cootehill. Notably, the north Cavan Tier 3 town of Ballyconnell (70 retail units) contains a similar retail offering to the Tier 2 towns, while the Tier 4 village of Arvagh contains a spread and quantum of businesses only slightly below the Tier 2 towns. Review of convenience retailers suggests a reasonable spread of convenience shopping distributed throughout the County.

As presented in Table 6.14, just over a quarter of the occupied and vacant retail and retail services units in the County are located in Cavan town. The retail survey suggests that 20.1% of the properties surveyed in the County are unoccupied. Furthermore, it is observed a greater level of vacancy within the smaller villages and rural areas than larger urban centres.

A total of 11.3% of the properties surveyed fall into the convenience shopping category, while mainstream comparison units accounted for 27.9% of the units surveyed. Cavan County has a reasonably high proportion of small independent comparison traders operating in villages and rural areas. 3.4% of the total number of comparison retail shops operating in Cavan County are located in villages and rural areas, often including pharmacies, craft and gift shops and hardware stores.

While review of the number of units in the County revealed that only 2.4% (see Table 6.14) of retail convenience units in the County is in Cavan town, a review of the floorspace attributed to these units (see Table 6.16) reveals a greater proportion of the overall floorspace is concentrated in Cavan town (11.9%). There is a much greater concentration of convenience floorspace in Cavan town when compared with the number of units based here, indicative of the fact that each of the primary retail operators have a presence in the town. The survey suggests larger shop unit floor areas in Cavan town compared with other parts of the County. Bulky goods units (28) amounted to the smallest category in terms of the number of units (See Table 6.1), but the floorspace associated with these units (14,102 sq.m) occupied the second largest category in terms of overall floorspace quantum.

Table 6.13. Total (no. of units) Retail & Retail Services in Cavan County, 2016

Settlement (County Tier Hierarchy)	Convenience	Comparison	Retail Services	Vacant	Total
Cavan Town (T1)	32	142	116	50	340
Ballyjamesduff (T2)	12	22	35	10	79
Virginia (T2)	9 ³⁷	27	41	11	88
Bailieborough (T2)	9	30	45	26	110
Kingscourt (T2)	15	22	37	13	87
Cootehill (T2)	11	30	44	14	99
Arvagh (T4)	7	9	22	7	45
Belturbet (T3)	3	14	34	29	80
Ballyconnell (T3)	7	18	27	18	70
Ballinagh (T4)	3	10	19	5	37
Killeshandra (T4)	5	5	14	21	45
Villages & Rural	38	45	113	65	261
Total	151	374	547	269	1341

Table 6.14. % Split of Total (no. of units) Retail & Retail Services in Cavan County, 2016

Settlement (County Tier Hierarchy)	Convenience	Comparison	Retail Services	Vacant	Total
Cavan Town (T1)	2.4	10.6	8.7	3.7	25.4
Ballyjamesduff (T2)	0.9	1.6	2.6	0.7	5.9
Virginia (T2)	0.7	2.0	3.1	0.8	6.6
Bailieborough (T2)	0.7	2.2	3.4	1.9	8.2
Kingscourt (T2)	1.1	1.6	2.8	1.0	6.5
Cootehill (T2)	0.8	2.2	3.3	1.0	7.4
Arvagh (T4)	0.5	0.7	1.6	0.5	3.4
Belturbet (T3)	0.2	1.0	2.5	2.2	6.0
Ballyconnell (T3)	0.5	1.3	2.0	1.3	5.2
Ballinagh (T4)	0.2	0.7	1.4	0.4	2.8
Killeshandra (T4)	0.4	0.4	1.0	1.6	3.4
Villages & Rural	2.8	3.4	8.4	4.8	19.5
Total	11.3	27.9	40.8	20.1	100.0

³⁷ Figure includes Lidl Ireland Ltd in the Ballyjamesduff Road opened in December 2016.

Table 6.15. Total Retail Floorspace in Cavan County, 2016 (sq.m net)

Settlement (County Tier Hierarchy)	Convenience	Comparison	Retail Services	Vacant	Total
Cavan Town (T1)	11,758	27,788	6,294	6,211	52,051
Ballyjamesduff (T2)	516	806	1,043	473	2,838
Virginia (T2)	2,884 ³⁸	951	1,157	233	5,225
Bailieborough (T2)	1,349	910	893	861	4,013
Kingscourt (T2)	1,364 ³⁹	1,236	1,033	496	4,129
Cootehill (T2)	663	1,417	1,410	473	3,963
Arvagh (T4)	454	1,094	684	141	2,373
Belturbet (T3)	1,104	1,103	1,116	1,239	4,562
Ballyconnell (T3)	1,132	1,096	1,051	468	3,747
Ballinagh (T4)	687	556	574	185	2,002
Killeshandra (T4)	252	350	536	509	1,647
Villages & Rural	1,809	3,563	4,676	2,588	12,636
Total	21,922	40,870	20,467	13,877	99,186

Table 6.16. % Total Retail Floorspace in Cavan County, 2016

Settlement (County Tier Hierarchy)	Convenience	Comparison	Retail Services	Vacant	Total
Cavan Town (T1)	11.9	28.0	6.3	6.3	52.5
Ballyjamesduff (T2)	0.5	0.8	1.1	0.5	2.9
Virginia (T2)	2.9	1.0	1.2	0.2	5.3
Bailieborough (T2)	1.4	0.9	0.9	0.9	4.0
Kingscourt (T2)	1.4	1.2	1.0	0.5	4.2
Cootehill (T2)	0.7	1.4	1.4	0.5	4.0
Arvagh (T4)	0.5	1.1	0.7	0.1	2.4
Belturbet (T3)	1.1	1.1	1.1	1.2	4.6
Ballyconnell (T3)	1.1	1.1	1.1	0.5	3.8
Ballinagh (T4)	0.7	0.6	0.6	0.2	2.0
Killeshandra (T4)	0.3	0.4	0.5	0.5	1.7
Villages & Rural	1.8	3.6	4.7	2.6	12.7
Total	24.2	41.2	20.6	14.0	100.0

³⁸ Figure includes Lidl Ireland Ltd in the Ballyjamesduff Road opened in December 2016.

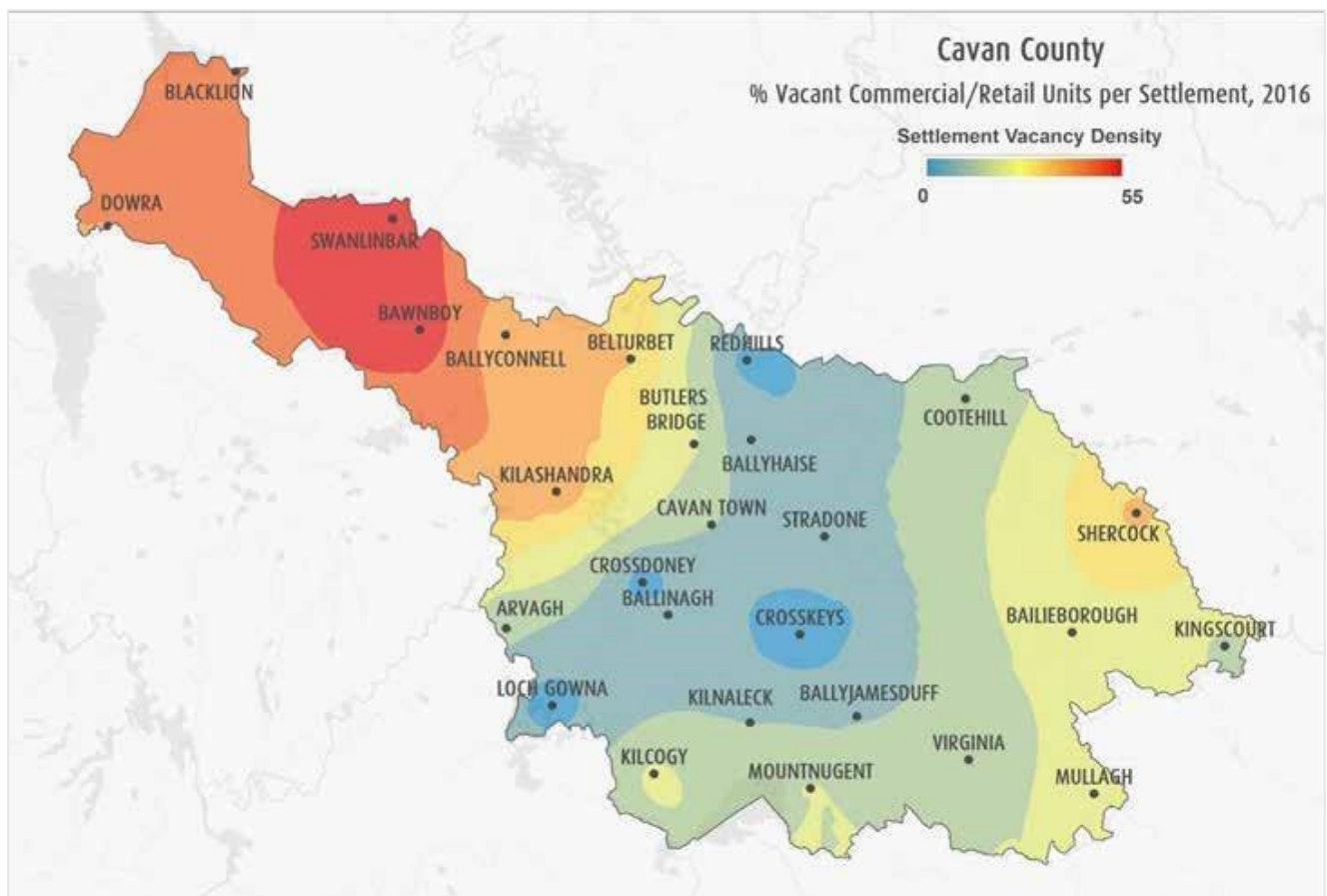
³⁹ Figure includes additional Sq.m from new SuperValu including 929 sq.m (previous SuperValu included 300 sq.m).

The distribution of occupied floorspace within the County generally followed findings in relation to the number of units, but Belburbet (2.5) and Ballyconnell (2.0) perform a more important retail and service function than their present settlement strategy position (see Table 6.14).

The survey shows that 20.1% (see Table 6.14) of the units within the County are considered vacant but only 14.3% (see Table 6.16) of the overall floorspace in the County was considered vacant following the survey. While containing 14.3% of the overall population in 2016, Cavan town contains over half the retail floorspace (52.5%) of the County (see Table 6.16). This is indicative of the monomodal nature of retail floorspace in the County. Ballyconnell and Arvagh accommodate a disproportionate amount of floorspace relative to their population, but this is skewed by the fact that they accommodate proportionately high quantum of vacant retail space (see Table 6.16).

While 20.1% of the units within the County are considered vacant, only 14% of the overall floorspace in the County was considered vacant following the survey.

A heat map of commercial and retail vacancy has been produced in order to illustrate the areas within the County that are performing well and the areas that are underperforming. The map provides a clear indication that the northern part of the county is suffering more in loss of retail trade, while those areas on the southside of Cavan town are performing best, possibly because of reduced tendency for retail spending leakage to Dublin and other centres.



6.6 Summary

Many urban centres have suffered from contraction of their retail offering in recent years as a result of wider economic conditions and consequent changes in shopping habits. However, this contraction in retail offering has not been matched with a contraction in town centre 'retail' space. A visit to many of the more rural areas and villages in Cavan as part of the survey process reveals a high level of vacancy spread throughout these centres. This situation has worsened by the COVID-19 pandemic in 2020. The vacancy is a reminder of the fact these towns and villages were once bustling market towns serving active rural hinterlands. Their function has amended with the advent of new ways of shopping and differing lifestyles, including daily commuting patterns. Planning policy needs to include recommendations that address contraction in retailing and consolidation of retailing where this can lead to unsustainable forms of development.

It would be best that future reviews of retailing within the County follow the same methodology employed in the floorspace survey undertaken, as this will allow for a better understanding of changes in retailing and also allow for planning policy to be prepared in light of such changes.

CHAPTER 7

Projected Requirements

Cavan County Retail Strategy

7.0 Projected Requirements

This section provides the floorspace capacity assessment for the County taking into account, as best as possible, changes to the economy, population and future economic and population forecasts. It should be noted that a quantitative retail appraisal of this nature is the best means of identifying the likely floorspace quantum that needs to be achieved in the County and is consistent with the approach sought under the Retail Planning Guidelines 2012. It involves making forecasts for the future population, expenditure, turnover and other factors using the best available data at the time. In order to reach the desired output, a number of inputs have to be estimated and have been chosen in order to be consistent and align with the core strategy and settlement strategy for the Cavan County Development Plan 2014-2020 and the forthcoming Cavan County Development Plan.

As the study is based on a number of assumptions, it can only provide a broad indication of anticipated capacity. Nonetheless, the quantitative study can give a useful overview of the position of the County from a retailing perspective. Furthermore, it should be noted that the figures set out in this section are not intended to be prescriptive thresholds nor should they be treated as upper limits⁴⁰, particularly bearing in mind future changes in economic conditions.

The base year 2021 aligns with the start date of this Strategy. Further to this, compared to 2020, 2021 may be a more appropriate base year due to the impact of the COVID-19 pandemic had on expenditure in 2020 (annual per capita spend was depressed); it is therefore assumed that using 2020 as the base year it would not provide a clear representation of the likely increase of expenditure per capita from the period of the Strategy.

The Design Year 2028 will allow for the study to have relevance beyond the lifetime of the current County Development Plan and will allow the strategy to align with the period of the forthcoming Cavan County Development Plan 2022-2028.

This chapter estimates retail expenditure growth and future floorspace requirements in the Study Area from 2021 to 2028. Findings from the Householder and Shopper surveys will influence the estimates. The approach taken is a step-by-step capacity assessment including the following steps: -

1. Estimate of total available expenditure in the base year and design year for occupied households of the catchment areas;
2. Estimate of expenditure per capita on convenience, comparison and bulky household goods at the base year and design year;
3. Estimate the catchment population at base and design years for convenience and comparison;
4. Estimate the likely increase in expenditure available for provision of additional floorspace, and changes to the proportion of expenditure on other forms of retailing such as remote shopping;
5. Estimate the likely average turnover of new floorspace in convenience, comparison and bulky household goods (net sales density);
6. Estimate the capacity for additional floorspace throughout the County.

⁴⁰ Section 3.6 of the RPGs states "Estimates of future retail requirements are only intended to provide broad guidance as to the additional quantum of convenience and comparison floorspace provision; they should not be treated in an overly prescriptive manner, nor should they serve to inhibit competition"

7.1 Population Estimates

The population of County Cavan increased from 64,003 persons in 2006 to 73,173 persons in 2011, which represents a 14.3% increase. Results from the latest Census of Population that took in April of 2016 reveal an increase in population of Cavan County to 76,176 representing a 4.1% increase. The Census due to take place in April 2021⁴¹ is postponed for one year. Population projections for 2026 and 2031 need to be consistent with the population targets for County Cavan set in the NPF, RSES and County Development Plan.

Taking Cavan County as the catchment, the baseline population for the base year is 79,169, as per population growth between 2011 and 2016 census figures and for the design year, 84,500 persons by following the population trends set in the NPF's Roadmap⁴² document.

Table 7.1 Recorded Populations and Population Projections for County Cavan

2006	2011	2016	2021 (Base Year)	2028 (Design Year)
64,003	73,183 (+14.3%)	76,176 (+4.1%)	79,169 (+4.1%)	85,900 (higher end)
CSO 2006	CSO 2011	CSO 2016	Estimated based on growth trend 2011-2016	Estimated based on higher tier of NPF's RoadMap. 2026: 83,000-84,500 2031: 86,000-88,000

7.2 Retail Expenditure

The Central Statistics Office provides data for the total estimated breakdown in household expenditure on convenience, comparison and other expenditure categories for the most recent period, 2015-2016 period⁴³. An adjustment for the County retail expenditure using a 0.937 weighting based on State averages in 2017 is incorporated into the estimated spend⁴⁴. This is to account for the fact that disposable incomes will vary across the State with a greater prevalence for higher levels of disposable income in counties proximate or comprising the largest urban centres.

Household income expenditure is known to vary between rural and urban households and weighting was also included for this based on the number of occupied urban and rural households in 2016 (using CSO Census stats). Average and total weekly expenditure per household in 2016 and *per capita* can then be estimated.

Indicators of growth and decline in disposable income are then used to estimate the potential change in average expenditure per capita at the base year, 2016. The reasonable means of identifying change in disposable income is *via* review of the Retail Sales Index (RSI)⁴⁵, as improved retail sales performance is generally an indication of increased levels of disposable income. It is possible to also review variations in the retail sales index for convenience and comparison goods, thereby excluding motor sales from the estimations. Our review indicates that the retail sales index for the sale of all retail goods, excluding motor sales, increased from an index measure of 101.2 in July 2016 to 109.7 in 2019 before it dropped to 105 in 2020 because of the COVID-19 pandemic.

⁴¹ Press Statement – CSO 2021. Accessible via:

<https://www.cso.ie/en/csolatestnews/pressreleases/2020pressreleases/pressstatementpostponementofcensus2021/>

⁴² The NPF's Implementation Roadmap contains population targets for the County at 83,000-84,500 in 2026 and 86,000-88,000 for 2031. The growth rates reported by the CSO consistently exceed the average national rate of change for the same periods. Therefore, the upper limit has been selected as for the purpose of estimating population in 2028 (design year).

⁴³ CSO Household Budget Survey 2015-2016. It is important to note that household expenditure is only referred to and this does not include retail expenditure by businesses, on items like food, drink or stationery nor does this include retail expenditure by communal households, such as nursing homes, hospitals or boarding schools. Accessible via: <https://www.cso.ie/en/releasesandpublications/ep/p-hbs/hbs20152016/hexp/>

⁴⁴ This weighting is based on Table 8 of the Central Statistics Office publication (2017), County Incomes and Regional GDP 2017, which refers to 'indices of disposable income per person by County. Accessible via: <https://www.cso.ie/en/releasesandpublications/er/cirgdp/countyincomesandregionalgdp2017/>

⁴⁵ The Retail Sales Index collated by the CSO measures the trend in the level of average weekly sales for each month. It provides an accurate and objective measure of retail trading and supplies a valuable guide to consumer behaviour in the Irish retail market. At the time of the study the latest RSI was available for November 2020. For the purposes of this exercise, all adjusted retail sales indices for the months of July 2016-2020 are used.

When broken down into weekly spend and multiplied per resident of Cavan for 2016, the estimated annual spend per capita is calculated as €2,950 on convenience goods and €1,541 on comparison goods in the base year, 2021.

Table 7.3 Estimated Spend on Comparison & Convenience Goods for County Cavan, 2016-2021		
	Convenience	Comparison
Total Weekly Household Spend	€3,869,528	€2,020,679
Weekly Spend per Capita	€48.48	€25.32
Annual Spend per Capita, 2016	€2,521	€1,316
Annual Spend per Capita, 2021	€2,950	€1,541

7.3 Future Floorspace Requirements

The demand for additional commercial facilities will be dependent on population increase and an increase in per capita expenditure. However, this needs to consider the existing and future dynamics of retailing in the catchment and the existing provision of retail floorspace.

Future Estimates (2021-2028)

For the purposes of estimating the future floor area requirements, it is essential that future changes in retail sales are estimated. A host of economic measures can be utilised to forecast future variations in retail expenditure. Trading Economics⁴⁶ use econometric models to estimate changes in disposable income and consumer spending. Forecasts are projected using an autoregressive integrated moving average (ARIMA) model calibrated by economic analysts. Similar to approaches by academics and research bodies, analysts build a model based on the past behaviour using vast amounts of historical data and adjust the coefficients of the econometric model by taking into account analytical assessments and future expectations. This will provide a current estimate and an estimate of consumer spending per capita in County Cavan in the design year, 2028.

The total annual spend for the County catchment is estimated in Table 7.4 based on census results and population growth from 2011 to 2016 and targets set within the NPF's roadmap between 2026-2031. Further reasoned assumptions on both market share and trade draw inform this aspect of the retail expenditure estimates.

In considering the above expenditure levels, it is important to note that significantly different levels of turnover will apply to town-centre comparison goods, such as clothing and footwear and smaller household durables than would apply to 'bulky-household goods' sold in retail warehouses. Retail warehouses have a distinct function and are generally located outside of town centres. It is necessary to establish the expenditure potentially available to town centre comparison floorspace.

In this regard, it is considered important to split between expenditure available for bulky household goods and comparison goods within the study area. Having regard to those items that clearly fall into the definition of bulky goods in the CSO Household Budget Survey (average of 16.1% cost of weekly expenditure), experience elsewhere in this respect (10%-20%) and the proportion of floor area identified for bulky goods in Cavan County (20.2%), it is estimated that approximately 18.2% of comparison expenditure will be accounted for by bulky household goods in retail warehouse type premises. The split in estimated spend on comparison, convenience and 'bulky-goods' is detailed below.

⁴⁶ Trading economics uses official sources, such as CSO historical data to identify economic patterns. Accessible at <http://www.tradingeconomics.com/about-te.aspx>

Table 7.4 Estimated Spend on Comparison & Convenience Goods for County Cavan, 2021-2028

	Convenience	Comparison	Total
Annual Spend per Capita, 2021	€2,950	€1,541	€4,491
Annual Spend per Capita, 2028	€3,206	€1,674	€4,880
Total Annual Catchment Spend, 2021	€233,574,037	€121,971,443	€355,545,480
Total Annual Catchment Spend, 2028	€275,375,661	€143,800,087	€419,175,749

Table 7.5 Total Estimated Spend on Comparison, Convenience & Bulky Goods, 2021-2028

	Convenience	Comparison	Bulky Goods	Total
Total Annual Spend, 2021	€233,574,037	€99,816,610	€22,154,833	€355,545,480
Total Annual Spend, 2028	€275,375,661	€143,800,087	€26,119,777	€419,175,749

Expenditure Adjustments (2021-2028)

Allowances have to be made for special forms of trading (SFT) which covers expenditure through the internet, market stalls, mail order and other non-store locations. Following analyses of various sources⁴⁷, practise in Ireland and the UK and the results of the Householder Survey⁴⁸, a reduction in comparison expenditure of 5% is assumed in 2021 rising to 8.5% in 2028, reflecting the increasing use of internet trading and the fact that many items purchased online are not hard goods (e.g., streaming). This also absorbs the market share attributed to expenditure draws towards other non-store locations.

Online grocery shopping is becoming increasingly widespread with each of the main convenience retailers having some current presence or intention to tap into this market. In Ireland, online grocery retail is currently held back by a relatively low broadband penetration and logistical issues. However, each of the key market players are keen to expand their online operations in Ireland over the next 5 years, particularly taking into account COVID-19's impact on many retailers to facilitate online shopping. Information on levels of market draw from online grocery shopping are not commercially available, but the Household and Shopper surveys undertaken as part of this Strategy show very low levels of uptake in convenience shopping online. Figures relating to the UK market suggest in the region of 2% to 5% of market share comes from online grocery shopping⁴⁹. Trends also suggest a greater concentration of online grocery sales in more urban locations. While online grocery shopping is expanding, a restrained approach to estimating the market share is taken in term of adjusting the market share and also taking into consideration that in many situations revenue from online shopping generally reverts back to the local shop. A 1% reduction is applied for the base year, 2021, increasing to 3% at the design year, 2028, to account for assumed increased uptake in this type of shopping.

Adjustments for inflows and outflows

Some adjustments to the capacity figures outlined in table 7.5 are required to take into account the levels of trade draw and leakage of expenditure from the county. Assumptions on both market share and trade draw are informed by the household and shopper surveys undertaken during the summer of 2016, the results of which are summarised in Chapter 4 of the Retail Strategy.

⁴⁷ For examples, see Retail Ireland (2013) Retail Focussed on €4.1 billion online shopping market; Euromonitor International (2015) Internet retailing in Ireland; Virgin Media (2016) Digital Insights Report 2016.

⁴⁸ While the Householder Survey revealed a high level of respondents shopped online for comparison goods, the frequency of use suggests that the expenditure allocated for online purchases would be quite low.

⁴⁹ See 'E-Commerce in Europe and Ireland' (August 2015). Accessible at <http://exsite.ie/e-commerce-in-europe-and-ireland/>

The household survey undertaken identified the following trends in the county:

- Convenience: 8.5% of respondents survey undertook their convenience shopping outside County Cavan;
- Comparison: 53% of the total respondents surveyed undertook their main comparison shopping outside County Cavan⁵⁰;
- Bulky Goods: 37% of respondents undertook their main bulky goods shopping outside County Cavan.

In terms of trade draw, the shopper surveys identified an inflow of expenditure of 11% from residents outside of the county. Based on the splits gathered within the Shopper Survey a total 9% of these respondents were in Cavan County for convenience shopping and 2% for comparison (0% for bulky goods shopping). Having regard to the trends identified within the household and shopper surveys, adjustments were made to the total expenditure within the catchment.

After applying these adjustments based on the above assumptions, household expenditure in Cavan County is estimated to be €370 million in 2028. It is estimated that there will be almost a €49 million increase in retail spend in the County over the 2021 – 2028 period based on population targets, catchment and forecasted economic trends.

The floorspace survey of existing occupied floorspace within County Cavan clarifies the extent of convenience, comparison or bulky goods.

Table 7.6 Total Adjusted Estimated Spend on Comparison, Convenience & Bulky Goods, 2016 - 2022				
	Convenience	Comparison	Bulky Goods	Total
Total Annual Spend, 2021	€232,394,488	€75,860,624	€13,259,667	€321,514,779
Total Annual Spend, 2028	€268,449,964	€87,083,429	€15,221,300	€370,754,693

Table 7.7 Existing Floorspace within County Cavan, 2021 ⁵¹				
	Convenience	Comparison	Bulky Goods	Total
Floorspace (m²)	23,972	20,805	20,065	64,842

Turnover Capacity of Existing Floorspace (2021)

The turnover figures for 2021 set out in Table 7.6 are an estimate of the amount of expenditure that is currently being sustained in the County. For example, at the start of 2021 Cavan County had 23,972 sq.m. convenience floorspace, which is estimated to be generating a turnover of €232 million; 20,805 sq.m. of comparison floorspace, which is estimated to be generating €75 million; and 20,065 sq.m. of bulky household floorspace, which is estimated to be generating €15 million. Looking at indicative turnover ratios (turnover divided by floorspace), trading conditions in the convenience sector would be considered to be trading at a reasonably healthy level (€9,694 per sq.m) with a good mix of stores, albeit concentrated within Cavan Town.

⁵⁰ The percentage spend on comparison shopping by residents of Cavan outside the County is not anticipated to be this high, particularly when considering the fact that 43% of shoppers only undertake their main comparison shopping 'less than one time per month' and given the growth of non-food products in supermarkets (approximately 20-30% floorspace). This suggests that the extent of comparison expenditure outside the County is probably closer aligned to the bulky goods figure in this regard (37%).

⁵¹ Based on the Floorspace Survey carried out in 2016. Additional floorspace built until 2021 is also taken into consideration, as detailed in Chapter 4.

Dividing the volume of net comparison floorspace with estimated adjusted expenditure, gives an average sales density of €3,646 per sq.m, for comparison shopping, lower than the general average for neighbouring Counties (see Table 7.8).

Review of the largest retail centres in the country by Sherry FitzGerald in 2013, highlighted that Cavan County has only one purpose-built Shopping Centre and this was less than 5,000sq.m.⁵², while neighbouring counties to the south and east include a large volume of shopping centres of varying scale. Bulky-goods floorspace is trading poorly at €661 per sq.m., which is reflected in the extent of vacancy in this type of shop floorspace, particularly within the Cavan town environs. For comparison, Table 7.8 identifies net sales density figures detailed recently within other neighbouring Retail Strategies.

Turnover Capacity of Floorspace (2028)

Assuming a similar trend in retail spending to that exercised within tables 7.5 and 7.6, we can calculate the estimated turnover per floorspace in County Cavan in 2028. By dividing the estimated change in retail expenditure 2021-2028 (see Table 7.6) with the estimated turnover per floor area for 2028 in Cavan, the additional floorspace envisaged to be required in Cavan County over the 2021-2028 period can be estimated (see Table 7.10).

Approximately 3,000 sq.m. of convenience and 2,600 sq.m of comparison floorspace are estimated to be required over the lifetime of the Strategy. This additional potential requirement does not account for the existing vacant floorspace in the County, which it was estimated at 13,877 sq,m (Table 6.15), and the volume of floorspace in the retail development pipeline. Further to this, it is important to highlight that this is just an estimated figure rather than an exact threshold. As stressed above, the study is based on a set of assumptions (i.e., emerging trends in the retail market, general estimates of future demand population and economic growth forecasts, etc). Therefore, the figure outlines the likely requirement for additional retail space based on current projections which may change at any time during the lifetime of this Strategy. This is in accordance with the recommendations set out in the RPGs⁵³.

Table 7.8 Neighbouring County Net Sales Densities			
	Convenience	Comparison	Bulky Goods
Cavan 2021	€9,694	€3,646	€661
Monaghan 2015	€8,715	€4,850	€1,939
Sligo 2016	€11,918	€4,005	€862
Leitrim 2014	€10,064	€5,035	€596
Louth 2014	€11,186	€4,224	€1,861
Longford 2014	€8,347	€8,787	€606
Roscommon 2014	€9,000	€4,050	€2,160

Table 7.9 Estimated Turnover per Floor Area in County Cavan, 2021-2028			
Year	Convenience	Comparison	Bulky Goods
2021	€9,694	€3,646	€661
2028	€12,327	€4,636	€840

Table 7.10 Estimated Additional Retail Floor Area in County Cavan, 2021-2028				
Year	Convenience	Comparison	Bulky Goods	Total
2028	2,925	2,598	2,506	8,028

⁵² DTZ Sherry FitzGerald (2013) Irish Shopping Centres and Retail Parks: A Stock Analysis. Accessible at <http://www.sherryfitz.ie/media/irish-shopping-centres-and-retail-parks1.pdf>

⁵³ Section 3.6 of the RPGs states "Estimates of future retail requirements are only intended to provide broad guidance as to the additional quantum of convenience and comparison floorspace provision; they should not be treated in an overly prescriptive manner, nor should they serve to inhibit competition"

Proposed increase in convenience shopping floorspace is most likely to be arise in Cavan Town but based on this Strategy, it is considered that Ballyjamesduff and Cootehill also appear to have capacity and this may allow for more sustainable development and reduced retail leakage. This situation should be monitored over the lifetime of the Strategy to ensure a sustainable geographical distribution of the anticipated floorspace throughout the County.

Any proposed increase comparison shopping is most likely to occur in Cavan town. While there may be scope for comparison shopping in the large and medium-size towns, a lack of footfall is likely to direct these developments towards Cavan town. It is vital that this floorspace is directed into the town in a sequential manner from the centre outwards.

It is considered that there is significant available comparison floorspace at present, but that will need to be reviewed over the lifetime of the Strategy. It would appear far more sustainable to encourage reoccupation or replacement of existing vacant floorspace within the main urban centres rather than seek new build additional floorspace outside of these centres. Considering the extent of comparison expenditure leakage from Cavan County overall, it would appear more sustainable to look to facilitate a greater presence of comparison retailing in Cavan town centre.

Taking into account the existing stock of vacant retail space in the County, it would be advisable to look at these units as the preferred option to absorb part of the extent of additional bulky goods retail floorspace estimated over the lifetime of the Strategy. However, it is important to note that constraints in terms of size and ownership may arise which would make some of the proposals unviable. These are some of the considerations that the Council should have regard for when assessing new bulky goods retail applications which are not proposed within the existing stock of vacant retail space.

7.4 Summary

Sections 7.1 to 7.3 above provided a summary of the results of the assessment undertaken, which was backed by a detailed statistical model. Future floorspace requirements are only used here for indicative purposes and as an evidence-based guide to inform future planning policy.

As provided for in the Retail Planning Guidelines, the figures above “should not be treated in an overly prescriptive manner, nor should they serve to inhibit competition” (p.23). It is also important to consider other factors like the decrease in retail floorspace as a result of changes of use.

It is clear from the Shopper Survey undertaken as part of the Retail Strategy that shoppers would like to see greater diversity in shops and less of a reliance on having to travel further to visit shops. Responses received indicate a significantly high quantum of leakage outside the County for comparison shopping. Consequently, it is imperative that applications for retail development over the lifetime of this Strategy should not be solely assessed on quantitative grounds, but also from a qualitative perspective.

Considering the current scenario and estimates of change over the 2021-2028 period, robust Retail Impact Assessments will be required as part of future planning applications for retail development, in order to best guide the development of retail planning in Cavan, in particular based on sound rationale, evidence and with reference to the findings of this Retail Strategy.

In considering proposals for future retail provision, the Council will have regard to the need to avoid unnecessary leakage of retail expenditure to competing centres within and outside of the County, where this is not considered a sustainable form of development.

CHAPTER 8

Recommendations

Cavan County Retail Strategy

8.0 Recommendations

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

The Retail Planning Guidelines also provide specific guidance for the content and role of Development Plans including the requirement to have clear evidence-based policies and objectives in relation to retailing in a discrete section of the Plan. Throughout this Retail Strategy proposals actions and measures to guide the future of retailing in the County from a planning perspective are suggested.

This Strategy sets out the retail hierarchy for the County and confirms the level and form of retailing activity appropriate to each of the main settlements in Cavan. The Strategy also appraises the primary retail centres in the County with insight backed by the results of Shopper and Householder Surveys. Identification of the extent of the retail catchment areas has been undertaken as part of the Strategy in order to identify the estimated populations for respective catchments. Following analysis and surveys a detailed assessment of the additional quantitative retail floorspace requirements (capacity and need) for the County is outlined. Finally, recommendations on key policy approaches for assessing retail proposals are provided in the conclusion to the Strategy. Various recommendations are set out with regards to actions that may assist in improving retailing within the County.

There are two aspects to the policy recommendations, including a broad description of the overall strategy over the period of the Strategy, 2021 to 2028. The second set of recommendations relate to policy requirements for the range of locations in the County retail hierarchy with appropriate policy advice and guidance.

8.1 Policies & Objectives

A consist theme across policy documents is the critical role of the retail sector to achieving economic growth and the creation of sustainable town centres, a message which has strong resonance in Cavan, and which has been transposed into a set of positive policy objectives in the adopted Cavan County and Cavan Town and Environs Development Plans. Reflective of the strategic role performed by Cavan town in the County and wider area, the policy context section of this Strategy sets out the primacy of the town in meeting retail planning objectives. However, this need not be to the detriment of other retail centres within the County. A realisable and practical balance needs to be struck. The surveys undertaken reveal the mono-nodal pattern to retailing within the County, particularly for convenience shopping.

The successful implementation of this Retail Strategy will be dependent upon cross-boundary co-operation between Councils and the implementation of the regional policies and objectives set out in the Regional Spatial and Economic Strategies. Dichotomous economic recovery influenced by wider regional and national parameters, emphasises a need for a regional retail strategy, similar to the approach undertaken for the Greater Dublin Area (Greater Dublin Area Retail Strategy 2008-2016). This would provide a more measured framework for retail development across the counties in the region.

8.1.1 Retail Hierarchy

The retail hierarchy does not align directly with the Settlement Hierarchy⁵⁴ adopted within the County Development Plan 2014-2020, but this is very much resultant from the findings arising during preparation of this Retail Strategy. Detailed analysis of the floorspace quantum including the range of services within the County and various surveys undertaken as part of the preparation of the Retail Strategy has informed the retail hierarchy with some differences to the County Settlement Hierarchy, which was adopted in 2014⁵⁴.

Tiers 1 and 2 of the retail hierarchy match tiers 1 and 2 of the county settlement strategy. Tier 3 differs in that this tier is divided into 2 subcategories of settlements, to reflect the difference in scale of activity noted during the undertaking of Retail Strategy surveys. Tier 3a includes Ballyconnell and Belturbet which are within Tier 3 of the county settlement hierarchy, while Mullagh which is also within Tier 3 of the county settlement strategy is placed on Tier 3b of the Retail Hierarchy. Mullagh would not appear to perform as high a service role as Ballyconnell or Belturbet and this may be related to its positioning relative to the Tier 2 towns and other larger centres to the south. Arvagh and Ballinagh are considered to perform a similar retail function to Ballyconnell or Belturbet, both of which have sizeable rural hinterlands. Alongside Mullagh on Tier 3b of the Retail Hierarchy is Killashandra, Kilnaleck, Blacklion, Dowra, Ballyhaise and Shercock. These centres were considered to perform a similar level of retail function and have similar capacity for additional retail. It is noted that Tier 3b includes centres from Tiers 3, 4, 5 and 6 of the county settlement strategy.

We note that Tiers 4, 5 and 6 of the current County Settlement Hierarchy⁵⁴ includes a host of towns and villages, some of which serve very similar retail roles to each other and some of which have quite divergent retail roles. For example, Dowra is placed on Tier 6 of the settlement hierarchy, but its role as a retail and services centre is much greater than that of Redhills for example, simply based on the extent of services. In fact, it is considered that Dowra performs a higher role than that assigned to it under the county settlement hierarchy. Tier 4 of the retail hierarchy comprises Kilcogy, Lough Gowna, Mountnugent, Swanlinbar, Bawnboy, Butlersbridge, Crossdoney, Redhills, Stradone and Crosskeys; villages that currently function in a broadly similar role for retail purposes. While villages such as Swanlinbar may have served a much greater retail function previously, the retail hierarchy presents a realistic positioning on the tiered system based on current performance, wider strategic retail planning objectives and future outlook. Similar to Tier 7 of the county settlement hierarchy, Tier 5 of the retail hierarchy comprises rural and local stores, which would not have been specifically referred to in the higher tiers. It is considered that based on the evidence collated, the retail hierarchy presented provides a balanced and rational approach in assigning appropriate categories for Cavan's urban centres on the tiered system. In arriving at this hierarchy, the following principles were considered:

- Strategic guidance at national and regional level;
- The need to protect and enhance the function and role of Cavan Town as the primary economic driver for the County and to protect and maintain the function of 'large towns', Ballyjamesduff, Virginia, Bailieborough, Cootehill and Kingscourt;
- The distribution of future retail floorspace relates to the identified existing and future retail hierarchy in the County and should be appropriate to the scale and character of the centre.
- The distribution of future retail floorspace should be linked to the future distribution of population growth;
- The principles of sustainability should be adhered to and future retailing should be concentrated as far as practicable in centres that are served by public transport;
- The need to foster sustainable competition in the retail environment.

⁵⁴ In June 2020, Cavan County Council commenced Stage 1 (Strategic Issues Paper) of the review of the existing Development Plan 2014-2020 by preparing the new Cavan County Development Plan 2022-2028, which may incorporate some changes to the Settlement Hierarchy.

A balanced development model is supported, promoting the treatment of urban and rural settlements, together with the surrounding countryside, as functional, spatially integrated entities. The Retail Hierarchy identified above has been prepared mindful of this model. It should be noted that there are no District Centres, as defined in the Retail Planning Guidelines in County Cavan. Detailed discussion regarding the function of each tier is provided below relative to the location and scale and development.

The position on the retail hierarchy reflects the size and role within and outside the County and outlines the functions which are assigned to it. This follows on from national and regional policy and may in future inform the strategic direction the Council follow in planning matters.

Cavan County Retail Hierarchy



8.1.2 Retail Boundaries

As part of this Strategy, zoning maps for each of the towns and villages have been reviewed and following surveys the retail boundaries for Cavan Town and Tier 2 towns on the Retail Hierarchy are identified (see p. 95 & 96). The 'town core' areas identified for each of the settlements in the zoning maps accompanying the Development Plan, generally conform to the retail boundaries for the settlements. However, retail boundaries at variance to 'town cores' are set out, for example, where recent retail permissions have been granted adjacent to town cores and where core consolidation is advisable.

8.1.3 Future Floorspace Requirements

The potential requirement for planned retail development to 2028 is demonstrated in Chapter 7 of this Strategy. This additional potential floorspace requirement⁵⁵ does not account for the existing vacant floorspace and the volume of floorspace in the retail development pipeline, each of which would be additional.

⁵⁵ Section 3.6 of the RPGs states "Estimates of future retail requirements are only intended to provide broad guidance as to the additional quantum of convenience and comparison floorspace provision; they should not be treated in an overly prescriptive manner, nor should they serve to inhibit competition."

Future floorspace requirements are only used here for indicative purposes and as an evidence-based guide to inform future planning policy. As set out in Section 4.9 of the RPGs⁵⁶ the quantum only becomes a critical consideration where a new floorspace is proposed outside of the town centre and the issue of likely impact on the town centre as a whole arises, or the proposal absorbs on one site the bulk of the projected floorspace (i.e., Retail Impact Assessment may be required).

Convenience Retail Development

The floorspace survey highlights the distribution of convenience retail space throughout the County, with over half of the total convenience retail floorspace in Cavan Town (Tier 1) (Table 6.15), approximately above one-quarter in the key support towns (Tier 2) and the remaining floorspace in medium-size towns, rural villages, and local stores (Tier 3 to Tier 5). In 2016, Cavan Town contained 28% of comparison retail floorspace within the County and 14.2% of the 'bulky goods' retail floorspace in the County. The number of vacant retail units in the County stood at 20.1%.

Analysis demonstrates scope for additional convenience floorspace in Cavan County. Over the period of the Development Plan, the additional floorspace requirements may be considered modest as a reflection of the anticipated population increase but will primarily allow for improved retail mix within the County and also allow for reduced drivetimes for shoppers.

This additional floorspace may entail expansion of an existing retail operator(s) or new build units, such as a supermarket. It is important to consider any losses in retail floorspace during the life of the Strategy. It should be an objective of the Council to keep the Retail Strategy under review in order to react to any significant shift in economic circumstances and population growth.

It should also be noted that some convenience operators now operate stores with a significant comparison element. Detailed consideration of the extent and scale of any such proposals will be given in the context of their potential impact on existing town centres. Proposals for retailing should clearly set out on floor plans those areas to be used for convenience, comparison and bulky goods, in order to best understand the likely impact on established retail centres.

Comparison Retail Development

In quantitative terms, between 2021 and 2028 there is scope for further mainstream comparison retail development. However, the projected retail floorspace quantum should not be considered a strict limitation as this may restrict proposals primarily aimed at enhancing the role of Cavan Town as a retail destination.

Bulky Goods Retail Development

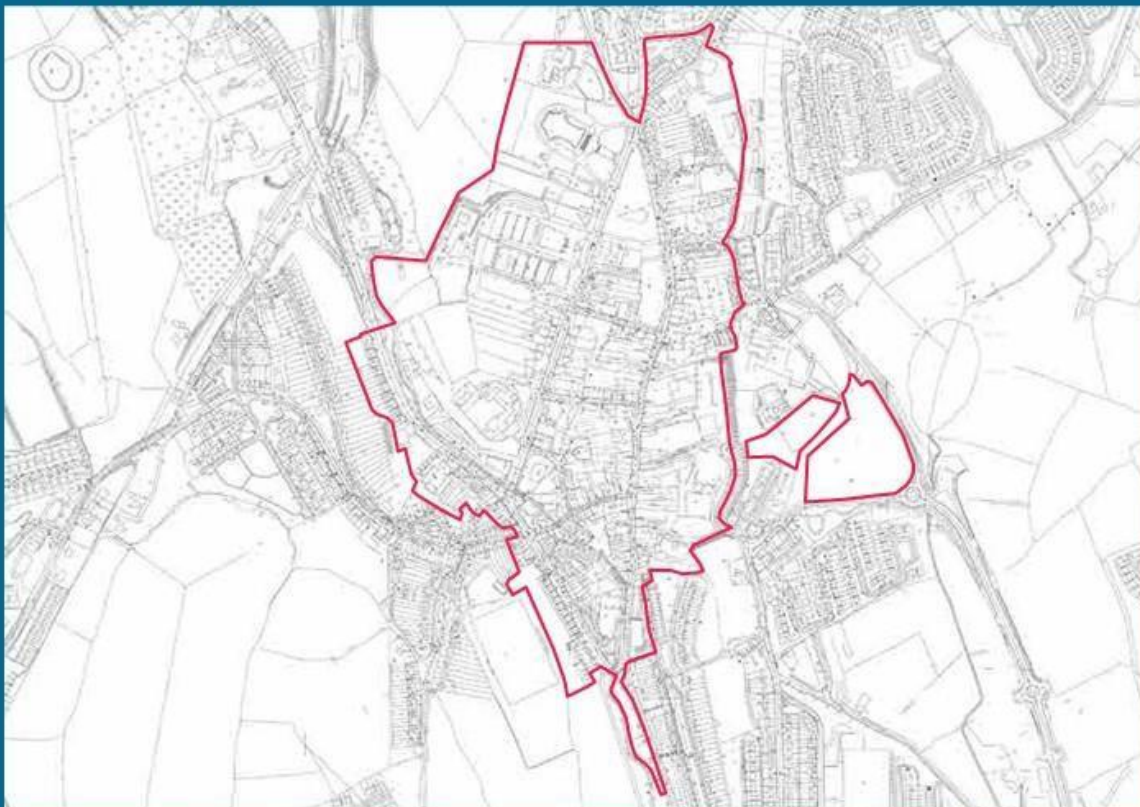
While analysis identifies a requirement for additional bulky retail floorspace in the County (approximately 2,506sq.m.), this is already provided for in existing vacant units principally within the southern environs of Cavan Town. There currently is a significant oversupply in retail warehousing and there is a need to constrain this type of development, where it has potential to undermine the viability and vitality of neighbouring retail centres.

Furthermore, applications to extend the range of goods sold from retail parks must be considered in the context of the Retail Planning Guidelines 2012 which detail that sales at these locations should be limited to bulky goods where DIY goods or goods such as flatpack furniture are of such size that they would normally be taken away by car and not be portable by customers travelling by foot, cycle or bus, or that large floorspace would be required to display them. Conditions should be imposed regarding any application relating to an existing or proposed retail warehouse development clearly restricting the sale of goods to bulky items as defined in the Retail Planning Guidelines.

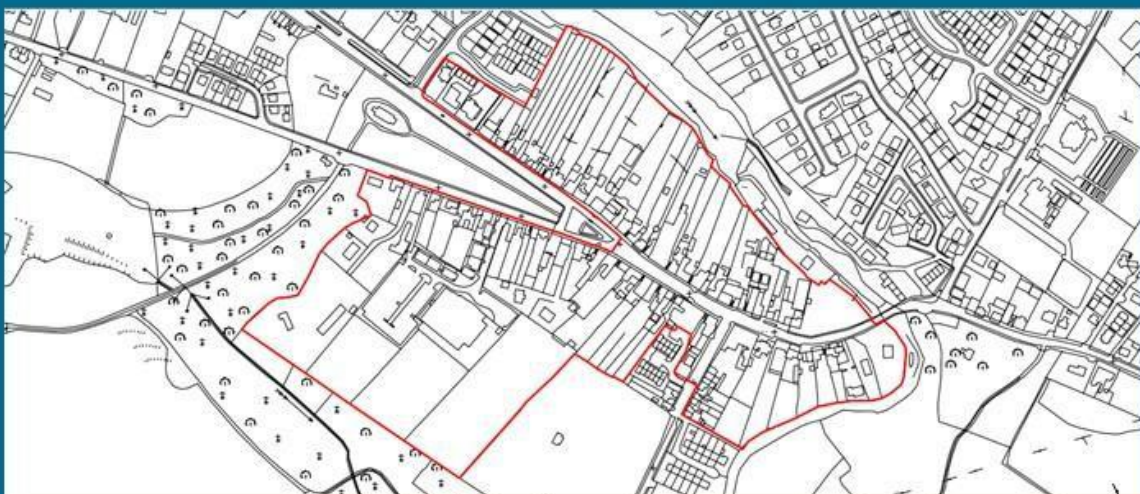
⁵⁶ Retail Planning Guidelines. Accessible via: <https://www.gov.ie/en/publication/aa2d8-retail-planning-guidelines-april-2012-418-mb/>

CAVAN COUNTY CORE RETAIL AREAS

CAVAN TOWN

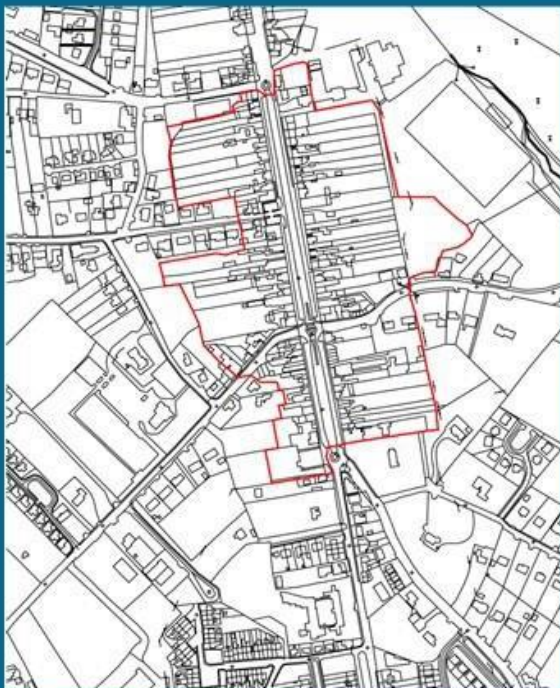


VIRGINIA

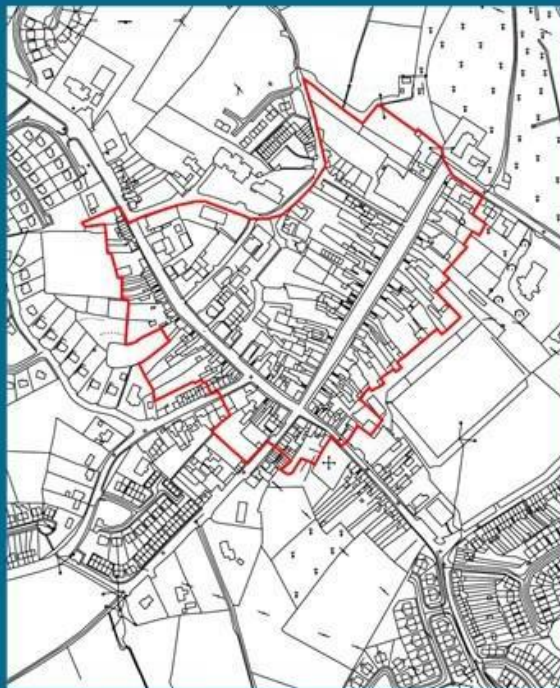


CAVANCOUNTY CORE RETAIL AREAS

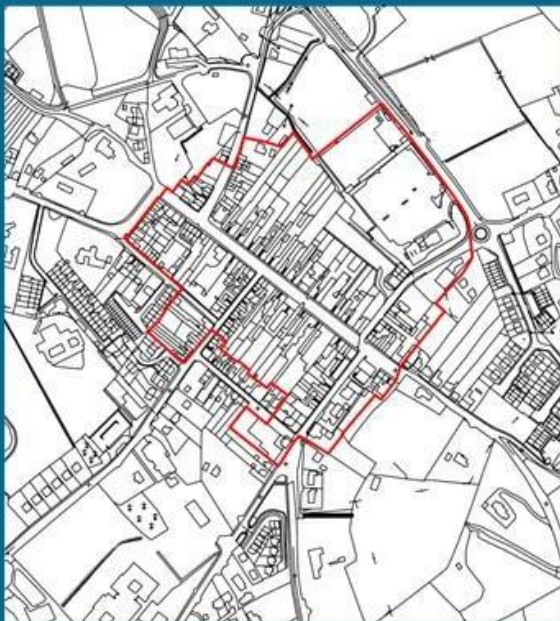
KINGSCOURT



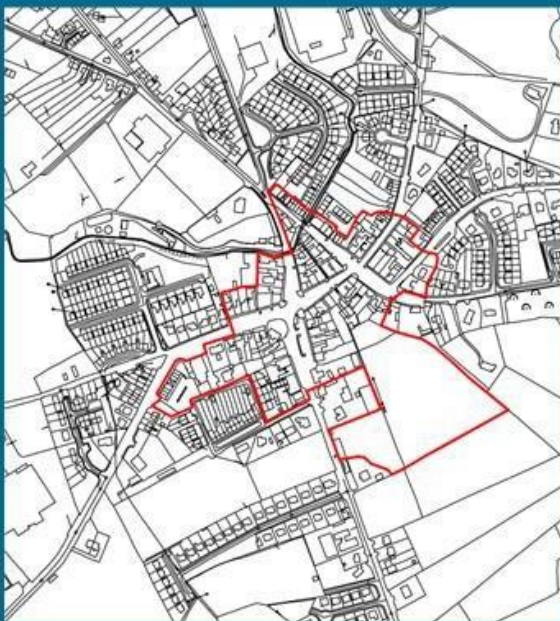
COOTEHILL



BAILIEBOROUGH



BALLYJAMESDUFF



8.1.4 Location & Scale of Retail Development

The preferred location for retail development is within the existing town centres. Development proposals not according with the fundamental objective to support the vitality and viability of town centre sites must demonstrate compliance with the sequential approach. Cavan County Council will require that a full assessment of all suitable, viable and available sites is undertaken.

Considering the outcomes of this Strategy, the extent of vacant floorspace and anticipated additional floorspace required over the lifetime of the Plan, all application proposals for significant additional retail floorspace will be required to be accompanied by a Retail Impact Statement, assessing the impact of the proposal relative to the Council Retail Strategy and the viability and vitality of respective retail centres.

Convenience Retail Development

In terms of convenience provision, it would appear that certain centres, most notably Ballyjamesduff and Cootehill are underprovided for in terms of convenience offer. Convenience development will in particular be promoted in these urban centres in order to improve competition choice and diversity in the retail market. Cavan Town is well serviced with convenience retailing.

Tier 1 - Primary Retail Centre (Cavan Town)

Each of the main convenience supermarket operators have at least one presence in the town, indicative of the expanding role of the town serving the convenience shopping demands of an expansive catchment. The Retail Planning Guidelines set a 3,000sqm retail floorspace cap on food store development and it is important to note that this cap applies to new stores, as well as to extensions of existing retail premises.

It would appear to be limited additional capacity for new convenience large-scale retail space in Cavan Town; however, greater diversity and increasing competition, and proposals which would enhance the role of Cavan Town as a retail destination may be welcomed.

Proposals for convenience retailing in Cavan Town must also be considered in the context of the existing retail provision within the neighbouring towns, particularly the Tier 2 towns. There would appear a greater necessity to distribute convenience floorspace growth beyond Cavan town into the other main retail centres, based on the results of the surveys.

Tier 2 - Key Support Retail Centres (Virginia, Bailieborough, Ballyjamesduff, Cootehill and Kingscourt)

The Retail Planning Guidelines 2012 require consideration of the mix of units, in order to ensure more sustainable patterns of retail distribution. These towns appear to be well-served by existing and permitted convenience retail floorspace. The town of Cootehill is served by 1 supermarket, while Ballyjamesduff is served by a number of small convenience stores. Considering the results of the analysis undertaken as part of this Strategy both Cootehill and Ballyjamesduff have scope to accommodate an additional supermarket-scale facility.

Ballyjamesduff is not currently served by a large convenience retailer and there is a number of convenience retailers in the town. Planning permission to construct a supermarket on the northern edge of the town did not receive permission and given the extent of the retail catchment, comparative analysis with other similar-size towns and the extent of leakage to competing centres, there is significant rationale to suggest the town is capable of absorbing a larger convenience retailer. This may also encourage occupation of existing vacant units in the town by complementary users while diverting the need for journeys to other neighbouring centres.

Additional convenience retail floorspace may potentially involve extension of an existing facility in the town centre or a new build facility, however it will be important to ensure linkages with the town centre and car parking to meet anticipated demand. An opportunity site has been identified for the town in Section 6.2.1.

Ultimately, the Tier 2 towns draw on similar-size catchments and custom, and historically have served similar retail functions. Permissions for development need to be mindful of the overlap in catchments and custom displacement, and as a result it will be important to control the size of new convenience retail operations.

Considering the support role these towns serve within the County, it would be advisable that proposals for new or extended convenience operations within the Tier 2 towns do not exceed 1,000sq.m. net retail floorspace, as otherwise they may undermine the primacy of Cavan Town. Only in circumstances where a robust and detailed Retail Impact Assessments/Retail Impact is prepared and demonstration of compliance with the sequential approach, it may be possible for the Council to consider applications which exceed the above-mentioned retail floorspace.

Tier 3(a) - Satellite Retail Centres - (Ballyconnell, Belturbet, Arvagh & Ballinagh)

These retail centres primarily function as secondary support centres serving reasonable scale catchments and operating as satellites of Cavan Town. These centres are on the same tier as the 'Local Retail Centres' as they serve similar size population catchments, but they are placed a rung higher on the hierarchy (Tier 3a) as their retail base and function is greater than that of the Local Retail Centres (Tier 3b). Such centres usually accommodate a medium-sized convenience shopping outlet and a number of smaller convenience and non-retail businesses. Based on the assessment of their existing performance, Arvagh and Ballinagh appear to be functioning quite well with low vacancy rates and there may be further demand for additional retail and related services in these centres. Ballyconnell and Belturbet serve as important centres for the northwest of the County. Without a commensurate increase in population within their catchment, it is unlikely that there will be significant rationale for increased retail floorspace in these centres. Proposals for convenience retailing in the Tier 3(a) centres needs to be considerate of their wider role, generally serving as satellites to Cavan Town which is well served with convenience retailing. Only in circumstances where a robust and detailed Retail Impact Assessments/Retail Impact is prepared and demonstration of compliance with the sequential approach, it may be possible for the Council to consider applications which exceed the above-mentioned retail floorspace.

Tier 3(b) - Local Retail Centres - (Killesandra, Mullagh, Kilnaleck, Blacklion, Dowra, Ballyhaise & Shercock)

The Local Retail Centres forming Tier 3(b) of the hierarchy is characterised by basic convenience shopping functions, some limited incidences of comparison shopping such as pharmacies and charity shops, and local retail services including hairdressers, beauticians, takeaways, post offices, pubs and cafes. The local retail centres comprise retail services significantly greater than that of the other villages in the County and are therefore recognised as performing a higher retail function. Considering these centres function as secondary rural service centres to the higher retail centres (Tier 1 and 2), it would be advisable that proposals for an individual unit in the Local Retail Centres do not exceed 500 sq.m. Only in circumstances where a robust and detailed Retail Impact Assessments/Retail Impact is prepared and demonstration of compliance with the sequential approach, it may be possible for the Council to consider applications which exceed the above-mentioned retail floorspace.

Tier 4 - Village Retail Centres - (Kilcogy, Lough Gowna, Mountnugent, Swanlinbar, Bawnboy, Butlersbridge, Crossdoney, Redhills, Stradone & Crosskeys)

The Village Retail Centres forming Tier 4 of the hierarchy is characterised by basic convenience shopping functions and local retail services including post offices and pubs. These centres have a narrow retail base and proposals for additional services in these centres is likely to be limited over of the lifetime of the Strategy (2021-2028).

Tier 5 - Rural & Local Stores

Rural and local stores play a vital role in catering for the daily or casual needs of neighbouring residents or of those passing by. Primarily convenience outlets, they provide a readily accessible service for basic goods, especially for the less mobile members of the local communities. The floorspace survey undertaken as part of this Strategy reveals the extent of retailing in rural villages and the countryside within County Cavan. There has been a tendency in Irish Retail Strategies to significantly underestimate the extent of retailing within rural villages and the countryside. Where appropriate, rural

villages and local shops should be recognised in the relevant parts of the Development Plans, with policy primarily aimed at supporting and maintaining such services.

Comparison Retail Development

Expansion of the comparison retail function of Cavan Town over other competing centres, should be a clear priority for the County. The results of the surveys undertaken as part of this strategic review suggest that the thrust of forthcoming Plans for the County and Cavan Town should be to allow for expansion of comparison retailing within Cavan Town Centre and more measured expansion of convenience retailing in the key support towns (Tier 2). Cavan Town as the key economic driver for the County will enhance its role, but the level of enhancement needs to be complementary to the role of other urban centres.

The ability to attract higher-order retailers into Cavan Town will be largely dependent upon improving the experience for shoppers given the anticipated modest increases in disposable income and population. In simple terms, shoppers will need to be given a reason to not have to travel longer distances outside the county for their comparison shopping demands. Enhancement of the main shopping streets and car parks in the town will be vital to realising this, as will the development of town centre sites, including the Masterplan (opportunity site) lands identified in the Development Plan.

Retail Warehouse (Bulky Goods) Development

The quantitative case for further allocations of retail warehousing over and above existing allocations is not supported by the capacity analysis. While the floorspace study suggests that additional floorspace of this type is necessary, the existing high level of vacancy of retail warehousing in Cavan Town will reasonably account for the anticipated demand. The existing restrictions to the sale of bulky goods only, or goods generally sold in bulk should stay in place and a requirement to meet the 20% rule should be sought and enforced where feasible. The above restrictions should not undermine the potential for bulky goods suppliers such as agricultural supplies, builder's merchants and similar providers to expand where planning policy can be met, as these can often serve a specific local need, while not impacting on neighbouring retail centres. It is suggested the Council should seek to encourage the conversion of vacant retail warehouse units to alternative appropriate uses or to consider alternative uses for such land subject to appropriate servicing arrangements and planning context.

8.1.5 Retail Policies

There is no silver bullet when it comes to reinvigorating retail centres. A whole suite of measures will need to be employed to address the underperformance of some towns from local level planning objectives to more strategic level direction. Arising from this Strategy the following policy directions are proposed for the Planning Authority: -

- To promote and encourage the major enhancement of retail floorspace, primarily in comparison goods, and town centre functions in Cavan Town in order to sustain and develop its competitiveness as an important Hub and economic driver in the Northern and Western Region.
- To reinforce the economic roles of the County's main urban centres by facilitating retail development on the basis of the Retail Hierarchy which designates the following: Tier 1 Cavan Town – Primary Retail Centre and Tier 2 - Virginia, Bailieborough, Ballyjamesduff, Cootehill and Kingscourt – Key Support Retail Centres.
- To support the development of core retail areas as identified within the County Retail Strategy and reinforce the role and function of these core retail areas.
- To adhere to the provisions of the sequential approach in the consideration of retail applications located outside of core retail areas.
- To support the preparation of a regional retail strategy for the Border Region following completion of the Regional Spatial and Economic Strategies.

8.1.6 Specific Retail Objectives

Chapter 6 of this Strategy details specific actions to be pursued specifically in relation to each Tier 1 and Tier 2 centre in the County. Actions are also suggested in relation to a number of Tier 3 centres, including Ballyconnell, Belturbet and Killeshandra, and some of these actions are inter-transferable with other centres in the County.

In addition to the specific local actions identified in Chapter 6, the following objectives should be implemented in order to ensure the continued vitality and viability of town centres.

- *Facilitate the creation of key town centre management teams;*

Town centre management teams with representation from the respective local business community have an essential role to play in the reinvigoration of retail centres. This is particularly pertinent in Cavan Town in light of the abolition of the Urban District Council and in Belturbet and Cootehill with the abolition of Town Councils in 2014. Cavan Community and Economic Plan highlighted the intention to develop and implement a Town Team Programme for a number of towns throughout the county, where key stakeholders identified to work collaboratively to develop a shared vision for the economic spatial and social/community development of the towns identified. Those towns with greatest urgency in this regard are those towns with highest levels of vacancy.

- *Facilitate the identification, promotion and development of key town centre opportunity sites in Cavan Town (comparison), Cootehill and Ballyjamesduff (convenience);*

Proactive work with landowners and other agencies to seek the development of appropriate town centre and edge of centre sites is encouraged in this Strategy to accommodate additional retail development and overcome site constraints, particularly sites in towns which have potential to attract national and international multiples.

- *Facilitate the reuse of existing vacant retail units in towns and villages;*

Specific local objectives are suggested within this Strategy to address the amenities and infrastructures of towns and villages in Cavan, as this can influence the location of businesses. The current exemption from development contributions for permissions for a change of use from one commercial use to another, as provided for under the County Development Scheme is to be encouraged. Measures such as this are beneficial in terms of trying to facilitate reoccupation of vacant units, including some of the prominent buildings.

- *Encourage infill development and the redevelopment of derelict and obsolete sites;*

Dereliction, vacant shopfronts and pubfronts, and disused railway lines provide glimpses into the economic and social past of towns and villages Cavan. Towns need to evolve, and it is clear from the surveys undertaken as part of this Strategy is that the function and roles performed by some towns and villages may need to be reviewed.

- *Prevent overdevelopment of particular retail uses such as supermarkets outside of town core retail areas;*

Existing fuel service stations often provide an important function as the local shop or small supermarket, but if their retailing and services element is not controlled they can have a major impact on neighbouring retail centres. The Council should discourage fuel-filling station forecourt retailing in excess of 100 sq. metres (net), as per the Retail Planning Guidelines where these stations are outside the town core. Where permission is sought for floorspace in excess of 100 sq. metres in retail units associated with fuel-filling stations, the 'sequential approach' to retail development shall apply. Proposals will need to specifically identify the use of floorspace within the station, including dining, seating, retail, staff, and back-of-shop areas. Where intensification of use is envisaged as a result of forecourt upgrades, cognisance should be had of likely road safety issues.

- *Facilitate improvements in traffic management that can lead to improvements in the shopping environment and safer and better access for pedestrians;*

Many of the towns would benefit from improved traffic flows and traffic management along the main shopping streets, with greater priority given to pedestrians. Reflective of surrounding commerce and trade, there is a high volume of heavy

goods vehicles passing through the main shopping streets of Cavan towns. Urban environmental improvement schemes should incorporate many of the measures supported in the Design Manual for Urban Roads and Streets which would improve the shopping environment and enhance the overall visual appearance and streetscape of town centres. Such schemes to improve the public realm and enhance the appearance should be prioritised for Cavan Town and the Key Support Towns (Virginia, Bailieborough, Ballyjamesduff, Cootehill and Kingscourt).

The potential of a comprehensive upgrade to the public realm of Thomas Ashe Street and Main Street in Cavan Town should be investigated, to include the provision of public spaces, high quality landscaping and street furniture, and other measures which would attract shoppers and visitors, while creating a pedestrian priority zone. Improvements to the public realm in the town centre should assist where possible in the promotion of Cavan Town as a major retail destination.

- *Promotion of activities including festivals, events and street markets in each town;*

Casual trading, including farmers' markets and street markets, can make a valuable contribution to the local economy and contribute to the vitality and viability of a retail centre. Such activities should be properly regulated, and consideration should be given to the quality of offer of such casual trading. Markets and events are best served in central locations, adhering to sequential testing and meeting specialist and tourist markets.

- *Promoting of measures to retail and improve the character of important streetscapes within the County;*

Measures to improve the retail environment on the main shopping streets have the potential to be undermined by associated ancillary developments. The Council should consider additional controls to ensure that developments on the main shopping streets are subject of detailed design proposals sympathetic to the architectural heritage of the streetscape. Extension of Architectural Conservation Areas or implementation of Special Planning Control Schemes could be considered.

- *To develop a consistent urban design framework for the market houses and market squares of Cavan;*

The market houses of Cavan represent an important asset to their respective towns, including the spaces fronting these buildings. There is a marked differentiation in the treatment of these spaces, some of which form urban plazas and meeting spaces, while others are used for car parking and ancillary storage space. Some of the historical market houses have been demolished (Cootehill and Killeshandra), but the remainder are generally occupied for a wide variety of purposes, including libraries (Bailieborough and Arvagh), tourist information office (Blacklion), shops (Shercock and Ballinagh), restaurant (Ballyjamesduff) and a courthouse (Virginia). These buildings should be the centre of each town and a focal point attracting footfall. A framework for developing a consistent approach to developing and maintaining these spaces would further enrich these spaces and their associated structures and foster a stronger identity for Cavan towns.

- *To develop a strategic parking management plan for the towns of Cavan;*

Parking would appear to be a concern for some shoppers in the town centre area. As parking is free in other parts of the town and 'pay and display' within the town centre, this does not provide an even field for retail competition. A consistent approach is needed with respect to positioning on the retail hierarchy.

- *To facilitate small-scale retail development and support the retention of retail/service units serving rural areas;*

Local villages and shops in rural areas play an important role in the lives of the communities that they serve and provide valuable day-to-day retail facilities and services to their communities. Development in such villages and small towns should be focussed on the core village/town centre area and should complement existing retail provision. Market dynamics generally curtail the extent of retail provision in these areas, although there is a clear need to ensure that provision should be cognisant of the retail role and function of such centres within the retail hierarchy (Tiers 4 and 5).

8.2 Development Management Standards

Retail development decisions will be informed by the Cavan County Retail Strategy 2021-2028 until the new, and the Retail Planning Guidelines for Planning Authorities 2012 including the accompanying Retail Design Manual.

8.2.1 Criteria for Assessment

A set of criteria for assessing retail developments need to be incorporated into forthcoming Plans for the County, in order to best provide for consolidation of the respective role of the town centres throughout the County. The Retail Planning Guidelines 2012 provide the main principles for assessing new retail proposals and this Strategy suggests that these should be referred to and reflected in forthcoming Plans, as they have been in the existing Development Plans. The Guidelines state that the main planning considerations for retail development include;

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

Criteria for assessment of the scale and location of convenience, mainstream comparison and bulky goods retailing have largely been addressed above. In assessing retail development proposals the Council will need to utilise the following: -

- *The Sequential Test - All applications for retail developments at edge-of-centre or out-of-centre locations will be subject to the sequential test as set out under the Retail Planning Guidelines*
- *Retail Impact Assessments - Retail Impact Assessments will be required for significant retail development where due to its scale and/or location, it may impact on the vitality and viability of centres. These assessments will be prepared in accordance with the current Retail Planning Guidelines.*
- *Traffic and Transport Assessments - A Traffic and Transport Assessment (TTA) may be required for retail developments over a particular threshold, as set out in the Traffic & Transport Assessment Guidelines 2014.*

8.3 Conclusion

The overarching aim of the Retail Strategy for County Cavan 2021-2028 is to ensure that future retail development in the County is accommodated in a manner that is efficient, equitable and sustainable. This Strategy takes a fresh view of retail development within and impacting County Cavan providing advice regarding the broad quantum, scale and type of retail development required in the County. Shifts in the political, economic and social landscape are constant with border areas even more sensitive to such shifts.

The retail centres of Cavan will always be particularly susceptible to such shifts and planning policy needs to be prepared mindful of this context. The ability of retail centres to respond and evolve accordingly and remain relevant to local users and businesses is influenced by a wide array of issues, including retail planning policy at national and local level. Since the previous Cavan County Retail Strategy was completed in 2008, it is generally perceived that economic and demographic recovery will be primarily dictated by access to the Dublin market.

In conclusion, the distribution of future floorspace must have regard to the identified retail hierarchy and needs to occur in a co-ordinated manner. The development or redevelopment of key sites within Cavan Town for retail development in order for the Town to compete as a high-level retail destination is of paramount importance. Cavan Town should be the

target and the focus for higher-order comparison retailing. Enhanced retail provision, particularly convenience provision will also be targeted to Ballyjamesduff, Bailieborough, Virginia, Kingscourt and Cootehill.

The Retail Planning Guidelines for Planning Authorities (2012), issued by the Department of the Environment, Community and Local Government (DoECLG), require Local Authorities to prepare retail strategies and retail policies for their areas and to incorporate these where appropriate into their respective statutory plans.

Arising from the Core Strategy of the Cavan County Development Plan 2014-2020 (Policy CSP10), Cavan County Council commissioned the preparation and implementation of this 'Retail Strategy' for the County. In compiling this Retail Strategy, due regard has been had to the most up-to-date information regarding demographics, economics and retailing. This has been used to provide a firm basis on which to inform future policy direction with the aim of enhancing and developing the retail offering of Cavan Town and Cavan County.



CAVAN COUNTY RETAIL STRATEGY 2021 - 2028



Comhairle Contae an Chabháin
Cavan County Council



Appendix - Cavan County Retail Strategy Health Checks

Prepared on behalf of Cavan County Council



December 2016

Prepared on behalf of
Cavan County Council

Cavan Retail Strategy

Health Checks

Mullagh

Mullagh, a tier 3(B) 'Local retail centre' in the Cavan County Retail Strategy, which has a population of 1137, as of the Census 2011. The town of Mullagh has experienced significant growth since 2006, of around 40%, as the population of the town in the Census 2006 was 679. Mullagh is a village with a traditional setting, with the Moynalty River running through the village along with the main street in the village being rather wide. The environs of Mullagh consist largely of green fields and pastures.

Attractions

Shopping Facilities in Mullagh village are primarily made up of retail services such as A Post Office, A café, a discount store, a family butchers, a barber shop, a couple of fashion boutiques along with a number of public houses. The primary location for convenience shopping in the village is the large Centra store at the petrol station, which is located at the edge of the village on the R191.

The main attractions in Mullagh are Mullagh Lough and Hill Walk. Mullagh Lough is situated just under two kilometres from the village of Mullagh. Hill Walk is on the Virginia Road, approximately 2 kilometres from Mullagh village.



Accessability

Mullagh is serviced by Bus Éireann, route 108, which provides three journeys a day, Monday-Saturday, and one journey on a Sunday, to Kells via Moynalty and additionally provides three journeys a day, Monday-Saturday, and one on Sundays to Bailieborough.

Amenity

Many of the shopfronts in Mullagh have well maintained traditional shopfronts and the pedestrian footways are in very good condition along the Main Street, which creates a pleasant and inviting shopping environment. The public realm in the village is very clean and well maintained with tree planting and hanging baskets throughout the village.



Assessment

In Mullagh, there are approx. 24% of the retail units vacant at present. The village has approx. 0.9 sq.m of occupied floor space per person, based on the population figures for the village in the Census of 2011. A large proportion of the retail floor space in Mullagh is devoted to traditional retail services, such as a Butchers, a barber's, beauticians, etc., which are located on the Main street or on adjoining streets.

Actions

Mullagh			
	Sq. M	Number	No. as %
Convenience	320	2	6.25
All Comparision	254	9	28.125
Mainstream Comparision	54	8	25.0
Bulky Comparision	200	1	3.1
Retail Services	482	12	37.5
Vacant	222	9	28.125
Subtotal	1,478	32	100.0

Killeshandra

Killeshandra is classified as a tier 4 "Village retail centre" in the hierarchy of the Cavan Retail Strategy. The area of Killeshandra has a population

of 364, as of the Census figures of 2011. The population of Killeshandra was 411 in the Census 2006, thus the area has experienced a decline in population in the previous Census of 2006, as there has been a decrease of approx. 11%.

Attractions

Killeshandra has a linear retail layout with almost all the retail units located along the Main Street. The main street is perched on the top of a hill, from which a vista of the hinterland can be viewed from either end of the Main St. Kilykeen Forrest Park and Lough Oughter are located directly to the east of Killeshandra.



Shopping facilities in the village are like that of any village in Ireland, with a trio of convenience stores, a sizeable number of public houses, a couple of eateries and financial institutions and a core mixture of retail services making up a large proportion of the retail offering.

Accessibility

Killeshandra is located at the point of intersection between two Regional roads, the R199 and the R201. Portaliffe Beg also provides and access road for the village. The village is serviced by Bus Éireann route 465, on Tuesdays only. The route transports residents from Killeshandra to Cavan, via Arvagh and Ballinagh.

Amenity

The public realm in the village is typical for a Main St. as the pedestrian footways are of good standard and any crossing points have dished kerbs and tactile paving installed. For a Main St. in a village, the nature of the road layout could be more sympathetic to its surroundings and additional crossing points could be an alternative to provide a more inviting atmosphere to residents

who are making use of the retail services in Killeshandra.



Assessment

In Killeshandra, regarding occupied floor space, there is approx. 2.7sq. m per resident, based on the population figures from the Census 2011. Vacancy rates in Killeshandra are relatively high now, with approx. 31% of available floor space for retail laying vacant.

Actions

Killeshandra			
	Sq. M	Number	No. as %
Convenience	252	5	13.2
All Comparrision	205	5	13.2
Mainstream Comparrision	60	4	13.2
Bulky Comparrision	145	1	0.0
Retail Services	536	7	18.4
Vacant	509	21	65.6
Subtotal	1,647	38	100.0

Arvagh

The town of Arvagh has a sizeable retail cluster, which is located around the main St. in a H-shaped formation. The town has a population of 925 as of the population figures in the Census 2011. There

has been marginal growth in the town with a population increase of approx. 3% since the previous Census in 2006.

Attractions

Shopping Facilities in Arvagh are well catered for in all regards. There are many small to medium locally owned convenience stores along with some which look after the needs of shoppers regarding

top-up shopping. Comparison stores in the town

range from bulky comparison stores such as hardware stores and farm supply stores to pharmacies and charity shops. There is a comprehensive array of retail services available in the town with numerous eateries, beauticians and hair salons, a medical centre, a bakery, two banks and a credit union,

Garty Lough is located directly off the R203 to the north of the road. The medium sized lough is a popular spot for pike fishing. Bruse Mountain overlooks the town to the east.



Accessibility

The regional road that is the R198 runs directly through the town and joins with the L2505 at the eastern end of the town. The R198 joins with the R203 at the north-western end of the town. The town is serviced by Whartons Travel who are the operator on behalf of the NTA, bus route 975 stops in the town six times daily, Monday-Saturday, and travels to Longford, Drumlish and Cavan.

Amenity

The public realm in Arvagh is of a good standard. The pedestrian footways are in good condition. The layout of the streets mean that planting of trees is not currently a feature however it could potentially be considered as an addition to enhance the retail environment. This could have the added effect of creating additional crossing points by breaking the car parking spaces and creating more links between either side of the street.

The public square in the center of the town adds greatly to the retail environment as it provides a meeting place for residents. The planting in the square adds colour and tranquility to the square. As time goes on, there may be the potential to add to this planting provision along with adding more

picnic tables, so residents may use the space for more than a meeting place and the square can evolve.



Assessment

At present, just under 19% of retail units are vacant. Arvagh currently has 1.9 sq.m of occupied retail floor space per resident.

Actions

Arvagh			
	Sq. M	Number	No. as %
Convenience	454	7	18.95
All Comparrision	634	9	24.3
Mainstream Comparrision	174	6	16.2
Bulky Comparrision	460	3	8.1
Retail Services	684	14	37.8
Vacant	141	7	18.95
Subtotal	2,373	37	100.0

Kilnaleck

Kilnaleck is a tier 4 'village retail centre' and has a population of 1,057 as of the Census of 2011. The population of Kilnaleck has grown a small amount since the previous Census in 2006, with growth of approx. 9.5%. Retail in the village of Kilnaleck is clustered on the Main St. and adjoining side streets.

Attractions

The freshwater lake of Lough Sheelin is located approx. 6.5 km south of Kilnaleck. The shopping facilities in Kilnaleck comprise mainly of convenience stores and retail services. Convenience shopping in the village is made up of a couple of local stores and a butcher shop. Due to

benches to the square or seasonal provision of

its proximity to Ballyjamesduff, there are very few comparison shops. The comparison stores which are present are; a clothes shop, a pharmacy, a charity shop and a couple of bulky comparrison stores.



Accessibility

The regional road, the R154 runs directly through Kilnaleck. The R154 joins with Church Road in the centre of the village. Kilnaleck is serviced by many of the Cavan Area Rural Transport routes.

Amenity

Kilnaleck has a nice and inviting environment for shoppers to use with tree planting and flower baskets placed at many of the breaks in the on-street parking bays. Kilnaleck also has a playground for kids installed on the Upper end of the Main Street. The pedestrian footways are of a good standard and widen at various points along the Main Street and Church Street which shortens crossing distances and creates greater permeability for shoppers to roam from shops on one side of the street across to shops on the other side of the street.



The addition of a couple of dedicated pedestrian crossings could be considered as an addition to enhance the shopping experience further.

Assessment

There is 0.8 sq.m of occupied retail floor space per resident in Kilnaleck at present. There are 19% vacant units in Kilnaleck.

Actions

Kilnaleck			
	Sq. M	Number	No. as %
Convenience	46	3	14.3
All Comparrison	419	6	28.6
Mainstream Comparrison	174	4	23.8
Bulky Comparrison	245	2	4.8
Retail Services	390	8	38.1
Vacant	312	4	19.0
Subtotal	1,167	21	100.0

Shercock

Shercock is a tier 4 'village retail centre' in the North-East of the county. Shercock has a population of 1,169 as of the Census 2011. The population has grown 12% since the previous Census in 2006.

Attractions

The village is located beside three lakes, Lough Sillan, muddy Lake and Steepletons Lough. Lough Sillan is located to the North-West of the village, approx. 750m from the center of the village. Muddy lake is located directly to the west of the village, approx. 250m from the village center. Steepletons Lough is located to the south of the town.



Shopping Facilities in Shercock are typical of a village of this size. There are several convenience stores which service shopper's top-up shopping needs. Comparison shopping needs are catered for by a Clothes shop, a picture framing shop, a pharmacy, a hardware store and a home interiors store. A more comprehensive array of comparison shopping facilities are available in the nearby towns of Bailieborough and Kingscourt.

Accessibility

Shercock is accessed mainly by two regional roads, the R162 and the R178. Shercock can also be accessed by the Corkerstown road. The village is serviced by two bus companies, Sillan Tours and Bus Éireann. Sillan Tours provides a daily service travelling to Kingscourt, Navan and Dublin. Bus Éireann provides route 166, on Mondays, Wednesday and Fridays only, which travels Cavan, Carrickmacross and Dundalk.



Amenity

The Main street in the village is quite a wide street with a lot of this space given over to the vehicular carriageway and to the on-street parking bays. A possible addition to the street could be the installation of more flower planting arrangements and tree planting could be incorporated into the street by creating breaks in the on-street parking bays by in-filling half a parking space with pavement and planting street trees in such locations. Additionally, by breaking up the parking bays and extending the width of the footways in places, the distance from one side to the next is decreased for shoppers. What's more, pedestrian crossing points could be installed on the Main street to enhance permeability for shoppers and create a more relaxed and pleasant shopping environment.

Assessment

Shercock currently has a very high vacancy rate of approx. 44% of the total units. There is 0.5 sq.m of occupied retail floor space per resident in Shercock, using the population figures from the 2011 Census.

Actions

Shercock			
	Sq. M	Number	No. as %
Convenience	168	5	14.7
All Comparison	136	5	14.7
Mainstream Comparison	136	5	14.7
Bulky Comparison	0	0	
Retail Services	312	9	26.5
Vacant	416	15	44.1
Subtotal	1032	34	100.0

Ballyhaise

Ballyhaise is a tier 4 'village retail centre' located in the North of the county, just to the north of Cavan town. The village has a population of 975 as of the Census of 2011. The population has decreased marginally from a population of 982 in the previous Census, in 2006. Ballyhaise is located approx. 11km from the border with Northern Ireland.

Attractions

Shopping facilities in Ballyhaise are somewhat spread out in comparison to a typical clustering of retail on a Main Street. The main convenience store in the village is a Lee's GALA convenience store which is located on the R212, 400m from the center of Ballyhaise village.



Accessibility

The regional road, the R212 cuts straight through Ballyhaise. The CART services Ballyhaise with

route 201 on the 1st and 3rd Tuesdays in the month and travels to Cavan. The route 491 brings residents of Ballyhaise to Stradone via Castletara, on the 1st Thursday of the month and the route 493 brings Ballyhaise residents to Clifferna via Castletara and Stradone, on the 4th Thursday of each month. The route 503 travels from Ballyhaise to Cavan every Friday on a weekly basis.

Amenity

Along the direct route through Ballyhaise, on the R212, the footway is not continuous and the road carriageway is very wide. A future addition may be to install a pedestrian footway which spans the entire length of the village to make it easier for shoppers and residents to travel safely from one end of the village to the opposite end of the village in a relaxed manner. The green space directly outside the community centre creates a focal point for the village and acts as a meeting point for people, as it sits in the center of Ballyhaise. If the pedestrian links to this space are developed, there is the potential to develop this space further, to create a strong central space in the village.

Assessment

Ballyhaise has currently got a vacancy rate of 9%, which is very healthy for a village of its size considering its proximity to the major retail centre, Cavan Town. The village has approx. 0.7 sq.m of occupied retail floor space per resident, when using the population figures from Census 2011.

Actions

Ballyhaise is very much a residential village with top up retail stores and retail services. It is closely located to Cavan Town. Therefore, it is logical to believe that the multitude of the residents and shoppers in Ballyhaise make use of public transport services which are provided on a weekly basis and travel to Cavan town to do the multitude of their comparrison shopping and make use of the wide array of retail services available in Cavan Town. Additionally, variety of small and large scale convenience stores are available in Cavan town.

The pedestrian footways connecting to the public square and central green space in Ballyhaise are not in great condition and are continuous connections by the footpath are not available for shoppers. Creating such continuous connections must be considered to create safe connections for

Ballyhaise			
	Sq. M	Number	No. as %
Convenience	134	3	27.3
All Comparrison	236	3	27.3
Mainstream Comparrison	236	3	27.3
Bulky Comparrison	0	0	0
Retail Services	272	4	36.4
Vacant	245	1	9.0
Subtotal	887	11	100.0

Ballinagh

Ballinagh is classified as a tier 4 “*village retail centre*” in the Cavan Retail Strategy, which has a population of 1,358 as of the Census 2011. The town has grown by approx. 8.5% since the previous Census in 2006.

Attractions

Shopping facilities in Ballinagh are good in all departments. Convenience shopping is well catered for with Cooper’s Centra, a SPAR store, Market Fresh Fruit & Veg store, Pat Gaynor Craft Butchers and a Checkout Store. Comparrison shopping is also well catered for, regarding the size of the settlement and its catchment. Shoppers are provided with an array of comparrison shopping options ranging from a florist to a charity shop and clothing and footwear outlets, a pharmacy and a service station. Retail services in Ballinagh are made up of several Beauticians and Eateries along with a couple of Financial Institutions and offices and a Post Office.



Ballinagh Market House is a two-story, five bay building.

shoppers to make use of.

Accessibility

Ballinagh is serviced by the Bus Éireann route 111 which transports residents to the county town of Cavan Town and travels on to Granard, Castlepollard and Athboy. The route travels four times, in each direction, from Monday to Friday. There are three journeys in either direction on Saturday and one journey in either direction on Sunday.

Ballinagh is located only 8.5 km south of the county town of Cavan Town. Ballyjamesduff is approx. 22km to the east of Ballinagh. Both large retail centres are only 10-20 mins' drive time from Ballinagh.

Amenity

The streets in the centre of Ballinagh are very well maintained and provide a very attractive environment for shoppers. There are hanging baskets with flower arrangements in each one, located on both sides of the street. The provision of pedestrian crossing points is good along the N55, with vertical and horizontal deflections like tactile paving, risen tables and street markings outlining to drivers that the pedestrian is the priority at such points.



Assessment

Overall, Ballinagh has approx. 0.7 sq.m of occupied retail floor space per head of population, when using the population figures from Census 2011. Occupancy levels in Ballinagh are good with 12.5 % of units currently unoccupied. The balanced allocation of the various sub-divisions of retail in the village mean that residents retail needs are well provided for. What's more, residents can travel to the larger retail centres of Cavan Town and Ballyjamesduff, which are only 10-20 mins from

Ballinagh by car, to facilitate a wider spectrum of retail needs.

The amenity in the village is of a very good standard and the village is very well serviced by public transport.

Actions

Ballinagh			
	Sq. M	Number	No. as %
Convenience	687	6	17.1%
All Comparision	556	10	28.6%
Mainstream Comparision	157	8	22.9%
Bulky Comparision	399	2	5.7%
Retail Services	574	14	40.0%
Vacant	185	5	14.3%
Subtotal	2,002	35	100.0

Loch Gowna

The village of Loch Gowna (formerly known as Scrabby) has a population of 605, as of the Census 2011 figures. The village has experienced small levels of growth since the previous Census in 2006 of approx. 6%. The village is classified as a tier 5 retail centre made up of "Rural and Local stores", in the Cavan Retail Strategy.

Attractions

Lough Gowna is a large lake, which can be found to the village of Loch Gowna all the way around from the North-West to the South-West of the village. Additionally, Lough Gamhna is located to the South of the village of Loch Gowna and to the east of the village, there is Swan Lough.



Shopping Facilities in the village are of a small scale however the basic retail needs of residents

are still adequately provided for. Convenience shopping is provided for by; White's Quick Pick Store and O'Reilly's food store. For the size of the village. Comparrison Shopping facilities are scarce in the village, the only comparrison store is a florist. Retail services in the village consist of a beautician, a post office and a couple of eateries.

Accessibility

The village of Loch Gowna is located at the point of convergence of the Loch Eala road and the Swan Lake Road.

There is currently no bus servicing the village of Loch Gowna.

Amenity

The surrounding lakes offer significant amenity for residents in Loch Gowna. All three of the lakes are popular spots for pike and fodder fishing. Lough Gowna is the most popular, as it is the largest, and the lake has very good levels of pike all year round.

Assessment

The village of Loch Gowna is a small village which is in the South-West area of County Cavan. It is mainly residential and has a very small retail offering. The village is not serviced by a bus service. Considering the retail offering in Loch Gowna, and the fact that Cavan Town and Ballyjamesduff are at least 20 minutes' drive time from the village, it would seem necessary that a bus service or some form of local transport service be implemented soon, so that residents can satisfy retailing needs in these larger retail centres.

Actions

Loch Gowna			
	Sq. M	Number	No. as %
Convenience	130	2	33.3%
All Comparrison	12	1	16.7%
Mainstream Comparrison	12	1	16.7%
Bulky Comparrison	0	0	0.00%
Retail Services	289	3	50.0%
Vacant	0	0	0.00%
Subtotal	431	6	100.0

Swanlinbar

Swanlinbar is in the far North West of the county, very close to the border between the Republic of Ireland and Northern Ireland. Swanlinbar has a population of 399 residents, as of Census 2011, a figure which has shrunk by 10.5% since the previous Census in 2006.

Attractions

Convenience shopping facilities in Swanlinbar are catered for by a local store; O'Reilly's Stop & Shop Food Store, along with a couple of Butcher Shops. Comparrison shopping in the village is relatively basic and lacking variety. There is two comparrison stores, a garden store and a drapery. Retail services on offer in the village consist of an Ulster Bank, a Post Office and a couple of beauty salons.



Accessibility

Swanlinbar is serviced by three bus routes operated by three different operators. The route 930 is operated by Leydon's Coaches and transfers residents from Swanlinbar to Bawnboy, Ballyconnell, Belturbet, Cavan Town and Enniskillen. The Ulsterbus route 192 provides a commuter service to Enniskillen for residents from Monday to Saturday, with one journey either way in the morning and evening. The Bus Éireann route 464 links Swanlinbar to Enniskillen, Ballinamore and Carrigallen on Thursdays, on a weekly basis.

Swanlinbar is located on the N87 national road. Additionally, it can be accessed from Mill Street which joins the N87 in the village of Swanlinbar.

Amenity

There is tree planting and hanging basket with flower arrangements along the Main Street in Swanlinbar, such features add colour to the

shopping environment in the village. There is a strong connection with the GAA club in the town as there are a several county and club colored flags on the buildings around the town. The local GAA club grounds, St. Mary's CLG, are located just off the Main Street.



Assessment

Swanlinbar has a small amount of retail on offer for residents however it is enough for daily top-up shopping because the large retail centre of Ballyconnell is located approx. 15 minutes by car from Swanlinbar. Residents can also travel to Ballyconnell by bus on the route 930, which takes roughly 20-25 minutes and travels daily.

Action

Swanlinbar			
	Sq. M	Number	No. as %
Convenience	79	2	10.5%
All Comparrison	83	2	10.5%
Mainstream Comparrison	83	2	10.5%
Bulky Comparrison	0	0	0.00%
Retail Services	206	6	31.6%
Vacant	0	9	47.4%
Subtotal	368	19	100.0

Blacklion

Blacklion is a tier 5 settlement in the Cavan Retail Strategy, which is in the North-West of the county and is located on the border with Northern Ireland. The population in Blacklion is 388, as of the Census 2011. The population has grown by 11%

since the Census of 2006. The Belcoo river runs through the village of Blacklion.

Attractions

Blacklion sits at the base of the foothills under Cuilcagh Mountain. Blacklion is also surrounded by two medium sized lakes to the East and West. Lough MacNea Upper sits to the West of the village while Lough MacNea Lower sits to the East of the village.

MacNea House and Restaurant is owned and run by the famous Irish chef, Nevin Maguire. The restaurant is well known nationwide and is particularly hard to get a reservation.



Accessibility

The village of Blacklion sits on the N16 national road, which becomes the A4 when it enters Northern Ireland. The An Bonnan Bui Way also joins the N16 in the centre of the village.

The Bus Éireann route 458 stops in Blacklion, while travelling from Ballina-Enniskillen via Sligo and Manorhamilton. The bus travels in both direction several times daily, Monday- Sunday.



Amenity

Blacklion may be a small village however the surroundings of the village are green and lushes, which creates great views which can be seen from certain parts of the village. The pedestrian footways in Blacklion are of a very good standard and there is sporadic plating on the fringe of the village, on the N16, when heading towards Belcoo and the border with Northern Ireland.

Assessment

The village of Blacklion is sparsely serviced by retail. The main retail attraction is most certainly Nevin Maguire's restaurant and cookery school.

The town is located just three hundred metres from the border with the Northern Ireland and the United Kingdom.

The environs and surroundings of the town are very scenic and picturesque.

Blacklion			
	Sq. M	Number	No. as %
Convenience	31	2	11.1%
All Comparrison	79	2	11.1%
Mainstream Comparrison	79	2	11.1%
Bulky Comparrison	0	0	0.00%
Retail Services	362	5	27.8%
Vacant	802	9	50.0%
Subtotal	1,274	18	100.0

Butlersbridge

Butlersbridge is classified as a tier 5 retail centre, in the Cavan Retail Strategy, which is made up of "*Rural and Local stores*". Butlersbridge has a population of 478, as of the Census of 2011 and has grown by 22% since the Census in 2006.

Attractions

Butlersbridge is a very scenic place, with the River Annalee running through under the bridge on Main Street.

Shopping Facilities in the village are relatively basic. The convenience shopping is provided by a local store and a butcher shop. There is no comparrison stores and the retail services on offer consist of a couple of beauty salons and an office.

Accessibility

The N54 national road, which is also known as the Clones Road, cuts straight across the Main Street in the village. The N3 located just 280m from the centre of the village.

The village is serviced by two bus routes. Bus Éireann provides a stop on the Expressway route 30 which travels from Donegal to Dublin Airport, via Enniskillen and Cavan Town, which is operated in conjunction with McGeehan Coaches. Leydon's Coaches route 930 also services Butlersbridge. The route travels from Enniskillen to Cavan Town via Swanlinbar, Ballyconnell and Belturbet.



Amenity

Butlersbridge is very scenic and is surrounded by several small hills and drumlins. The river which runs through the village and the number of mature trees around the fringe of the town provide a very green, relaxed landscape for the residents and shoppers in the village to take in when travelling in and around the village. Inishmuck Lough is located to the west of the village and Lough Oughter is located to the South-West along with Kilkeen Forrest Park.



Assessment

Butlersbridge is a small village in the centre of the county, only 15 km from the county town, Cavan Town. The town is surrounded by an abundance of natural amenities with Kilkeen Forrest Park located to the South-West of the village along with several lakes.

Retail in the village is somewhat lacking as there is no comparrison stores at all and very few retail services however it is recognized that most residents are most likely to satisfy retail needs by travelling the short journey by car to Cavan Town and do any shopping they need to in the wide variety of retail stores on offer.

Butlersbridge			
	Sq. M	Number	No. as %
Convenience	36	2	28.6%
All Comparrison	0	0	0.0%
Mainstream Comparrison	0	0	0.0%
Bulky Comparrison	0	0	0.0%
Retail Services	239	3	42.8%
Vacant	191	2	28.6%
Subtotal	466	7	100.0

Bawnboy

Bawnboy is a very small, primarily residential village with a couple of stores. Bawnboy is designated as a tier 6 retail centre in the Cavan Retail Strategy. The village has a population of 580, as of the Census in 2011. The village has experienced a small growth in population since the previous Census in 2006, of roughly 6%.

Attractions

Bawnboy is a village located at the foot of Slieve Rushen.

Retail services in the village are very minimal with a local convenience store and a car dealership.

Accessibility

Bawnboy is located just 6.5 km from the large retail centre of Ballyconnell. The village is located on the N87 which runs straight through the village. The Bawn Villas road also links with the centre of the village.

Leydon's Coaches route 930 services the village with a bus service and transport residents from

Bawnboy to Ballyconnell, Belturbet, Cavan Town, Swanlinbar and Enniskillen. This bus service runs a couples of times, in either direction, daily.

Amenity

There is a large playground located just off the N87, in the grounds of St. Aidan's GAA Templefort, which provides the kids and youths of the town with a safe and enjoyable place to play, very close to the heart of the village.

Assessment

The town of Bawnboy has a very basic retail offering at present however due to the proximity of Ballyconnell, it is logical to think that the residents of the Bawnboy would travel the short distance to the much larger retail centre of Ballyconnell and do whatever shopping and retailing that they need to there.

Bawnboy			
	Sq. M	Number	No. as %
Convenience	20	1	14.3%
All Comparrison	58	1	14.3%
Mainstream Comparrison	58	1	14.3%
Bulky Comparrison	0	0	0.0%
Retail Services	0	0	0.0%
Vacant	85	5	71.4%
Subtotal	215	7	100.0

Dowra

Dowra is a tier 5 settlement in the Cavan Retail Strategy and is classified as having a retailing core of "Rural and Local Stores". Dowra has a population of 161 residents as of the Census 2011. The town has grown by approx. 25% since the previous Census in 2006. Dowra is in the far North West of the county, on the Cavan-Leitrim border.



Attractions

Dowra is situated in the valley of Lough Allen and is the first town along the River Shannon. As mentioned previously, Dowra is located on the Border with Leitrim. A bridge on the edge of the town, on the R200, which runs over the River Shannon is the dividing point between the two counties, at this point.

The Leitrim hiker's way starts in the village and the Miners Way runs nearby.

Shopping Facilities in the village are very good for a village of this size. Convenience shopping is catered for by a large SPAR store which is in the centre of the village. Comparision shopping options in the village are supplied by a hardware store and a fuels store. The retail services in the village are made up of a beauty salon, a post office and a financial institution.



Accessibility

The R200 runs through the centre of the village and joins the R207, from County Leitrim and on towards Lough MacNea Upper and Lower, in the North of county Cavan.

Bus services in the village are provided by Bus Éireann route 462. This route travels from Dromkeerin, Dromahair and Sligo and has a stop in Dowra. The route runs in both directions several times daily from Monday-Saturday inclusive.

Amenity

The village is small but very scenic, the River Shannon can be seen from the village along with the surrounding hills and mountains providing a very tranquil atmosphere for residents and shoppers alike.

There is a nice walkway through a small green area, with sporadic tree and scrub planting, on the bank of the River Shannon which are located just beyond the Main Street in Dowra.



Assessment

The village is a small village with a relatively small population however the large SPAR on the Main Street is a positive attraction for residents of the village and shoppers from the surrounding villages because of the variety of convenience goods that store offers. There is approx. 4.2 sq.m of occupied floor space per resident in the Dowra. Vacancy levels are currently at around 42% if the total units in Dowra.

The village is located along the River Shannon which possibly creates an opportunity to market the natural beauty of the village further.

Dowra			
	Sq. M	Number	No. as %
Convenience	214	1	8.3%
All Comparision	145	4	33.3%
Mainstream Comparision	56	3	25.0%
Bulky Comparision	89	1	8.3%
Retail Services	314	2	16.7%
Vacant	208	5	41.7%
Subtotal	881	12	100.0

Kilcogy

Kilcogy is a small town which is classed as a tier 6 retail centre in the Cavan Retail Strategy. The village has a population of 434 as of the Census 2011 figures. The village has experienced significant growth since the previous Census in 2006, of approx. 16%.

Attractions

Kilcogy is located just ten minutes' drive from the popular fishing destination, Lough Sheelin.

Kilcogy is a relatively small village with few retail facilities. Convenience shopping is catered for by O'Reilly's Food store and Farm Sales.



Accessibility

Kilcogy is accessed by the regional road, the R394, which runs directly through the village. There is no bus servicing the village. Kilcogy is located approx. fifteen minutes' drive time from large retail centre Ballyjamesduff.

Amenity

There is small green space located in the centre of the village with recent tree and scrub planting. There is also a bench to sit on and survey the village and its surroundings.

Assessment

Kilcogy is a very small village with a small number of retail units. At present, there is one third of the units that are vacant however this figure is misleading, as there is only three units in the village. There is 0.6 sq.m of occupied floor space per resident in the village.

Kilcogy			
	Sq. M	Number	No. as %
Convenience	48	1	33.33%
All Comparrison	210	1	33.33%
Mainstream Comparrison	0	0	0.0%
Bulky Comparrison	210	1	100.0%
Retail Services	0	0	0.0%
Vacant	23	1	33.33%
Subtotal	281	3	100.0

Stradone

Stradone has a population of 777 as of the Census 2011 figures. Stradone is classified as a tier 6 retail centre in the Cavan Retail Strategy. The village is in the centre of the county, just ten kilometers from Cavan Town, which takes approx. ten to fifteen minutes by car.

Attractions

Aine's Handmade chocolate is located on the R165 in Stradone. The shop and factory is world famous for crafting handmade Irish chocolate bars, truffles and Irish cream liquors and has won numerous 'Great Taste' gold medal awards.



Shopping facilities in the village consist of a couple of local convenience stores, a specialty store and an office. The small number of retail is understandable because of the village's proximity to Cavan Town.

Accessibility

The village is accessed by the regional road, the R165, which runs straight through the village.

The village is serviced by the Bus Éireann route 166, which travels from Dundalk to Cavan twice in either direction, on a Tuesday and Thursday.

Amenity

The village centre is plush with green space and tree planting, which creates a relaxed and tranquil environment in this rural village.

There is widespread flower planting and a few picnic tables and park benches which creates a place for residents to meet and gather, in the centre of the village.

Assessment

Stradone is quite and relaxed village which has a small offering of retail. There is approx. 0.35 sq.m of occupied floor space per resident in Stradone. However, the population of the village is relatively high for the amount of occupied floor space per resident, thus it is logical to believe that the residents do most, if not all, of their retail shopping in the main retail centre for the county, Cavan Town, which is located close to the village.

Stradone			
	Sq. M	Number	No. as %
Convenience	73	2	33.3%
All Comparrison	0	0	0.0%
Mainstream Comparrison	0	0	0.0%
Bulky Comparrison	0	0	0.0%
Retail Services	166	3	50.0%
Vacant	30	1	16.7%
Subtotal	269	6	100.0

Redhills

Redhills is classified as a level 6 retail centre in the Cavan Retail Strategy. The village of Redhills has a population of 439, as of the Census of 2011. The population of the village has grown marginally, by 4% since the previous Census in 2006. The village is located just two kilometers from the border with County Monaghan and is located just under three kilometers from the border with Northern Ireland and the United Kingdom.

Attractions

The village of Redhills is home to the Oscar nominated writer Shane Connaughton.

Killybandrick Lough is located just five minutes' drive from Redhills. The lough is popular for medium sized pike fishing.



Shopping facilities in Redhills are very basic, a local store is the only retail offering in the village. However, the much larger retail centre of Belturbet is located just under ten kilometers from the village, or fifteen minutes' drive by car.

Accessibility

The local road, the L1503, runs directly through the village of Redhills.



Amenity

The village has a large green space in the centre of the village. The green space is lined by tree planting, flower arrangements in planters and park benches. All of which create a perfect place of relaxation or simply a meeting place for residents. The centre piece of the green space is an old water pump.

Assessment

The village of Redhills is a small rural village in the north of the county, which is located close to the Cavan-Monaghan border and close to the border with Northern Ireland.

Whilst the retail provision in the village is very small, it is highly likely that the residents of the village travel to the nearby tier 3 retail centre of Belturbet to do most of their shopping and only use the local convenience store in the village for top-up shopping.

Redhills			
	Sq. M	Number	No. as %
Convenience	30	1	100.0%
All Comparrison	0	0	0.0%
Mainstream Comparrison	0	0	0.0%
Bulky Comparrison	0	0	0.0%
Retail Services	0	0	0.0%
Vacant	0		0.0%
Subtotal	30	1	100.0

Mountnugent

Mountnugent is a small village which is located in the south of the county. Mountnugent is located approx. 3.5 km from the Cavan-Meath border. Mountnugent has a very small population of 27, as of the Census 2011 figures.

Attractions

Lough Sheelin is located just over five minutes' drive from the village. The Inney River runs through the village of Mountnugent.

Shopping facilities in the village are good for a retail centre of this importance level. Convenience shopping is provided by a local store, comparison options in the village are a clothes shop and a car garage. Retail services consist of a post office, a financial institution and a hair salon.

Accessibility

The regional road, the R154, runs directly through the village of Mountnugent. Ballyjamesduff is located just 8 kilometers from the village, or ten minutes' drive by car.

Bus Éireann route 187 serves the village from Monday- Saturday. The route provides transport transports for residents to travel to Kells via Oldcastle, Ballyjamesduff and Virginia. Each weekday, the route has two journeys from the

village and three journeys to the village.



Amenity

Some of the buildings have hanging baskets and platens outside them, which adds colour to the Main Street.

Assessment



Mountnugent			
	Sq. M	Number	No. as %
Convenience	40	1	12.5%
All Comparison	62	2	25.0%
Mainstream Comparison	62	2	100.0%
Bulky Comparison	0	0	0.0%
Retail Services	86	3	37.5%
Vacant	54	2	25.0%
Subtotal	242	8	100.0

Crossdoney

The village of Crossdoney has been classified as a tier 6 retail centre in the Cavan Retail Strategy.

Crossdoney has a population of 584, as of the Census 2011 figures. The village has grown by approx. 7% since the previous Census in 2006. The village is located in the south-west of the county. Crossdoney is located approx. 9km from the county town, Cavan Town, which takes just over ten minutes' drive.



Attractions

Shopping Facilities in Crossdoney are minimal. There is a Local Convenience store which serves the village however this is the only retail store in the town.

Accessibility

Crossdoney is located at the intersection of two regional roads, the R154 and the R198.

Crossdoney is serviced by Wharton's Travel route 975 on behalf of the NTA. This route runs four times daily in either direction. The route transfers residents of Crossdoney to Cavan, Arvagh, Drumlish and Longford.

Assessment

The village of Mountnugent is a small village which has good a good retail offering. At present, the vacancy rate in Mountnugent is approx. 22%. The town appears to have a very small population.

The village itself is well maintained, the footways are of good standard and the village has a large amount of vegetation around the village and its hinterland which creates a nice leafy, relaxed environment for shoppers and residents.

Crossdoney			
	Sq. M	Number	No. as %
Convenience	32	1	92.3%
All Comparrison	0	0	0.0%
Mainstream Comparrison	0	0	0.0%
Bulky Comparrison	0	0	0.0%
Retail Services	357	1	7.7%
Vacant	0	0	0.0%
Subtotal	392	2	100.0

Crosskeys

Crosskeys is a village which is classed as tier 6 retail centre, in the Cavan Retail Strategy. The village has a population of 708, going by the Census 2011 figures. There have been decent levels of growth in the area, of approx. 9%. Crosskeys is located in the south-Central area of the county. The village is situated halfway between Cavan Town and Ballyjamesduff. Cavan Town is approx. 11.5km, just over ten minutes' drive from Crosskeys. Ballyjamesduff is approx. 7.5 km, or 7 minutes' drive, from the village of Crosskeys. Retail

in the village is minimal, the retail offering consists of a local store and a restaurant.

Accessibility

The village is served by the Cavan Area Rural Transport bus service route R391 and 392 service the village on the third Wednesday of every month. The R402 travels every Thursday from Killyconnell to Cavan via Crosskeys. The R507 travels from Crosserlough to Cavan via Crosskeys on a Friday every week.

Amenity

There is a green space in the centre of Crosskeys, which is lined with flower and scrub planting.



Assessment

The village of Crosskeys is a small rural village has a very small retail offering however it is logical to think that residents of Crosskeys would make the short journey to either Cavan Town or Ballyjamesduff to do their weekly retail shopping. Additionally, the local store in the village can facilitate the top-up shopping of the residents.

The green space in the village provides a perfect centre piece for the village, this feature could possibly be further cultivated and the design

enhanced, to further enhance the sense of place in the village.

Crosskeys			
	Sq. M	Number	No. as %
Convenience	30	1	12.7%
All Comparrison	0	0	0.0%
Mainstream Comparrison	0	0	0.0%
Bulky Comparrison	0	0	0.0%
Retail Services	207	3	87.3%
Vacant	0	0	0.0%
Subtotal	237	4	100.0