DRAFT
ATHLONE
JOINT RETAIL STRATEGY

Prepared on behalf of
Roscommon County Council & Westmeath County Council

WESTMEATH COUNTY COUNCIL
Comhairle Chontae na hIarmhí

ROS COM MON
Comhairle Contae Ros Comáin
Roscommon County Council

(Proposed for adoption under Variation No. 4 to the Athlone Town Development Plan 2014-2020 and Variation No. 2 to the Monksland/Bellanamullia Local Area Plan 2016 – 2022)

January 2019

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Statement:
This report has been prepared by MacCabe Durney Barnes using due skill, care and diligence and is sufficient as a means of estimating future retail requirements of Roscommon and Westmeath County Councils. The data and conclusions reached should not be used for other purposes.

Advisory:
Revision updates applied by Roscommon and Westmeath Local Authorities (January 2019), undertaken in particular to give effect to the provisions of Project Ireland 2040 National Planning Framework.

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List of Acronyms

ACA	Architectural Conservation Area
ASI	Annual Services Inquiry
ATDP	Athlone Town Development Plan
CDA	Central Development Area
CIRGDP	County Incomes and Regional Gross Domestic Product
CPI	Consumer Price Index
CSO	Central Statistics Office
DHPLG	Department of Housing, Planning and Local Government
DWCRS	Draft Westmeath County Retail Strategy
ED	Electoral Division
EDA	Eastern Development Area
EMR	Eastern and Midland Region
EMRA	Eastern and Midland Regional Assembly
ESRI	Economic and Social Research Institute
FOC	Factory Outlet Centre
GDA	Greater Dublin Area
GIS	Geographical Information Systems
GRP	Guidelines for Planning Authorities Retail Planning
JALAP	Joint Athlone Local Area Plan
M/BLAP	Monksland/Bellanamullia Local Area Plan
MRA	Midland Regional Authority
MRPG	Regional Planning Guidelines for the Midland Region
NPF	National Planning Framework
NSS	National Spatial Strategy
NWR	Northern and Western Region
NWRA	Northern and Western Regional Assembly
RIA/RIS	Retail Impact Assessment/Retail Impact Statement
RCDP	Roscommon County Development Plan
RCRS	Roscommon County Retail Strategy
RSES	Regional Spatial and Economic Strategy
The Board	An Bord Pleanála
UAP	Urban Area Plan
WRA	West Regional Authority
WRPG	Regional Planning Guidelines for the West Region
WCDP	Westmeath County Development Plan

Introduction

MacCabe Durney Barnes (**MDB**) was commissioned by Roscommon and Westmeath County Councils (the Councils) to prepare the Athlone Joint Retail Strategy (the Strategy) for the period 2017 – 2026 in May 2017. The timeframe of the Strategy has been adopted to align with the remainder of the *Roscommon County Development Plan 2014* (RCDP) and *Westmeath County Development Plan 2014* (WCDP) and that of the next plans which will cover the period 2020 – 2026.

It is intended that the Strategy will be adopted as a Variation to the *Athlone Town Development Plan 2014* (ATDP) and the *Monksland/Bellanamulia Local Area Plan 2016* (M/BLAP) and will inform the preparation of the next County Development Plans and the Joint Athlone Urban Area Plan (UAP).

Please also be advised that the policies and objectives contained within this updated Retail Strategy (2019) supersede the policies and objectives contained within Chapter 4 of the Athlone Town Development Plan (as adopted in 2014) and the content of the Monksland/Bellanamullia LAP 2016-2022 (as adopted in 2016) where any discrepancy exists.

1.1 Context

The Strategy has been prepared in accordance with one of the key recommendations of the *Report of the Athlone Boundary Review Committee* (the Review Committee) which was published in November 2016. The Review Committee was one of four established by the then Minister for the Environment, Community and Local Government, under Section 28 of *Local Government Reform Act 2014* in June 2015. It was tasked with carrying out a review of the boundary between County Roscommon (Roscommon) and County Westmeath (Westmeath), making recommendations with respect to the Municipal District of Athlone that it considered to be necessary in the interests of effective and convenient local government and preparing a report with recommendations to the Minister. The report of the Review Committee, in summary, recommended the following:

> *'Having considered all of the issues in the context of the terms of reference, the Committee recommends that no change to the existing boundary should take place. It recommends that a new programme of structured cooperation be immediately initiated by both local authorities to develop an innovative governance system for Athlone – Monksland/Bellanamullia. This should build on existing cooperation between the authorities and focus on the development of an agreed vision for the area, a joint Local Area Plan for Athlone – Monksland/Bellanamullia, a joint retail strategy, the possible expansion of shared services, the further development of the identity of Athlone and other matters.'*

The preparation of the Strategy responds to the Review Committee's recommendation that a Joint Retail Strategy should be prepared for the Athlone – Monksland/Bellanamullia area (the Study Area).

1.2 Study Area

The Study Area for the Strategy covers the spatial extent of Athlone and its environs. This is defined as the area covered by the current ATDP in Westmeath and the M/BLAP 2016 in Roscommon, with the latter comprising what is termed the Athlone West. The Study Area is illustrated in Map 1.

Map 1: Athlone Joint Retail Strategy Study Area

1.3 Terms of Reference

The Councils' Terms of Reference for the preparation of the Strategy were founded on the requirements of the Department of the Environment, Community and Local Government (now the Department of Housing, Planning and Local Government – DHPLG) *Guidelines for Planning Authorities Retail Planning 2012* (GRP 2012) but were extended to incorporate additional information which was deemed important in the Roscommon, Westmeath and Study Area contexts. The Terms of Reference were reviewed at the Inception Meeting for the Strategy by the Councils' Joint Client Team (the Client Team) and the consultants and were agreed as follows:

i) Confirmation of the role of Athlone and the various centres within the Study Area;

ii) Confirmation of the Core Shopping Area of Athlone;

iii) An analysis of existing retail floorspace provision in the Study Area including the different locations in the area with respect to the convenience, comparison and retail warehousing sectors;

iv) Strategic guidance on the location and scale of retail development for convenience, comparison and retail warehousing categories;

v) Preparation of policies and initiatives to enhance and underpin the economic viability of the core/central area of Athlone (a designated Regional Centre) and address quantitative issues of floorspace provision and qualitative issues of variety, choice, amenity, accessibility and sustainability;

vi) Identification of where there is currently overprovision of lower order services such as take-aways and betting offices within the Study Area, and make policy recommendations in relation to the appropriate mix of retail use types. Areas of under provision of higher order retail services should also be identified and the appropriate policy response formulated;

vii) Identification of the criteria for the assessment of retail developments;

viii) Health Check assessments of the centres within the Study Area;

ix) An analysis of data, retail and economic, in relation to the retail sector within the Study Area including household income, retail spend, leakage, floorspace, vacancy rates and trends in online shopping;

x) Detailed quantification of projected need for additional retail floorspace for Athlone and its environs in terms of all sectors of retail floorspace;

xi) Identification of the extent of the retail catchments for Athlone;

xii) Make recommendations on policy and actions required to address changing trends in retailing as they may affect Athlone and its environs; and

xiii) Make recommendations on policy and actions aimed at preserving existing independent retailers within Athlone and its environs.

Additionally, it was recognised that for consensus to be achieved on the framework, policies and proposals of the Strategy and its adoption by both Councils, due weight and consideration is required to be given to the policies and objectives of both, as is implicit in the context for the Strategy.

1.4 Study Approach

The preparation of the Strategy adopted a staged approach as set out below:

- **Preliminary Stage:** Commissioning and Inception
- **Stage 1:** Baseline Review and Analysis
- **Stage 2:** Capacity and Market Assessment
- **Stage 3:** Strategy Formulation and Final Report.

It was agreed at the Commissioning Meeting that the cut-off date for baseline information inputs to the Strategy be 31st July 2017. However, where identified as appropriate by the Client Team and the consultants, the Strategy acknowledges/responds to changing strategic policy directions which have emerged in the interim.

Additionally, it is highlighted that it was agreed by the Client Team and the consultants, to clarify that reference to Athlone Town Centre was broader than that of the Athlone Town

Centre shopping centre, then to reflect the distinction, the terminology adopted for the wider shopping heart of the town be *'the town centre of Athlone*[1]*'*.

Stage 1 of the preparation of the Strategy included the Councils engaging in a public consultation exercise, which comprised the following:

i) Elected Members of both Councils being informed of the preparation of the Strategy;

ii) A joint public notice from the two Councils in the two local papers, namely the Athlone Advertiser and the Roscommon Herald; and

iii) The Athlone Chamber of Commerce, the Public Participation Networks (PPN) in both Council administrative areas, the Northern and Western Regional Assembly (NWRA) and the Eastern and Midland Regional Assembly (EMRA) all being informed by letter of the preparation of the Strategy.

All of the above were invited by the Councils to make submissions on the Strategy and six responses were received. The Councils' review of these submissions is provided separate to the Strategy. Due consideration of the submissions was taken by the consultants in the preparation of the Strategy.

1.5 Structure of the Strategy

The structure of the remainder of the Strategy is as follows:

Chapter 2: Outlines the retail planning policy context within which the Strategy sits

Chapter 3: Presents a summary of the baseline for the Strategy

Chapter 4: Provides a review of the retail market trends which have underpinned the preparation of the Strategy

Chapter 5: Presents an assessment of vitality, viability and potential of the central core of Athlone and other key centres in the Study Area

Chapter 6: Provides the broad assessment of the potential for additional retail floorspace in Athlone and its environs

Chapter 7: Sets out the aim, objectives, strategic framework and policies and proposals of the Strategy.

[1] Referred to as core area of Athlone Regional Centre following the publication of Project Ireland 2040: National Planning Framework in 2018

2 Retail Planning Policy Framework

This chapter sets out all of the spatial and retail policy frameworks which have influenced the preparation of the Strategy. However, these are in or are about to enter a period of transition particularly at the national and regional levels and this has significant implications for planning at the county and more local levels across the country. The key drivers of this are founded in:

i) The National Planning Framework: Ireland 2040 Our plan (NPF) and of particular note, the designation of Athlone as a 'Regional Centre'.

and

ii) The delivery of the new *Regional Spatial and Economic Strategies* (RSES) envisaged to be adopted in 2019, which will replace Regional Planning Guidelines (RPG), as these require to be consistent with the NPF. The complexity of this increased following the restructuring of regional government under the *Local Government Reform Act 2014* into three regions, each with their own regional assemblies. Under this reform: Roscommon became part of the Northern and Western Region (NWR) and is located in the Western Region/Strategic Planning Area; and, Westmeath was incorporated into the Eastern and Midland Region (EMR) within the Midland Strategic Planning Area.

Under the *Planning and Development Act 2000 (as amended)*, City and County Development Plans, and consequently their retail strategies, currently require to be consistent – as far as practicable – with the NPF and relevant RSES.

2.1 Current Policy Context

Noting the above and the changes which are underway, the current policy context is provided by key national, regional and local planning frameworks and these must be given weight in the preparation of the Strategy. They are:

- The National Planning Framework: Ireland 2040 Our plan (NPF) and of particular note, its designation of Athlone as a 'Regional Centre.'
- Guidelines for Planning Authorities – Retail Planning (2012).
- Regional Planning Guidelines for the West Region 2010 – 2022.
- Regional Planning Guidelines for the Midland Region 2010 – 2022.
- Roscommon County Development Plan 2014 – 2020.
- Westmeath County Development Plan 2014 – 2020.
- Monksland/Bellanamullia Local Area Plan 2016 – 2022.
- Athlone Town Development Plan 2014 – 2020.
- Retail Strategy for County Roscommon 2014 – 2020.
- Draft Westmeath County Retail Strategy 2019 – 2026.

2.2 National Policy

2.2.1 National Planning Framework Ireland 2040 Our plan (NPF)

The National Planning Framework (NPF) is the Government's high-level strategic plan for shaping the future growth and development of Ireland up to 2040. It contains an overall vision for the country and a number of shared goals referred to as National Strategic Outcomes (NSOs) which seek to implement this vision and are relevant to all communities throughout Ireland. The NPF has set about achieving this vision by: (i) developing a new region-focused strategy for managing growth; (ii) linking this to a new 10-year investment plan, the Project Ireland 2040 National Development Plan 2018-2027; (iii) using state lands for certain strategic purposes; (iv) supporting this with strengthened, more environmentally focused planning at local level; and (v) backing the framework up in law with an Independent Office of the Planning Regulator.

The NPF designated Athlone as a 'Regional Centre'. One of its key future planning and development and place-making policy priorities for the Eastern and Midland Region includes: "More effective strategic planning and coordination of the future development of nationally and regionally strategic locations at points that straddle boundaries between this and neighbouring regions as in the example of Athlone, which is a focal point for an area reaching into much of this and neighbouring regions in economic and employment, transport, education and public service delivery and retailing terms".

The transposition of this national strategic plan into the forthcoming Eastern and Midlands and Northern and Western Regional Spatial and Economic Strategies will further inform and guide retailing policy as relevant to Athlone.

2.2.2 Guidelines for Planning Authorities Retail Planning 2012

The third successive GRP were published by the Department of Environment, Community and Local Government (now the DHPLG) in April 2012. They generally reinforce the principles and guidance provided in the 2005 Guidelines but introduce a number of new dimensions informed by: the experience from how previous GRP were implemented/interpreted; a greater foundation/understanding of the dynamics of the retail sector and its importance to the economy; and, reinforcing the recognised importance of sustaining the vitality and viability of centres at all levels of the settlement hierarchy. Founded on this, the GRP 2012 advise that:

> *'The aim of the Guidelines is to ensure that the planning system continues to play a key role in supporting competitiveness in the retail sector to the benefit of the consumer in accordance with proper planning and sustainable development. In addition, the planning system must promote and support the vitality and viability of city and town centres thereby contributing to a high standard of urban design and encouraging a greater use of sustainable transport.'*

2.2.3. Requirements of the RPG 2012

The framework of what City and County Development Plans should incorporate in respect of retailing has been established by the preparation of city and county retail strategies since the introduction of the GRP 2000. The GRP 2012, in para 3.3 – Development Plans and Retailing, have refined and expanded the requirements of what development plans should be founded on and include. These requirements will underpin as appropriate the approach adopted to

the preparation of the Strategy. They are:

'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:

1. *State the elements of their **settlement hierarchy** in line with the relevant regional planning guidelines and their core strategy;*
2. *Outline **the level and form of retail activity appropriate** to the various components of the settlement hierarchy in that core strategy;*
3. *Define, by way of a map, the **boundaries of the core shopping areas** of city and town centres and also the location of any district centres;*
4. *Include a broad assessment (m²) of the **requirement for additional retail floorspace** only for those plans covered by a joint or multi-authority retail strategy;*
5. *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;*
6. ***Identify sites** which can accommodate the needs of modern retail formats in a way that maintains the essential character of the shopping area;*
7. *Include **objectives to support action initiatives** in city and town centres; such as:*
   - ***Mobility management measures** that both improve accessibility of retail areas while aiming to develop a pedestrian and cyclist friendly urban environment and vibrant street life; and*
   - ***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*
8. *Identify relevant **development management criteria** for the assessment of retail development in accordance with these guidelines.'*

Table 1 of the GRP 2012 identifies the authorities which must prepare joint or multi-authority retail strategies and the Councils, along with Offaly County Council, is one such group of local authorities which are required to do so.

The guidelines 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.

2.3 Regional Policy

As has been acknowledged, the WRPG 2010 and the MRPG 2010 will be replaced by RSES' which are currently being prepared following the publishing of the NPF and envisaged to be adopted in 2019.

The above noted, while the WRPG and MRPG are recognised to be significantly out-of-date, they remain the regional level spatial planning framework which requires to be given weight in the preparation of development plans and retail strategies. In the paragraphs which follow, the key strategic guidance in the two RPG that need to be taken into account in the preparation of the Strategy are summarised.

2.3.1 Regional Planning Guidelines for the West Region 2010 – 2022

The WRPG 2010 take cognisance of the Midland Gateway and particularly of Athlone and its influence on the economic development of South Roscommon, and more specifically Monksland. They determine that Monksland forms part of the Linked Gateway. The guidelines preferred strategic option for the Region's spatial development foresees the growth of the Galway Gateway, Tuam Hub and the Castlebar – Ballina Linked Hub as being supported by that of the Midland Gateway. The WRPG also recognise that Monksland is an important employment generating area for both the West and Midland Regions. Additionally, the guidelines promote the joint role to be played by both Councils in the sustainable development of the Athlone – Athlone West (Monksland) area.

2.3.1.1 Interregional Balance

The WRPG highlight in their Strength and Opportunities analysis, that Athlone played the role of an economic driver for its surrounding area and that should continue to be built on. A number of Settlement Strategic Objectives consider the relationship of the West Region with the Midland Region. Objectives which are of direct relevance and importance to the preparation of the Strategy are identified below:

'***CO5:*** *Support the overall development of Monksland as an integral part of the Athlone Gateway and as a key growth area which requires phased infrastructure supports, services and facilities and good environmental quality and taking full account of the presence of the Natura 2000 sites associated with the River Shannon and the requirement to protect these by subjecting all plans and projects to Habitats Directive Assessment, where relevant.*

CO6: *Local Authority Development Plan policies and Local Area Plan policies in County Roscommon shall be prepared in consultation with Westmeath County Council and Athlone Town Council with regard to the Athlone Gateway and the development of Monksland. Co-ordination of policy and infrastructural priorities (including physical and social) shall be agreed between the three local authorities. Coordination of service provision and supported links will be required.*

CO7: *Roscommon County Council shall explore the feasibility of a Joint Retail Strategy for Monksland and the Athlone Gateway with Westmeath County Council and Athlone Town Council.*'

2.3.1.2 Retail Strategy

A Retail Strategy for the West Region is incorporated in the WRPG and it specifically considers the potential role of Monksland. It recommends that a plan-led approach should be taken in relation to retail development in Monksland and that a Joint Retail Strategy be prepared with the Midlands Gateway in accordance with the GRP 2005, which were the guidelines in place at the time that the WRPG were being prepared.

Other retail objectives in the Regional Retail Strategy include the provision of a suitable range of retailing throughout the various levels of the Regional Settlement Hierarchy. The central thrust of the Retail Strategy is the application of the *'town centre first'* approach and the promotion of the vitality and viability of existing centres. Such approach is aligned with the objective of promoting sustainable transport and travel patterns, a principle which is at

odds with the provision of out-of-town retail centres. The Retail Strategy also includes a number of policies and objectives which are set below:

2.3.1.3 Retail Policies

*'**EDP73**: Implement the principles established in the Retail Planning Guidelines for Planning Authorities (2005) or future guidance as the primary basis for the control of future retail development.*

***EDP74**: Support, promote and protect the retail role and attractiveness of all towns in the West Region.*

***EDP75**: Protect the vitality and viability of 'town centres' and retain the capacity for retail development in town centre areas.*

***EDP76**: Support the role of retailing as a key contributor to a vital and viable town centre by identifying and facilitating the provision of retailing in 'Core Retail Areas'.*

***EDP77**: Support retail development in towns, villages and population centres across the West Region, acknowledging the role of the retail sector in providing lasting employment and in anchoring communities.'*

2.3.1.4 Retail Objectives

*'**EDO25**: Ensure that there are sufficient lands zoned for retail floorspace in an efficient, equitable and sustainable manner, with a particular emphasis on improved public transport access (Section 3.1.1 applies).*

***EDO26**: Assess the impact of significant proposed expansions of retail floor space on movement taking into account impact on road capacity and access to public transport.*

***EDO27**: Improve access to town centres by facilitating opportunities for public transport, cycling and walking whilst also ensuring sufficient short term parking is available to meet the needs of car borne shoppers (Section 3.1.1 applies)."*

The strategic policies contained in the WRPG recognise the pivotal role of the Athlone – Athlone West area and recommend that a joint approach, to planning, investment and development should be taken to the overall area, but more specifically to Monksland to ensure that Athlone – Athlone West plays its role of economic driver for the regions its straddles. To this end, a number of policies and objectives were incorporated in the WRPG. These are as follows:

*'**SPP5**: Support the sustainable development of South Roscommon (Monksland area) as part of the Athlone Gateway and inter-regional co-operation of service requirements.*

***SPO5**: To support the development of a Unitary Spatial Plan for Athlone and its environs including Monksland which is guided by relevant environmental assessment. The Unitary Spatial Plan will be subject to Habitats Directive Assessment and other relevant environmental assessment to ensure the protection of the Natura 2000 sites in this area.*

***SPO8**: To formulate and implement a settlement strategy for the region that builds up 'critical mass' in the nominated Galway Gateway, the Hub of Tuam and the Linked Hub of Castlebar-Ballina and the Monksland area as part of the Athlone Linked Gateway whilst creating a network of key towns and smaller settlements which will develop into vibrant communities finding support to/from the Gateway and Hub/Linked Hub.*

***IP5**: Upgrade and improve all roads in the Gateway, Hub and Linked Hub including Monksland, part of the Athlone Gateway. Road developments will be subject to Habitats Directive Assessment or other environmental assessment where relevant and in accordance with the requirements of the Habitats Directive or other legislation.'*

2.3.2 Regional Planning Guidelines for the Midland Region 2010 – 2022

2.3.2.1 Balanced Development

The MRPG 2010 provide the population targets for the Midlands Region. The guidelines adopt a development strategy based on the creation of five spatial *'sub-regions'* to guide the Region towards more balanced development. Reflecting the strategic role and importance of Westmeath within the Region, it includes two of these sub- regions – the Central Development Area (CDA) and the Eastern Development Area (EDA). The CDA is focused on the Linked Gateway Towns (Athlone, Mullingar and Tullamore) and is determined as the core economic driver/area of Region, while the role of the EDA is promoted as providing important/complementary strategic/spatial guidance on enhanced lifestyle choice and facilitating opportunities for the population to participate in the local and regional economy. However, this strategic approach to the future growth and development of the Region was revised under the NPF and in accordance with same, Athlone has now been designated as a 'Regional Centre' (2018).

2.3.2.2 Settlement Hierarchy

The guidelines set out the Regional Settlement Hierarchy for the Midland Region, together with that for Westmeath, which is of key importance in the context of the preparation of the Strategy being defined as follows:

1. The **Linked Gateway**, as designated by the NSS 2002, comprises Mullingar, Athlone and Tullamore.

***Advisory**: In terms of the settlement hierarchical structure, the NPF (2018) abolished the linked Gateway status which was attributed to the gateway towns of Athlone, Tullamore and Mullingar under the NSS. Athlone has now been designated as a 'Regional Centre' and has been identified as a focal point within the region and neighbouring regions in economic and employment, transport, education and public service delivery and retailing terms. The forthcoming Eastern and Midlands and Northern and Western Regional Spatial and Economic Strategies in 2019 will inform the County's settlement hierarchy and the future development of Athlone in a plan-led, sustainable manner.*

2.3.2.3 Retailing in the Region

Section 2.2 – Goals of the MRPG identifies 13 strategic goals underpinning the vision for the Region. Of particular importance to the preparation of the Strategy are the following:

Goal 9

'To structure the region in a manner that integrates high quality built and physical environment with essential physical and social infrastructure such as transport and water services as well as schools, retail, community, healthcare and recreation/sporting facilities.'

Goal 12

'To strengthen and sustain rural communities in order to complement urban centres, and contribute to the distinct identity of the region.'

Section 3.4.10 of the MRPG on Retail outlines the policy followed by the Midland Regional Authority (MRA), which has now been replaced under the *Local Government Reform Act 2014* by the EMRA, as follows:

- *The MRA supports the sequential approach to the provision of retail within the region. This approach assists in promoting both the vitality and viability of existing centres, which has positive quality of life implications and in turn supports the objective of developing sustainable travel and transport measures.*
- *The MRA supports the preparation of joint retail strategies for Athlone by Westmeath/Roscommon Local Authorities and for Carlow/Graiguecullen by Laois/Carlow Local Authorities.'*

The retail sector is of key importance for the Region as confirmed in Section 3.5 of the MRPG which focuses on Economic Development Policies and more specifically in **Policy EDP 3**, which states the following objective:

'Actively encourage the sustainable development of the region's sectoral opportunities including: Internationally Traded Services, Life Sciences, Food, Tourism and Leisure, Engineering, Green Enterprise, Logistics and Distribution, International Trading, Public Sector, Retail and the Rural Economy through the following measures.'

2.4 County & Local Policy

Important foundations for the preparation of the Strategy are the County and more local area retail policies which have been adopted by the Councils, recognising that the latter have been generally informed by those of the RCDP 2014 and the WCDP 2014.

In respect of the retail policies of the two County Development Plans, these were both informed by the *Retail Strategy for County Roscommon 2014 – 2020* (RCRS 2014) and the *Westmeath Local Authorities Retail Strategy 2007* (WCRS 2007). With regard to the latter, this is set to be superseded by the *Draft Westmeath County Retail Strategy January 2019* (DWCRS 2019~~)~~ which is to be adopted as a Variation to the WCDP 2014-2020. It, rather than the policies of the WCRS 2007, is therefore included in the policy review.

The review of both the retail policies of the RCDP 2014 and the RCRS 2014 identifies that the retail policy framework for the Strategy is provided by those in the former with the latter providing policy guidance on a more general level in respect of different retail formats under Sub Section 4.5 *Criteria for Assessment of Retail Development*. As the guidance reflects and responds to retail trends underpinning each of the different formats, it is addressed in Chapter 4 of the Strategy. Additionally, it would be highlighted that while the review of the Roscommon retail policies provides those at the strategic County level, the focus has been on those which specifically relate to Monksland/Bellanamullia (Athlone West).

The review of the County and local retail policies of both Councils is summarised in Table 2.1 and is structured firstly by those prevailing in Roscommon followed by those in Westmeath.

Table 2.1: Summary Review of County & Local Retail Policies

Plan/Strategy		Objective
Roscommon County Development Plan 2014 – 2020	Strategic Aims of the Plan	**Strategic Aim 3**: Prioritise the development of **Monksland** within the context of its association with Athlone and in the context of its location within a Linked Hub (incorporating Athlone, Tullamore and Mullingar) and its potential to positively influence the economic wellbeing of South Roscommon.
	Core Strategy	Not specifically a policy but considered as part of the Core Strategy: Retail facilitation is also envisaged for **Monksland/Bellanamullia (Athlone West)** within the context of a district centre for that area.
	Economic Development	**(A) Centres of Industry and Commerce:** **Action:** Ensure a strategic reserve of industrial/enterprise land to attract and capitalise on new industrial and commercial development. **Settlements:** include Monksland.
		(b) Centres of Retailing: **Special Policy on Retail/Storage/Light Industrial Warehousing** Due to observed trends and high retail warehousing vacancy in the settlements of Cortober, Ballaghaderreen, Roscommon Town, **Monksland** and Strokestown, strict control on the location of new retail/storage/light Industrial warehousing is required in these settlements. Prospective developers of such units shall be required to demonstrate that existing units of the nature proposed are not available or easily adaptable within the settlement for the duration of this Plan.
		Core Policy 3.3: Strictly control large scale commercial, particularly retail and retail warehousing outside of the defined development boundaries of Roscommon Town, Castlerea, Boyle, Ballaghaderreen,

Plan/Strategy		Objective
		Monksland/Bellanamullia (Athlone West), Strokestown, Elphin and Cortober. Commercial/retail development in other towns and villages in the County shall be, proportionate in scale to existing retail/commercial development within the settlement.
		Core Policy 3.4: Promote Roscommon Town as the primary focus of new retail development along with the settlements of Castlerea, Boyle and Ballaghaderreen and **Monksland District Centre**.
		Core Policy 3.6: Promote the sustainable development of retail and other commercial development of a scale which meets the local needs of the district centres of **Monksland** and Cortober without undermining the proper planning and sustainable development of their parent settlements of Athlone and Carrick-on-Shannon.
		Core Policy 3.7: Require all proposals for new retail warehouse, storage warehouse, light Industrial warehouse developments within the settlements of Cortober, Ballaghaderreen, Strokestown, Roscommon Town and **Monksland**, to be accompanied by a comprehensive sequential assessment which demonstrates that no existing vacant units on appropriately zoned lands within the settlement are available or could be adapted to accommodate the proposed development for the duration of this Plan.
		Core Objective 3.4: Co-operate with Leitrim, Offaly and Westmeath County Councils in the preparation of a joint retail strategy for the settlements of **Monksland (Linked Gateway)** and Cortober.
	Retail Planning Policies	**3.13:** Implement the principles established in the Retail Planning Guidelines for Planning Authorities (2012) and companion Retail Design Manual document, as the primary basis for the control of future retail development.
		3.14: Protect and reinforce the established central retailing and service areas of town centres and encourage and facilitate retailing, particularly convenience and non-bulky comparison retail uses, as the key function within the town and village centres of the County.
		3.16: Encourage the retention of retail and other appropriate town centre uses such as; general food stores, newsagents, post offices, pharmacies, pubs, restaurants and cafés within town and village centres.
		3.17: Ensure that retail and service outlets are located within identified town centres, or in any case within the central area of a town or village, where they can best serve the population of the surrounding area, and discourage inappropriate out-of-town shopping facilities that detract from the viability and vitality of existing town and village centres.
		3.18: Encourage and facilitate the reuse and regeneration of derelict and vacant buildings for retail uses in town centres with due regard to the Sequential

Plan/Strategy		Objective
		Approach.
		3.19: Ensure that all new retail and commercial development proposals respect the scale and character of the existing streetscape within which they are proposed.
		3.20: Encourage the retention of traditional shop fronts and pub fronts of character and design.
		3.21: Promote initiatives or programmes to enhance the character and urban design quality of the County's towns to ensure that they remain attractive for investment in commerce and in retailing.
		3.22: Restrict new retail and other commercial access points, and the intensification of existing accesses, onto or adjacent to National Roads in accordance with the requirements of Section 2.5 of 'Spatial Planning and National Roads' DECLG; 2012 in order to maintain traffic capacity, minimise traffic hazard and protect and maximise public investment in such roads.
Monksland/ Bellanamullia Local Area Plan 2016 – 2022	Strategic Aims	**1.** Build on the role of Monksland/Bellanamullia (Athlone West) as a Key Town within Tier 2 of the County Settlement Hierarchy and given its Special Category status as a settlement which will develop as part of the larger Athlone Town area.
		3. Support the consolidation of commercial activity within the LAP area around a District Centre in which a high quality commercial core is established within a well-developed public realm. The public realm should display appropriate and sustainable building forms, materials, heights and associated landscaping in order which aims to create a sense of place and focus for the Monksland/Bellanamullia (Athlone West) LAP area.
		8. Positively impact on the well-being of the LAP area by ensuring the redevelopment and reuse of vacant and derelict residential, commercial and industrial buildings and promoting the renewal and environmental improvement of neglected areas.
	Preferred Development Strategy's Objectives	The consolidation of commercial development into a single 'District Centre' which should be purpose designed and built in accordance with guidance provided in a Framework Plan for the overall landholding. This will provide a currently lacking central focus and 'sense of place' for the community. The development proposed in this area will also need to be of a high architectural standard which will improve the appearance of this urban environment.
		Addressing high retail warehousing vacancy by encouraging the use of vacant and infill BE lands and providing limited zoning of additional lands for this purpose between the District Centre and lands for Industrial purposes, thereby providing choice in this area where take-up and release of property is high. In addition, it provides a much needed buffer between the two aforementioned uses.
		Strategic Objective 1 Establish a 'central' focus for the

Plan/Strategy		Objective
		LAP area by consolidating commercial development around a single centrally located District Centre.
		Strategic Objective 3 Encourage sustainable development through the use of vacant and infill BE lands particularly for retail warehousing.
	Specific Objectives	**SO2:** Provides for a mix of retail/commercial and residential units on the District Centre portion of the S02 lands in the creation of an active frontage which will edge and define the public park with a mix of retail, commercial and residential units at ground floor level constituted of small floorplate, fine grained mixed use blocks of high quality design, providing passive surveillance and opportunities for public interactions within the district centre.
	Policies for Retail and Commercial Development	**Policy 84:** Ensure that retail and service outlets are located within the identified District Centre and Local Centres, in order to serve the population of the surrounding area.
		Policy 85: Encourage and facilitate the use of existing vacant units, particularly retail warehousing, for development. In addition, ensure that areas of vacant, derelict and under-used land within existing built-up areas (Brownfield sites) are brought into productive use, as an alternative to the use of Greenfield sites.
		Policy 86: Ensure that all developments, where appropriate, are connected by safe, usable and viable pedestrian and vehicular links.
		Policy 87: Implement the findings and recommendations of the Retail Strategy for County Roscommon, and assess all retail proposals against the criteria and recommendations set down in the Retail Planning Guidelines (April 2012) and the Retail Strategy for County Roscommon 2014 – 2020, as well as investigations carried out as part of this LAP process.
		Policy 88: Seek improvements to the visual quality of the area as part of new development and facilitate the appropriate development of the District Centre subject to compliance with the relevant development standards where applicable.
	Objectives for Retail and Commercial development	**Objective 83:** Prepare a Framework Plan (SO3) for the District Centre lands south of the New Tuam Road, prior to their development.
		Objective 84: Facilitate and encourage the appropriate provision of retail facilities in the LAP area, particularly focused in the areas zoned as District and Local Centre/s.
		Objective 85: Encourage property owners/developers to improve the appearance of vacant/derelict buildings, including the implementation of measures such as simple maintenance (painting, cleaning, removal of vegetation, removal of defunct inappropriate signage, securing property to protect from vandalism, installation of temporary window displays) and the provision of appropriate screening or boundary

Plan/Strategy		Objective
		treatment.
	Objectives for Architecture and Building Design	**Objective 95:** SO3 within the 'District Centre' zone requires the preparation of a Framework Plan for the entire zone prior to the granting of any planning permissions on it. Following this, all planning applications that involve site and/or building development works within the 'District Centre' zone shall be accompanied by a design statement and landscaping plan to ensure consistent, high-quality developments on the site and to enable the Planning Authority to assess applications accordingly, in line with the approved Framework Plan for the area.
	DC: District Centre	• Provide a range of retail and non-retail service functions, including social and community functions, at a level which will serve the population of the Plan area, but will not affect the viability and vitality of the neighbouring town centre of Athlone. • Purpose built group of shops. • Provide for the development of a mix of commercial/retail uses including a convenience shop(s) such as a supermarket or superstore, comparison shops, non-retail services, such as banks, building societies, restaurants, pharmacies, take away, video/DVD rental, public house, and dental/medical surgery. • Provide for local services such as medical centre, offices, workshops, crèche, petrol station, waste segregation facility (bring bank), launderette, where appropriate, to meet the needs of the community. • Where appropriate, provide accommodation over retail/commercial units, grouped small starter/incubator workshops, craft or service units etc. • Strong building design to provide focal points within mixed-use developments that will add legibility and clarity to the physical structure and layout of the development. • The centre could be developed around a public/focal space, where appropriate • Provide sustainable transport linkages such as public transport, adequate cycle and walkways from the district centre to surrounding residential areas. • Require the inclusion of appropriate open spaces in development in this zone.
Plan/Strategy		**Objective**
County Westmeath		
Westmeath County Development Plan 2014 – 2020	Mixed Use	**O-LZ3**: To provide for, protect and strengthen the vitality and viability of town centres, through consolidating development, encouraging a mix of uses and maximising the use of land, to ensure the efficient use of infrastructure and services.
	Commercial	**O-LZ5:** To provide for commercial development which does not need to be located in the town centre or retail

Plan/Strategy		Objective
		warehousing zone.
	Retail	**P-GR1**: To prioritise the reuse of vacant and derelict buildings in the town centre for uses including retail development.
		P-GR2: To sustain the vitality and viability of major shopping areas and to encourage measures to improve their attractiveness.
		P-GR3: To support the vitality and viability of existing designated centres and facilitate a competitive and healthy environment for the retailing industry into the future by ensuring that future growth in retail floorspace is in keeping with the Retail Hierarchy, as prescribed in the Retail Strategy.
		P-GR4: To adhere to the provisions of the Sequential Approach in the consideration of retail applications located outside of core retail areas.
		P-GR5: To promote and facilitate the development of country markets devoted to the sale of local agricultural and craft produce and support their role as visitor attractions.
		P-GR6: To promote and facilitate the significant role of new retailing and services in encouraging regeneration and investment, providing local employment, improving local services and the attractiveness of regeneration areas for residents and businesses, and attracting additional complementary services.
		P-GR7: To prohibit the development of large retail centres located adjacent or close to existing, new or planned National Roads/motorways or to National Roads outside the speed limit zones for towns and villages.
		O-GR1: To prepare and implement a Joint Retail Strategy for the Linked Gateway Towns of **Athlone**, Mullingar and Tullamore, in conjunction with Offaly and Roscommon County Councils.
		O-GR3: To develop a GIS based system for retailing in Westmeath.
		O-GR4: To resist the loss of retail units, to non-retail use, at pedestrian level, particularly in the primary shopping frontages of the towns of Mullingar and **Athlone** which is defined as follows: ▪ **Athlone:** O'Connell St., High St., Main St., Castle St., Pearse St., Church St., Mardyke St., and Irishtown Upper.
		O-GR5: To align new retail development with existing and proposed public transport infrastructure and services and encourage access by foot and bicycle to reduce the dominance of access by private car.
		O-GR7: To provide off street car-parking and to manage on street carparking, to further improve town centres.

Plan/Strategy		Objective
		O-GR8: To encourage the retention of traditional shop fronts and pub fronts of character and good design quality.
	Urban Areas	**P-MUU4**: To retain active frontages within the Core Retail Area of town centres and resist the cumulative impact of non-retail uses at ground floor level, to protect the vitality and viability of the town centre and its streets.
		O-MUU1: To carry out health checks on a regular basis within town centres to monitor the level and extent of uses, vacancy, footfall and environmental quality, to ensure that vitality, viability and diversity is maintained.
	Retail & Commercial Policies for Settlement Plans	**P-SPRC1**: To ensure that there are sufficient convenience and comparison retail outlets to meet the needs of residents of the settlement.
		P-SPRC2: To support the expansion of existing retail and commercial outlets, consistent with the Retail Strategy and the Core Strategy.
		O-SPRC1: To permit the provision of new appropriately scaled retail development and commercial outlets, of a range and type consistent with the growth of the town or village and located in accordance with retail policy.
		O-SPRC2: To require the provision for adequate car and bicycle parking in respect of new retail and commercial development, in accordance with the Planning Authority's standards for retail/commercial uses.
Athlone Town Development Plan 2014 – 2020	Mixed Use	**O-LZ3**: See County Development Plan 2014 above.
	Commercial	**O-LZ4:** See County Development Plan 2014 above.
	Retail Warehousing	**O-LZ6**: To provide for retail warehousing in appropriate locations on edge of town centre sites, which do not detract from the town centre's retailing function.
	Strategic Gateway Zone	The Strategic Gateway Designation provides for a range of specialist but complementary uses which are permissible within this area. Such uses include flagship enterprise, trade, exhibition, conference facilities and related leisure, cultural, residential and community uses including schools.
	Economic Development Strategy	To support the role of retailing in Athlone in recognition of its key role in the provision of employment and economic activity and its contribution to the social dimension of the town.
		To enhance the range of functions and services, retail offer and facilities in the town, in order to support economic activity, retention of an appropriate workforce and to reinforce sustainable travel patterns.
	Retail	**Aim:** To continue to sustain and improve the retail profile and competitiveness of Athlone, through the support, consolidation and environmental enhancement of the town centre and by improving the quality and choice of retail developments on offer.
		P-RET1: To protect and strengthen the retail primacy of Athlone within the region.

Plan/Strategy		Objective
		P-RET2: To promote retail development as a fundamental element and catalyst for the promotion and enhancement of broader town centre functions. New development proposals shall respect the retail function of the core shopping area, contribute positively to the public realm and display high quality urban design and place-making attributes.
		P-RET3: To prioritise the reuse of vacant and derelict buildings in the town centre for uses including retail development.
		P-RET4: To sustain the vitality and viability of the major shopping areas and to encourage measures to improve their attractiveness.
		P-RET5: To support the vitality and viability of existing designated retail centres and facilitate a competitive and healthy environment for the retailing industry into the future by ensuring that future growth in retail floor space is in keeping with the Retail Hierarchy, as prescribed in the Retail Strategy.
		P-RET6: To adhere to the provisions of the Sequential Approach in the consideration of retail applications located outside of core retail area, as identified in Fig. 4.2.
		P-RET7: To promote and facilitate the development of local markets devoted to the sale of local agricultural and craft produce and support their role as visitor attractions.
		P-RET8: To prohibit the development of large retail centres located adjacent or close to existing, new or planned national roads/motorways or on national roads outside the speed limit zones of the town.
		P-RET9: To provide for an adequate and appropriate scale of retail and other services within the existing and proposed neighbourhood centres in the town.
		P-RET10: To ensure that best quality of design is achieved for all proposed retail developments and that design respects and enhances the specific characteristics of the town.
		P-RET11: To restrict the subdivision of retail warehouse premises into smaller units, as they may undermine existing retail provision in the retail core and thereby adversely impact upon the vitality and viability of the town centre.
		P-RET12: To pursue all avenues of funding to secure resources for the continued enhancement, renewal and regeneration of the public realm of the town centre.
		P-RET13: To discourage non-retail and excessive lower grade retail uses, such as, take-aways and betting offices in the core retail area and other principal streets in the town centre, in the interests of maintaining and sustaining the retail attraction of the town centre.
		O-RET1: See County Development Plan **O-GR1** above.
		O-RET2: See County Development Plan **O-GR3** above but this objective is specific to Athlone.

Plan/Strategy		Objective
		O-RET3: To promote higher order and comparison goods retail activity in the town centre and resist the loss of retail units, to non-retail use, at pedestrian level, particularly in the primary shopping streets in Athlone which are defined as follows: Connaught Street, O'Connell St., High St., Main St., Castle St., Pearse St., Church St., Mardyke St. and Irishtown Upper.
		O-RET4: To align new retail development with existing and proposed public transport infrastructure and services and encourage access by foot and bicycle to reduce the dominance of the private car.
		O-RET5: To provide off street car-parking and to manage on street car parking, to further improve the town centre.
		O-RET6: To encourage the retention of traditional shop fronts and pub fronts, and where relevant interiors, of character and good design quality.
		O-RET7: To promote the development of street furniture and public art in the town centre, in order to ameliorate the retail environment.
Draft Westmeath County Retail Strategy 2019 – 2026		**Objective 1:** To sustain and improve the retail profile and competitiveness of the County and its main centres within the retail economy of the Region and beyond.
		Objective 3: To provide the retail land use and planning policy framework that harnesses the potential of **Athlone's** role as a 'Regional Centre' within the national and regional economies and to ensure that Athlone and both Counties in their entirety fully play their role in achieving the objectives and targets of Project Ireland 2040: National Planning Framework and associated RSES'.
		Objective 6: To reinforce the hearts of town and village centres as the priority location for new retail development, with quality of design and integration/linkage being key underpinning principles.
		Objective 7: To ensure that the retail needs of the County's residents are met as fully as possible within Westmeath to enable the reduction in the requirement to travel to meet these needs and in the interests of achieving greater social inclusion and accessibility to shopping and services across all sectors of the community.
		Objective 9: To align, as far as practicable, new retail development with existing and proposed public transport infrastructure and services and encourage access by foot and bicycle to reduce the dominance of access by private car.
		Objective 10: To encourage and facilitate the re-use and regeneration of derelict land and buildings for retail and other town centre uses, with due cognisance to the Sequential Approach.
		Objective 11: To promote and sustain the importance

Plan/Strategy		Objective
		of retailing in the County's tourism economy.
		Objective 12: To encourage and facilitate innovation and diversification in the County's retail profile and offer.
		Objective 13: To prepare and implement a Joint Retail Strategy for the counties of Westmeath, Roscommon and Offaly, in conjunction with Offaly and Roscommon County Councils following the adoption of the County Retail Strategy as required in the GRP 2012.
		Objective 14: To prepare and implement with Roscommon County Council a Joint Retail Strategy for the **Athlone – Monksland/Bellanamullia area (the Athlone Western Environs)** in accordance with the recommendations of the Athlone Boundary Review Committee.
	Strategic Policy Framework	**SRP2: Core Retail Areas:** It is the policy of the Council to define the Core Retail Areas of Mullingar and **Athlone** to provide guidance on the Sequential Approach.
		SRP3: It is the policy of the Council to provide guidance on the application of Sequential Approach in the County's main centres.
	Specific Policies & Proposals	**RP9: Athlone Regional Centre:** It is the policy of the Council to promote and encourage major enhancement and expansion of retail floorspace and regional centre functions in Athlone to reflect its role as a regional centre and to further develop its competitiveness and importance within the County and Region.
		RP10: To support and implement appropriate development of lands for the future major retail expansion within the core area of Athlone, with the priority being the designated Development Opportunity Sites and the linked integration of these lands with the Core Retail Area.
		RP11: To develop a vision and strategy to progress the realisation of the Western Bank of **Athlone's core area** as a Cultural and Tourism Quarter.
		RP12: To support the incremental expansion of the Core Retail Area through the increased profile and ambience of town centre main streets by enhancing the public realm and encouraging intensification of retail, commercial leisure, tourism and cultural uses.
		RP13: To prepare and implement a Public Realm Strategy for **Athlone Regional Centre** to secure the enhancement and renewal of the area and which includes an Interpretation and Signage Strategy to maximise the understanding of the heritage of the town.
		RP14: To promote the preparation of a strategic environmental masterplan for the Golden Island Shopping Centre and its immediate environs.
		RP15: To prepare and implement a Traffic Management Plan for **Athlone Regional Centre** which addresses the strategic relief of congestion, examines opportunities for pedestrianisation, improves movement and

Plan/Strategy		Objective
		integration for pedestrians, cyclists and the private car and addresses parking deficiencies and issues.
		RP16: To encourage and facilitate the development of appropriately located Neighbourhood and Local Centres to meet the needs of existing, growing and new residential areas of the town and its environs as informed by the Joint Retail Strategy for **Athlone**.
		RP17: To develop and enhance **Athlone's** role as an important bulky goods shopping destination in the County and Region.
		RP18: To work in partnership with local organisations, businesses and local people in the delivery of the policies and objectives for **Athlone's core area** and the Regional Centre as a whole.
	General Retail Policies	**GR2:** To encourage and facilitate the development of appropriately located Neighbourhood Centres to meet the needs of existing, growing and new residential areas of the Tier 1 settlements.
		GR3: To retain, encourage and facilitate the retail and limited non-retail services role of Rural Centres and Local/Corner Shops around the County.
		GR4: To request that the nature of the comparison component of proposed large convenience stores is provided in detail and a transparent and evidence based RIA/RIS provided in support of the application.
		GR5: To refuse permission for edge of and out of centre large convenience stores which include a large component of high street fashion brands in the comparison mix proposed in the interests of sustaining and further enhancing the vitality, viability and attraction of the Core Retail Areas and central areas of the main centres in the County Retail Hierarchy.
		GR6: To refuse permission for applications for District Centres in the Tier 1 settlements to ensure and protect the vitality, viability and attraction of the Core Retail Areas of Mullingar and **Athlone**.
		GR7: To prohibit mainstream and discount convenience retail developments in retail parks.
		GR8: To prohibit mainstream comparison retail development or retailers in retail parks.
		GR9: To ensure that the level of retail and local services provision in existing and new major employment areas sustains and enhances their attraction as locations for investment and working in.
		GR10: To provide the land-use and retail planning framework to ensure that the mixed-use strategies for new employment areas respond to the wider context of need and demand in related expanding residential areas and individual main centres in the interests of ensuring that these locations are attractive to new residents, workers and employers.
		GR11: To limit the level of shopping and local services provision in existing industrial estates or business parks, stand-alone mainstream and discount convenience or

Plan/Strategy		Objective
		comparison floorspace will not be permitted but the introduction of wholesale retail floorspace will be open for consideration.
		GR13: To pursue all avenues of funding to secure resources for the enhancement, renewal and regeneration of the public realm of the County's towns and villages.
		GR14: To ensure the best quality of design is achieved for all new retail development and that design respects and enhances the specific characteristics of the different towns and villages in the County.
		GR15: To identify obsolete and potential renewal areas and to encourage and facilitate the re-use and regeneration of derelict land and buildings in the County's main towns, villages and smaller centres. The Council will use its statutory powers, where appropriate, to facilitate this and consider such buildings and lands for inclusion in the Register of Derelict Sites or Vacant Site Register.
		GR16: To work with landowners and development interests to pursue the potential of suitable, available and viable land and buildings for retail and other Regional centre/town centre uses across all centres in the County Retail Hierarchy.
		GR17: To encourage and facilitate the development of retailing in the tourism and leisure sectors, subject to protecting these assets and amenities from insensitive and inappropriate development.
		GR18: To encourage and facilitate the delivery of tourism related retail developments and initiatives, subject to compliance with the Strategy's objectives and assessment criteria.
		GR19: To refuse planning applications for amusement/gaming arcades as they are considered to be an undesirable use and potentially detrimental to the business and commercial environment of centres in the County.
		GR20: To discourage where possible within its statutory powers the introduction of non-retail and lower grade retail uses in the Core Retail Areas and central areas of the main centres in Westmeath in the interests of maintaining and sustaining the retail attraction of the County's centres.
		GR21: To support and develop, in association with leading organisations in the County's main settlements and other centres, an integrated Markets Strategy for the County.
		GR22: To encourage and facilitate the development and attraction of quality town markets selling indigenous products in the Athlone Regional Centre, towns and villages at all levels of the County Retail Hierarchy, in recognition of their potential to sustain and increase the attractiveness of these centres.
		GR23: To prosecute in situations where the Casual

Plan/Strategy		Objective
		Trading Act 1995 is being contravened.
		GR24: To take cognisance of the proper and sustainable development of the County's Regional Centre, towns and villages, including the preservation and improvement of amenities, the safety and convenience of pedestrians, the traffic likely to be generated by Casual Trading and the promotion of tourism.
		GR25: To encourage and facilitate innovation in the County's retail offer and attraction.
		GR26: To review and monitor retail trends that could have an influence on the performance of the sector within Westmeath and pursue harnessing new concepts and formats in the County's retail structure.
		GR28: To generally restrict the size of any retail units associated with petrol filling stations to 100m^2 of net retail floor area and ensure that any proposals above this threshold will be subject to the Sequential Approach.
		GR29: To generally refuse permission for food takeaway outlets and cafes in petrol filling stations if not located in a designated centre.
		GR30: All applications for large retail development will be assessed in accordance with the County Retail Strategy assessment criteria.

Source: MacCabe Durney Barnes

3 Baseline for the Strategy

A suite of key baseline and comparative information has been collated and analysed in the preparation of the Strategy which have important implications for the shaping of retail policy in Athlone Regional Centre and its environs to 2026 and beyond. These comprise the following:

i) Recent trends in population growth;
ii) Population forecasts – the scenarios;
iii) The changes in the retail profile and dynamics of the Study Area; and
iv) The shopping patterns in the Study Area.

3.1 Recent Trends in Population Growth

Over the period of the finalisation of the Strategy, it is known that more detailed information from the CSO's Census 2016 and other authoritative bodies (e.g. the Economic and Social Research Institute – ESRI) will be published. However, as has been the approach adopted by the consultants in the preparation of other retail strategies and population/economic founded studies, it was important that a deadline was set for all of the baseline data and information underpinning the preparation of the Strategy. This deadline followed the publishing of the CSO's Small Area Population Statistics (SAPS) on 20th July 2017 and was **31st July 2017**.

3.1.1 Population Trends Study Area, Counties, Regions & State 2006 – 2016

The analysis of population trends between the CSO 2006 Census and that of 2016 benefits from the recently published CSO SAPS and the finalisation of the figures at the County, Region and State levels. The population of the Study Area for 2006 and 2011 were derived from those published in the M/BLAP 2016 and the ATDP 2014, with the former comprising what is termed the Athlone West. The population figures for the Study Area for 2016 were provided by the Westmeath GIS Team, derived from the CSO SAPS for the area.

Table 3.1 presents the population figures and respective percentage increases for the Study Area, Roscommon, Westmeath, West Region, Midland Region and the State over the period 2006 – 2016. The effects of the recent recession on population growth can be clearly seen when the percentage growths at each of these levels between 2011 – 2016 are set against those which previously prevailed in the period 2006 – 2011. Against population growth experienced between 2006 – 2011 which was unprecedented in the country, the significant slowdown in growth between 2011 – 2016 is acutely reflected in the percentage figures at the Study Area, County, Region and State levels.

Table 3.1: Population Trends at the Study Area, County, Regional & State Levels 2006 – 2016

Area	2006	2011	2016	Change '06 – '11	Change '11 – '16	Change '06 – '16
Study Area	17,544	20,156	21,349	14.9	5.9	21.7
Roscommon	58,768	64,065	64,544	9.0	0.7	9.8

Westmeath	79,346	86,164	88,770	8.6	3.0	11.9
West Region	414,277	445,356	453,109	7.5	1.7	9.4
Midland Region	251,664	282,401	292,301	12.2	3.5	16.1
State	4,239,848	4,588,252	4,761,865	8.1	3.7	12.3

Source: CSO Censuses 2006, 2011 & 2016

The table illustrates the very significant changes in population growth at all levels between 2006 – 2011 and 2011 – 2016, with the major decreases in the latter period being directly attributable to the impact of the recession and its lingering effects. Of importance is the fact that the Study Area at **21.7%** significantly outperformed population growth at all the other levels between 2006 – 2016. Although the detailed information has not been published for 2016, it can be assumed that the higher levels of growth reflect the continuation of the previous trends of the Study Area having a younger age profile than what prevails at the County, Regional and State levels, particularly in the 20 – 24 and 25 – 29 age cohorts.

3.2 Population Forecasts

3.2.1 Population Projections – The Context

The current population projections for the Study Area are founded in the population targets prescribed in the RCDP 2014 and WCDP 2014, as extrapolated from those set in the WRPG 2010 and MRPG 2010 respectively. These RPG population targets remain in force until the RSES' projections have been published.

The above noted, under the *Planning and Development Act 2000 (as amended)*, City and County Development Plans, and consequently their retail strategies, currently require to be consistent – as far as practicable – with the NPF and relevant RPG. These RPGs– as has been highlighted – are both recognised to be significantly out of date, particularly in respect of population targets, and this has been further reinforced by the results of the CSO Census 2016. This will be redressed in the forthcoming RSESs and with which Development Plans and the Urban Area Plan for Athlone will require to be consistent.

3.2.2 Review of Population Forecasts

In respect of determining the appropriate population forecasts for the Strategy, the following have been reviewed:

- The results of the 2006, 2011 and 2016 CSO Censuses
- M/BLAP 2016
- ATDP 2014
- RCDP 2014
- WCDP 2014
- WRPG 2010
- MRPG 2010.

In respect of population forecasts, the review has determined that those derived and presented in the two County Development Plans and RPG significantly overestimated the potential population growth of the two Counties between 2011 – 2016 and beyond and this has been incorporated in the M/BLAP 2016 and ATDP 2014. The overestimation of the outturn forecasts is not unique to Roscommon and Westmeath but has generally prevailed at the county and regional levels across the remainder of the country. The overestimations reflect that the impact of the recession on population growth were generally not fully understood or appreciated.

Table 3.2 provides a comparative review of the projected forecasts and actual population levels for the Study Area, Roscommon and Westmeath and the two Regions. In respect of the population forecasts for both the projected forecasts and those based on actual trends, the following principles have been applied:

i) **Projected:** these are founded on the two RPG targets, as extrapolated in the two County Development Plans, the M/BLAP 2016 and ATDP 2014, with those for the Study Area derived from combining the figures for the latter two for 2017, 2020 and 2026; and

ii) **Actual:** applying the mid-point percentage per annum growth achieved between 2006 – 2011 and 2011 – 2016 to estimate the population at 2017, 2020 and 2026.

Table 3.2: Comparative Review of Projected and Actual Population Trends/Targets

Area	2006	% pa 06-11	2011	% pa 11-17	2017	% pa 17-20	2020	% pa 20-26	2026
Study Area									
Projected	17,544	4.92	22,303	3.35	27,037	2.86	29,447	2.66	34,464
Actual	17,544	2.81	20,156	1.16	21,773	1.99	23,096	1.99	25,988
Roscommon									
Projected	58,768	1.19	62,348	1.36	67,790	1.63	71,166	1.56	78,081
Actual	58,768	1.74	64,065	0.15	65,154	0.95	67,019	0.95	70,910
Westmeath									
Projected	79,346	1.66	86,164	2.99	102,228	1.59	106,370	1.52	116,430
Actual	79,346	1.66	86,164	0.51	89,773	1.13	92,851	1.13	99,327
West Region									
Projected	414,277	1.64	449,470	1.52	490,632	1.22	508,868	1.22	547,398
Actual	414,277	1.47	445,536	0.34	457,194	0.90	469,672	0.90	495,658
Midland Region									
Projected	251,664	1.68	283,771	1.68	300,512	1.08	310,358	1.08	331,027
Actual	251,664	2.33	282,401	0.69	296,719	1.51	310,378	1.51	339,611

Source: MacCabe Durney Barnes

Although the Census 2016 results illustrate that the adopted population targets for the two Counties and West Region are considerably above the trends which have been experienced, as has been highlighted above, until the RSES are adopted for both theNWRA and EMRA then those in the RCDP 2014, WCDP 2014, WRPG 2010 and MRPG 2010 must be recognised as remaining in force and complied with.

However, it is sound and defensible that in the interim, weight must also be given to the results of the Census 2016 in the population baseline and projections applied in the Strategy to the derivation of the potential for additional retail floorspace between 2017 – 2026. To enable both sets of population baselines and projections to appropriately inform the Strategy's broad assessment of the requirement for additional retail floorspace, the approach adopted has been to set out in two scenarios. These are outlined in the paragraphs below.

3.2.3 Population Projections – The Scenarios

The two scenarios which have been adopted to inform the assessment of the potential for additional retail floorspace in the Study Area over the timescale of the Strategy are:

- **Scenario 1:** the population projections derived from the results of the Census 2016.
- **Scenario 2:** those founded on the WRPG 2010 and MRPG 2010 population targets and extrapolation of these in the RCDP 2014 and WCDP 2014 respectively, as applied in the M/BLAP 2016 and ATDP 2014.

In respect of both scenarios, the projections for the Study Area are derived from combining the figures for Monksland/Bellanamullia and Athlone and the resultant per annum population growth percentages.

*3.2.3.1 **Scenario 1:** Population Projections Founded on the Results of the Census 2016*

Scenario 1 is derived from the assessment of the implications of the results of the Census 2016 on population growth in the Study Area over the period 2017 – 2026, the timescale of the Strategy.

Between 2006 – 2011 and 2011 – 2016, the population of the Study Area increased by **2.81%** and **1.16%** per annum respectively, with the latter reflecting the significant impact of the recession on population growth. Reference to Table 3.2 highlights that this per annum growth was considerably above that which prevailed at the County and Regional levels.

Noting the above, and the assumption that population growth trends in the Study Area may be unlikely to reach the levels of 2006 – 2011 but will be above those between 2011 – 2016, derived from the results of the Census 2016, the projections applied take a median position **1.99%** (mid-point between 2.81% and 1.16%) growth per annum between 2017 – 2026.

3.2.3.2 Population Targets Founded on the Two County Development Plans

Scenario 2 is founded on the population targets/forecasts of the WRPG 2010 and MRPG 2010 and extrapolation of these in the RCDP 2014 and WCDP 2014 for the Study Area for the period of the Strategy. Under this scenario, the per annum population growth between 2017 – 2020 and 2020 – 2026 was derived as **2.86%** and **2.66%** respectively. These levels of per

annum growth were considerably above the **1.99%** derived from the results of the Census 2016 for these periods.

3.2.3.3 Comparative Review of the Two Scenarios

Table 3.3 provides a comparative review of the population projections under the two scenarios over the period of the Strategy.

Table 3.3: Study Area Population Forecasts 2017 – 2026

Scenario	2017	2020	2026
Scenario 1: Founded on Results of Census 2016	21,773	23,096	25,988
Scenario 2: Founded on County Development Plan 2014 Targets (Extrapolated from WRPG 2010 and MRPG 2010)	27,037	29,447	34,464
Difference	5,264	6,351	8,476
% Difference	24.2	27.5	32.6

Source: MacCabe Durney Barnes

The table illustrates the increasing divergence in assessed potential population growth in the Study Area founded on the results of the Census 2016 against those derived from the targets/forecasts in the two County Development Plans and the WRPG 2010 and MRPG 2010.

The above noted – looking forward – the reconciled population targets/forecasts to be incorporated in the Strategy's capacity assessment of the potential for additional retail floorspace in the Study Area will not be available until those are provided in the RSES. In the interim, the approach adopted is that both scenarios should be applied and outlined in the assessment.

3.3 Comparative Analysis of the Changing Retail Floorspace Profile

This section provides a comparative review of the changing retail profile of the Study Area between 2007 – 2017. A floorspace survey was not part of the brief for the preparation of the Strategy and, thus, the profile has been constructed from the following:

i) The 2007 and 2013 floorspace figures provided in the RCRS 2014;

ii) The 2007 and 2016 floorspace figures provided in the DWCRS 2019;

iii) Review of planning permission information provided by the Councils at the 31st July 2017 freeze date for information for the preparation of the Strategy and consultations with members of the Client Team on the permissions; and

iv) Information derived from health checks of the different centres in the Study Area.

The floorspace profile does not include a quantitative appraisal of the levels of vacant floorspace, given that a floorspace survey was not undertaken. However, a qualitative appraisal of vacant floorspace was undertaken in the heath check assessments and this is provided in Chapter 5 of the Strategy. For the Monksland/Bellanamullia area, this was informed by survey work conducted by the Roscommon Planning Department in 2015.

A threshold of **500m² net** was set for new convenience, comparison and/or a mix of both for inclusion in the 2017 baseline update. The application of net figures was underpinned by the fact that it is net figures which are applied in the broad assessment of the requirement for additional floorspace. Change of use from retail to other uses was not included unless the change of use was above the threshold in size. This is the approach which has on the whole been adopted in other retail strategies or studies around the country.

The basis of the comparative review of what has changed in the Study Area's retail landscape since the 2007 baseline was established and the current day is provided in Tables 3.4 and 3.5. The tables break the information down by: retail category; totals for the Athlone and Monksland/Bellanamullia components of the Study Area; and, for the Study Area as a whole.

Table 3.4: Net Retail Floorspace Breakdown Trading in 2007 (m²)

Area	Convenience	Comparison	Retail Warehousing	Total
Athlone	10,226	12,177	8,741	31,144
Monksland/ Bellanamullia	2,127	2,927	10,567	15,621
Study Area	**12,353**	**15,104**	**19,308**	**46,765**

Source: Roscommon County Retail Strategy 2014 – 2020 & Draft Westmeath County Retail Strategy 2019 – 2026

Table 3.5: Net Retail Floorspace Breakdown Trading in 2017 (m²)

Area	Convenience	Comparison	Retail Warehousing	Total
Athlone	13,716	24,359	8,741	46,816
Monksland/ Bellanamullia	2,663	2,927	15,464	21,054
Study Area	**16,379**	**27,286**	**24,205**	**67,870**

Source: Roscommon County Retail Strategy 2014 – 2020, Draft Westmeath County Retail Strategy 2019 – 2026 & MacCabe Durney Barnes

The tables enable a comparative analysis of changes in floorspace quantum and other patterns over the period since 2007. This is summarised under the following headings in the paragraphs below:

- Overall trends
- Patterns by market sector.

3.3.1 Overall Trends

3.3.1.1 Study Area

At 2007, the Study Area's total net 'trading' retail floorspace, excluding vacancies, or total estimated floorspace, was **46,765m²**. By the time of the 31st July 2017 freeze date for baseline information, it totalled an estimated **67,870m² net**. Over the period, the Study Area's retail floorspace was derived to have increased by approximately **21,105m² net**, some **45.1%**. Notwithstanding the recognised very high level of vacancies, given that this growth

was largely over the period of the recession then it would be assessed as a very significant level of increase.

3.3.1.2 Study Area v Roscommon & Westmeath Trends

Over the period 2007 – 2017, the combined total retail floorspace of Roscommon and Westmeath increased by **59,365m² net** from **165,524m²** to **224,889m²**, some **35.9%**. Growth in floorspace at the Counties' level was, therefore, very significant but was **9.2%** below that of the Study Area.

In 2007, the Study Area had **28.3%** of the total retail floorspace in the two Counties and by 2017 this had risen to **30.2%**. To put this in context, in 2007 Roscommon Town and Mullingar had a **17.3%** and **18.2%** share respectively of the combined total floorspace in the two Counties and at 2017 these shares were **22.4%** and **15.5%**. These comparative figures highlight the increasing scale and importance of the floorspace of the Study Area in the retail landscape of Roscommon and Westmeath.

3.3.2 Patterns by Sector

3.3.2.1 Study Area

Of the Study Area's total net floorspace (**46,765m²**) in 2007, some **26.4%** (**12,353m²**) was convenience, **32.3%** (**15,104m²**) was mainstream comparison and **41.3%** (**19,308m²**) bulky goods/retail warehousing. At 2017, of the area's total net floorspace (**67,870m²**) the profile had changed to **24.1%** (**16,379m²**) of convenience, **40.2%** (**27,286m²**) mainstream comparison and **35.7%** (**24,205m²**) of bulky goods/retail warehousing. The key highlights of the comparative analysis are: the substantial increase over the period 2007 – 2017 of mainstream comparison floorspace in the retail profile of the Study Area; the relatively marginal decline in the share of convenience; and, the greater decrease in the percentage share of bulky goods/retail warehousing. In respect of mainstream comparison floorspace, this greater profile can be wholly attributed to the introduction of the Athlone Town Centre scheme into the retail landscape of the Study Area.

3.3.2.2 Study Area v Roscommon & Westmeath Trends

Set against the Study Area profile and trends, it is informative to compare these with those for the combined Roscommon and Westmeath net retail floorspace between 2007 – 2017. In 2007, the combined net floorspace of **165,524m²** comprised **29.0%** (**47,985m²**) convenience, **31.3%** (**51,756m²**) mainstream comparison and **39.7%** (**65,783m²**) of bulky goods/retail warehousing. In this higher-level profile when set against that of the Study Area, there was a greater percentage share of convenience floorspace (**+2.6%**) and lesser percentage shares of mainstream comparison (**-1.0%**) and bulky goods/retail warehousing (**-1.6%**), however, the percentage differences were relatively minimal.

In respect of the picture at 2017, the combined Roscommon and Westmeath shares of the **224,889m²** net floorspace were **27.0%** (**60,678m²**) convenience, **37.1%** (**83,443m²**) mainstream comparison and **35.9%** (**80,765m²**) bulky goods/retail warehousing. These translate into: a very small increase of **0.3%** in the areas' convenience share of total floorspace above that which prevailed in the Study Area at 2007; a decrease of **3.1%** with regards to mainstream comparison; and, an increase in percentage share of **4.0%** in bulky

goods floorspace when compared to those in the Study Area. These are not significant changes but serve to illustrate how the profile of the Study Area by retail market sector is beginning to appear to evolve differently to that emerging in the combined Roscommon and Westmeath areas.

It has been highlighted above that between 2007 – 2017 the Study Area's share of the total combined net floorspace of Roscommon and Westmeath had increased from **28.3%** to **30.2%**. The next step is to examine this at the market sector level:

i) **Convenience:** between 2007 – 2017, the Study Area increased its share of the total from **25.7%** to **27.0%** (+**1.3%**);

ii) **Mainstream Comparison:** similarly, the Study Area increased its share of the total from **29.2%** to **32.7%** (+**3.5%**); and

iii) **Bulky Goods/Retail Warehousing:** as with both of the above, between 2007 – 2017 the Study Area increased its market share in this sector from **29.4%** to **30.0%** (+**0.6%)**.

The profile is that the Study Area, albeit relatively modestly, is increasing its percentage share of the combined Roscommon and Westmeath totals across all sectors of the retail market. However, the importance or otherwise of this is put into context when the profile and trends are set against those of the other key centres – Roscommon Town and Mullingar – in the combined Counties area between 2007 – 2017:

- **Roscommon Town:** witnessed a **0.6%** decrease from **16.1%** to **15.5%** in its convenience market share; an important **5.8%** increase from **22.3%** to **28.1%** in mainstream comparison; and, also a large **7.5%** increase from **14.2%** to **21.7%** of the town's bulky goods/retail warehousing percentage share.
- **Mullingar:** its convenience market share increased by **0.7%** from **15.7%** to **16.4%**; its mainstream comparison share decreased by a relatively large **6.1%** from **19.7%** to **13.6%**; and, its bulky goods/retail warehousing market share reduced by **2.1%** from **18.8%** to **16.7%**.

Comparative analysis of the above figures against those for the Study Area, indicates that, while Roscommon Town is demonstrating a stronger performance than Mullingar across all of the retail market sectors, neither of these main centres compare with the market share percentages of the Study Area when set against the totals of each for the combined Roscommon and Westmeath area.

3.4 Shopping Patterns in the Study Area

There were no household or shopper surveys commissioned to inform the preparation of the Strategy.

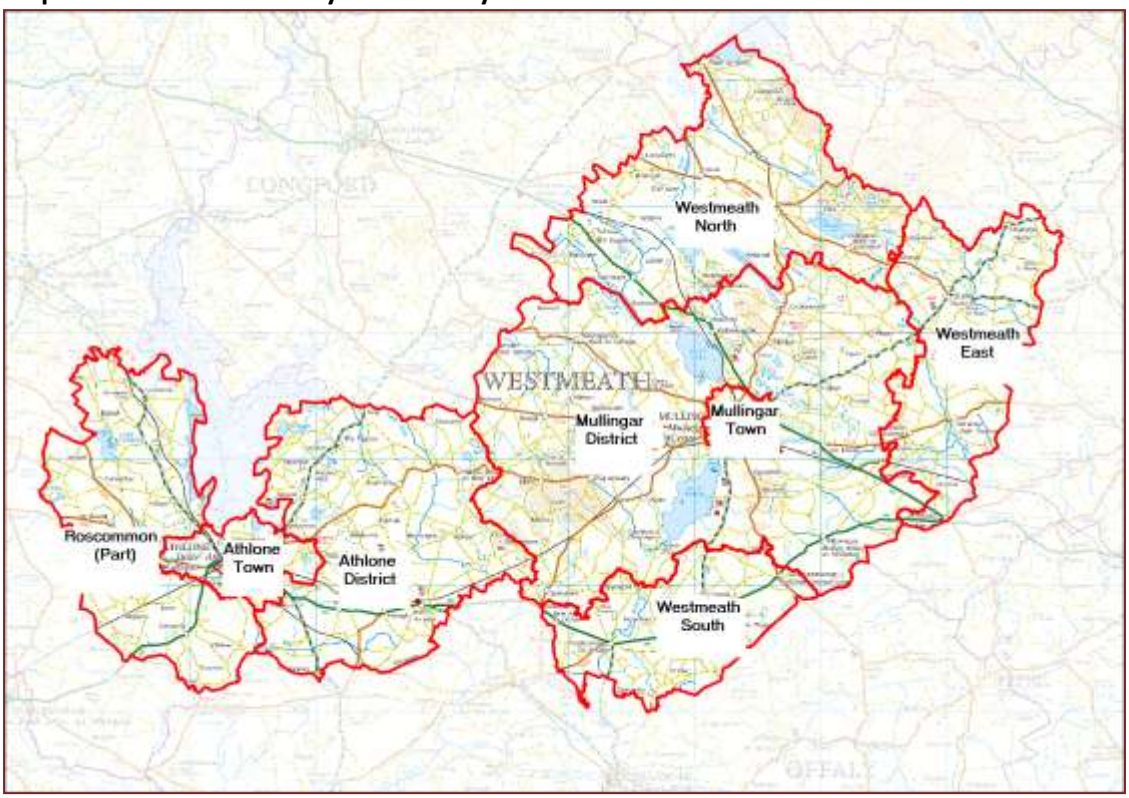
However, the Strategy benefits from the consumer surveys undertaken by **Demographics Ireland** as part of the preparation of the DWCRS 2019. They comprised the following:

i) A **400** household telephone survey of residents across Westmeath, including the portion of Roscommon which forms part of the Strategy Study Area; and

ii) A **300** shopper on-street survey conducted in Athlone (**150**) and Mullingar (**150**), the main retail centres in Westmeath.

Map 2 illustrates the survey areas applied in the household telephone survey. Of these, those which form the basis of the review are: Athlone, Athlone District; and, Roscommon (Part) (hereafter referred to as Athlone West). In respect of the shopper survey, only the results of those undertaken in the core area of Athlone have been examined as these are the ones most relevant to the preparation of the Strategy.

Map 2: Westmeath & Study Area Survey Areas



Source: Demographics Ireland 2016

3.4.1 Household Survey

The **400** sample household telephone survey was conducted in October 2016. This was undertaken in 8 defined zones, including the zone in Roscommon. The Study Area comprised three of the zones. The sample size per survey zone was determined as representative of the distribution of population in Westmeath and the Roscommon zone. Founded on this, **162** household telephone interviews were conducted across the Study Area, which represented **40.5%** of the total survey population. The distribution of the respondents in the three zones of the Study Area and their percentage of the total survey population is provided in Table 3.6.

Table 3.6: Sample Size of Household Telephone Survey Respondents in Study Area 2016

	Athlone Town	Athlone District	Athlone Western Environs	Total
Sample Size	84	48	30	**162**
%	21.0	12.0	7.5	**40.5**

Source: Demographics Ireland 2016

3.4.1.1 Key Survey Findings

The household survey included questions regarding the location of main food, top-up, mainstream comparison, bulky goods and internet shopping. Other data on the mode of transport, frequency of trips, levels of expenditure and the attraction of the centre were also collected.

Main Food Shopping

Of the **162** households surveyed in the Study Area, **79.6%** did their main food shopping in the central core area of Athlone while **13.6%** undertook it in Mullingar, which suggests that they may also work in the latter. Dunne's in Athlone was the most popular store (**17.3%**) for main food shopping, followed by Aldi at **12.7%**. Main food shopping was undertaken weekly by **53.7%** of the survey population but those living in Athlone had a higher prevalence (**35.6%**) of shopping twice weekly. The majority (**43.2%**) spend between €61 – €100 on their main food shop, with a further **24.1%** spending between €101 – €200.

Top Up Shopping

The majority of the survey population (**57.4%**) chose not to answer where they did their top-up shopping. This was not unique to the Study Area as **50.0%** of those in the rest of Westmeath elected not to answer where they did this shop, with it rising to **64.3%** in the Westmeath South zone. The reason why so many decided not to answer this question is not understood. Of those in the Study Area that did answer **36.7%** did this shop in Athlone with a further modest **1.2%** doing it at other locations in the Study Area, and **5.0%** of households in stores outside the area. Although many respondents did not answer where they did their top-up shop, they did provide responses to the frequency of this shop and the amount spent on their last trip. Top-up shopping was undertaken by **61.1%** between one and three times a week, while **16.7%** did it daily. The majority (**50.0%**) spent on average under €10 on each top up shop and a further **28.4%** spending between €11 – €20 on each trip. Altogether, **96.9%** spent less than €50 on their last top-up shopping trip, with the remaining **3.1%** spending between €51 – €100.

Clothing & Footwear

Athlone was the location for a very significant **84.6%** of Study Area residents undertaking their clothing and footwear shopping, with **2.4%** and **8.6%** doing it in wider Westmeath or another county respectively. It was noted that the shopping location in Athlone or the wider Study Area was not differentiated by respondents in their responses. This type of shopping was undertaken very infrequently with **62.3%** undertaking it every two to three months and **31.5%** doing it less often**.** The highest average spend on a trip (**34.6%**) was between €51 – €100, with **38.3%** spending less than €50.

Bulky Goods

The great majority (**75.3%**) of residents in the Study Area did their bulky goods shopping in Athlone, again which location in the Study Area was not differentiated by respondents. The next highest was **9.9%** doing this shop in counties other than Westmeath, which was the location outside the Study Area where only **1.9%** did their bulky goods shopping. While **19.8%** spent less than €50 on their last trip, some **40.1%** spent between €250 – €500.

Internet Shopping

The large majority (**76.5%**) of respondents within the Study Area do not make purchases online. Of the **23.5%** who do use the internet for shopping, some **8.6%** stated that their last purchase was on clothes and footwear, **4.3%** on electrical goods, **3.1%** on books, **2.5%** on sports goods, **1.2%** on groceries and **0.6%** on CDs and videos. Expenditure by these users was relatively low with **8.6%** spending less than €50 on their last purchase and a further **8.6%** spending between €51 – €100. Internet shopping and trends is examined in Chapter 4 of the Strategy.

Attraction of Shopping Destination

As the Study Area retains **96.3%** and **87.2%** of its convenience and comparison expenditure potential respectively, the findings in respect of this topic relate to the area and predominantly the centre of Athlone. Of the **162** surveyed, **15.4%** chose not to reply to this question. Those that did respond provided multiple replies – **212**. The results identified that the following were the key attractions of the Study Area, with the percentages based on the multiple replies figure:

- Choice/high quality of shops: **34.9%**
- Close to home: **31.6%**
- Parking related (easy to find/easy to park near shops/free/cheap): **14.2%**.

3.4.2 On-Street Shopper Survey

The shopper survey was conducted in September 2016. It comprised **150** on-street interviews in the central core area of Athlone with **75** interviews at the following two locations: to the front of the Athlone Town Centre shopping centre, on Dublin Gate Street; and, in the Golden Island Shopping Centre. Those interviewed were on a random based sample.

3.4.2.1 Key Survey Findings & Comparative Analysis with Household Survey

The key questions posed in the survey were related to the following: shopper's place of residence; main food, top up, clothing and footwear, bulky goods and internet shopping; and, attraction of shopping destination.

Shopper's Place of Residence

The significant majority (**81.3%**) of those interviewed were from the Study Area with the split derived as: Athlone central core area – **48.7%**; Athlone District – **26.0%**; and, Athlone Western Environs – **6.7%**. In respect of those others in the survey, **2.7%** were from the remainder of Westmeath and **16.0%** from Roscommon (**3.3%**) and other counties (Galway – **3.3%**; Offaly – **4.7%**; Mayo – **3.3%**; and, Longford and Dublin both **0.7%**).

Main Food Shopping

Respondents did their main food shopping in predominantly (**84.0%**) three stores in Athlone broken down in their order of ranking as follows: Dunne's – **34.7%**; Aldi – **25.3%**; and, Tesco

Golden Island – **24.0%**. The fourth and fifth main food shopping stores in the rankings were Lidl (**9.3%**) and SuperValu (**4.7%**).

Only **2.0%** of those interviewed did their main food shopping outside of the Study Area and this was in Dunnes Mullingar (**1.3%**) and SuperValu Moate (**0.7%**). These results varied considerably from those found in the household survey where: **79.6%** did their main food shop in Athlone's central core area **13.6%** in Mullingar; and, while Dunnes (**17.3%**) and Aldi (**12.7%**) remained the most important main food shop stores, the percentages were considerably lower.

The significant majority of respondents (**80.7%**) did their main food shop on a weekly basis, with twice a week and fortnightly being the next highest levels at **8.7%** and **8.0%** respectively. The spend on the last main food shop was relatively evenly spread between: €41 – €60 (**19.3%**); €61 – €80 (**17.3%**); and, €81 – €100 (**18.0%**). Again, these results differed from those of the household survey where: **53.7%** carried out their main food shop weekly in Athlone and **35.6%** of those living in the centre of Athlone did it twice weekly; and, **43.2%** and **21.4%** had spent €61 – €100 and €101 – €200 on their last main food shop trip.

Top-Up Shopping

The most favoured stores (**68.0%**) for top-up shopping in the Study Area were SuperValu (**26.0%**), Tesco (**16.7%**), Centra (**13.3%**) and Dunnes (**12.0%**). There were no stores identified outside of the Study Area where respondents did their top- up shopping so **100.0%** of those surveyed did this shop in the area. Some **69.3%** undertook top-up shopping on the following frequency: **30.0%** twice a week; **22.0%** once a week; and, **17.3%** both daily and three times a week. Almost all (**97.3%**) had spent less than €50 on their last top-up shopping trip with: **32,7%** spending under €10; **34.0%** between €11 – €20; and, **30.7%** between €21 – €50. The remaining **2.7%** of respondents spent between €51 – €100 (**2.0%**) and over €100 (**0.7%**) on their last trip.

As with main food shopping, these results generally differed from those found in the household survey. While some **57.4%** of those household survey respondents in the Study Area chose not to state where they did their top-up shopping, of those who did **37.9%** did it in the area but **5.0%** used stores outside of the Study Area. The latter is in contrast to the findings of the shopper survey where **100.0%** of the last top-up shopping trips were within the Study Area. In respect of frequency of the top-up shop, **77.8%** of Study Area residents in the household survey did this either daily or between once to three times a week. The equivalent figure from the shopper survey, as highlighted above is **69.8%**. In contrast, to the responses to these questions, the amount spent on the last top-up shopping trip found in the shopper and household surveys were almost the same at **97.3%** and **96.9%** being below €50.

Clothing & Footwear

The large majority (**86.7%**) of those interviewed in the shopper survey did their last clothing and footwear shop in the Study Area, with the remaining **13.3%** spending as follows: **1.3%** in Mullingar; **9.3%** in other counties (including Fermanagh in Northern Ireland) and only **0.7%** in the remainder of Roscommon; and, **2.7%** on online purchases. Clothing and footwear shopping was generally undertaken infrequently as the following illustrates: **66.7%** either shopped monthly (**40.7%**); or, less often (**26.0%**). Clothing and footwear expenditure was predominantly (**58.0%**) between €51 and over €201, with a further **26.7%** spending between €31 – €50 on their last clothing and footwear shop.

In respect of Athlone being the most important destination for clothing and footwear shopping, the findings of the household and shopper surveys are comparable at **84.6%** and **86.7%** respectively. Additionally, both surveys identify that this type of shop is generally undertaken infrequently with the household survey results showing a very significant level of infrequency (**79.6%**), with **48.1%** of last trips being between monthly and three monthly or less often (**31.5%**) against the shopper survey's findings indicating **66.7%** of trips are made either monthly (**40.7%**) or less often (**26.0%**). There are, however, very different profiles of levels of expenditure between the two surveys. The findings of the household survey reveal the amount spent by respondents on their last clothing and footwear shop was below €100 (**72.8%**), with **38.3%** of this being under €50. This contrasts with the results of the shopper survey which illustrate **84.7%** of respondents spent between €31 and over €201 and that the majority (**58.0%**) of this was between €51 and over €201.

Bulky Goods

The main location for bulky goods shopping of residents in the Study Area in the shopper survey is Athlone (**58.0%**), with Mullingar being the next most important (**10.8%**) followed by a range of different counties (**13.3%**): Galway – **5.3%**; Dublin – **4.0%**; and, Roscommon, Kildare and Longford – all **0.7%**. Additionally, some **16.0%** of those interviewed stated that they had no location where they undertook bulky goods shopping. The majority (**66.7%**) of expenditure on respondents' last bulky goods shop was between €51 – €500, profiled in the following bands: **23.3%** between €51 – €100; **18.7%** €101 – €250; and, **24.7%** €251 – €500. These are shouldered by **10.0%** having spent less than €50 and **10.7%** between €501 – €1,000 (**4.0%**) and over €1,000 (**6.7%**). A further **12.7%** chose not to respond to the question.

The findings of the household survey indicate a higher level (**75.3%**) of respondents doing their bulky goods shop in Athlone than the shopper survey (**58.0%**). In respect of expenditure on the last trip, again there were significant differences in the results of the two surveys. The household survey had much lower levels of spend with **19.8%** having spent less than €50 on their last bulky goods shop and **40.1%** between €251 – €500. In contrast, as highlighted above: the majority (**66.7%**) by shopper survey interviewees was between €51 – €500; only **10.0%** was below €50; and, **10.7%** over €501, with **6.7%** of this being expenditure over €1,000.

Internet Shopping

The considerable majority (**65.3%**) of respondents in the shopper survey used the internet for shopping purchases, which significantly contrasts with the **23.5%** who did founded on the results of the household survey. The major difference may be attributable to the age profiles of the two surveys with the latter having an older one than the former. Notwithstanding the significant differences in usage, there are also significant ones in respect of the percentage purchases made. This can be to a very large degree attributable to the higher level of usage of shopper survey respondents but a key influence is also the fact that it enabled multiple responses whereas the household one restricted respondents to only their last purchase. Below the resultant differences are highlighted, with the percentages from the shopper survey set out first:

i) **Clothing & Footwear:** 47.6% v 8.6%;

ii) **Electrical Goods:** 11.9% v 4.3%;

iii) **Holidays:** 10.5% v 2.5%;

iv) **Books:** 9.8% v 3.1%;

v) **CDs/Videos:** 5.6% v 0.6%;

vi) **Sports Goods:** 3.5% v 2.5%; and

vii) **Food & Groceries:** 1.4% v1.2%.

The percentage comparative figures illustrate the considerable divergences between the two surveys, with the exceptions of Sports Goods and Food and Groceries where there is relative parity. It would also be highlighted that some **9.8%** of those respondents in the shopper survey who have made purchases over the internet stated that they did not know what items they had purchased from the list.

Finally, levels of expenditure on the internet by those who have made purchases also generally varies considerably between the two surveys. Spend of less than €50 on the last purchase is, however, directly comparable at **8.7%** and **8.6%** by respondents to the shopper and household surveys respectively. There is also parity for last purchases over €1,000 at **1.3%** and **1.2%**. Noting these exceptions, below the key percentage differences for each of the following expenditure bands are highlighted, with again the shopper survey figures set out first:

- **€21 – €50:** 26.0% v 6.8%
- **€51 – €100:** 19.3% v 8.6%
- **€101 – €250:** 6.0% v 3.1%
- **€251 – 1,000:** 4.0% v 1.3%.

As advised on this category of spend in the analysis of the household survey results, internet shopping and trends are examined in Chapter 4 which follows.

Attraction of Shopping Destination

The shopper survey, as with the household survey, also sought the opinions of respondents on what the main attractions of the centre of Athlone as a shopping destination were. Of the **150** interviewed, **14.5%** chose not to reply to this question. Those that did respond provided multiple replies – **212**. The results identified the key attractions of the Study Area for shoppers, with the percentages based on the multiple replies figure. For comparative purposes, the equivalent figures from the household survey are provided in brackets. The findings in order of shopping survey ranking are:

i) Choice/high quality of shops: **33.0%** (34.9%);

ii) Parking related (easy to find/easy to park near shops/free/cheap): **18.4%** (14.2%);

iii) Close to home: **15.6%** (31.6%);

iv) Nice shopping environment: **10.8%** (5.7%); and

v) Easy by car: **10.8%** (4.7%).

It is interesting to note that, with the exception of *Choice/Quality of Shops*, the views of the respondents to the shopper and household surveys generally differ considerably on what

each survey group considers are the strengths of the different categories of attraction of the centre of Athlone as a shopping destination.

3.4.3 Expenditure Trends & Potential

In both surveys, respondents were asked how much they spent on the different types of retail category on their last shopping trip. The information derived was then modelled to provide informed estimates for convenience and comparison expenditure retention and inflows. The household survey provides the estimates for residents in the Study Area expenditure retention and outflows and the shopper survey provides that on expenditure inflows from people living outside of the area. These data are important inputs to the capacity assessment on the potential for additional floorspace over the period of the Strategy.

The results of the examination of patterns of expenditure indicate that the Study Area is relatively self-sufficient in convenience shopping but the outflow of comparison expenditure was higher. In respect of the latter, there were also important inflows of retail expenditure, both convenience and comparison, from people living outside of the Study Area. These findings are reflected in the following expenditure outflow and inflow figures:

- **Convenience:** 3.7% expenditure leakage and 15.2% inflow
- **Comparison:** 12.8% expenditure leakage and 17.8% inflow.

4 Current Retail Trends & Issues

Although the retail potential of centres in Roscommon and Westmeath is being influenced by global shifts in the dynamics of the sector/the retail economy, these shifts and influences are more appropriately addressed in the contexts of the State, the Greater Dublin Area (GDA) and both Counties, with the State and the GDA being the key interfaces with the wider global economy.

The advice is informed by the consultant's market experience from work with operators, developers and investors in Ireland in the retail sector over of the order of the last twenty years. Founded on this, the shifts and influences across each of the main retail sectors/formats and their implications for new retail development in the Study Area were reviewed under the following headings:

i) Convenience;

ii) Comparison;

iii) Bulky Goods; and

iv) Alternative Forms of Shopping.

4.1 Convenience

The GRP 2012 removed the previous distinction of the discount foodstore being a separate category of convenience shopping. This is noted and agreed with but for the purposes of the market review, it is considered appropriate for there to be subdivisions in the convenience market. This comprises: main operators; discount operators; and, independent stores/groups.

4.1.1 Main Operators

The competition between the main convenience operators – Dunnes, SuperValu and Tesco – is dynamic and strong as reflected in their constantly changing position in the top three places in the market share rankings. The source for the review are the statistics published for Ireland by **Kantar Worldpanel**, which is a global expert on shoppers' behaviour.

Until the last few years, the main convenience operators in terms of floorspace and market share have been Tesco and Dunnes, with SuperValu ranking third. Since the acquisition of Superquinn by the Musgrave Group and its 2014 rebranding as SuperValu, Dunnes was third in rank to Tesco and SuperValu. At the freeze date of 30 November 2016 for the baseline underpinning the preparation of the DWCRS 2019, Dunnes had become the country's largest grocery retailer with a **22.6%** market share, followed by SuperValu and Tesco at **22.4%** and **21.4%** respectively. The position with the discount operators is examined in the next sub-section. Dunnes held onto the lead over the first quarter of 2017 but from March has been overtaken by both SuperValu and Tesco, with this being attributed to shoppers moving to both groups' own labels. At the freeze date for the Strategy of 31st July 2017, SuperValu continued to be the leading main convenience operator with **22.2%** of market share, closely followed by Tesco at **22.0%** and Dunnes at **21.1%**. Although Dunnes has witnessed a fall in its

number of shoppers, it has experienced an increase in spend. The position with each, in order of current ranking, is summarised below:

- **SuperValu:** there are two stores in the Study Area – Croghan's on the Ballymahon Road, which opened in 2015, and Smith's in the River Village commercial area in Monksland – both are franchises in the Musgrave Group. In the wider Roscommon and Westmeath, there are also SuperValu stores in Roscommon Town, Ballaghaderreen, Castlerea, Moate and Mullingar. All of these are also operated as franchises of the parent Musgrave Group. It is understood in respect of large store formats that the main focus of the Group is currently on making the existing stock work better rather than progress new major stores, although franchises around the country continue to invest in their stores. With regard to future potential, it is assumed that SuperValu, whether under the Musgrave hat or its network of franchises, will continue to build on its increasing profile and market potential across all formats in the convenience sector.
- **Tesco:** has two stores in the Study Area: a full format superstore which is the convenience anchor of the Golden Island Shopping Centre; and, across the Shannon in Baylough a Tesco Express. Within the remainder of Roscommon and Westmeath, there are Tesco superstores in Roscommon Town, Mullingar and Kinnegad and a Tesco Express in Castlepollard. From building on its acquisition of Quinnsworth in the late 1990s, Tesco rapidly grew to have a dominant **28.0%** share of the Irish grocery market. However, consistent with its performance in the UK, Tesco's market share declined and only in July 2017 did it recover to 2014 levels. The response of the company to the decline was a review of its holdings and the major grants it had secured and a disposal strategy put in place. This included the sale of Golden Island Shopping Centre to Credit Suisse in March 2016, although the sale excluded the anchor Tesco store. Where Tesco is leading, and the Marks & Spencer *Simply Food* brand did not achieve in Ireland, is the introduction of the Tesco Express format in the centres of many cities and main towns which has promoted the *'Tesco Finest'* brand. It is understood that this will remain a key thrust in the company's investment strategy for the foreseeable future along with the upgrading of its existing portfolio.
- **Dunnes:** as with SuperValu and Tesco, there are two stores in the Study Area – in the Athlone Core Retail Area on John Broderick Street and on Abbey Road in Montree. The former is an old Dunnes format outlet, with the latter a more modern recent store. Dunnes representation in Roscommon and Westmeath is its full format outlets in Roscommon Town and Mullingar. There has been limited delivery of new stores in recent years with the company pulling out of anchoring a number of profile shopping centres around the country and vacating a number of properties in town centre locations. Instead, the company has generally focused on: upgrading the offer and environment/ambience of its existing store network; the introduction of High Street smaller format foodstores; the incorporation of designer names/concessions in its comparison offer; and, the introduction of café/coffee franchises. In respect of the introduction of designer names/concessions to its offer, this is a concern particularly in respect of its out of centre stores as this opens the door to the potential of trade diversion from town and city centres. This is responded to in the general policies of the Strategy.

Given the population size of the Study Area and the fact that all three of the main operators have two outlets in the area, it is unlikely that they would be looking to develop/open any further stores. However, this potential cannot be wholly dismissed.

In looking at the alternatives to those above, both **Sainsbury's** and **Asda/Walmart** are operating such formats in Northern Ireland. However, the current – and that for the foreseeable future – view is that the Republic's market is saturated by the existing large format operators. It should also be recognised that, with the exception of **Marks & Spencer** – which has a different profile and niche in the Irish market built up over particularly the last 15 – 20 years, the route for new convenience operators to enter the market is through the acquisition of a relatively similar profile established business. This was the model with Tesco and Quinnsworth here in the late 1990s and Walmart with Asda over the last decade in the UK. It would, however, appear that there is limited scope for this to be replicated but there may be options under discussion.

In respect of **Marks & Spencer** food offer, this generally forms an important part of its department store format. The company's food offer is recognised to be at the quality end of food retailing. This has been responded to in the introduction of such ranges by both the main food operators and the discounters. In the mid-2000s, the company introduced its *Simply Food* format in smaller shops in a number of locations, largely main centre High Streets, around the country. With the exception of the store in Dublin's International Financial Services Centre, this model was found not to be working and the other stores were closed in 2013. Although it is understood that the company is now looking at a limited number of new locations, it is unlikely that there will be any sizeable reintroduction of this format, at least not for the foreseeable future. With regards to the potential for it being introduced in the Study Area, given the full format store in the Athlone Town Centre scheme, then this could be taken to rule this potential out.

4.1.2 Discount Operators

The discount convenience operators, namely Aldi and Lidl, have been gradually increasing their market share over the last decade or so since their introduction to the Irish market. At November 2016 (the freeze date for baseline information for the DWCRS 2019), Kantar Worldpanel assessed that the combination of each was a **22.5%** share of the Irish convenience market. While cautiously accepted in their early years and branded as lower market shopping outlets, the impact of the recession combined with effective marketing strategies have served to bring the stores into mainstream food shopping patterns across all socio-economic groups. The German discounters have also changed in response to market demand and potential and, along with their traditional discount ranges and own labels, have been introducing quality lines at discounted prices. They have also: adopted a more creative, better designed approach to store formats; entered the High Street in a number of locations; and, begun to develop larger sized stores. This strategy has proven successful with their combined market share creeping up to **23.5%** at the end of July 2017, split Lidl **12.0%** and Aldi **11.5%**. Their combined market share was greater than that of any of the main operators individually at this time.

Both companies have continued expansion strategies across the different centres of the State. Although they are not seeking to evolve into much larger format stores. This is not their model, as well evidenced by their store development strategies in the UK where both entered the market some 20 – 25 years ago. The objective is increased market presence and penetration. There is little evidence that the indigenous retailer, either here or in the UK, is seeking to enter the discount convenience market or being able to on a comparable/competitive basis. However, there has been a response to their entry into the Irish market with the main operators introducing their own branded discount lines, which has been positive for the consumer.

Aldi and Lidl both have stores in the Study Area, the former at Golden Island and the latter on the Dublin Road in Creggan/the Kilmartin N6 Centre. Additionally, Aldi has one store in Roscommon Town and two in Mullingar, with Lidl having one in both Roscommon Town and Castlerea and two in Mullingar. Reflecting that both companies are active in their expansion strategies and the fact Mullingar has two of each and has a smaller population than that of the Study Area, there is market potential for one or both to have a second store in the area.

4.1.3 Independent Stores/Groups

It is well documented that over the last thirty years plus there has been the significant demise of the independent store (convenience and comparison) and/or groups in cities and towns across the country. With regards to both, this has greatly been attributed to the introduction of out of centre shopping centres and large format convenience stores. It is an issue not unique to Ireland and one recognised to prevail in the UK but to a lesser extent in other countries in Europe. This is reflected in the fact that at the end of July 2017, the independent stores/groups had a convenience market share of only **11.2%**.

There have been an important number of new convenience businesses that have been sustained/emerged in the last decade, despite the recession. The growth in these has taken three forms:

i) Existing/new businesses becoming franchises of larger companies, such as the Musgrave Group/Musgrave Retail Partners Ireland (e.g. SuperValu and Centra) and SPAR, which enables them to benefit from the strength of the branding and the economies of scale through mass purchasing;

ii) The increasing propensity for foodstores, particularly branded ones, in petrol filling stations; and

iii) Businesses founded on quality/particular niches, such as Avoca, Donnybrook Fair and Sheridans Cheesemonger, albeit there are few of them and they are generally located in the cities and the main conurbations in the country.

There is scope and potential for further small scale foodstores within the Study Area, particularly in the Athlone environs/growing suburban areas. With regard to the quality/niche independent foodstores, these are the nature of food shopping which requires to be attracted to the Western Bank Cultural and Tourism Quarter, albeit not exclusively, but to be delivered will require an active marketing strategy.

4.2 Comparison

The comparison retail sector comprises: department stores; High Street national and international multiples; independents; factory/designer outlet centres; bulky goods/retail parks; and discount comparison outlets.

4.2.1 Department Stores

Once a key feature of our main towns and cities, department stores have largely disappeared from main town High Streets and have significantly decreased in number in the cities. This noted, within the Study Area and wider Roscommon and Westmeath, there remain a number of department stores and the focus of the review is, therefore, the changes and potential in respect of these as follows:

- **Burgess:** was established in 1893 and is located in the central core area of Athlone. It is an important attractor and presence within the traditional heart of Athlone, bringing in shoppers from neighbouring counties and further afield. The store retails women's, men's and children's fashionwear, footwear and gifts. Although there is scope for continued renewal and enhancement of the store's offer, it is unlikely that there will be any expansion of the shop's retail footprint given the market which prevails. The opportunity to be harnessed is enhancing its linkage and synergy with the Athlone Town Centre and Golden Island Shopping Centres, and the former in particular.
- **Donnellan & Company:** was founded in 1954 in Roscommon Town Centre and, as with Burgess', attracts shoppers from beyond Athlone and County. Its profile is quality women's and men's fashion and footwear, with an emphasis on leading labels. The shop is recognised as being one of the leading menswear retailers in the country and won the Retail Excellence Ireland *'Store of the Year'* award in 2014. There has been considerable investment in and expansion of the fabric and space of the store in recent years but it is unlikely to be further expanded or seek additional locations, at least for the foreseeable future.
- **Guineys:** was established in 1971 and the Mullingar store is one of nine distributed around the country. It retails bedding, homeware, women and men's fashion and children's wear. There has been no expansion of the store network in recent years and this is likely to be the strategy sustained in future years.
- **Heatons:** is an Irish department store network founded over 70 years ago. It has 60 shops around the country, including a store in Mullingar and Roscommon and one in Northern Ireland. The Mullingar store is one of the most recent additions to the store network. The stores are located in a mix of High Street and retail park locations. An important development in the company's expansion strategy has been its acquisition/partnership with UK Sports Direct since 2016. This has resulted in the reformatting of a number of the outlets to co-locate the Heatons and Sports Direct core offers. Although there has been a recent dip in Sports Direct International plc's shares, this has not deterred it from taking a 10.0% stake in the struggling Debenhams High Street department store. It is anticipated there will be an expansion strategy for the Heatons/Sports Direct brand and in the context of the Study Area there may be potential for the Group to seek a new out-of-centre location. An issue in respect of this is whether this would be desirable in the interests of consolidating and enhancing the vitality and viability of the centre of Athlone. The preference would be location/expansion in the Study Area within the core area or,where this not feasible, on one of the edge of centre Development Opportunity Sites identified in the health check appraisal which are listed in Chapter 5 and illustrated in Map 4 of Appendix I.
- **Marks & Spencer:** has undergone a significant expansion of its network of stores in Ireland over the last decade and is still seeking opportunities. It will anchor Horizon Mall, a new shopping centre near the University of Limerick, and the company continues to seek enhancing its offer in Galway and opening a store in Waterford. It is a key anchor and attractor in the Athlone Town Centre shopping centre and Newbridge's Whitewater Shopping Centre and also has smaller format outlets in Clonmel and Drogheda. Although the company is still on an expansion strategy, it closed the store in Mullingar's Fairgreen Shopping Centre in 2013. There is limited scope for the expansion of the store's footprint in the Athlone Town Centre shopping centre.
- **Penneys:** and its sister Primark brand in the UK, has been one of the winners in terms of sales and market profile before, during and after the recession. Impetus to this has

been added to by the mix and match approach of models and others in the public eye who combine 'off the rack' affordable fashion with exclusive expensive designer labels. In response, there has been increased investment by the parent group (Associated British Foods) in the development of highly stylised new stores and to a lesser degree existing ones. This has been the case in respect of the two Penneys stores which provide the comparison anchors for the Golden Island and Fairgreen shopping centres in Athlone and Mullingar respectively. An expansion of the Penneys' offer in the Study Area would not be anticipated.

- **Shaws:** celebrated 150 years in business in 2014. The company has 16 stores around the country, largely but not exclusively in main regional centres. Even in the light of the recession, there has been continued investment between 2006 – 2016 in: its Portlaoise store's relocation; upgrading of four stores (including that in Mullingar); and, the opening of four new shops. It is anticipated that this strategy will continue but largely through the upgrading of existing outlets. However, the company is not represented in the Study Area and this may be a potential market opportunity, with the scope for its format to be accommodated on one of Athlone's edge of centre Development Opportunity Sites.

4.2.2 High Street National & International Operators`

Although there has been a recession, there has been active interest and take up by international fashion and footwear brands. Many of these are entering the Irish market for the first time. This is generally at the quality end of the spectrum although the mix and match of designer and affordable fashion has seen increasing representation of multiples such as H&M, TK Maxx and Zara. The majority of these multiples have large space requirements. They have benefited from reductions in rentals that have generally not been afforded to existing occupiers in view of current legislation. This interest is expected to continue as the performance of the economy continues to grow but will be generally limited to the Dublin area, the cities and other main centres, with the Athlone Town Centre and Newbridge/Whitewater Shopping Centre schemes particularly potentially benefiting from this.

There have, however, been both departures from the market and the restructuring of a number of businesses, with high rentals being cited as a key factor in the demise of these companies. This trend is anticipated to continue, albeit at a slower pace.

Within both the Athlone Town Centre and Golden Island Shopping Centres, there is strong and profile representation of High Street national and international operators – fashion, footwear, jewellery and accessories. The challenge is how this can be further expanded on in the Study Area, and in the centre of Athlone specifically. This can only be achieved through a new, quality shopping centre and the edge of centre Development Opportunity Sites provide the potential to enable it to be delivered but will require to have an anchor as the driver.

4.2.3 Independents

In this sector of the comparison market there has been both winners and losers, largely founded in the realism or otherwise of their business plans. As confidence in consumer expenditure continues to grow and banks become less restrictive in lending to small businesses then this sector will begin to re-emerge across High Streets, but on the whole limited to off prime pitch in the Dublin conurbation and other cities and in country's main towns.

The Study Area, particularly the centre of Athlone but not exclusively, has a range and diversity of independent boutiques which make an important contribution to the attraction of the area as a shopping destination. This requires to be encouraged to grow, with the proposed designated Western Bank having the potential to develop into a niche shopping location in the retail landscape of the Study Area.

4.2.4 Factory Outlet Centres

Factory Outlet Centres (FOC) to be successful, require to have significant sized population catchment areas. To date, with the exception of the Kildare Tourist Outlet Village (KTOV), located adjacent to Kildare Town Centre, those across the island of Ireland have had a mix of brand/profile and viability challenges. It is recognised that they are a niche form of retailing and the Study Area's relative proximity to KTOV (under 1 hour and 15 minutes' drive) would deem the location of a parallel quality FOC to not being a realistic potential. This assessment is founded on consultations with Value Retail, the developer and operator of KTOV.

4.2.5 Bulky Goods/Retail Warehousing

Since the advent of the recession (and in fact emerging before that), there has generally been a halt in the development of new retail parks. This essentially reflects the saturation in the market which was underpinned by the considerable level of new schemes and grants over the last decade in particular. What was not generally recognised was for a new retail park to be successful and attract bona fide bulky goods operators then they require at least one national/international DIY anchor (such as Atlantic Homecare, B&Q or Woodies) and, apart from the Dublin conurbation, given the population of the country these anchors on the whole work on a regional basis.

As a consequence, there is both a large number of underperforming retail parks – both old and new in the Study Area and across the remainder of both Roscommon, Westmeath and the State as a whole. In addition, there are a significant suite of unimplemented permissions. These vacancies/unimplemented grants put pressure on the relaxation of the permissible range of occupiers/goods sold in retail parks/retail warehouses. This is recognised in the RCRS 2014, DWCRS 2019 and M/BLAP 2016.

In response, the RCRS 2014 advises:

> *'Thus, it is considered that only in exceptional circumstances, (which have been demonstrated to the satisfaction of the Planning Authority) should further sites for new build retail warehousing be permitted where vacant floorspace exists in the general locality. It is reasonable to assume that existing retail warehouses could accommodate or could be modified to accommodate most new retail warehouse proposals.'*

The DWCRS 2019 takes a dual pronged approach to the issues as follows. Firstly, in respect of Athlone, it promotes the following which is consistent with the advice in the RCRS 2014:

> *'However, when market conditions improve, the objective must also be for Athlone to raise its profile and attraction in the County and Region for bulky goods shopping. This is not anticipated to emerge in the foreseeable future but when it does the priority must be consolidating and upgrading existing retail warehousing locations. It is a position which requires to be monitored over the period of the Strategy.'*

Secondly, the DWCRS 2019 addresses the increasing pressure for alternative forms of retailing to bulky goods shopping to be permissible on retail parks through prohibiting mainstream convenience, discount convenience developments, mainstream comparison retail developments or retailers in retail parks.

The approach adopted by both Councils is consistent with the guidance set down in the GRP 2012, which reflects the overprovision of bulky goods floorspace and out of centre retail parks and advises that *'....there should, in general be a presumption against further development of out-of-centre retail parks'*.

These approaches and principles are reinforced in the policies and recommendations of the Strategy.

4.2.6 Discount Comparison Outlets

Over relatively recent years, there has been the introduction of the new format of discount comparison brands/outlets such as Dealz and Eurogiant, which provide a range of comparison and convenience goods (often recognised brands) at prices significantly below those that generally prevail in supermarkets or outlets such as Boots (chemist). Their attraction and potential can be seen to reflect the increasing role and profile of Aldi and Lidl in convenience shopping patterns – the consumer market has changed and getting value for money at the lowest cost is no longer an issue in shopping baskets. Such outlets are increasingly found in town centres and shopping centres and it would be anticipated they will continue to increase their presence in generally larger centres around the country. This has been the case in the Study Area with both Dealz and Eurogiant present in the central core area of Athlone. There is also a Eurogiant in Roscommon Town and both Dealz and Eurogiant in Mullingar Town Centre. In respect of the Study Area, as both are already present, it would be unlikely for either to seek further representation.

4.3 Alternative Forms of Shopping

It has been recognised in a suite of reports over a number of years that online shopping has become an ever-increasing feature of the Irish retail market (and across Europe and internationally). The Forfás report *Review of the Economic Impact of the Retail Cap 2011*, which had an important influence on the revised GRP 2012, stated that *'....while there is a lack of robust ecommerce data in relation to Ireland, the proportion of sales made over the internet and mobile phones is increasing.'* Given that there are very varying views on the actual quantitative impact of internet sales on traditional shopping patterns and expenditure, then this lack of authoritative researched information is a large and important gap.

Review of research in the UK partly assists in informing what the position is here but has to be read with a degree of caution as each piece of research was generally commissioned to serve different purposes. While it can be accepted that internet shopping will continue to increase in importance, it appears the shopping public still prefers shopping for real with it having increasingly become an important leisure time activity. Key findings/observations on internet shopping are:

i) **Convenience:** main retailers offer online grocery shopping but this is generally sourced and delivered from the most local store and thus forms part of local per capita

expenditure. Additionally, a recent report published by **YouGov**, an international internet-based market research and data analytics company, identifies that *'…we are still waiting for the 'lift off moment' which has characterised other industries'* because consumers prefer the social side of shopping.

The report states that, although almost half of consumers have tried online grocery shopping, only 15% do so a few times a month; and

ii) **Comparison:** research conducted in the UK and Germany in 2013 by Deloitte on behalf of eBay found that of every £100 spent online, only £5 was being taken away from High Street retailers although cross-border sales in Europe were growing. Where a retailer did have a presence on eBay then this tended to drive more shoppers to their High Street stores.

The above noted, the CSO undertakes an annual survey entitled *Information Society Statistics – Households* which examines patterns in internet usage for a range of purposes. The last results were published in December 2016 (at the time of surveying and analysis in the making of this strategy). This does not state what the sample size was but it is assumed to enable direct comparison of the findings and trends, it was the same as for 2015 which was **6,800**. The findings of the survey identified that the number of households in the sample survey who had access to the internet had increased from **72%** in 2010 to **87%** in 2015 – a **15%** increase in 6 years. This was a slight decrease on the **18%** increase found between 2009 – 2015 (derived from the 2015 results which were the baseline in the preparation of the DWCRS 2019).

Of the **87%** of households in the sample survey (**5,916**) who had access to the internet, some **42%** (**2,366**) of individuals had used it to purchase clothes or sports goods in the last 12 months, the percentage only slightly above the **40%** of those who make travel arrangements or the **38%** who used it to buy holiday accommodation or tickets for events. The **2,366** of the sample survey who had purchased clothes or sports gear was **35%** of the total of those who were surveyed. The 2016 results show changes from those of 2015 when: **31%** used the internet to buy clothes or sports goods; **29%** to make travel arrangements or purchase tickets for events; and, **27%** used it to buy holiday accommodation. In 2015, those of the sample survey who had purchased clothes or sports goods (**1,792**) was **26.3%** of the total of those who were surveyed.

It is accepted that the above are very summary findings. However, they serve to indicate that the percentage figures are creeping up but, as it is founded on usage over the previous 12 months, there is no detail of the frequency of this usage over the period and the consequent full effect of internet shopping on in-store shopping expenditure. This would be identified as a major gap in respect of what the internet shopping patterns are.

5 Health Check Appraisal

5.1 Introduction

The health check assessment of the Study Area has been informed by: those incorporated in the RCRS 2014 for Monksland/Bellanamullia and in the DWCRS 2019 for Athlone; site visits; and, consultations with members of the Client Team by the consultants.

It is principally founded on a qualitative and not quantitative appraisal of the nature and offer of the different centres in the Study Area's retail hierarchy as has been outlined in Section 3, floorspace surveys were not included in the brief for the preparation of the Strategy. This noted, the assessment has benefited from the quantitative information provided by both Councils.

In view of the assessments which were undertaken in the preparation of both the RCRS 2014 and DWCRS 2019 and the policies which have emerged from these, the health check appraisal of the different centres in the Study Area is not starting with a blank piece of paper. However, a key objective of the health check is to provide the framework for an integrated and functionally linked approach to the collaborative spatial retail planning of the centre of Athlone and the Study Area.

Underpinning the purpose of the health check is the assessment of the vitality and viability of the different centres at each level of the retail hierarchy of the Study Area and determining the response required to redress any issues/deficiencies identified. The tools to assist with this have been informed by the Annex 2 criteria in the GRP 2012. These have been adapted to respond to the context of the Study Area and for the purposes of the preparation of the Strategy are as follows:

i) **Attractions:** these underpin a Regional Centre /area and comprise the range and diversity of shopping and other activities which draw in customers and visitors.

ii) **Accessibility:** successful centres at all levels of the retail hierarchy of an area need to be as accessible as appropriate to their respective surrounding catchment areas via: a good road network; availability of public transport facilities; good and safe local pedestrian linkages, with attention given to the needs of the mobility impaired; and, provision of integrated facilities and infrastructure for cyclists. In the retail landscape of the Study Area, of key importance is accessibility to the centre of Athlone and specifically its designated Core Retail Area. This reflects the dominant role and importance of the core area of Athlone within the retail hierarchy of the Study Area and the shopping and leisure patterns of those who live and work in the area; and

iii) **Amenity:** a healthy centre, at whatever level within the retail hierarchy of an area, should be a pleasant place to be in. It should be: attractive in terms of environmental quality and urban design; safe; and, have a distinct identity or image. The latter is of particular importance, but not exclusively, in respect of centres at the higher levels of the retail hierarchy.

Founded on the assessment of the different centres in the Study Area against the above, a suite of **Actions and Recommendations** have emerged which serve to form the basis of both the **Specific Policies and Proposals** and **General Retail Policies** in the Strategy.

5.2 The Study Area – An Overview

Athlone, is designated as a 'Regional Centre' in the NPF. Within this context, Monksland/Bellanamullia (Athlone West) is recognised in the WRPG 2010, RCDP 2014 and M/BLAP 2016 as being an integral part of the dynamics of Athlone. This has been further reinforced by the Review Committee's recommendation that the area be included in this Strategy and a Joint Urban Area Plan be prepared for the Study Area.

The combination of Athlone and Monksland/Bellanamuliia with a population of **21,349** makes the Study Area the largest settlement in either Roscommon or Westmeath founded on the results of the Census 2016. It also recorded population growth significantly above trends at the national, regional and county levels between 2006 – 2016 (**21.7%**) and importantly between 2011 – 2016 (**5.9%**), albeit as with the rest of the country between 2011 – 2016 percentage growth slowed down. A key factor underpinning the above trend population growth is the above average young age cohorts within the area's population profile.

Athlone Regional Centre and its environs has emerged as the most important retail centre in the Roscommon and Westmeath area, surpassing both Roscommon Town and Mullingar. At 2007, the Study Area's total net 'trading' retail floorspace, excluding vacancies, was **46,765m²**. By the time of the 31st July 2017 freeze date for baseline information, it totalled – excluding vacancies – an estimated **67,870m² net**. Over the period, the Study Area's retail floorspace was derived to have increased by approximately **21,105m² net**, some **45.1%**. Notwithstanding the recognised very high level of vacancies, given that this growth was largely over the period of the recession then it would be assessed as a very significant level of increase. This growth was **9.2%** above that experienced in the combined total retail floorspace of Roscommon and Westmeath between 2007 – 2017. Over the period, the Study Area's share of total retail floorspace in the two Counties increased from **28.3%** to **30.2%**. Set against this, Roscommon Town's share increased from **17.3%** to **22.4%** and Mullingar's decreased from **18.2%** to **15.5%,** and puts the significance of the increasing Study Area's share of total retail floorspace in the Roscommon and Westmeath combined area into context. As has been summarised in Chapter 3, the comparative figures highlight the increasing scale and importance of the floorspace of the Study Area in the retail landscape of Roscommon and Westmeath.

A key strategic asset of Athlone is its location at the centre of the country on the River Shannon. The Study Area has sustained its national/regional strategic role and its importance as is reflected in it being one of the few centres outside of the main cities which has secured leading international hotel operators (Radisson and Sheraton) and retailers (Marks & Spencer) to locate there. Athlone Regional Centre and its environs is a key retail destination for residents in both the former West and Midland Regions, now both incorporated in the new larger NWR and EMR areas respectively. This is in view of its varied offer and profile shopping centres – namely Athlone Town Centre and Golden Island – and its convenience and retail warehousing offers. Plus, immediately to the west of the Shannon is the 13th century Athlone Castle, the remains of the walled town and the heritage of important protected structures set within the medieval street network. These all make a key

contribution to the urban fabric and the potential of the tourism industry and attraction of Athlone Regional Centre and its environs.

This fabric and importance have, however, not generally been harnessed to date in environmental enhancement, promotion of its unique heritage or the delivery of quality developments in Athlone and its environs over previous decades – an issue which is not unique to the Study Area but prevalent in many large towns and cities across the country. The tide has turned with combined Westmeath and European Union funding in place to progress the restoration of the attraction/dynamics of this historic town centre which this Strategy seeks to reinforce. Athlone has its unique historical heart and identity. There are, however, exemplars to learn from and develop on, such as Clonakilty, Kilkenny and Westport plus further enhancing Athlone's strategic importance as a key driver in the regional and county economies of the NWR, EMR, Roscommon and Westmeath.

The Study Area is home to a number of large national and international companies with a profile in pharmaceuticals and telecommunications. It also has the regionally and nationally, and increasingly internationally, important expanding Athlone Institute of Technology (AIT) which is located to the east of the town centre off the Dublin Road. At the time of the 31st July 2017 freeze date for baseline information for the Strategy, AIT had over 6,000 third level students, an increase of 1,000 since 2016.

5.3 Attractions

The Study Area comprises a hierarchy and mix of discrete retail areas. These, excluding retail warehousing parks and locations, are identified in Map 3 of Appendix I (Map 3 illustrates the Retail Hierarchy for the Study Area). The attraction and, issues in respect of these centres are summarised in the paragraphs which follow.

5.3.1 Tier 1: Centre of Athlone – The Eastern Bank

On the eastern bank, Church Street, Custume Place, Dublin Gate Street, Mardyke Street, Sean Costello Street and John Broderick Street constitute the traditional retail area of the core area of Athlone. These streets, along with the Athlone Town Centre shopping centre, form the Core Retail Area of Athlone. This is illustrated in Map 4 of Appendix I, along with the development opportunity sites and the retail hub of the Golden Island shopping centre which are identified within the 400 metre isochrone from the boundary of the Core Retail Area. There are no defined Core Retail Areas in the other main centres in the Study Area and this is consistent with the approach adopted by both Councils in the RCRS 2014 and DWCRS 2019 respectively.

The area is characterised by a compact form and narrow medieval streets and is designated as an Architectural Conservation Area (ACA). It, along with that of the Western Bank, forms part of the Old Town Wall Historic Quarter. The vacancy rate is high on Church Street. Several mixed retail/retail service and residential developments are located between the Golden Island shopping centre and the Core Retail Area. These are Belhavel, Inis Oir and Inish Carraig. They are predominantly occupied by independent retailers and many cater for services, particularly beauty and hair salons. Dunnes Stores (comparison and convenience) is located on a site at Irishtown Central/John Broderick Street and has an entrance on Dublin Gate Street. The Dublin Gate Street entrance is into the comparison department of the store, whereas the southern entrance to the convenience section faces a car park and the Golden

Island shopping centre. The former Texas shopping centre, located on St Mary's Place, is vacant. It also has an associated multi-storey car park.

Additionally, Athlone has a successful food and village market which is held on Saturdays adjacent to the Civic Centre. In contrast to both Roscommon Town and Mullingar, many of the streets in Athlone have a high incidence of lower order services, such as take-aways and betting offices, which detract from the profile and ambience of the core area.

Athlone Town Centre Shopping Centre: forms a key new part of Athlone's Core Retail Area and opened in 2007. Its design, floorplates and market potential has resulted in national and international High Street comparison retailers to be attracted to take up space. The key anchor is a full format Marks & Spencer (still not present in Galway, Limerick and Waterford, although there is now a grant for one in Limerick to proceed) which has been fundamental in attracting profile international comparison retailers such as Zara, H&M and TK Maxx. It is recognised as being one of the best shopping centres in the country outside of Dublin and the other cities. The shopping centre has a large pay parking underground car park (1,300 spaces) which it shares with the Sheraton Hotel. Vacancy levels are negligible and reflect the attraction and demand for units.

Golden Island Shopping Centre, which opened in 1997, is anchored by a Tesco supermarket and also includes a 6 screen IMC cinema. Its profile is predominantly national and international comparison retailers including Penneys, Dealz, Lifestyle Sports, Elverys and Boots. Additionally, it accommodates the National Driver Licence Service Centre. The shopping centre has circa 1,000 free of charge surface car parking spaces which add to the attraction of the centre. Adjacent to the shopping centre is an Aldi and a mix of relatively low grade retail warehouses and car related outlets. In the health check, it was assessed that in the order of 11% of these units were vacant. Planning permission was refused for a major extension to the east of Golden Island Shopping Centre in 2013 on the grounds of retail impact on the Core Retail Area. As has been highlighted in Chapter 4, the centre was sold by Tesco to Credit Suisse in March 2016. The sale excluded the Tesco supermarket anchor.

Plate 1: Traditional retail facades on Church Street (Pre-Public Realm Enhancement Works in 2018)

Plate 2: Public realm on John Broderick Street

Plate 3: Urban square at The Bawn

Plate 4: Mixed use at Inis Oir

5.3.2 Tier 1: Centre of Athlone – The Western Bank

On the west of the Shannon, the retail/commercial area comprises High Street, Bastion Street, O'Connell Street and Connaught Street. It forms part of the Old Town Historic Quarter ACA. It is designated as the **Cultural and Tourism Quarter** of the centre of Athlone in the DWCRS 2019. The Castle and the Post Office effectively mark the entrance to the Quarter. Its role in the dynamics of this Regional Centre is more tourism-related than retail founded. Although retail vacancies appear high, the continuing conversion of these units to restaurants and other food and drinks related businesses reflect the new and growing momentum of the area with retail generally being subsidiary to this. Unlike the retail and commercial heart of the centre of Athlone, there is not a prevalence of lower order services, such as take-aways and betting offices, in the profile of the designated Cultural and Tourism Quarter, although they are present.

5.3.3 Tier 2: Special Category Settlement – Monksland

This is a Tier 2 centre in the Study Area's Retail Hierarchy. Its central area has a District Centre (DC) zoning objective in the M/BLAP (Athlone West), which is flanked by business parks with a mix of retail, non-retail services, business and other commercial/commercial leisure uses and large-scale industrial, business/enterprise, light industry and warehousing developments. The vision of Roscommon for the Local Area Plan area includes: the area continuing to be a prime centre for industrial and manufacturing development opportunities; being a vital driver of social and economic development; and, the consolidation of Monksland's commercial core through creating a sense of place and focus for the M/BLAP area.

Plate 5: River Village Commercial Area Monksland

Plate 6: River Village Commercial Area Monksland

The central area of Monksland comprises a mix of the River Village commercial area, business centres/parks, namely Daneswell Business Centre, Monksland Business Park and Westpoint Business Centre, and residential areas. The main retail and commercial centre is the River Village commercial area although the business centres/parks also host retail (largely bulky goods), non-retail services, commercial leisure and office/business space. The business centres/parks are examined under the appraisal of retail warehousing parks below. Adjacent to the River Village commercial area is the 4* Athlone Springs Hotel and Leisure Complex, which is an important attraction and resource in the area for both local people and visitors. The River Village commercial area is anchored by Smith's SuperValu supermarket and is the main convenience shop in the M/BLAP area, with other food shopping options being very limited. Other shops and services in the River Village commercial area include two restaurants (one with a takeaway), a café, a takeaway, a sandwich shop, a pharmacy, an optician, a bookmakers with a nail bar above, Athlone Credit Union, a barbers, a laundrette and a sports injury clinic and is served by a surface level car park. Adjacent to the River Village commercial area is a modern car sales showroom. There is not a prevalence of lower order services, such as take-aways and betting offices. Those which are there blend in with the overall quality of the centre rather than undermine it. At the time of the site visit in May 2017, there was one vacancy in the centre.

5.3.4 Tier 4: Neighbourhood Centres

Neighbourhood Centres are distributed around the suburbs of Athlone in existing and growing residential areas. Given the role, importance and potential of River Village commercial area in the Athlone West area combined with the current population of the area (and that which is forecast), there is no proposed potential Neighbourhood Centre in Monksland/Bellanamullia with the priority being consolidation and enhancement of River Village commercial area. In the remainder of the Study Area, the existing and proposed potential Neighbourhood Centres are all located within the Westmeath administrative area. The centres have generally been built in the last 10 years, although a number are adjacent to older local centres. These centres, their key offers, their potential and issues are summarised in the paragraphs that follow.

5.3.4.1 Auburn Neighbourhood Centre

Auburn Neighbourhood Centre is located to the west of the core area of Athlone on the Dublin Road (A446) and to the south of AIT. The centre comprises a three-storey block with apartments above retail/commercial units. It has a Costcutters supermarket, Asian foodstore, pharmacy, off licence, hairdressers, public house and pizzeria. Additionally, there is a concentration of takeaways between it and the intersection of Willow Park and the Dublin Road. Of the units within the area, some 46% are either takeaways or cafes. Although the figures affirm that there is a prevalence of lower order services, in particular takeaways, these are part of the ambience and attraction of the Neighbourhood Centre's location in the student hinterland of AIT. It is important that AIT across all dimensions is integrated within the heart of the local community and a more holistic view as to how this can be achieved is through the opportunities and diversity that the Auburn Neighbourhood Centre can deliver. It is recognised that AIT is wholly committed to integration within the local community. The centre is served by a surface car park but this was underutilised on the day of the site visit, which is likely to reflect that there is considerable walk-in trade from AIT students and staff. At the time of the visit, some 18% of the units were vacant. There is scope and potential for this to be redressed through environmental and shop/commercial premises front

enhancement outside of the footprint of the purpose-built Neighbourhood Centre as an adjunct to the emerging Student Quarter of Athlone Regional Centre.

Plate 7: Auburn Neighbourhood Centre

5.3.4.2 Baylough Neighbourhood Centre

Baylough Neighbourhood Centre, also known as part of the Shine Centre, is located to the south of the River Shannon on the Galway Road (R446). It is anchored by a Tesco Express. Other services and facilities include: a petrol filling station with a Centra shop and deli; Shines Bar/Restaurant/Guest House; a newsagent; an off licence; a bookmakers; a restaurant and takeaway; a separate takeaway, a public house and a laundrette. Additionally, there is a Supermacs Express nearby within the Roscommon part of the Study Area. The Neighbourhood Centre comprises a mix of new build and older premises. Although there are lower order services (the two takeaways and a betting office) located within the Neighbourhood Centre, they fit with the mix and are not predominant. It is served by a surface car park both in front and to the rear of the Tesco Express and on-street free car parking. At the time of the site visit, there were no vacancies in the centre. The Neighbourhood Centre is a blend of old and new, which characterises the evolving nature of such centres not only in the Study Area but across the country. However, spatially it does not have cohesion – the disparate parts essentially function separately. The bridge to redressing this is through a strategic Public Realm Strategy developed and proofed with local businesses and the local community.

Plate 8: Baylough Neighbourhood Centre

5.3.4.3 Cloghanboy/Ballymahon Road Neighbourhood Centre

Cloghanboy/Ballymahon Road Neighbourhood Centre is located to the north east of Athlone on the N55. The Neighbourhood Centre opened in the last two years and is anchored by Croghan's SuperValu and is, thus, a modern high specification development. The remainder of the centre's offer is a Costa Coffee, a pharmacy and a barber's shop. It, thus, has a relatively limited offer in the context of the mix that under the RPG 2012 a Neighbourhood Centre is likely to comprise. The profile of the centre, as summarised, confirms that lower order services are not in the equation of the mix. It is served by a surface car park. At the time of the site visit, there were no vacancies in the centre. There is greater scope and potential for this Neighbourhood Centre to grow in the functions and services it provides over the timescale of the Strategy, subject to this being in parallel to the growth of its surrounding residential areas continuing. This identified centre should be a Neighbourhood Centre which has an identity at the heart of the local community. Delivering this must be a priority on the agenda for the future expansion of the Neighbourhood Centre over the timescale of the Strategy.

5.3.4.4 Creggan/Kilmartin N6 Centre

The Creggan/Kilmartin N6 Neighbourhood Centre is located on the Dublin Road to the east of the core area of Athlone. This centre stretches from the Creggan Roundabout to the Kilmartin N6 Retail Park. The supporting non-retail services offer of the Neighbourhood Centre and the Kilmartin N6 Retail Park are mutual and inclusive to both. Noting this, the Neighbourhood Centre component of the equation would be determined as comprising: a Centra with deli and a petrol filling station, a MacDonalds, a Dominos Pizza, a Subway sandwich shop and the Creggan Court Hotel. The mix of the uses in the Neighbourhood Centre would be assessed as limited in the context of what is prescribed as the components of what a Neighbourhood Centre is likely to comprise in the RPG 2012. This is albeit that it would be deemed as a successful centre, given that there were no vacancies at the time of the May 2017 site visit. There is a prevalence of takeaways in and around the Neighbourhood

Centre but they are part of the dynamics of the area, fuelled in particular by the Neighbourhood Centre's proximity to AIT and the local market of the Institute's students. The centre is dispersed in nature and served by surface car parking. There were no vacancies at the time of the May 2017 site visit.

Plate 9: Creggan/Kilmartin N6 Neighbourhood Centre

5.3.4.5 Montree

The Montree Neighbourhood Centre is located to the north west of Athlone on the Abbey Road. It is anchored by a Dunnes with the only other outlet being a shoe shop. The centre is served by surface car parking. At the time of the site visit, there was one vacancy in the centre. Although Dunnes meets a large majority of the needs of the local community, there is scope for an increase in the provision of local retail and non-retail services to be enhanced.

5.3.4.6 Potential Neighbourhood Centres

To meet the needs of Athlone Regional Centre and its environs growing residential population, two further potential Neighbourhood Centres have been proposed by Westmeath County Council in Clonbrusk and Cornamagh, which are to the north and north east of Athlone respectively. The locations of both are identified in Map 3 of Appendix I. The potential of securing permission of the development of either will be underpinned by evidenced based supporting data in respect of the critical mass of residential development/population increase in both.

5.3.5 Tier 5: Local Centres/Corner Shops

Strategic retail provision is supported by a network of on-street Local Centres and Corner Shops which are distributed around the Study Area. These have not been specifically identified in the Retail Hierarchy of the Study Area but are recognised as an important

component of the retail landscape of the area.

5.3.6 Retail Warehouse Parks & Business Centres/Parks

There are also a suite of retail warehouse parks, a number of which are in general proximate to the above Neighbourhood Centres. Reflecting the pressures that the bulky goods sector has been under as a result of the recent recession: a number of these parks/centres have been on the market over the last two years; there are varying levels of vacancy; and, there has been a seepage of, or pressures for alternative uses/occupiers to fill up the space. The **General Retail Policies** of the Strategy respond to this. The retail/business parks and their profiles are summarised below.

- **Arcadia:** is located to the north of Athlone on the L4023. Despite being anchored by B&Q, some 30% of the 14 units were vacant at the time of the May 2017 site visit. In addition to B&Q, the only other bulky goods operators are Carpet Right and Laura Ashley. Other occupiers are an Applegreen petrol filling station and shop, the MoHH Hairdressing Academy, a pharmacy, a bookmakers, two restaurants/takeaways and Jungle World, a play centre. The park is served by surface car parking.

Plate 10: Arcadia Retail Park

- **Daneswell Business Park:** is located to the east of the R362 in Monksland. The units close to the Tuam Road are generally modern but the buildings are dated and more industrial in format further into the business park. In comparison with the other business parks in the area, Daneswell has limited retail warehousing/retail floorspace. This comprises a furniture store, a car sales room, CT Electrics and a paint store. There is also a gym on the park. It is served by surface car parking. Founded on the most recent vacant retail floorspace survey conducted by Roscommon Planning Department, over one fifth of the floorspace on the park is vacant.
- **Kilmartin N6 Retail Park:** is located to the east of Athlone on the Dublin Road. It is a modern retail park anchored by Woodies, with DID Electrical, Harry Corry, Right Price

Tiles and Carphone Warehouse. The park is served by surface car parking. At the time of the site visit, one of the units was vacant.

- **Monksland Business Park:** is located to the east of the R362 in Monksland. It was designed as a business park and consequently has limited retail or non-retail services floorspace with the only shops being a pharmacy and a trade only bridal outlet. Five of the other units are a photographers, a café/sandwich shop, a dance studio, a skincare salon and a hairdressers. The theme of the business park is medical and pharmaceutical and it also hosts the Constituency Office of a local TD. The business park is served by surface car parking. At the time of the site visit, there were no vacant units.

Plate 11: Monksland Business Park

- **Shannon Retail Park:** is located to the east of Athlone on the Dublin Road. It is a modern retail park anchored by Smyths Toys Superstores with other occupiers being Heavins Hardware, Petworld and Jimmy's Superstore. A Lidl is located to the east of the park along the Dublin Road. The current retail park was to be the first phase of a larger development but a combination of the impact of the recession and changes in the ATDP 2014 zoning objectives for the site curtailed further expansion of the park. It is served by surface car parking. At the time of the site visit, there were no vacant units.

Plate 12: Smyth's Toys Superstore

Plate 13: Lidl adjacent to Shannon Retail Park

- **Westpoint Business Park:** is located to the east of the R362 in Monksland. It is a purpose built modern retail park. However, it does not have the generally prerequisite national or international bulky goods anchor which generally would underpin the diversity of bulky goods occupiers on the retail park. The retail operators are Tile Warehouse, Home Sweet Home, Arcon Plumbing, Atlantic Bathrooms, Suits Direct, Kreative Salon Supplies and Supersavers. A large proportion of the units are occupied by health and fitness related businesses including Planet X Bikes, Athlone Taekwondo Club, Bikram Yoga, The Health and Beauty Club, Jump for Joy, Athlone Gymnastics and Cross Fix and Fusion Training Centre. Westpoint is served by surface car parking. At the time of the site visit there were three vacant units, two of which had large retail/unit footprints.

Plate 14: Westpoint Business Park

5.4 Accessibility

Located adjacent to the Dublin – Galway M6, Athlone Regional Centre and its environs is very accessible by car, train and bus from many towns and cities across the country. It is also a popular stop for cruisers on the River Shannon. In summary, in respect of road, rail and bus, accessibility is as follows:

i) **Road:** it sits: at the centre of the M6 Dublin – Galway Motorway; on the N55 Athlone – Edgeworthstown National Secondary Road, which provides access to the M4/N4; on the N61 Athlone – Roscommon Town National Secondary Road; and, the M62 – Athlone – Roscrea and Thurles National Secondary Road, which provides access to both the M7 and M8 Motorways;

ii) **Rail:** there are regular rail services to Dublin, Galway, Roscommon Town through to County Mayo and Tullamore; and

iii) **Bus:** the bus services are equally frequent to all of the above destinations and also include a service to Dublin Airport. Following a review by Bus Eireann and the National Transport Authority, an enhanced network of bus services was introduced to the Study Area in January 2016 which improved bus access to the centre of Athlone from the

majority of the parts of the Study Area. There requires to be continual improvement of bus services in Athlone Regional Centre and its environs area in response to the needs of its expanding and growing residential areas. In some parts of the Study Area, there is an under-provision of convenient bus stops and a deficit of bus stop shelters. To better meet needs, a review of provision of both bus stops and bus shelters is required to encourage the transfer from the private car to greater usage of bus services.

While strategic road access is good, road accessibility within the Study Area is undermined by the following issues:

- Traffic congestion within the centre of Athlone is a problem, both from traffic accessing the retail centres within the core area, but also that passing through it. However, €3m was allocated for the Church St. Enhancement Scheme This scheme was jointly funded by the European Union and Westmeath County Council. It includes: the introduction of a one-way system on Church Street; and, traffic calming measures of key streets..
- Monksland/Bellanamullia suffers from a lack of cross linkages within the Local Area Plan area. Access is also limited by a number of inadequate junctions which constrain the provision of new access points and the level of additional traffic which can be accommodated. Additionally, the existing M6/N61 junctions are nearing capacity and further commercial, enterprise and residential development in the M/BLAP area will put additional pressures on capacity and increase road safety issues. In recent years, there have been a number of road improvements comprising: the upgrading of the New Tuam Road (R362), including construction of a roundabout at the junction of the Old and New Tuam Roads; upgrading of the Old Tuam Road (L2047) from its junction to the New Tuam Road to the Roscommon Athlone Area Office and Community Centre; and, upgrading of the Monksland Industrial Estate Road (L75841). Further improvements are required if the issues are to be redressed. These will emerge from the Athlone West Strategic Transport Assessment which is currently being prepared for the M/BLAP (Athlone West) area, and will provide recommendations concerning infrastructure upgrades as well as improvements in the area for walking and cycling, which Roscommon will be able to progress subject to funding.

At present, the only multi-storey car park in use in the Study Area is that of the Athlone Town Centre development (1,300 spaces), which is shared with the Sheraton Hotel. Elsewhere around the Study Area there are a suite of surface car parks. Those at the Golden Island Shopping Centre, River Village commercial area, the Neighbourhood Centres and Retail/Business Parks are free while it is pay and display at the Church Street and Gleeson Street car parks. There is also a limited amount of pay and display on-street car parking in the centre of Athlone.

Although cycling is popular in the Study Area, cyclists are poorly provided for in terms of either cycle lanes and secure cycle parking facilities. In the overall approach to encouraging sustainable travel within Athlone Regional centre and its environs, these issues require to be redressed.

Pedestrian accessibility and connections are challenging within Athlone Core Retail Area and adjacent streets, in view of traffic congestion, but are relatively good in and around the Golden Island Shopping Centre. However, there is no signposted pedestrian linkage between the Athlone Town Centre and Golden Island shopping centres which would serve to

encourage enhanced pedestrian movement between both. Overall, the Study Area is not well served by pedestrian crossings, particularly adjacent to retail areas. This requires to be reviewed in the interests of both safety and connectivity. In all improvements for pedestrians, the needs of the mobility impaired require to be given particular priority.

5.5 Amenity

5.5.1 Centre of Athlone – The Eastern Bank

The Eastern Bank of Athlone has a recognised relatively poor environment. Traffic congestion, poor pedestrian footpaths and connectivity significantly undermine the potential and ambience of this area. The heart of the traditional old town consisting of Custume Place, Church Street, Dublin Gate Street and Sean Costello Street experiences particular traffic problems. Dublin Gate Street, specifically, has a narrow section, where the sidewalk significantly narrows and exposes pedestrians to oncoming traffic.

Several public realm interventions have, however, taken place introducing more attractive and better designed public spaces, particularly on John Broderick Street at its intersection with St Mary's Place and to the south east of the core area. Church Street appears to be more run down than other parts of the area, particularly due to the lack of activity in the area. The Athlone Town Centre Shopping Centre has resulted in the creation of new high quality urban squares in and around its immediate environs, which includes the Civic Centre. However, there is a need to improve better interaction and pedestrian movement between the new shopping centre and the traditional old streets/areas immediate to it, as well as to the Golden Island Shopping Centre, as the linkages between both are poor.

These issues are set to be partially redressed through the jointly funded European Union and Westmeath County Council Church Street Enhancement Scheme, which in addition to the introduction of a one-way system on Church Street and traffic calming measures in key streets in the centre, included the paving of Church Street and the provision of new street furniture, soft landscaping, and trees. This improvement strategy requires to be extended throughout the Core Area of Athlone and extend to incorporate an Interpretation and Signage Strategy. Additionally, to improve the attraction and inclusiveness of the central core area of Athlone to all sectors of the community, an important principle should be that of proofing *Access Awareness* in all new developments and Movement and Environmental Enhancement Strategies. This should include mobility management measures and the provision of toilets and changing facilities for those in the community and visitors with profound and multiple learning difficulties and significant physical disabilities. It is not a principle which should apply to the Eastern Bank alone but across the Study Area as a whole.

The area around Golden Island Shopping Centre is dominated by surface car parking and heavy traffic flows. These are characteristics which have prevailed since the opening of the centre. The shopping centre's design is poor and outdated. The opportunity to redress this has been opened up by the purchase of the shopping centre by Credit Suisse in 2016. The units to the east of the shopping centre, with the exception of the Aldi store, are a poor mix of lower grade retail warehousing and other warehousing/business uses, all of which are generally in a poor condition. This is an issue particularly when set in the context of their location and profile close to Athlone's Core Retail Area and the tourism attraction of the Shannon. This highlighted, the mixed-use development north of Golden Island Shopping Centre is in good condition and well-kept. However, directly to the north of this – Inish

Carraigh – is poor in both building design and public realm and also its propensity of car over pedestrian priority.

5.5.2 Centre of Athlone – The Western Bank

This is the jewel in the crown in respect of the foundations of Athlone and its heritage/tourism potential which has not to date been built on to the degree it should be. However, even in the absence of substantial investment in public realm interventions, there has been a localised/indigenous gradual re-invigoration of the potential of the area as a distinctive **Cultural and Tourism Quarter** in Athlone. This potential requires to be further harnessed and developed with key issues such as the traffic congestion experienced immediately north of the Castle, facing St Peter and St Paul Church and improvement to the public realm in respect of the triangular car park at Barrack Street and Castle Street being critical in the agenda. It should be in parallel to the introduction of an Interpretation and Signage Strategy. These require to be recognised as integral components of the more comprehensive and ambitious vision required.

5.5.3 Monksland/Bellanamullia – Athlone West

The River Village commercial area is a modern and well maintained retail and commercial centre. However, the dominance of surface car parking and paucity of landscaping mean that it does not create a real sense of place or focus. These are required if the River Village commercial area is to evolve from essentially a suburban type centre into a dynamic heart of the community. This could evolve through densification of development, increased diversification of retail, commercial and community uses and a creative landscaping strategy.

As assessed in the Monksland/Bellanamullia health check in the RCRS 2014, the remainder of the M/BLAP area is characterised by dispersed urban type development with no defined streets or open spaces – essentially it is ribbon development. Greatly contributing to the lack of urban feel and identity is the predominance of large scaled retail/commercial, business and industrial blocks of development served by large expanses of grey surface area car parking. This is further exacerbated by the high levels of vacant units. To redress this is a challenge, but one that can be met through pursuing the following to create an identity for the area:

i) The consolidation of commercial development into a single 'District Centre' which should be purpose designed and built in accordance with guidance provided in a Framework Plan for the overall landholding. This will provide a currently lacking central focus and 'sense of place' for the community. The development proposed in this area will also need to be of a high architectural standard which will improve the appearance of this urban environment;

ii) Support for the policies (Policies 106-108) and objectives included in the M/BLAP referring to public spaces and places and car parking areas; and

iii) The introduction of street furniture, distinctive street lighting and public art.

This cannot be achieved by Roscommon alone but through accessing other public sector funding and working in partnership with landowners, businesses, local organisations and the community.

5.5.4 Neighbourhood Centres & Retail/Business Parks

The Neighbourhood Centres and Retail/Business Parks in the Study Area are generally recent developments. They would be characterised as being functional and served by large frontage areas of surface car parking, with little landscaping, street furniture or facilities for cyclists. This is not unique to centres or parks in Athlone Regional Centre and its environs, but typical of these retail formats around Roscommon, Westmeath and the remainder of the country. They require to be enhanced as part of a commitment to reinvigorating the quality and attraction of the Study Area's environment and profile. This will require the Councils to work with landowners and operators. It should also be a principle that underpins the assessment of all applications for new developments.

6 Broad Assessment of Additional Floorspace Potential

In accordance with the requirements of the brief for the preparation of the Strategy, this chapter provides the detailed quantification of projected need for additional retail floorspace in the Study Area over the period of the Strategy 2019 – 2026. This timescale extends beyond the timeframe of the RCDP 2014 and WCDP 2014 (to 2020) and includes the period of the next County Development Plans (2020 – 2026). This approach enables a longer term look at the retail planning and potential of the Study Area to be taken. It also responds to the fact that some new retail developments, particularly larger ones, will often be delivered over two County Development Plan timeframes.

6.1 Principles & Components

The capacity assessment identifies the type and amount of floorspace required to accommodate the projected additional expenditure in the Study Area over the period between the Base Year (2017) and the end of the next County Development Plans (2026). It, as appropriate, takes account of:

i) New retail outlets that are planned to come on stream, identified by emerging permissions;

ii) Increases in sales in existing stores due to improvements in turnover efficiency; and

iii) Expenditure in alternative forms of retailing – this includes e-retailing, mail order sales and market stalls. It excludes wholesale retail and car sales outlets, as set down by the GRP 2012. The expenditure in alternative forms of retailing has been deducted from the per capita estimates applied in the capacity assessment.

The key inputs and outputs of the capacity assessment are the derivation of the following:

- **Step 1:** Population and Expenditure Estimates
- **Step 2:** Turnover Estimates
- **Step 3:** Gross Additional Expenditure Potential
- **Step 4:** Future Sources of Retail Sales
- **Step 5:** Capacity Potential.

6.2 Step 1: Population & Expenditure Estimates

The first step is to calculate the total amount of expenditure on convenience and comparison goods by the resident population of the Study Area over the periods up to 2026. It is recognised that over the last decade there has been a significant downturn in the economy and, although recovery is underway, the levels of growth experienced prior to 2008 in the Study Area, Roscommon and Westmeath, the two Regions and State as a whole have not been achieved. This is outlined in Chapter 3 of the Strategy which sets out that the approach to the potential for additional retail floorspace requires to be provided under two population scenarios: It, as appropriate, takes account of:

i) **Scenario 1**: Results of the Census 2016; and

ii) **Scenario 2:** assessments founded on the RCDP 2014 and WCDP 2014 extrapolations of the WRPG 2010 and MRPG 2010 population targets.

6.2.1 Scenario 1: Founded on the Results of the Census 2016

This assessment incorporates the latest authoritative population and economic forecasts which reflect/respond to the changed economic conditions which prevailed at the 31st July 2017 freeze date for baseline information for the Strategy. At this point in time, these forecasts were provided by application of the following:

- The population forecasts presented in Chapter 3.
- The CSO's: Annual Services Inquiry (ASI); County Incomes and Gross Domestic Product – excluding rent (CIRGDP); and, the Consumer Price Index (CPI) statistics for 2013. This is the latest year for which comparable disaggregated information is available.
- With regards to CIRGDP, as the figures for Roscommon (**€15,320**) and Westmeath **(€16,221**) differ, the approach adopted has been to weight the figures by the estimated population percentages of Monksland/Bellanamullia and Athlone at 2013 to derive the figure for the Study Area. This is **€16,072**, reflecting the higher population weighting of the wider Athlone part of the area.
- The ESRI's *Medium – Term Review: 2013 – 2020* (the Review) provides forecast growth Gross Domestic Product (GDP) and other economic indicator trends to 2020. It is the GDP trends which are applied in the Strategy's economic forecasting. As the forecasts only extend to 2020, those for the period 2015 – 2020 have been extended to 2026 in the appraisal. The Review provides three scenarios and the Recovery and Delayed Adjustment scenarios, as opposed to the Stagnation Scenario, have been applied.
- Per capita convenience and comparison expenditure estimates which are derived from the CSO's ASI, CIRGDP and CPI for 2013 and the two ESRI scenarios.

A **2013 Price Year** for the assessment has been adopted, as highlighted above, as this was the latest year for which disaggregated information was available at the time of the freeze date for baseline data at the end of July 2017. Over the period of the Strategy, there will continue to be updated data published by the CSO and ESRI and new Price Years should be adopted accordingly by applicants in the capacity and Retail Impact Assessments/Retail Impact Statements (RIA/RIS) prepared in support of retail applications.

Applying the population projections for the Study Area to the derived per capita estimates provides an estimate of the total amount of potentially available convenience and comparison expenditure in the area. This is set out in Table 6.1 for both the Low and High per capita growth scenarios, with these being determined by the ESRI Delayed Adjustment and Recovery Scenarios respectively.

Table 6.1: Scenario 1 – Expenditure by the Resident Population in the Study Area 2017 – 2026 (2013 Prices)

Year	Conv (€)	Comp (€)	Study Area Population	Conv (€m)	Comp (€m)
2017 – Low	3,917	3,187	21,773	85.3	69.4

2017 – High	4,156	3,381		90.5	73.6
2020 – Low	4,306	3,503	23,096	99.4	80.9
2020 – High	4,662	3,729		107.7	87.6
2026 – Low	5,232	4,256	25,988	136.0	110.6
2026 – High	5,898	4,799		153.3	124.7

Source: MacCabe Durney Barnes

The analysis of retail expenditure is only concerned with expenditure which occurs within retail outlets i.e. that related to retail floorspace only. Therefore, as has been noted, the above figures discount shopping not occurring within a retail outlet e.g. via the internet or telephone.

6.2.2 Scenario 2: Founded on the two County Development Plans 2014 Extrapolations of WRPG 2010 and MRPG 2010 Population Projections

The inputs to this scenario only vary in respect of the population targets/projections derived from the RCDP 2014 and WCDP 2014, which extrapolate those from the WRPG 2010 and MRPG 2010 respectively. As such, the per capita estimates for both convenience and comparison expenditure remain the same as set out in Scenario 1. Given the higher population projections under this scenario, the consequent expenditure potential of residents in the Study Area over the period 2017 – 2026 is higher. This is evident from a comparative review of Table 6.2 below with the figures presented under Scenario 1 in Table 6.1.

Table 6.2: Scenario 2 – Expenditure by the Resident Population in the Study Area 2017 – 2026 (2013 Prices)

Year	Conv (€)	Comp (€)	Study Area Population	Conv (€m)	Comp (€m)
2017 – Low	3,917	3,187	27,037	105.9	86.2
2017 – High	4,156	3,381		112.4	91.4
2020 – Low	4,306	3,503	29,447	126.8	103.1
2020 – High	4,662	3,729		137.3	111.7
2026 – Low	5,232	4,256	34,464	180.3	146.7
2026 – High	5,898	4,799		203.3	165.4

Source: MacCabe Durney Barnes

6.3 Step 2: Turnover Estimates

The total amount of forecast convenience and comparison expenditure in the Study Area is what would be termed *'Gross Potential Expenditure Available'* from the projected resident population in the Study Area at 2017, 2020 and 2026 under either of the scenarios. However, as the results of the household and shopper surveys set out in Chapter 3 revealed, not all of this expenditure will be retained in the Study Area but there will also be inflows of spend from people living outside of the area. The balance of this supports the current turnover of retail outlets in the Study Area. This can be derived by applying estimates of percentage outflows and inflows of spend. These are defined as follows:

i) **Market Share:** the proportion of total expenditure by the Study Area's population that is retained in the area; and

ii) **Trade Draw:** the proportion of total turnover that is due to persons living outside of the Study Area.

The market share and trade draw percentages reflect the attraction of retail outlets in the Study Area at the current time. Although it is the long-held objective of both Councils to reduce expenditure outflows and increase inflows, particularly in respect of comparison spend, as all of the neighbouring/nearby counties will in parallel be seeking to improve their retail offers, then this would effectively counteract any improvement in the Study Area's market share and trade draw. This is the principle that is applied in the capacity assessment in the Strategy – they thus are determined to remain constant over the period 2019 – 2026. Noting this, founded on the findings of the household and shopper surveys, the following market share and trade draw estimates were modelled for convenience and comparison shopping patterns.

6.3.1 Convenience

The household and shopper surveys revealed the following convenience shopping patterns:

- **Market Share:** some **96.3%** of convenience expenditure was retained in the Study Area – only **3.7%** of spend was leaking elsewhere. This is a very sound and high level of convenience spend retention and reflects the quality and attraction of the Study Area's convenience offer.
- **Trade Draw:** there was **15.2%** convenience expenditure inflow from people living outside of the Study Area. This again is positive given the competitiveness of the retail market across the country. It can be anticipated to be primarily drawn from linked comparison shopping trips to the Study Area as generally people do their convenience shopping locally.

6.3.2 Comparison

As would be anticipated, the comparison shopping patterns derived from the surveys identified a different picture in respect of expenditure retention and inflows, particularly in respect of the former as set out below:

i) **Market Share:** some **87.2%** of resident's comparison expenditure was retained in the Study Area, with **12.8%** of spend leaking elsewhere. This reflects the quality and attraction of the Athlone Town Centre and the Golden Island Shopping Centre schemes' offers and the range of retail warehousing which prevails, but also the fact that local people make trips to other centres for comparison goods; and

ii) **Trade Draw:** there is a **17.8%** comparison expenditure inflow from people living outside of the Study Area. Again, this a direct consequence of the key attractors that underpin this which are the Marks & Spencer anchored Athlone Town Centre Shopping Centre, the Penneys/Tesco anchored Golden Island Shopping Centre and the retail warehousing offer of the area. Before the Athlone Town Centre scheme was introduced to the Study Area's retail landscape, it would be expected that comparison expenditure inflows would have been much lower.

6.3.3 Projected Turnover of Retail Units

The derived market share and trade draw assumptions from the household and shopper surveys have been incorporated in Table 6.3 under Scenario 1 which provides the estimation of turnover in retail floorspace in the Study Area over the period 2017 – 2026. The same exercise was undertaken for Scenario 2. The table presents the assessment under Scenario 1 and is provided as illustration of the approach adopted under the two scenarios.

Table 6.3: Scenario 1 – Projected Turnover from Retail Outlets Located in the Study Area (2013 Prices)

Period	%	Convenience		%	Comparison	
		Low	High		Low	High
2017						
Resident Expenditure		85.3	90.5		69.4	73.6
Less Expenditure Outflow	3.7	3.2	3.3	12.8	8.9	9.4
Spend by Residents in Outlets in Study Area		82.1	87.1		60.5	64.2
Add Imported Expenditure	15.2	14.7	15.6	17.8	13.1	13'9
Spend in Retail Outlets in Study Area		**96.9**	**102.8**		**73.6**	**78.1**
2020						
Resident Expenditure		99.4	107.7		80.9	87.6
Less Expenditure Outflow	3.7	3.7	4.0	12.8	10.4	11.2
Spend by Residents in Outlets in Study Area		95.8	103.7		70.5	76.4
Add Imported Expenditure	15.2	17.2	18.6	17.8	15.3	16.5
Spend in Retail Outlets in Study Area		**112.9**	**122.3**		**85.8**	**92.9**
2026						
Resident Expenditure		136.0	153.3		110.6	124.7
Less Expenditure Outflow	3.7	5.0	5.7	12.8	14.2	16.0
Spend by Residents in Outlets in Study Area		130.9	147.6		96.4	108.7
Add Imported Expenditure	15.2	23.5	26.5	17.8	20.9	23.5
Spend in Retail Outlets in Study Area		**154.4**	**174.1**		**117.3**	**132.3**

Source: MacCabe Durney Barnes

To calculate turnover, the amount spent by the Study Area's residents in retail outlets located outside the area (leakage) is subtracted from the total amount of potential retail expenditure by these residents. To this, is added the additional expenditure which is due to people living outside the Study Area (inflow). The combination of these deductions and additions provides the derived total turnover of retail outlets located in the Study Area. This

is the process used in calculating the turnover figures for 2017, 2020 and 2026 in Table 6.3 for both convenience and comparison floorspace under the Low and High growth scenarios.

6.4 Step 3: Gross Additional Expenditure Potential

Using the turnover estimates presented in Table 6.3 under Scenario 1, it is possible to estimate the growth in spare expenditure capacity that will occur in the Study Area up to 2026. The same exercise was conducted for Scenario 2. The estimates for both scenarios are provided below.

6.4.1 Scenario 1: Founded on the Results of the Census 2016

Table 6.4 below shows that population growth coupled with that projected in per capita consumption will increase the expenditure capacity of the Study Area under the Low and High growth scenarios by between:

- **€16.1m – €19.5m** for convenience goods and between **€12.2m – €14.8m** for comparison over the period 2017 – 2020.
- **€41.5m – €51.8m** for convenience goods and between **€31.5m – €39.4m** for comparison over the period 2020 – 2026.
- **€57.5m – €71.3m** for convenience goods and between **€43.7m – €54.2m** for comparison over the period of the remainder of the two County Development Plans 2014 (to 2020) and that of the next ones to 2026.

Table 6.4: Scenario 1 – Gross Spare Expenditure Potential (2013 Prices)

Period	Convenience		Comparison	
	Low	High	Low	High
2017 – 2020	16.1	19.5	12.2	14.8
2020 – 2026	41.5	51.8	31.5	39.4
Total	**57.5**	**71.3**	**43.7**	**54.2**

Source: MacCabe Durney Barnes
Note: Figures are rounded up and down

The table illustrates that convenience *Gross Spare Expenditure Potential* is considerably greater than that of comparison to 2026. This a direct consequence of comparison per capita expenditure having decreased relative to that of convenience in view of the impact of the recession on comparison spending.

6.4.2 Scenario 2: Founded on the County Development Plans 2014 Extrapolations of the WRPG 2010 and MRPG 2010 Population Projections

Comparison of the figures in Scenario 1 Table 6.4 with those under Scenario 2 in Table 6.5 below highlights the increased *Gross Spare Expenditure Potential* available in view of the greatly higher population targets/projections in the two County Development Plans 2014 and the WRPG 2010 and MRGP 2010.

Table 6.5: Scenario 2 – Gross Spare Expenditure Potential (2013 Prices)

Period	Convenience		Comparison	
	Low	High	Low	High
2017 – 2020	23.7	28.3	18.0	21.5
2020 – 2026	60.8	75.0	46.2	57.0
Total	**84.5**	**103.2**	**64.2**	**78.5**

Source: MacCabe Durney Barnes
Note: Figures are rounded up and down

6.5 Step 4: Future Sources of Retail Sales

The spare expenditure figures that have been estimated for the Study Area are gross estimates and need to be adjusted to take account of expenditure which may occur via new retail developments that are due to come on stream and increases in turnover efficiency. These are each addressed below.

6.5.1 Extant Planning Permissions

The freeze date for extant planning permissions incorporated in the capacity assessment was the end of July 2017. A detailed baseline of retail related permissions in the Study Area was provided by the Councils. This was augmented by: the findings of the health checks; further review of the Councils' website; and, consultations with members of the Councils' Client Team. Review of the information identified:

i) A significant number of the grants related to: change of use to retail; or from retail to alternative uses; and/or, alternatively from other uses to retail. These were generally small scale. Founded on knowledge of the preparation of county retail strategies across the country, they would not be included in the baseline for the broad assessment of the potential for additional retail floorspace. Consequently, they have not been included in the capacity assessment unless they were above the **500m²** net threshold for inclusion;

ii) There were no extant planning permissions; and

iii) Those permissions which had been implemented, albeit not all were fully trading.

The above principles underpinned the Scenario 1 and Scenario 2 assessments.

In considering **new retail outlets** that are planned for development, in the assessment regard has only been to those with a net floorspace of over **500m²**. This approach reflects that adopted in retail strategies which have been prepared for other generally rural counties and towns in the country. The underlying principle is that a retail strategy is prepared to provide strategic guidance in respect of the required broad assessment of the need for additional retail floorspace, albeit that smaller scale changes of use are important in the retail profile and dynamics of the different centres in the Study Area.

Founded on the above approach and principle, there were no extant planning permissions which fulfilled the criteria and were live at the end of July 2017.

6.5.2 Turnover Efficiency

Convenience floorspace is assumed to be operating efficiently and there is no further scope for increased efficiency. Over time, the efficiency of both existing and new comparison floorspace is assumed to increase by 1% per annum and will capture potential available spend. Comparison turnover efficiency growth is, therefore, calculated and incorporated in the capacity assessment for existing and emerging floorspace for the period 2017 – 2026.

6.6 Capacity Potential

6.6.1 Scenario 1 – Net Expenditure Potential

The expenditure accounted for by turnover efficiency growth is subtracted from the estimates of gross additional expenditure potential in Table 6.4. This results in estimates of net additional expenditure capacity, as set out in Table 6.6.

Table 6.6: Scenario 1 – Net Expenditure Potential (2013 Prices)

Period	Convenience		Comparison	
	Low	High	Low	High
2017 – 2020	16.1	19.5	7.5	10.1
2020 – 2026	41.5	51.8	22.1	29.9
Total	**57.5**	**71.3**	**29.5**	**40.0**

Source: MacCabe Durney Barnes
Note: Figures are rounded up and down

6.6.2 Scenario 2 – Net Expenditure Potential

The same exercise was conducted for Scenario 2. The results of this are provided in Table 6.7.

Table 6.7: Scenario 2 – Net Expenditure Potential (2013 Prices)

Period	Convenience		Comparison	
	Low	High	Low	High
2017 – 2020	23.7	28.3	13.3	16.8
2020 – 2026	60.8	75.0	36.7	47.5
Total	**84.5**	**103.2**	**50.0**	**64.3**

Source: MacCabe Durney Barnes
Note: Figures are rounded up and down

Comparative analysis of Tables 6.6 and 6.7 under the two scenarios highlights the greater scope and potential for additional retail floorspace in the Study Area over the period of the Strategy under the latter scenario in view of the population targets/forecasts that have been applied. Additionally, it is highlighted that the relatively low net expenditure potential over period 2017 – 2020 when compared to that for 2020 – 2026 is primarily the result of the short period of three years (2017 – 2020) against the six years of the next County Development Plans.

6.6.3 Floorspace Potential

The final part of the capacity assessment is to determine the amount of floorspace that is required to accommodate any anticipated increase in retail expenditure over the period of the Strategy (2017 – 2026).

By applying derived median weighted turnover ratios for **new** floorspace to the estimated net spare expenditure capacity presented in Tables 6.6 and 6.7, the estimated net retail floorspace potential can be calculated. The turnover ratios applied for both **new** convenience and comparison floorspace are median weighted across the different types of both floorspace. It is highlighted that these ratios are above those which prevail in respect of **existing** floorspace which is much lower – a fact not often recognised in retail strategies or RIA/RIS. They are set at a 2013 Price Year. For net convenience floorspace, a turnover ratio of **€14,837 per m²** is used while a ratio of **€6,988 per m²** is applied for comparison. Based on these principles, the broad assessment of the potential for additional retail floorspace in the Study Area under the two scenarios is outlined in the paragraphs that follow and a median scenario devised for the Strategy. It should be noted that the comparison element includes retail warehousing, albeit that the scope and additional potential for this is viewed as limited for the foreseeable future but it comes out of the overall comparison spend purse.

6.6.4 Scenario 1: Founded on the Results of the Census 2016

Under Scenario 1, Table 6.8 indicates that between 2017 – 2020 the potential for both new convenience and comparison floorspace is between **1,083m² – 1,314m²** and **1,071m² – 1,444m²** respectively under the Low and High growth scenarios. This reflects the factor outlined above – the short three-year time period. However, this requires to be put in the context of that unless an application or applications is/are at an advanced stage in the planning process, then it is unlikely that it/they will be capturing spend until after 2020.

The table illustrates that the scope for additional convenience and comparison floorspace considerably improves under the Low and High growth scenarios between 2020 – 2026 with the indicative net potential for both being **2,795m² – 3,492m²** and **3,157m² – 4,281m²** respectively.

Looking at the whole 2017 – 2026 timescale of the Strategy, the capacity for new convenience floorspace under the Low and High growth scenarios is **3,878m² – 4,806m²** and **4,228m² – 5,726m²** for comparison.

This represents a potential increase on the level of existing floorspace in the Study Area of between **23.7% – 29.3%** of convenience and **8.2% – 11.1%** comparison.

Table 6.8: Scenario 1 – Indicative Net Floorspace Potential (m²)

Period	Convenience		Comparison	
	Low	High	Low	High
2017 – 2020	1,083	1,314	1,071	1,444
2020 - 2026	2,795	3,492	3,157	4,281
Total	**3,878**	**4,806**	**4,228**	**5,726**

Source: MacCabe Durney Barnes
Note: Figures are rounded up and down

6.6.5 *Scenario 2: Founded on the County Development Plans 2014 Extrapolations of the WRPG 2010 and MRPG 2010 Population Projections*

The same exercise was undertaken for Scenario 2. In view of the higher population targets/forecasts applied, the potential for additional floorspace at both 2020 and 2026, and consequently over the whole period between 2017 – 2026, is much greater. This is illustrated by a comparative review of Tables 6.8 and 6.9. The percentage potential increases for convenience and comparison floorspace over the timescale of the Strategy under Scenario 2 are between **34.8% – 42.5%** and **13.9% – 17.9%** respectively against those under Scenario 1 of **23.7% – 29.3%** of convenience and **8.2% – 11.1%**.

Table 6.9: Scenario 2 – Indicative Net Floorspace Potential (m²)

Period	Convenience		Comparison	
	Low	High	Low	High
2017 – 2020	1,598	1,906	1,901	2,399
2020 – 2026	4,096	5,052	5,256	6,799
Total	**5,694**	**6,958**	**7,157**	**9,198**

Source: MacCabe Durney Barnes
Note: Figures are rounded up and down

6.6.6 *Strategy Scenario*

The GRP 2012 requires a broad assessment of the requirement for additional retail floorspace for plans covered by a Joint Retail Strategy. While the two scenarios founded on the different approaches to population forecasting have had to be constructed in the absence of up-to-date population targets set at the regional level, the Strategy requires to give clear guidance on what the broad assessment of this requirement must be and this cannot be achieved by presenting two scenarios. Therefore, the approach to the Strategy has been to select a scenario which is the median of Scenario 1 and Scenario 2 and this is set out in Table 6.10. The percentage potential increases for convenience and comparison floorspace over the timescale of the Strategy under the **Strategy Scenario** are between **29.2% – 35.9%** and **11.1% – 14.5%** respectively.

Table 6.10: Strategy Scenario – Indicative Net Floorspace Potential (m²)

Period	Convenience		Comparison	
	Low	High	Low	High
2017 – 2020	1,340	1,610	1,486	1,922
2020 - 2026	3,445	4,272	4,206	5,540
Total	**4,786**	**5,882**	**5,693**	**7,462**

Source: MacCabe Durney Barnes
Note: Figures are rounded up and down

6.7 Conclusion

As required in successive GRP, it is important to recognise that the figures presented in the capacity assessment provide a broad assessment of the **requirement** for additional new retail floorspace in the Study Area over the defined periods. They should, therefore, be taken

as **indicative** and as **guidance** on the quantum that will be required and are no way intended to be prescriptive. It is not a function of the capacity assessment to set a definitive cap on the scope for future retail development in the Study Area.

The above is particularly important given the divergence in the assessed potential for additional retail floorspace in the Study Area over the period of the remainder of the two County Development Plans 2014 and that of the next under the two scenarios.

Additionally, it is important to recognise that the assessment is a tool to inform decision-making, with the real control factor being meeting the tests of the assessment criteria for retail developments set out in Chapter 7 of the Strategy. This responds to the fact that different retail formats have different catchment areas and retail expenditure potential – with, for example, a major new shopping centre having a significant catchment area against that of other retail formats – and, consequently the Study Area not having a defined/set catchment area. As such, proposals will require to be assessed on their merits under the tests of the Strategy's assessment criteria, as well as those set down in the GRP 2012, rather than the proposed floorspace being examined as solely a quantitative exercise.

7 The Joint Retail Strategy

Every retail planning strategy must be clear to its purpose and what it intends to achieve. In respect of the Strategy, its foundations and purpose are set in the aim for the integrated retail planning and development of the spatial extent of Athlone Regional Centre and its environs by the two Councils. This aim is:

To promote the development of a vibrant and competitive retail sector within Athlone Regional Centre and its environs, whilst protecting the integrity, vibrancy and viability of the centre of Athlone.

To achieve the overall aim over the 2019 – 2026 period of the Strategy, a logical step-by-step framework has been adopted which is summarised in Figure 7.1.

Figure 7.1 Joint Retail Strategy Framework

7.1 Objectives

The objectives underpinning the Strategy have been informed by: the requirements of the GRP 2012; reviews of the WRPG and MRPG 2010, RCDP and WCDP 2014, ATDP 2014, M/BLAP 2016, RCRS 2014 and the DWCRS 2019; the current baseline and retail market trends; and, responding to the retail issues and opportunities that prevail in Athlone Regional Centre and its environs. Founded on this, the retail planning objectives of the Strategy are:

Objective 1: To sustain and improve the retail profile and competitiveness of Athlone Regional Centre and its environs within the retail economy of the two Counties and Regions and beyond.

Objective 2: To confirm a Retail Hierarchy for Athlone Regional Centre and its environs which assists in achieving the respective County and Regional Settlement Strategies and their objectives and provides clear guidance on where major new retail floorspace would be acceptable.

Objective 3: To provide the retail land use and planning policy framework that harnesses the potential of the Study Area's role within the national and regional economies and to ensure that Athlone and its environs fully play their role in achieving the objectives and targets of regional and national policies.

Objective 4: To reinforce the heart of the core area of Athlone as the priority location for

new retail development, with quality of design and integration/linkage being key underpinning principles.

Objective 5: To ensure that the retail needs of Athlone Regional Centre and its environs residents are met as fully as possible within the area, to enable the reduction in the requirement to travel to meet these needs and in the interests of achieving greater social inclusion and accessibility to shopping and services across all sectors of the community.

Objective 6: To address leakage of retail expenditure from Athlone Regional Centre and its environs by providing the means to strengthen the range and quality of its retail offer.

Objective 7: To align, as far as practicable, new retail development with existing and proposed public transport infrastructure and services and encourage access by foot and bicycle to reduce the dominance of access by private car.

Objective 8: To encourage and facilitate the re-use and regeneration of derelict and vacant land and buildings for retail and other Regional centre uses, with due cognisance to the Sequential Approach.

Objective 9: To promote and sustain the importance of retailing in Athlone Regional Centre and its environs tourism economy.

Objective 10: To encourage and facilitate innovation and diversification in Athlone Regional Centre and its environs retail profile and offer.

Objective 11: To provide the criteria for the assessment of retail development proposals.

7.2 Strategic Policy Framework

The achievement of the Strategy's objectives requires due cognisance to be taken of the strategic policy framework that underpins specific policies and proposals. This framework is set by the:

i) Athlone Joint Retail Strategy Retail Hierarchy;

ii) Core Retail Areas;

iii) Sequential Approach;

iv) Spatial Distribution of New Retail Development; and

v) Consideration of Need.

7.2.1 Athlone Joint Retail Strategy Retail Hierarchy

Policy SRP1: Athlone Regional Centre & Its Environs Retail Hierarchy

It is the policy of the Councils to guide major retail development in accordance with the framework provided by the Athlone Regional Centre and its environs Retail Hierarchy set out

in Table 7.1 to enable an efficient, equitable and sustainable distribution of floorspace throughout the area.

The Athlone Regional Centre and its environs Retail Hierarchy has been informed by the WRPG and MRPG 2010, the RCDP and WCDP 2014, the RCRS 2014 and DWCRS 2019. Reflecting this, the Athlone Regional Centre and its environs Retail Hierarchy is set out in Table 7.1. It is illustrated in Map 3 of Appendix I.

Table 7.1: Athlone Regional Centre & Its Environs Retail Hierarchy

Position in the Hierarchy	Description	Centre
Tier 1	Core/Central Area of Athlone	Core/Central Area Athlone.
Tier 2	Special Category Settlement	Monksland
Tier 3	Service Town	No Centres.
Tier 4	Neighbourhood Centres	**Existing:** Auburn, Baylough, Cloghnaboy/Ballymahon Road, Creggan/Kilmartin N6 Centre, Montree. **Potential:** Clonbrusk, Cornamagh.
Tier 5	Local Centres and Shops	Various in Athlone Regional Centre and its environs.

Source: Roscommon and Westmeath County Councils and MacCabe Durney Barnes

7.2.2 Core Retail Area

Policy SRP2: Core Retail Area

It is the policy of the Councils to define the Core Retail Area of Athlone Regional Centre to provide guidance on the Sequential Approach.

In accordance with the RCRS 2014 and DWCRS 2019, definition of a Core Retail Area relates only to the central/core area of Athlone. The defined Core Retail Area for Athlone, along with the development opportunity sites and retail hubs identified in the Sequential Approach within the 400 metre distance of the Core Retail Area, is illustrated in Map 4 in Appendix I. The Core Retail Area of Athlone comprises the following: Custume Place, Church Street, Dublin Gate Street, the Athlone Town Centre shopping centre and John Broderick Street.

The Core Retail Area has been modified from that defined in the ATDP 2014 and is generally smaller. The reduction in size reflects the issue that the larger the Core Retail Area is, then so too is the extent of the parameters for what would be defined as edge-of-centre sites, with consequential implications for impact on the vitality and viability of the heart of Athlone.

7.2.3 Sequential Approach

Policy SRP3: Sequential Approach

It is the policy of the Councils to provide guidance on the Sequential Approach in the core/centre of Athlone and the other main centres in the Athlone Regional Centre and its environs Retail Hierarchy.

The importance of the Sequential Approach in respect of sustaining and protecting the vitality and viability of centres is a fundamental principle in the Strategy. It is, thus, reinforced in the strategic policy framework for guiding new retail development. Proposals for retail developments in centres at whatever level in the Athlone Regional Centre and its environs Retail Hierarchy must take full cognisance of this as follows:

- In the first instance, the priority should be locating retail development in the core/centre of Athlone, or the other main centres in the Athlone Regional Centre and its environs Retail Hierarchy (refer Map 3).
- If central core locations are not readily available within a reasonable and realistic timescale, then edge-of-centre sites should be looked to. In successive GRP, these are defined as sites which are within 300 – 400 metres of the Core Retail Area, and less in smaller centres.
- Only after all the options for the centre of Athlone (or other main centres in the Athlone Regional Centre and its environs Retail Hierarchy) and edge-of-centre sites are exhausted should out-of-centre locations and sites be considered.

The suite of GRP qualify that the precise distance to apply in prescribing what is an edge-of centre site cannot be defined precisely as different centres vary in their size. Reflecting this, the approach adopted in the Strategy has been to distinguish between what is apposite for the centre of Athlone and the other main centres in the Athlone Regional Centre and its environs Retail Hierarchy as follows:

i) **Centre of Athlone:** a distance of 400 metres from the boundary of the Core Retail Area has been adopted in the identification of opportunity sites; and

ii) **Other Main Centres:** reflecting their smaller scale and size only the 300 metre distance would be applied and would be derived from the identification of a central point in each of the centres.

7.2.4 Spatial Distribution of New Retail Development

The Strategy, in accordance with the GRP 2012, provides the strategic policy framework for the spatial distribution of new retail development. The emphasis is on strategic guidance on the location and scale of major retail development. The Strategy does not seek to inhibit small-scale retail development in the other main centres in the Athlone Regional Centre and its environs Retail Hierarchy, but the scale should be appropriate to local needs. It should be taken to be implicit in the aims of the Strategy that such developments should be encouraged and facilitated to enhance the sustainability, vitality and viability of other main centres in the Athlone Regional Centre and its environs Retail Hierarchy. The hierarchy sets the framework for the spatial distribution of the nature and quantum of convenience and comparison floorspace. The following provides guidance on how the Strategy defines the

distribution of strategic and non-strategic retail floorspace that is appropriate in Athlone and its environs Retail Hierarchy:

- **Tier 1 – Centre of Athlone:** major convenience and comparison, including tourism related niche comparison.
- **Tier 2 – Special Category Settlement:** local level convenience and comparison and bulky goods floorspace. Convenience and comparison floorspace will be limited to lower order to ensure the primacy for higher and middle order convenience and comparison shopping remains in the centre of Athlone.
- **Tier 3 – Service Town:** No centres designated.
- **Tier 4 – Neighbourhood Centre:** local level convenience and comparison. Comparison floorspace will be limited to lower order to ensure the primacy for higher and middle order comparison shopping remains in the centre of Athlone.
- **Tier 5 – Local/Corner Shops:** predominantly additional local level convenience.

In addition, there are a number of retail warehousing parks distributed around Athlone Regional Centre and its environs. Retail warehousing parks do not form part of the retail hierarchy. However, they form an important part of the retail landscape of Athlone Regional Centre and its environs. It is these locations where retail warehousing should be located with the emphasis on the regeneration and re-use of existing vacant bulky goods floorspace, prior to any grants for new developments being permitted.

7.2.5 Consideration of Need

In the proper and sustainable integrated spatial retail planning of Athlone and its environs over the period of the Strategy, both qualitative and quantitative needs have to be considered. In respect of the consideration of qualitative need, this is set down in the objectives of the Strategy.

The quantitative consideration of need is determined by the broad assessment of the requirement for additional retail floorspace in Athlone and its environs under a **Strategy Scenario** which is the median of two scenarios: one based on the 2016 Census; and, the other based on the extrapolation of the MRPG 2010 population targets. The assessment is provided in Table 7.2 below.

Table 7.2: Strategy Scenario – Indicative Net Floorspace Potential (m^2)

Period	Convenience		Comparison	
	Low	High	Low	High
2017 – 2020	1,340	1,610	1,486	1,922
2020 - 2026	3,445	4,272	4,206	5,540
Total	**4,786**	**5,882**	**5,693**	**7,462**

Source: MacCabe Durney Barnes
Note: Figures are rounded up and down

7.3 Specific Policies & Proposals

The specific policies and proposals of the Strategy are designed to facilitate the achievement of the aim and objectives of the Strategy. As such, they are formulated to ensure that:

i) Existing or emerging issues in Athlone Regional Centre and its environs' retail profile have the policy framework to be addressed; and

ii) The expenditure capacity for additional floorspace is harnessed over the timescale of the Strategy.

7.3.1 Tier 1 – Centre of Athlone

Policy RP1: Tier 1 – Centre of Athlone

It is the policy of the Councils to promote and encourage major enhancement and expansion of retail floorspace and regional centre functions in the centre of Athlone to reflect its role as a major Regional Centre and further develop its competitiveness and importance as a key centre in Roscommon and Westmeath and the West and Midland Regions.

7.3.1.1 Strategic

The priority is continuing to grow and enhance convenience and mainstream comparison shopping in the centre of Athlone. The nationally recognised profile of Athlone, through the combination of the Athlone Town Centre and Golden Island Shopping Centres has reinforced the strategic retail function/profile of Athlone in the shopping patterns in both Roscommon and Westmeath and their respective regions. It has been secured and sustained throughout the period of economic recession the country has faced. This performance and potential requires to be built on recognising that, due to the fine grain morphology of the Core Retail Area of Athlone, then this would be difficult to achieve in the Core Retail Area of Athlone. However, through a suite of development opportunity sites, this can be redressed and underpin further growing Athlone's retail role, potential and profile within edge-of-centre sites in the Eastern Bank. These sites are identified in Map 4 of Appendix I and are:

- Adjacent to Southern Station Road
- At Loughanaskin
- Former shopping centre off St Mary's Square
- Between Sean Costello Street and John Broderick Street
- The Dunnes site and car park
- On Lloyds Lane and The Strand
- Golden Island.

In addition, the Strategy has identified the designation of lands on the Western Bank as a **Cultural and Tourism Quarter**. This designation is wholly in accord with the ATDP 2014 but reinforces the assessment that the area will not become a prime retail location within the centre of Athlone context. Rather its potential lies in the established recognition of the area being the as yet, the untapped Cultural and Tourism Quarter within the heart of Athlone. Retailing will play an important part of this but is envisaged to be craft/speciality/niche

rather than mainstream convenience or comparison floorspace. However, in parallel, there is recognition that the convenience shopping needs of local people require to be better met in the area and ensuring this is achieved is a fundamental principle of the Strategy.

7.3.1.2 Integration & Public Realm

There has been a long-term commitment in successive ATDPs to address/remodel/significantly enhance the public realm of the centre of Athlone. This is now beginning to be facilitated with the €3 million invested in the Church St. Enhancement Scheme jointly funded by the European Union and Westmeath County Council. It includes: the introduction of a one-way system on Church Street; traffic calming measures in key streets in the entre of Athlone; the paving of Church Street; and, the provision of new street furniture, soft landscaping, and trees. This requires to be extended across the whole of the centre if significant progress, profile and competitiveness of Athlone is to be sustained and developed. It should be through an ongoing programme of investment in the public realm, with appropriate street furniture, signage, tree planting and footpath improvements. Integral to this is the development of a parallel Interpretation and Signage Strategy.

Additionally, to improve the attraction and inclusiveness of the centre to all sectors of the community, an important principle should be that of proofing *Access Awareness* in all new developments and Movement and Environmental Enhancement Strategies. This should include mobility management measures and the provision of toilets and changing facilities for those in the community and visitors with profound and multiple learning difficulties and significant physical disabilities. It is not a principle which should apply to the Eastern Bank alone but across the Study Area as a whole, consequently, it is set down as one of the **General Retail Policies** that underpin the Strategy. By adopting this principle, Athlone could/will provide an exemplar for the approach which is required to be adopted in cities and towns around the country.

Although Athlone Town Centre and Golden Island Shopping Centre are the key retail locations in the core, there is little connectivity between them. As such, they serve as destination centres in their own right. A key strand in looking forward must be to overcome this to help strengthen the retail and commercial function and coherence of the centre.

In addition, as part of the above equation, Golden Island Shopping Centre is a dated centre surrounded by extensive surface car parking and adjacent to a mix of poor condition retail, commercial and industrial buildings, excluding the Aldi store, set in a generally degraded environment. Given the area's proximity to the Core Retail Area and its profile on the major amenity and tourism asset of the Shannon, it is a priority that there is strategic environmental enhancement and upgrading of the area.

A long-term vision is required for the designated Western Bank **Cultural and Tourism Quarter** which builds on the heritage asset and potential of the area. Strategic environmental enhancement is only one strand in the equation with a detailed examination of what the focus of the suite of cultural, tourism and niche retailing use mix requires to be. This should be informed by best practise exemplars from around the country and internationally.

There is a clear traffic challenge within the centre of Athlone. Traffic calming measures, enhanced pedestrian priority and improved pedestrian facilities would also serve to redress

the traffic challenges. There also requires to be improved bicycle lane and secure cycle parking facilities provided in the equation. Additionally, pedestrianisation of certain streets needs to be considered. Related to this is the need to manage and increase parking in the centre in terms of future provision, pricing structure and car park access points. The creative development of edge-of-centre opportunity sites around the Core Retail Area provides the potential to assist in this.

For the core area of Athlone to continue to sustain and enhance its role and attraction as a key retail and tourism destination in the two Counties and Regions and beyond as well as better meeting the needs of local people, it is the policy of the Councils:

RP2 *To support and implement appropriate development of lands for the future major retail expansion within the core area with the priority being the designated development opportunity sites and the linked integration of these lands with the Core Retail Area.*

RP3 *To develop a vision and strategy to progress the realisation of the Western Bank of Athlone as a Cultural and Tourism Quarter.*

RP4 *To support the incremental expansion of the Core Retail Area through the increased profile and ambience of its main streets by continuing the programmed enhancement of the public realm and encouraging intensification of retail, commercial leisure, tourism and cultural uses.*

RP5 *To prepare and implement a Movement and Environmental Enhancement Strategy for the whole of the core area of Athlone to secure the enhancement and renewal of the area and which includes an Interpretation and Signage Strategy to maximise the understanding of the heritage of Athlone.*

RP6 *To support the preparation of a strategic environmental masterplan for the Golden Island Shopping Centre and its immediate environs.*

RP7 *To prepare and implement a Traffic Management Plan for the whole of the core area of Athlone which addresses the strategic relief of congestion, examines opportunities for pedestrianisation, improves movement and integration for pedestrians, cyclists and the private car and redresses parking deficiencies and issues.*

RP8 *To work in partnership with local organisations, businesses and local people in the delivery of the policies and objectives for the core area of Athlone and Athlone Regional Centre and its environs as a whole.*

7.3.2 Tier 2: Special Category Settlement – Monksland

Policy RP9: Tier 2: Special Category Settlement – Monksland

It is the policy of the Councils to sustain and enhance the retail, services and community offer of Monksland/Bellanamullia as a more fully integrated part of Athlone and its environs, ensuring local needs are better met but without potentially having an adverse impact on the vitality and viability of the centre of Athlone.

7.3.2.1 Strategic

The main retail and commercial centre in the M/B/LAP (Athlone West) area is the River Village commercial area. It and adjacent lands have a District Centre zoning objective in the M/BLAP. The vision of Roscommon for the M/BLAP (Athlone West) area includes: the area continuing to be a prime centre for industrial and manufacturing development opportunities; it being a vital driver of social and economic development; and the consolidation of Monksland's commercial core through creating a sense of place and focus for the M/BLAP area.

Adjacent to the River Village commercial area is the 4* Athlone Springs Hotel and Leisure Complex, which is an important attraction and resource in the area for: local people; the profile local, national and international business community that are located in the area; and, that of visitors to the area. The River Village commercial area is a modern and well maintained retail and commercial centre. However, the dominance of surface car parking and paucity of landscaping mean that it does not create a real sense of place or focus. These are required if River Village commercial area is to evolve from essentially a suburban type centre into a dynamic heart of the community. The potential for this to be delivered is through densification of development, increased diversification of retail, commercial and community uses and a creative landscaping strategy. In respect of densification of development and diversification of retail uses in particular, the principle is that this should be to better meet the needs of local people and not have an adverse impact on the vitality and viability of the centre of Athlone. It is a principle which has been a constant in the decisions of Roscommon County Council and An Bord Pleanála (the Board), albeit these have related on the whole to sites external to River Village commercial area. The aforementioned is supported in the Strategic Aims, Strategic Development Objectives, Policies and Objectives of the M/BLAP (Athlone West) as summarised in Chapter 2 of the Strategy.

The River Village commercial area had one vacant unit at the freeze date for baseline information for the Strategy of 31st July 2017. This was not the profile of the nearby business parks, Daneswell and Westpoint Business Parks in particular where some levels of vacancy prevailed plus there were extant unimplemented permissions. The vacancies have a detrimental impact on the ambience of the heart of the M/BLAP area and there is consequent pressure for alternative use of the space. This is responded to further in the **General Retail Policies** which follow. However, as with the case with other retail warehousing developments in the Study Area, there is a presumption against the permission of new retail warehousing developments and the encouragement of the re-use of existing units unless it can be proven by prospective developers/operators that existing units of the nature proposed are not available or easily adaptable within the M/BLAP area for the duration of the Strategy. The aforementioned is supported in the Policies and Objectives of the M/BLAP (Athlone West) as summarised in Chapter 2 of the Strategy.

7.3.2.2 Integration & Public Realm

The issues with the public realm in the River Village commercial area have been outlined above. The remainder of the Monksland/Bellanamullia area is characterised by dispersed urban type development with no defined streets or open spaces. Greatly contributing to the lack of urban feel and identity is the predominance of large scale retail/commercial, business and industrial blocks of development served by large expanses of grey surface area car parking. This is further exacerbated by the greater levels of vacant floorspace and units. The

mechanisms to redress this and create an identity for the area require a combination of the following:

iv) The consolidation of commercial development into a single 'District Centre' which should be purpose designed and built in accordance with guidance provided in a Framework Plan for the overall landholding. This will provide a currently lacking central focus and 'sense of place' for the community. The development proposed in this area will also need to be of a high architectural standard which will improve the appearance of this urban environment;

v) Support for the policies (Policies 106-108) and objectives included in the M/BLAP referring to public spaces and places and car parking areas; and

vi) The introduction of street furniture, distinctive street lighting and public art.

The above, as with the enhancement of the River Village commercial area, will take time to deliver but should be achieved over the timescale of the Strategy. It is recognised that it will not be achieved by Roscommon alone but will require working with other public sector bodies, landowners, businesses, local organisations and the community.

Although there have been improvements in recent years, the road network serving Monksland/Bellanamullia – both strategically and within more localised areas – is constrained by: the lack of cross linkages in the area and a number of inadequate junctions. These constraints limit the provision of new access points and the levels of additional traffic which can be accommodated, which are issues in respect of the growing pressures for further commercial, enterprise and residential development in the M/BLAP area, plus the increasing prevalence of road safety issues. Subject to funds being available, a number of schemes and improvements are programmed to further relieve the situation.

In parallel, there has been a recent improvement to bus services serving the Monksland/Bellanamullia area. As residential, commercial, business and industrial development in the area expands, there will be a need to ensure that these developments continue to be better and more sustainably served by public transport. While improved bus connectivity to the centre of Athlone and other parts of its environs has been achieved, there remains a relative paucity of bus stops and bus stops with shelter within Monksland/Bellanamuullia. This is important in respect of more localised bus travel given that the area is characterised by dispersed urban type development. Local people need to have the option of travelling to shops, other local services, work, school and community facilities by bus as well as by private car, cycling or walking.

As with the remainder of Athlone and its environs, although cycling is popular, cyclists are poorly provided for in terms of either cycle lanes and secure cycle parking facilities within the Monksland/Bellanamullia area. An Athlone West Strategic Transport Assessment is currently being prepared which will provide recommendations concerning walking and cycling in the M/BLAP area which Roscommon County Council will be able to progress subject to funding.

It is recognised that within Monksland/Bellanamullia that currently optimum connectivity through a network of pedestrian paths has not been achieved but improvements are in progress which are also envisaged to be included in the recommendations in the forthcoming Athlone West Strategic Transport Assessment. With regard to the River Village commercial area, this must be one of the key priorities to enable people from surrounding residential, business and industrial areas to safely walk to the shops, work places and other services.

For Monksland/Bellanamullia to sustain and enhance its retail, business, services and community offer and better play its role as an integral part of Athlone Regional Centre and its environs, it is the policy of the Councils:

RP10 *To encourage the densification and diversification of retail, non-retail services, commercial and community uses in the River Village commercial area to better meet local needs, with the scale and nature of proposals determined to not have an adverse impact on the vitality and viability of the centre of Athlone.*

RP11 *To have a presumption against new retail warehousing proposals, with the priority being the re-use of vacant units, unless it can be proven by prospective developers that existing units of the nature proposed are not available or easily adaptable within the Monksland/Bellanamullia area for the duration of the Strategy.*

RP12 *To progress the finalisation of the Framework Plan for SO3 District Centre lands and to require all planning applications to be accompanied by a design statement and landscaping plan to ensure consistent, high-quality developments on the site and to enable the Planning Authority to assess applications accordingly, in line with the approved Framework Plan for the area.*

RP13 *To promote adherence in all retail proposals to Urban Design, and Architecture and Building Design principles, as set out in Policies 96 to 108 and Objectives 88 – 94 of the Monksland/Bellanamullia (Athlone West) LAP 2016 – 2022.*

7.3.3 Tier 4: Neighbourhood Centres – Existing & Potential

Policy RP14

It is the policy of the Councils to sustain and facilitate a network of existing and potential Neighbourhood Centres in existing and growing residential areas in Athlone and its environs to ensure that local needs are better met.

Neighbourhood Centres are designated Tier 4 centres in the Athlone and its environs Retail Hierarchy. There is currently a network of five Neighbourhood Centres – Auburn, Baylough, Cloghanboy/Ballymahon Road, Creggan/Kilmartin N6 Centre and Montree. A further two locations are identified as potential Neighbourhood Centres in the growing and planned residential areas of Clonbrusk and Cornamagh. These are identified in Map 3 of Appendix I.

The GRP 2012 define a Neighbourhood Centre as consisting of a small group of shops, typically comprising a newsagent and anchored by a small supermarket – be that a mainstream, symbol group or discount operator – and have the potential to provide a small range of local non-retail services, civic, community and commercial leisure floorspace serving a small localised catchment population. The existing centres are generally: relatively recent developments; anchored by a supermarket; and, limited in their scale and function. All existing Neighbourhood Centres: have different levels of local bus services; are served by surface car parks; have limited secure parking provision for cyclists; and, have very limited landscaping.

While all existing and potential Neighbourhood Centres should retain their function and profile as Tier 4 Neighbourhood Centres in the Athlone and its environs Retail Hierarchy, there will be scope over the timescale of the Strategy for limited expansion of retail and non-

retail services floorspace to ensure that the needs of their expanding residential areas continue to be met sustainably locally.

There is a need to respond to the deficiencies in both cycling facilities and landscaping. With respect to the latter, of key importance is the need to enhance the local urban environment. Additionally, as with the centre of Athlone and Monksland/Bellanamullia, there is a need to ensure that the attraction and inclusiveness of the Neighbourhood Centre is *Access Awareness* proofed to ensure mobility management measures and the provision of toilets and changing facilities for those in the community and visitors with profound and multiple learning difficulties and significant physical disabilities are in place. This should be a requirement on the checklist for the proposed potential of Neighbourhood Centres.

For the existing and potential Neighbourhood Centres to continue to respond to local needs and better serve their local communities, it is the policy of the Councils:

RP15 *To positively respond to appropriately scaled expansion of retail and non-retail services in existing Neighbourhood Centres in expanding residential areas, subject to proposals meeting the tests of the Sequential Approach.*

RP16 *To formally designate and zone lands for potential new Neighbourhood Centres in Clonbrusk and* Cornamagh *in the new Joint Athlone Urban Area Plan.*

RP17 *To liaise with landowners and operators to achieve enhanced cycling facilities, landscaping, and mobility management measures and the provision of toilets and changing facilities which meet the needs of those in the community and visitors with profound and multiple learning difficulties and significant physical disabilities.*

7.4 General Retail Policies

In addition to specific policies relating to the main centres in Athlone Regional Centre and its environs, a number of general policies are defined to shape retailing in the Study Area over the period of the Strategy. These are set out in the paragraphs which follow.

7.4.1 Mobility Management & Access Awareness

A key principle underpinning this Strategy is that it should be a leader and exemplar in respect of proofing *Access Awareness* in existing and proposed developments. Underpinning this is a commitment by the Councils set out in the following policy:

GR1 *To improve the attraction and inclusiveness of the core area of Athlone and other main centres, (both current and potential), in the Athlone Regional Centre and its environs Retail Hierarchy to all sectors of the community, an important principle should be that of proofing Access Awareness in the Strategy which includes mobility management measures and the provision of toilets and changing facilities for those in the community and visitors with profound and multiple learning difficulties and significant physical disabilities. This is a principle which should apply across Athlone Regional Centre-and its environs as a whole.*

7.4.2 Local/Corner Shops

Local/Corner Shops are designated as Tier 5 centres in the Athlone Regional Centre and its environs Retail Hierarchy They are not specifically identified in the Map 3 of Appendix I but are distributed throughout the Study Area. The role and function of Local/Corner Shops in the life of the community is recognised as very important. They predominantly serve local level convenience shopping needs, but some will provide a limited range of non-retail services.

Reflecting their role and importance, it is the policy of the Councils:

GR2 *To retain, encourage and facilitate the retail and limited non-retail services role of Local/Corner Shops around Athlone Regional Centre and its environs.*

7.4.3 Convenience

The enhancement of the convenience/food shopping offer across Athlone Regional Centre and its environs is a sustainable objective. Underpinning this is the need to ensure the sustained vitality, viability and attraction of centres at all levels of Athlone Regional Centre and its environs Retail Hierarchy and, as such, new foodstores should be located in the core/central area of Athlone, Monksland and Neighbourhood Centres with all other applications demonstrating they fully meet the tests of the Sequential Approach. The GRP 2012 no longer distinguishes between discount stores and other convenience shops and the Strategy reinforces this. There is concern with the exclusion of any comparison threshold within the net floor space cap of 3,000m² for large convenience stores in the Study Area, as set out in the GRP 2012. This is specifically as a number of the main national and international convenience operators are potentially opening the door to in-store High Street mainstream fashion brand concessions. This has very real potential implications for the vitality, viability and attraction of the central area of Athlone, specifically its Core Retail Area. Over the period of the Strategy, it is an issue which will be fully addressed in the assessment of applications for large scale convenience stores.

To ensure that these issues are addressed, it is the policy of the Councils:

GR3 *To request that the nature of the comparison component of proposed large convenience stores is provided in detail and a transparent and evidence based RIA/RIS provided in support of the application.*

GR4 *To refuse permission for edge of and out of centre large convenience stores which include a large component of High Street fashion brand/labels in the comparison mix proposed in the interests of sustaining and further enhancing the vitality, viability and attraction of Athlone Regional Centre Core Retail Area.*

7.4.4 District Centres

The GRP 2012 in Annex 1 – *Glossary of Terms* under A.1.5 *Types of Centre* sets out the following description of what a District Centre comprises:

'Provides a range of retail and non-retail service functions (e.g. banks, post office, local offices, restaurants, public houses, community and cultural facilities) for the community at a

level consistent with the function of that centre in the core strategy. They can be purpose built as in new or expanding suburbs or traditional district centres in large cities or towns.'

Within the M/BLAP 2016, the central area of Monksland is zoned District Centre (DC) and it is an objective of Roscommon County Council to increase the range of local shopping, non-retail services, commercial leisure and community and cultural facilities in the Tier 2 Special Category Settlement to better meet the needs of local people, subject to the population of Athlone West increasing over the period of the Plan. Additionally, the Council seeks that the retail mix and quantum does not have an adverse impact on the vitality, viability and attraction of the- centre of Athlone, specifically its Core Retail Area. The DC zoning objective specifically advises that while supermarkets are permissible, superstores are not. The vision of Roscommon for the Monksland/Bellanamullia (Athlone West) LAP area includes: the area continuing to be a prime centre for industrial and manufacturing development opportunities; it being a vital driver of social and economic development; and the consolidation of Monksland's commercial core through creating a sense of place and focus for the Local Area Plan area.

Additionally, the previous GRP set out what the thresholds for District Centres were likely to comprise and, outside of the Dublin Area, in or adjacent to main towns this was 10,000m². This has not been the guidance provided in the GRP 2012 where no threshold is provided. In the context of Athlone Regional Centre and its environs and the priority of the *'town centre first'* principle, the nature and scale of District Centres, as prescribed in the GRP 2012, are deemed not to be an appropriate centre or retail format in the Athlone Regional Centre and its environs Retail Hierarchy. As such, it is the policy of the Councils:

GR5 *To not facilitate applications for District Centres of the nature prescribed in the GRP 2012 in Athlone and its environs to ensure and protect the vitality, viability and attraction of the Core Retail Area of the centre of Athlone.*

7.4.5 Retail Warehousing Parks

In view of the saturation of the retail warehouse market over the last decade, there are both many unimplemented permissions for new retail parks and vacancies in existing retail parks/bulky goods developments. The priority of both Councils is to secure the regeneration of existing retail parks through the use of vacant land and buildings for bulky goods shopping.

Additionally, there has been increasing pressure on the Councils for alternative forms of retailing to bulky goods shopping to be permissible on retail parks. To protect the vitality and viability of the centre of Athlone Regional Centre and avoid retail parks emerging as out-of-town shopping centres, this pressure has been resisted by the Councils. This responds to advice in the GRP 2012 which states under paragraph 4.11.2 – *Retail Parks and Retail Warehouses* that:

'To minimise potential adverse impacts on central areas, it is important that the range of goods sold in both existing and any future retail parks is tightly controlled and limited to truly bulky household goods or goods which are not portable by customers travelling by foot, cycle or bus.'

Reflecting the issues of vacancies and the above advice, it is the policy of the Councils:

GR6 *To not facilitate planning consent for new retail parks until 75% of existing vacant retail warehousing is occupied and this position be monitored over the timescale of the Strategy.*

GR7 *To prohibit mainstream and discount convenience retail developments in retail parks.*

GR8 *To prohibit mainstream comparison retail development or retailers in retail parks.*

7.4.6 Retail Development in Business Parks & Employment Areas

Increasingly, single use large employment areas, be they business parks or industrial parks/estates, have generally been superseded by more mixed-use sustainable development models that combine working, living, leisure, shopping and local services provision. In addition to being a more sustainable development strategy for major strategic greenfield and brownfield locations, the introduction of local shopping and services provision is an important ingredient in the attraction and competitiveness of such areas. In respect of older employment areas, retail provision will be limited unless it directly interfaces with existing and expanding residential areas and forms part of a strategic approach to provision in Athlone Regional Centre and its environs. Any further retail floorspace in such employment areas will be restricted to meeting the convenience and non-retail services needs of employees rather than facilitating the creation of a new Neighbourhood Centres or enabling retail warehousing to be introduced.

Underpinning this strategic approach, it is the policy of the Councils:

GR9 *To ensure that the level of retail and local services provision in existing and new major employment areas sustains and enhances their attraction as locations for investment and working in.*

GR10 *To provide the land-use and retail planning framework to ensure that the mixed-use strategies for new employment areas respond to the wider context of need and demand in related expanding residential areas in the interests of ensuring that these locations are attractive to new residents, workers and employers.*

GR11 *To limit the level of shopping and local services provision in existing industrial estates or business parks. Sstand-alone mainstream and discount convenience or comparison floorspace will not be permitted but the introduction of wholesale retail floorspace will be open for consideration.*

7.4.7 Re-Use & Regeneration of Derelict & Underutilised Land & Buildings

Re-use and regeneration of derelict/obsolete/underutilised land and buildings in centres in the Athlone Regional Centre and its environs Retail Hierarchy is a sustainable and desirable objective. In the context of the centre of Athlone in particular, regeneration and renewal are important, as they will help achieve preservation and restoration of the character and quality of the core area, particularly in terms of vernacular/historical architecture, scale, height, density and massing. The potential for the re-use and regeneration of derelict buildings and brownfield or underutilised sites in centres within Athlone and its environs should be promoted in the formulation of retail and mixed-use development proposals. Only where suitable, available and viable land and buildings cannot be found should alternative options be considered by applicants.

To deliver the achievement of these principles, it is the policy of the Councils:

GR12 *To identify obsolete and potential renewal areas and to encourage and facilitate the re-use and regeneration of derelict land and buildings in the centre of Athlone and other centres in the Athlone Regional Centre –and environs Retail Hierarchy. The Councils will use their statutory powers, where appropriate, to facilitate this and consider such buildings and lands for inclusion in the Register of Derelict Sites or the Vacant Sites Register, where appropriate.*

GR13 *To work with landowners and development interests to pursue the potential of suitable, available and viable land and buildings for retail and other regional centre uses in the centre of Athlone and across all centres in the Athlone Regional Centre and its environs Retail Hierarchy.*

7.4.8 Retailing & Tourism & Leisure

The specific policies for Athlone Regional Centre and its environs serve to highlight the importance of tourism in the economy. To date, the full retail dimension of the Study Area's tourism economy has not been harnessed. To help redress this, there requires to be greater connectivity with the assets and attractions of the centre of Athlone and the River Shannon. As this is of considerable importance to the wider Roscommon and Westmeath economies, retail-related tourism requires to develop a greater critical mass and profile, in the interests of the attraction and competitiveness of the two Counties.

To develop and better harness this potential, it is the policy of the Councils:

GR14 *To encourage and facilitate the development of retailing in the tourism and leisure sectors, subject to protecting these assets and amenities from insensitive and inappropriate development.*

GR15 *To encourage and facilitate the delivery of tourism related retail developments and initiatives, subject to compliance with the Strategy's objectives and assessment criteria.*

7.4.9 Non-Retail Uses in Main Centres in the Athlone Regional Centre & Its Environs Retail Hierarchy

The Terms of Reference for the preparation of this Strategy indicated concern with regard to the overprovision of lower order services within the main centres of Athlone Regional Centre and its environs and that this was impacting on the characteristics and ambience of these centres. These lower order services were identified as take-aways and betting offices. However, there is a wider range of retail and non-retail uses which also contribute to the potential undermining of the heart of these centres. These include amusement/gaming arcades, budget shops, charity shops, telephone/mobile shops and business and financial services. To maintain the integrity, critical mass of quality retail activity, viability and vitality of Athlone's Core Retail Area and other main centres in the Athlone Regional Centre and its environs Retail Hierarchy, the Councils will seek to discourage an overconcentration of the aforementioned uses.

To achieve this objective, it is the policy of the Councils:

GR16 *To not facilitate planning applications for amusement/gaming arcades as they are considered to be an undesirable use and potentially detrimental to the business and commercial environment of centres in Athlone* Regional Centre *and its environs.*

GR17 *To discourage where possible within their statutory powers the introduction of non-retail and lower grade retail uses in the Athlone Core Retail Area and centre and in other main centres in the Athlone Regional Centre and its environs Retail Hierarchy in the interests of maintaining and sustaining the retail attraction of these centres.*

7.4.10 Markets

Farmer's Markets and Christmas Markets are a popular form of traditional retailing which meet local shopping needs, often with a range of other specialist and tourism-related shopping. Currently, there are Farmer's Markets in Roscommon Town and Boyle in Roscommon and in Athlone, Mullingar, Moate and Clonmellon in Westmeath, with Christmas Markets in the majority of main centres in both Counties. Quality markets are key attractors to centres and greatly add to their vibrancy and ambience. To complement the successful markets in the centre of Athlone, the scope and potential for their introduction to the Monksland retail landscape requires to be examined as this would greatly contribute to creating a sense of place at the heart of the centre.

To harness this potential, it is the policy of the Councils:

GR18 *To encourage and facilitate the introduction of a Farmer's and Christmas Market in the Tier 2 Special Category Settlement of Monksland.*

7.4.11 Casual Trading

In contrast to Farmers' Markets, those which would come under the banner of Casual Trading are not considered to be the image and attraction sought for the centre of Athlone or other main centres in the Athlone Regional Centre and its environs Retail Hierarchy. In addition to not having the ambience of Farmers' Markets, they are viewed as creating adverse environmental effects such as noise, litter and traffic congestion. To seek to redress this, the Councils will carry out their statutory functions under the Casual Trading Act 1995, including the issuing of permits and the designation of Casual Trading Areas where the Councils considers these to be necessary.

In recognition of the prevailing issues, it is the policy of the Councils:

GR19 *To prosecute in situations where the Casual Trading Act 1995 is being contravened.*

GR20 *To take cognisance of the proper and sustainable development of the centre of Athlone and other main centres in the Athlone* Regional Centre *and its environs Retail Hierarchy, including the preservation and improvement of amenities, the safety and convenience of pedestrians, the traffic likely to be generated by Casual Trading and the promotion of tourism.*

7.4.12 Innovation in Athlone & Its Environs Retail Offer

After the boom years in retail development, following the impact of the recession, there remains caution in CSO and ESRI forecasts on whether the retail sector achieves the level and

profile of its expansion years in the last decade. This noted, to ensure that Athlone and its environs sustains and enhances its attraction and competitiveness as a retail destination, it must be proactive and responsive in respect of innovation in retailing and new retail market trends. Therefore, encouraging and facilitating innovation, be that in trading format, location or product, will assist Athlone and its environs to build on the success that has been established to date and, consequently, its retail profile and attraction.

To ensure this remains a strategic component in the development of Athlone and its environs retail and tourism profile and competitiveness, it is the policy of the Councils:

GR21 *To encourage and facilitate innovation in Athlone and its environs retail offer and attraction.*

GR22 *To review and monitor retail trends that could have an influence on the performance of the sector within Athlone and its environs and pursue harnessing new concepts and formats in the Study Area's retail structure.*

7.4.13 Petrol Filling Stations

The GRP 2012 reinforced that the size of retail units associated with petrol filling stations should not exceed 100m^2 net. Where permission is sought for floorspace in excess of 100m^2 in retail units associated with petrol filling stations, the Sequential Approach to retail development shall apply i.e. the retail element of the proposal shall be assessed by the Planning Authority in the same way as would an application for retail development (without petrol/diesel filling facilities) in the same location. In addition, there has been development pressure for non-retail food takeaways and cafes at filling stations, which have the potential to adversely affect main centres in the Athlone Regional Centre and its environs Retail Hierarchy through trade diversion. In respect of the latter, this is highlighted as a concern of the Councils.

To be consistent with the guidance in the GRP 2012 and limit the range and function of petrol filling stations, it is the policy of the Councils:

GR23 *To generally restrict the size of any retail units associated with petrol filling stations to 100m^2 of net retail floor area and ensure that any proposals above this threshold will be subject to the Sequential Approach.*

GR24 *To generally refuse permission for food takeaway outlets and cafes in petrol filling stations if not located in a designated centre.*

7.5 Criteria for Assessment of Retail Proposals

The development management process is fundamental to the delivery of an effective retail strategy. In accordance with the requirements of the GRP 2012, the Strategy identifies the development management criteria for the assessment of retail developments. These criteria apply to the assessment of what is considered significant retail development in the context of Athlone Regional Centre and its environs. Development thresholds for rural counties, such as Roscommon and Westmeath, generally distinguish between what should be applied to major centres and what is appropriate at lower levels in the County Retail Hierarchy. This is the approach adopted with regards threshold levels in Athlone and its environs which are developments of 1,000m² gross convenience and 2,000m² gross comparison will be tested by

the assessment criteria.

Applications for significant retail development will be assessed in accordance with the following criteria and whether or not the proposal will:

i) Support the long-term strategy for the Central area of Athlone and other main centres in the Athlone Regional Centre and its environs Retail Hierarchy, as established in the Strategy, and not materially diminish the prospect of attracting the private sector into one or more such centres;

ii) Have the potential to increase employment opportunities and promote site and centre sustainable economic regeneration in the regional centre area of Athlone and other main centres in the Athlone and its environs Retail Hierarchy;

iii) Have the potential to increase the competitiveness of Athlone and its environs regionally, nationally and internationally, as appropriate, and thereby attract further consumers/shoppers to the centre of Athlone and other main centres in the Athlone Regional Centre and its environs Retail Hierarchy;

iv) Respond to consumer demand for its retail offer and not diminish the range of activities that all centres across the Athlone Regional Centre and its environs Retail Hierarchy can support and sustain;

v) Cause an adverse impact on the centre of Athlone, either singly or cumulatively with recent developments, outstanding permissions (which have a realistic prospect of implementation) or those which are at an advanced stage in the planning process, sufficient to undermine the quality of the centre or its wider function in the promotion and encouragement of the arts, culture, leisure and public realm, all of which are critical to the economic and social life of communities in Athlone Regional Centre and its environs;

vi) Cause an increase in the number of vacant properties within the designated Athlone Regional Centre Core Retail Area;

vii) Ensure a high standard of access by public transport, foot, bicycle and private car so that the proposal is easily accessible by all sections of society. Specifically, details of proposed Mobility Management/Access Awareness measures should be provided which outline how the proposed development could both improve accessibility of retail areas while aiming to contribute to the development of pedestrian and cyclist friendly centre environments and a vibrant street life; and

viii) Link effectively with the centre of Athlone so that there is likely to be commercial synergy.

In addition, the Councils will seek that applications for new retail developments address and provide evidence in respect of the following:

- The relationship of the application to any Development Plan/Local Area Plan/Urban Area Plan allocations.
- Assessment of the proposal against the tests of the Sequential Approach with all other options being considered. Under the Sequential Approach, the following criteria requires to be addressed:
  - If a brownfield site within the core of Athlone or other main centre site in the Athlone Regional Centre and its environs Retail Hierarchy is not being promoted in

the application, it should be demonstrated that all the regional centre of Athlone or other main centres options in the Athlone Regional Centre and its environs Retail Hierarchy have been fully evaluated and that flexibility has been adopted with regard to the retail format.

- In all cases, the site should offer the optimum accessibility by all transport modes, including walking and cycling, and this is generally best achieved within the centre of Athlone or other main centres in the Athlone Regional Centre and its environs Retail Hierarchy.
- There is demonstrable qualitative and quantitative need for the proposal and it is in accordance with the centre's role and level in the Athlone Regional Centre and its environs Retail Hierarchy. In respect of quantitative need, this should be derived from the expenditure capacity within the relevant catchment area which should be appropriate to the nature and quantum of the retail floorspace proposed. All applications should provide details of the methodology applied and the source inputs to the capacity assessment.
- The baseline information and capacity/impact assessment is fit for purpose and transparent.
- Its contribution to the centre of Athlone and other main centres in the Athlone Regional Centre and its environs Retail Hierarchy improvement through quality of design, public realm interventions and integration.
- Its contribution to site and/or area regeneration.
- The extent to which it is relevant to consider the imposition of restrictions on the nature and range of goods permitted for sale.

The Councils will consider hours of operation in assessing planning applications for retail development and may attach conditions restricting same.

In making applications for retail development above the Strategy defined thresholds, applicants should ensure that the proposal addresses and demonstrates compliance with above assessment criteria. This is a requirement set down in the GRP 2012.

If the retail proposal, whether significant or not, is in compliance with Development Plan and Local Area Plan policies and proposals in all material respects, it should expect to be met with approval. In accordance with the GRP 2012, in such instances, it should not be necessary for the applicant to provide additional supporting background studies. However, the onus is on the applicant to demonstrate convincingly that the proposal does comply with these plans as appropriate. Where there is doubt on any aspect of a planning application, the Councils will require a detailed justification related to the matter that is questionable. The Councils will, however, seek to ensure that all potential issues in respect of the proposal are identified and understood at the pre-application stage through pre-application consultations with applicants.

GR25 *All applications for large retail development will be assessed in accordance with the Athlone Joint Retail Strategy assessment criteria.*

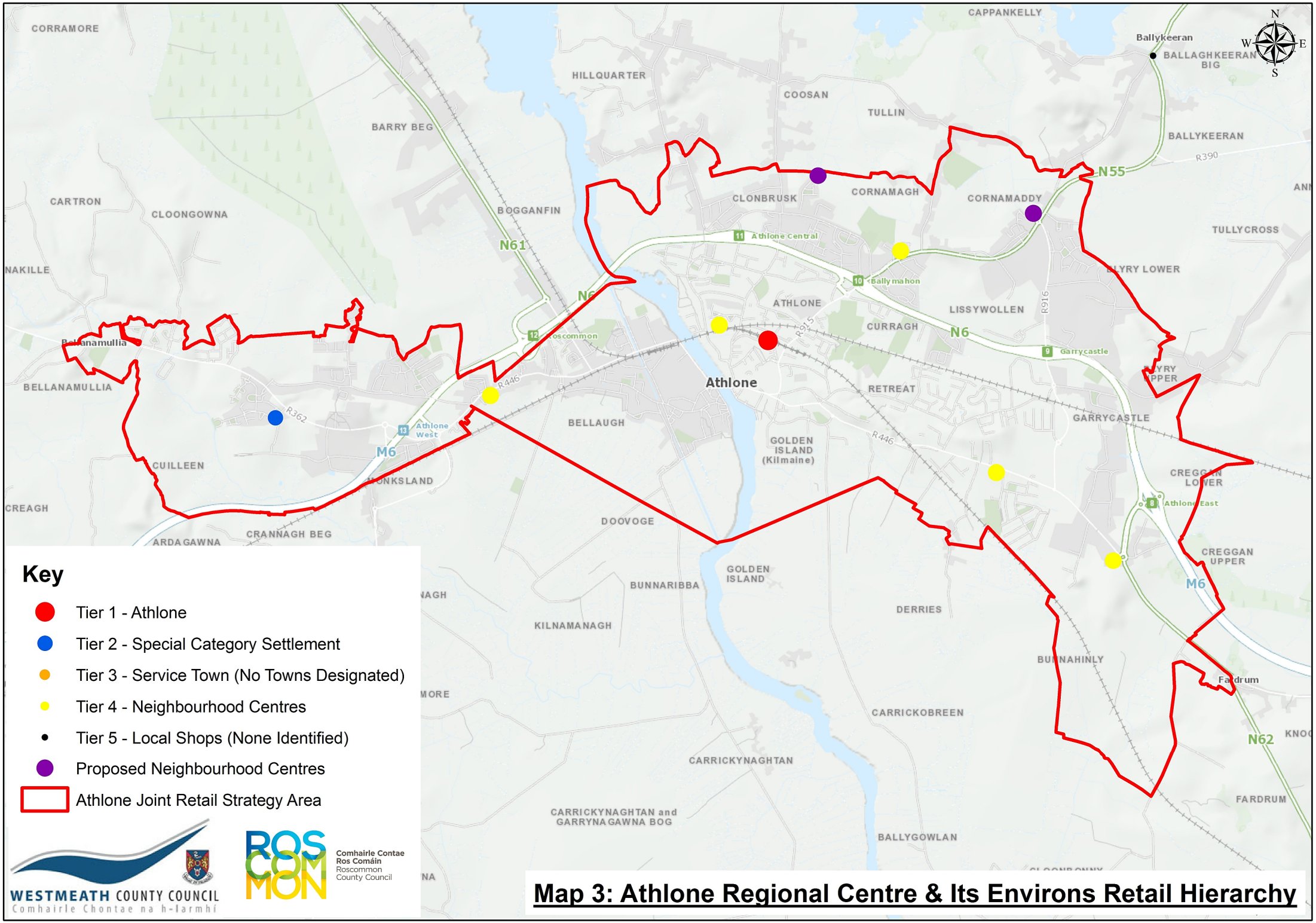
7.6 Monitoring & Review

This Strategy shall be reviewed in parallel with that of the RCDP 2014, WCDP 2014, RCRS 2014, DWCRS 2019 and in the preparation of the emerging UAP for Athlone following the adoption of the Western and Northern and Eastern and Midland RSES's. This will enable monitoring of the progress made in the delivery of the Strategy, permissions granted and implemented and on envisaged changes to the population and economic assumptions applied to be made. This review of the Strategy will form part of that of the RCDP 2014 and WCDP 2014 which will underpin the preparation of the two County Development Plans 2020 – 2026. As future Athlone Joint Retail Strategies will be aligned to the timeframe of the County Development Plans then interim update and review monitoring reports will be produced at regular intervals of no less than every second year. If the findings of these reports indicate any significant changes in baseline information or trends, as deemed appropriate, the Councils will review the Strategy or parts thereof.

Appendix I –

Map 3: Athlone Regional Centre & Its Environs Retail Hierarchy

Map 4: Retail Core Area and Opportunity Sites within Athlone



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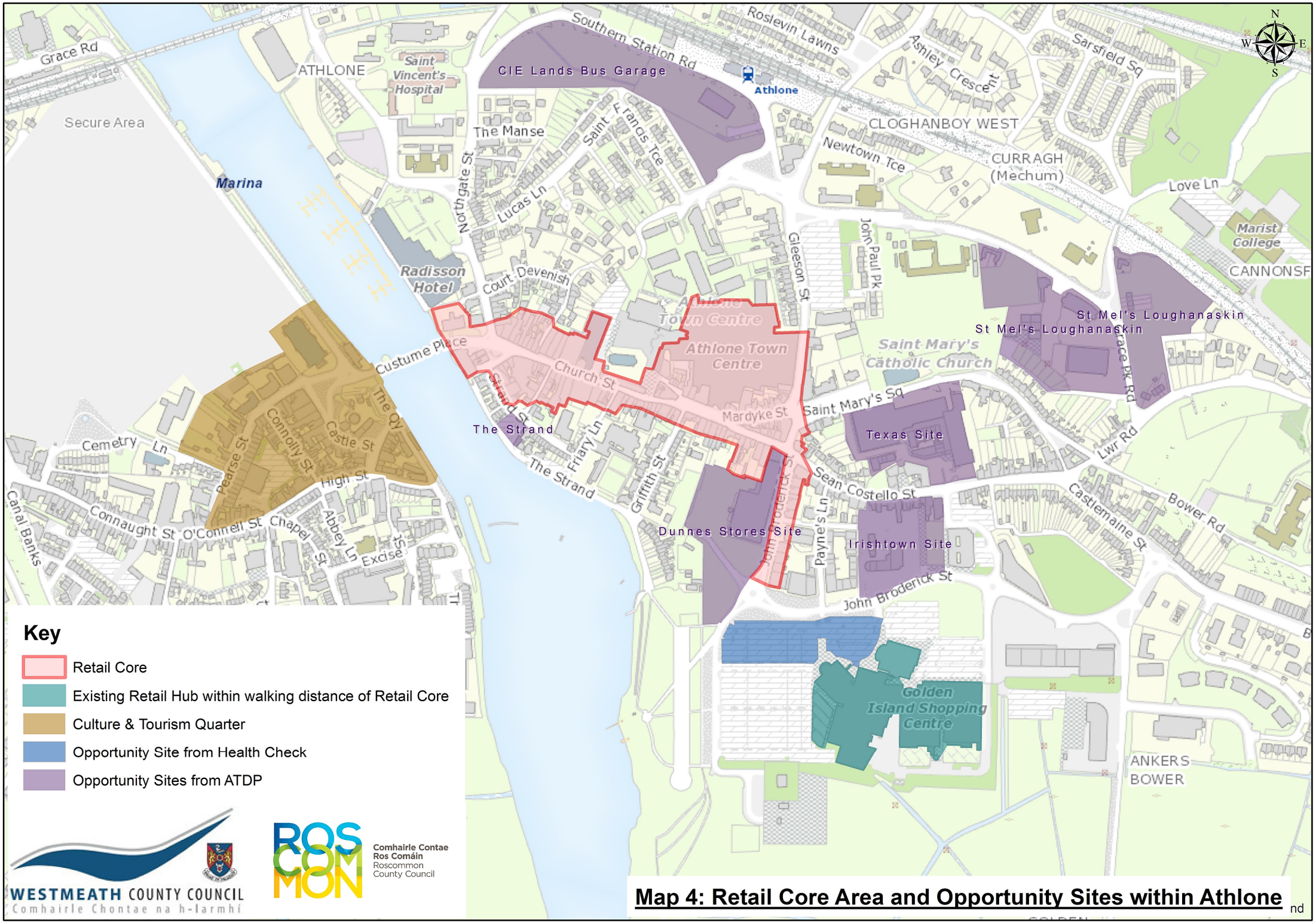

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