WESTMEATH LOCAL AUTHORITIES

RETAIL STRATEGY

Adopted by Athlone Town Council – July 2nd 2007

Adopted by Westmeath County Council - June 25th 2007

CONTENTS

1 INTRODUCTION 1

1 INTRODUCTION

Requirements of the Strategy.

1.1 The Retail Planning Guidelines, as published in December 2000, required the Westmeath Local Authorities to prepare a comprehensive retail strategy that outlines relevant policies and addresses a series of matters to be included in the development plan. These include:

- Confirmation of the retail hierarchy, the role of centres and the size of the main town centres;
- Definition in the Development Plan of the boundaries of the core shopping area of town centres;
- Broad assessment of the requirement for additional retail floorspace;
- Strategic guidance on the location and scale of retail development;
- Preparation of policies and action initiatives to encourage the improvement of town centres; and
- Identification of criteria for the assessment of retail developments.

1.2 This particular study focuses on the major towns of Athlone and Mullingar, due to these towns inclusion in the Midland Gateway under the National Spatial Strategy, although we provide a broad indication of retail development potential elsewhere in the County.

Study Context

1.3 The Westmeath Retail Study was undertaken in 2003 by the consultancy John Spain Associates, on behalf of Westmeath County Council. In consultation with the adjoining County of Roscommon, the retail strategy for the County of Westmeath and Athlone town has since been incorporated into the County Development Plan for Westmeath as a variation.

1.4 The Westmeath retail strategy makes an assessment of future retailing requirement of both administrative areas for the duration of the plan period, i.e. 2002-2008, and suggests policies and actions for Athlone and Mullingar, as well as containing the criteria against which to assess future retail development.

1.5 The Westmeath retail study indicates that the floorspace capacity figures outlined in Section 6 should be seen as ‘minimum’ rather than ‘maximum’ requirements, as the exact level of floorspace will primarily only tend to be a potential major issue where the location of development is non-town centre or if town centre impact is envisaged as being a potential stumbling block.

Study Approach

1.6 There have been several key stages in the preparation of this study, with the timing of some aspects tapered accordingly to ensure that the findings of the review are made available to form part of the input to the County Development Plan Review. For consistency we have adopted the same study area as John Spain Associates.

Survey Work

1.7 In the first stage of the study review we carried out a review and update survey of the floorspace within each of the centres (where available), building upon previous surveys undertaken in 2003 and those subsequently completed by Westmeath County Council during 2004 and 2005. In addition, a street side survey of shoppers was undertaken in

Athlone and Mullingar town centres, to help confirm the shopping patterns established in the 2003 study[1] and the wider perceptions of retail and services within these towns.

Consultation

1.8 The survey work was coupled with a programme of wider local consultation, including meetings with Westmeath County and Athlone Town Council area members as well as workshop / presentations with local businesses, retailers etc in Athlone and Mullingar. The main purpose of these meetings were to collate and understand better the specific local views of each of the town centres, and utilise this information in the preparation of our appraisal and study review. Consultations were additionally undertaken with senior planning officers at Roscommon County Council primarily to discuss issues relating to the overlapping Athlone catchment area.

1.9 In addition, we invited early written representations and submissions from members of the general public, retailers, businesses, trade organisations, developers and shopping centre owners across Westmeath. This process was supplemented through discussion with local retail agents active in Westmeath in order to understand the market context and views of the retailing sector throughout County Westmeath.

Healthcheck

1.10 We carried out a comprehensive healthcheck appraisal of Athlone and Mullingar. This, in tandem with the details collected through the survey work and the consultation exercise, has informed the review of the Westmeath retail hierarchy.

Strategy and Policy Recommendations

1.11 We then prepared an appropriate retail strategy for Athlone and Mullingar. This is based on the survey results and consultation responses and the output of our quantitative capacity assessment.

Structure of the Report

1.12 Following this initial section and introduction, the report provides a summary of the main findings of the study programme, without repeating in great detail much of the shoppers' survey data or indeed calculations of retail floorspace requirements. This information is contained in the appendices.

1.13 In the next section of the report, we outline details of the retail hierarchy in County Westmeath and provide a summary of the two main retail centres, namely Athlone and Mullingar. Subsequently, in the third section we review the current and emerging policy framework and context and highlight the key implications. Section four comprises the summarised results of the shoppers' (and household) surveys undertaken in Athlone and Mullingar.

1.14 The results of these earlier sections of the report are brought together in Section 5 to draw up an appraisal of the two main retail centres in Westmeath. We then utilise this information in developing the strategy and policy aspects of the study review. In the next section, we set out the key requirements for additional retail floorspace across the Study Area, which is then followed in Section 7 by a presentation of the broader strategy and policy recommendations. The report concludes with Section 8, providing details on monitoring and implementation.

[1] Westmeath Retail Study, John Spain Associates, 2003

2 DESCRIPTION OF RETAIL HIERARCHY

Introduction

2.1 The current Retail Planning Guidelines require retail strategies to examine the retail hierarchy, the role of the main retail centres and the relevant size of each centre.

2.2 In the context of this particular study we regard the whole of the County of Westmeath and an area of South Roscommon as one Study Area, and on this basis we have defined the County Westmeath Retail hierarchy as comprising:

- Tier One: Athlone and Mullingar town centres;
- Tier Two: Moate, Kinnegad, Kilbeggan and Castlepollard ('district') towns – as well as Mullingar Shopping Centre (Large Neighbourhood Centre);
- Tier Three: Other smaller/rural towns - including local and Neighbourhood Centres;
- Tier Four: Other small local shops; and
- Retail warehousing.

2.3 The retail hierarchy shown above is illustrated on Map 2.1 overleaf. In the remainder of the section below we provide a summary of the role and size of each of the centres within the Westmeath retail hierarchy. The amount of retail floorspace within each of the centres is also shown in Map 2.2.

Shopping in County Westmeath

Introduction

2.4 Westmeath is arguably one of the most accessible counties in Ireland, with more than half the country reported to be located within approximately one hour drive of the County. The County has three key rail lines passing through (i.e. Dublin to Sligo, Dublin to Galway and Dublin to Mayo), giving it good public transport accessibility. In addition the County has six national road routes, the River Shannon as well as Royal and Grand Canals linking Westmeath to various parts of Ireland.

2.5 The County has experienced significant population growth in recent years. Most of this growth has been concentrated in the two major towns (Athlone and Mullingar) and along the major road network in the eastern areas of the County, which are nearer Dublin. This has contributed to the vibrancy of the towns, particularly Mullingar, and made them attractive for house purchasers. Despite the growth in the major urban centres, the population density of the County as a whole remains low.

Retail Hierarchy

2.6 In general terms, **Athlone and Mullingar** town centres function and perform the role of the two main town centres within Westmeath, and therefore dominate the retail hierarchy in the County. Mullingar serves as a traditional market town and service centre, whilst Athlone performs a similar role, with the additional appeal of being a key tourist destination that also has the added benefit of acting as a 'gateway' to Galway, via the River Shannon.

2.7 Both towns have a range of comparison and convenience shopping floorspace selling higher order goods and services not as a 'rule of thumb' found elsewhere within the County. The towns also offer a choice of entertainment and leisure amenities, and pubs and restaurants etc. In this context, neither of the towns is likely or envisaged to lose their status or position as major town centres within the County hierarchy.

2.8 The 'district' towns of Westmeath such as the likes of **Moate, Kinnegad, Kilbeggan and Castlepollard** are recognised by the County Development Plan as having key roles to play in serving the shopping patterns and needs of the County.

2.9 These smaller (tier two) towns have an established local catchment area and defined town centre area, and serve a more distinct local service role than the larger centres. The towns often comprise a handful of convenience goods shops, as well as one or two retailers selling everyday comparison goods (e.g. clothes, etc).

2.10 The towns are relatively small in population terms with generally very limited realistic opportunity of significant growth that would dictate any form of major retail development.

2.11 There is a purpose-built large neighbourhood centre located to the west of Mullingar. **Mullingar Shopping Centre** is a traditional suburban shopping centre, with a number of small shop units offering a range of typically convenience services, and anchored by a food supermarket and the more recently opened petrol filling station (both operated by Tesco).

2.12 The third tier of smaller towns and centres in Westmeath comprises those that are slightly larger than other villages, and especially those that have strategic locations in the context of Dublin and the N6 route. This includes: **Delvin, Clonmellon, Killucan & Rathwire, Ballynacarrgy, Glasson and Tyrellspass**.

2.13 Finally, the fourth tier of the County retail hierarchy consists of **all other small local shops** which will normally exist to serve localised residential areas, and also include small shops associated with petrol filing stations, post offices and smaller villages which solely serve their local area.

Athlone

2.14 Athlone town centre functions as a main town serving the County (as well as parts of neighbouring County Roscommon), and along with the other principle town of Mullingar in the east of the County, dominates the Westmeath retail hierarchy. Athlone acts in many ways as the primary retail centre in the east of the County and is a key focus for future retail development (in the form of convenience and comparison floorspace). Athlone town centre benefits significantly in terms of its wide attraction and appeal to shoppers. Its catchment extends well beyond the County boundary to include parts of adjoining Counties Roscommon, Galway and Longford.

2.15 Athlone has good provision of main convenience goods shopping, with Tesco supermarkets at the Golden Island and Athlone Shopping Centres. There is also the Dunnes supermarket, and discount food stores operated by Aldi and Lidl (on Dublin Road). This existing convenience provision will be supplemented by the new major town centre development currently under construction.

2.16 There is modern quality comparison retailing on offer in Athlone, with large multiples such as Dunnes, Texas, Argos, Penney's, Eason and others (primarily in the Golden Island Shopping Centre). Local independent traders remain in the town, such as the Burgess department store and other small specialist stores. There is an IMC multiplex cinema situated adjacent to the Golden Island centre. The new Athlone town centre scheme (Gallico) will offer significant opportunites for large multiples to enter Athlone, through provision of four major department store anchor units.

2.17 The distribution of the majority of bulky goods shopping floorspace is more towards the periphery of the town to the north and east, with Woodies DIY and others trading from the N6 Kilmartin Centre (on Dublin Road) as well as B&Q at the Arcadia Retail Park. In addition, Ganly's of Athlone hardware warehouse is located on Roscommon Road to the west of the town.

2.18 Athlone town contains over 46% of all retail floorspace across County Westmeath. At present the town accommodates some 47,764 sq m of gross retail floorspace of which 17,588 sq m is comparison (37%), 10,582 sq m is bulky goods shopping (22%) and 12,030 sq m is convenience goods (25%). There is further 7,614 sq m of floorspace (16%) noted as vacant at this time.

2.19 Athlone town centre is contained within the area bound by the Golden Island Shopping Centre to the south, and northwards to the traditional core retail area within the town centre. The core shopping area in Athlone includes Costume Place, Church Street, Dublin Gate Street, Mardyke Street, Gleeson Street, John Broderick Street, Castle Street, Barrack Street, Pearse Street, Connolly Street, High Street, Bastion Street, O'Connell Street and Connaught Street.

2.20 It is clear that the planned retail and mixed use development in Athlone town centre (by Gallico Developments, now under construction) will help to further improve the town centre, and also enhance the town's role and function, so as to meet its status as a Midlands linked gateway. This will offer in excess of 25,000 square metres of retailing and up to 1,300 car parking spaces.

2.21 In the town, at Market Square, there is an area dedicated for use for casual trading, which is permitted for up to three days a week (Thursday-Saturday). The provision or availability of a site for such an open air market is important if Athlone is to encourage and benefit from niche forms of specialist local retailing and tourist-orientated shopping.

Mullingar

2.22 Mullingar (along with Athlone) performs the role of a main town centre in Westmeath County, and provides for a broad range of both comparison and convenience goods shopping, including major foodstores and specialist shops.

2.23 Mullingar is well served in terms of main convenience goods stores, with Buckleys Supervalu supermarket in the town centre, along with Dunnes. There is a Tesco supermarket and petrol filing station situated at the suburban Mullingar Shopping Centre, Marshall's store and the out-of-town Lidl discount food store. This provision would be enhanced should the Blackhall development scheme in the town centre be approved.

2.24 There is a limited range of comparison retailing in Mullingar, provided by multiples such as Dunnes (Harbour Place Shopping Centre) and Texas, and other local independent traders spread throughout the town. Whilst Mullingar is an attractive retail centre, it lacks modern, larger stores. This deficiency will be partly filled by the proposed Blackhall development. Bulky goods shopping is provided for at the out-of-town Lakepoint retail park, which also offers a multiplex cinema complex. The more recent Penny's retail development at Fairgreen along with proposed retail warehousing at Lynn Park will add to this.

2.25 Mullingar provides for a little over 40% of all retail floorspace in Westmeath, with the town accommodating 41,971 sq m of gross retail floorspace of which 14,187 sq m is comparison (33%), 8,904 sq m is convenience goods (21%) and 15,857 sq m is bulky goods shopping (37%). At the time of the survey there was a further 3,908 sq m of floorspace (9%) lying vacant.

2.26 The core shopping area in the town centre consists of Pearse Street, Oliver Plunkett Street, Dominick Street, Grove Street, Blackhall Street, Mont Street, Church Avenue and also Castle Street.

2.27 It is anticipated that proposed and planned retail and mixed use development in and adjoining the town centre in Mullingar (i.e. Blackhall, Lynnpark retail warehousing and Fairgreen) will help to revitalise the centre of Mullingar, and thus assist in the town retaining its present and future key role and function as a linked gateway town. These schemes (subject to development) will both provide improved pedestrian links to and from the traditional core part of town centre.

3 POTENTIAL FOR CHANGE

Introduction

3.1 In this section we broadly review the planning policy context in Westmeath, including the National Spatial Strategy, the Retail Planning Guidelines, the Regional Planning Guidelines for the Midlands, the County Development Plan and local planning policies for Mullingar and Athlone. We highlight the key policies, which need to be addressed, and the key implications of these policies.

National Spatial Strategy

3.2 This National Spatial Strategy for Ireland (NSS) was published as a 20-year planning framework (for the period up to 2020) designed to achieve a better balance of social, economic, physical development and population growth between the Irish regions. Its main focus is therefore on its people, on places and on building its communities.

3.3 In relation to this particular study, the most significant implications of the current NSS for the County of Westmeath are summarised below.

3.4 County Westmeath holds a strategic location of regional importance in the Midlands, with the designated 'linked centre gateway' of Athlone-Mullingar-Tullamore combined with an effective connection to surrounding areas within the wider national transportation network. This gateway will provide a level of critical mass that is necessary to establish more self containment and discourage long distance commuting to Dublin and Galway.

3.5 The strategy proposes the strengthening of links between Athlone, Mullingar and Tullamore based on exploiting their complementary strengths in education, healthcare, transport and industrial development for the benefit of each. This is then emphasised by acknowledgement of the role played by innovation and capacity for third level educational facilities in the Midlands, in supporting the attractiveness of the Region for entrepreneurship and investment.

3.6 The strategic and central location of the Westmeath urban centres and those elsewhere in the Midlands, is recognised in the national transport framework, which proposes a key role for a strong north-south link interconnecting with the east-west links proposed for upgrading under the National Development Plan 2000-2006.

Retail Planning Guidelines

3.7 The Department of the Environment and Local Government issued the Retail Planning Guidelines in December 2000, as a result of increasing pressure for retail development lasting over the last decade.

3.8 The retail planning guidelines identifies a **national retail hierarchy**, which reflects the primacy of Dublin, whilst also recognising three other broad tiers of the hierarchy. The first three tiers account for 78% of State comparison turnover and almost two thirds of convenience turnover. The third tier incorporates the Westmeath towns of Athlone and Mullingar (as well as nearby Tullamore).

3.9 The key (five) policy objectives of the guidelines are summarised as follows:

- To ensure that all development plans have clear retail polices and proposals;
- To facilitate a competitive and healthy environment for retail industry i.e. it is not the role of the planning system to stifle competition, preserve commercial interests or prevent innovation in retailing;
- To promote development which is easily accessible – particularly by public transport – and in locations which encourage linked shopping, business trips;

- To support the continuing role (and vitality and viability) of town and District Centres, with established centres being the preferred location for new retailing development, and acting as the focus for social, business and community activities; and
- To presume against large-scale retail centres adjacent or in close proximity to existing, new or planned national roads and motorways.

3.10 The Guidelines emphasise the need for retail planning strategies and decisions made on retail planning applications to be firmly embedded in the **plan-led system**. The Guidelines therefore place a requirement on the preparation of strategic retail studies for the six main conurbations as well as elsewhere.

3.11 The Guidelines advocate the application of the **sequential test** approach to the location of retail development, with preference given to town centre sites, followed then by edge-of-centre sites - within an easy and convenient walking distance from the primary shopping core (i.e. 300-400 m) - and only then where there are no out-of-centre alternative suitable, viable and available sites.

3.12 Finally the guidance outlines the approach to be taken in assessing **retail impact** with all large scale retail developments required to be appraised in relation to:

- Supporting long term strategy for town centres whilst not materially diminish the prospect of attracting private sector investment to town centres;
- Adverse impact on town centres, individually or cumulatively, in particular the quality of the centre and its economic and social role within that community;
- Diminish range of supportable town centre activities and services;
- Likelihood of increased vacant properties in the designated primary retail area;
- High levels of accessibility by public transport, walking and private car; and
- Likelihood of achieving commercial synergy with the existing town centre.

3.13 In addition to the above criteria, there are specific policy guidelines for particular types of retail development. The application of floorspace caps to forms of retail development will not only help the planning system but also reduce the potential likelihood of local monopolistic effects. The specific criteria are noted below:

- Regional shopping centres – outside Greater Dublin, there is no justification for new large scale regional shopping centres;
- District centres – development plans will identify any need for new District centres, comprising up to 10,000 sq m in the main towns and 20,000 sq m in Dublin;
- Large foodstores – 3,500 sq m net retail sales floorspace cap in Greater Dublin, and 3,000 sq m net retail sales floorspace elsewhere;
- Discount foodstores - up to 1,500 sq m gross floorspace have a potential role in extending the choice and range of retailing;
- Retail parks – in the range of 8,000 to 15,000 sq m (gross) of development will generally be acceptable provided the range of goods is conditioned to the sale of bulky household goods only, i.e. carpets, furniture, white electrical goods and DIY items;
- Retail warehousing units – a threshold cap of 6,000 sq m gross floorspace (including ancillary garden centre) is applied on single large retail warehouse units. There may similarly wish to be a minimum size condition imposed (700 sq m) on units in out-of-centre locations to prevent sub-division or smaller stores; and
- Retail in petrol filling stations - up to 100 sq m net retail sales area may be allowed.

Retail Planning Policy Guidelines (Amendment 2005)

3.14 More recently an amendment to the Retail Planning Guidance became effective in February 2005. This had the **effect of lifting current retail warehousing floorspace restrictions** (see 3.14) for individual single large-scale retail warehouse developments in Dublin, and the 'gateway' towns and cities identified by the National Spatial Strategy. This only applies to those areas subject to Integrated Area Plans under the provisions of the Urban Renewal Act 1998 (which has not included Athlone and Mullingar).

Regional Planning Guidelines for the Midlands

3.15 The Regional Planning Guidelines (RPG) for the Midlands (adopted in May 2004) provides planning policy guidance for the Midlands region, covering Counties Westmeath, Offaly, Laois and Longford.

3.16 The RPG provides population projections for the Midlands Region, based on data from CSO, 2001, along with the NSS regional projections used to stabilise inter-regional migration pattern derived from historically observed trends up to the year 1996.

3.17 Assuming the adoption of a 'medium' variant in this Regional Planning Guidelines the estimated population for the Midland region by the year 2020 would grow to some 250,000. However, the accelerated growth envisaged by the National Spatial Strategy (for the Midlands Gateway) suggests an additional 50,000 people, representing a total estimated population of 300,000 in the Region by 2020. The RPG identifies a realistic achievable target population of 325,000, equivalent to 100,000 new additional residents by 2020.

3.18 The RPG identifies the linked gateway of Athlone-Mullingar-Tullamore (along with principal towns of Longford and Portlaoise) as the focal point for attracting population as well as business/employment to the region. As these are established towns with existing infrastructure provision, and a range of functions, they are identified as being the most suitable to accommodate further levels of development and growth.

3.19 To provide for the anticipated future development and growth of the Midlands the RPG outlines three alternative development scenarios, as a means of accommodating the significant growth in population envisaged by year 2020.

3.20 The three different scenarios include:

- *Continuation of current trends* – population growth will continue more predominantly in the eastern part of the region with settlement dispersal along the main transport routes from Dublin, in an east-west direction.
- *Emphasis on gateways* – concentration of the region's projected growth towards the linked gateway of Athlone-Mullingar-Tullamore.
- *Spatial distribution throughout Region* – assumption that population growth and economic development will be distributed widely across the settlement hierarchy.

3.21 The RPG adopts a development strategy based on the creation of five spatial, inter-related development areas:

- *Central* – focusing on Midland gateway towns which have approximately one third of the region's current population.
- *Eastern* – areas closest to Greater Dublin Area and the associated road and rail corridors, who are experiencing greatest population growth.
- *Western* – parts of the region linked with Birr and close ties with the Mid-west.
- *Northern*– Longford and those areas associated with the wider North-west and Borders regions.

- *Southern* - including parts situated along the N7/N8 road and rail corridors and thus associated to Portlaoise.

3.22 The overall strategy for achieving RPG objectives aims to develop the urban structure and settlement hierarchy by promoting the growth of a range of distinct settlements. The hierarchy will be as follows:

- *Linked Gateway* - Athlone, Mullingar and Tullamore.
- *Principal towns* of Portlaoise (to south) and Longford (to north).
- *Key Service towns* - Birr, Edenberry, Granard and Portarlington - closely linked to the development of the gateway and principal towns.
- *Service towns* - serving a mainly local hinterland whilst supporting nearby gateway and principal towns, through consolidating growth.
- *Local service towns and villages* - provision of services for rural communities.

3.23 In relation to the current retail study, the 'central' development area concentrates on the linked gateway, and suggests that the population of this area will require growth of between 55,000 and 60,000 in the years leading up to 2020.

County Westmeath Development Plan

County Development Plan 2002-2008

3.24 The adopted County Development Plan for Westmeath 2002-2008 excludes the area of Athlone Town Council, which is a separate local planning authority. This plan supersedes the earlier County Development Plan from 1994. In terms of retailing, there are five key issues to note.

3.25 The plan recognises the importance attached to the distribution of population in the County, along with the provision of transport and infrastructure, this being the key to the success of a *future balance and provision of retail growth* across Westmeath.

3.26 The County Development Plan also identifies *town centres as the first, preferable location for retail development* under the sequential test approach, as outlined in the Retail Planning Guidelines.

3.27 The *settlement hierarchy for Westmeath*, as outlined in the plan, illustrates the main retail policy objective of *focusing investment* in the commercial, shopping and other community facilities of Westmeath town centres, such as Athlone, Mullingar and in Moate. In addition, other appropriate scaled development will be encouraged in a range of the smaller settlements in the Westmeath hierarchy.

3.28 The *active regeneration* of a town can be achieved through *encouraging new retail development* on disused opportunity sites, or through improving district and local shopping centres. The main policies of the County development plan are clearly intended to support town/local centres, thereby reinforcing investment and renewal.

3.29 Finally, it is recognised that an important part of the Development Plan review process will be the carrying out of a '*health check assessment*' of the retailing function within the County and its towns.

County Development Plan Review

3.30 Westmeath County Council in March 2006 announced its intention to formally begin the preparation of a review of the County Development Plan. It is expected that the plan review will provide an up-to-date planning and development strategy for the County for the six-year period from 2008 to 2014, reflecting a range of national and regional strategies and guidelines.

3.31 An initial phase of consultation was held from March to May 2006, which was followed later in the year by a further period of formal consultation on the Draft County

Development Plan Review. To help inform this initial consultation Westmeath County Council prepared a series of short Issues Papers on a wide range of topics to be addressed by the new plan.

3.32 In particular, the Issues Paper for 'Town Centres and Retailing' raises a number of important matters for consideration across the County:

- Do you think that town centres, particularly Mullingar and Athlone respond adequately to the needs of people with mobility impairment?
- What role do you see the main shopping centres of Mullingar or Athlone having in shopping/ retail?
- How can public transport links to retail centres be improved?
- Should the town centres of Athlone and Mullingar be able to compete with comparison retail outlets in the capital?
- Can we make town and Neighbourhood Centres more attractive for shopping, leisure and residential activities?
- What should the future role of Mullingar and Athlone centres be and what form of development should be encouraged?
- What should be the role of the traditional main street shopping locations in view of changing shopping patterns?
- How can good design in the main centres be encouraged?
- Neighbourhood Centres are locations within towns, ideally within 200m of residences, which provide for local shopping and other services. Do you think that current provision is adequate?

County Roscommon Retail Strategy

3.33 Given the overlapping administrative arrangements for parts of the Athlone town area of the Westmeath Retail Study Area, it has been necessary to examine the approved retail strategy in neighbouring County Roscommon.

3.34 In broad terms, the Roscommon Retail Strategy 2002 covers the five year period from 2002 to 2007 and identifies a three tier retail hierarchy within the County, focusing on Roscommon town as the retail centre for the County. This is then followed by the other town centres, and local and Neighbourhood Centres. The County retail strategy also identifies Athlone and other towns outside the County as having an important role in serving the retailing needs of Roscommon residents.

3.35 The Roscommon Retail Strategy concludes that there is an estimated additional retail requirement for both convenience and comparison retail floorspace across the County, totalling between 6,770 sq m and 14,330 sq m. A convenience goods requirement of 1,870 – 6,800 sq m was identified. A comparison goods requirement of 4,900 – 7,530 sq m is identified.

3.36 Although the strategy highlights the requirement for more comparison retail floorspace there is no specific mention of a requirement for retail warehousing floorspace provision. It is recognised, however, that a location in the western environs of Athlone may be suitable for such retail development, and then any further retail warehousing within the County should be restricted.

3.37 We note that retail provision in Roscommon town itself has been improved significantly in recent years, through the opening of a new Tesco superstore and the Dunnes Stores.

4 SHOPPING PATTERNS

Introduction

4.1 In this section of the report we examine the shopping patterns of residents and shoppers within the Westmeath Retail Study area. This information is based on the findings of the earlier household survey undertaken in 2002 as part of the Westmeath Retail Strategy 2003. This has then been supplemented with the conclusions of our recent shoppers' survey completed in the autumn of 2005.

Household Survey

Introduction

4.2 In April 2002, a household survey was undertaken by Demographics Ireland as part of the preparation of the Westmeath Retail Strategy. The telephone survey of 800 households was completed to help inform and establish the shopping patterns of the Westmeath resident population, for different types of retailing.

4.3 The telephone survey covered the whole County; some 38% of respondents lived in Athlone, 28% in Mullingar, 16% in Westmeath North, 8% in Westmeath East and a further 10% in Westmeath South. This sample is noted as being representative of the proportion of households estimated in each of these areas.

Key Survey Findings

4.4 The household survey contained questions relating primarily to where the respondents carried out main food shopping, top-up shopping, bulky household shopping, general comparison shopping and internet shopping. The survey also included other information such as the mode of transport and frequency of shopping trips.

4.5 Just under half (48%) of all respondents carried out their main food shopping in Mullingar and 33% stated that they did their main food shopping in Athlone Town. A further 5% did their main food shopping in Athlone District. Some 11% did their main shopping at other locations in County Westmeath and 9% said that they did their main shopping outside the County. Those carrying out their main food shopping outside Westmeath visit Tullamore, Meath, Longford and Edenderry.

4.6 Shopping patterns for top up shopping tend not to be as concentrated in and around certain towns as in the case for main food shopping. Two thirds of respondents said that they did their top-up shopping in a local store which could be a symbol store (e.g. Centra, Mace), a corner shop or petrol filing station with a shop. Tesco and Dunnes were infrequently mentioned as a store for top-up shopping whereas a number of Supervalu stores were popular with over 13% of respondents.

4.7 Mullingar and Athlone were the preferred location for comparison shopping (i.e. clothing and footwear) with 49% of those surveyed saying that they went to Mullingar and 40% to Athlone. Dublin was a popular destination for clothing and footwear shopping especially for those living in Mullingar and the Westmeath East area, with 30% and 38% respectively saying that they travelled there. The only other destination in Westmeath mentioned was Moate which was used by 10 households living in Athlone District.

4.8 Some 55% of all households said that they travel to Mullingar for their bulky goods shopping and 31% travel to Athlone. Tullamore was particularly popular destination for people living in the south of Westmeath, with 25 of Westmeath South respondents travelling there. Smaller numbers use stores in Dublin, Longford and Meath. In addition, trips for shopping at the ESB outlets throughout the County were popular.

4.9 The household survey shows that Mullingar and Athlone are both important centres for convenience shopping with over 76% of respondents carrying out their main food shopping in either one of these two centres. With regard to comparison shopping (i.e. clothing and footwear), Mullingar appears to be the stronger of the two centres, with over 49% of the respondents stating that this was the town that they would normally visit for these purchases.

4.10 It is important to note that the 2002 household survey only interviewed people residing within the County of Westmeath and therefore excluded those people from neighbouring County Roscommon and elsewhere who travel to Athlone town centre to carry out their general comparison shopping. It is evident that there is leakage of expenditure in this category of shopping outside the County with over 21% of those surveyed travelling to Dublin for purchases on clothing and footwear, etc.

Shoppers Survey

Introduction

4.11 The survey of shoppers was carried out in Mullingar and Athlone in November 2005, yielding just over 300 interviews in each of the two centres. The following tables are numbered according to the questions on the shoppers' survey form, a copy of which is reproduced in the Appendices.

Key Survey Findings

4.12 Shopping for food and groceries was important in both centres but many respondents were also doing other forms of shopping, particularly in Athlone.

4.13 Table Q3 below shows that most respondents had travelled to the respective centre by car, though some had walked, especially in Mullingar. Few respondents had travelled by public transport.

Q3 HOW DID YOU TRAVEL HERE TODAY?

	Mullingar	**Athlone**
Number of respondents	308	305
	%	%
walk	26	14
cycle	0	0
own car	59	65
other car	9	11
taxi	4	2
bus/train	1	8
other	0	0

4.14 Most of the car drivers had parked in off-street car parks. In Mullingar, the most commonly-used car parks were those situated at Tesco, SuperValu, the Harbour Court Shopping Centre and Fair Green. In Athlone, the most frequented car parks were at Texas, the Golden Island Shopping Centre and at Woodies (Kilmartin).

Q6 WAS THIS PARKING PLACE CONVENIENT?

	Mullingar	Athlone
Number of respondents	199	216
	%	%
very convenient	67	40
alright	26	44
rather poor	6	8
very inconvenient	2	7

4.15 Most survey respondents found their car parks to be "convenient" or "all right" (Q6) but in answer to a later question about whether or not they would be prepared to use a multi-storey car park, nearly two thirds said they would be so prepared. It should be noted that this particular question was only asked in Mullingar, where Westmeath County Council is considering the provision of such a car park. Respondents were told that the parking charges would be similar to those being levied at existing car parks.

Q4 HOW LONG DID YOUR JOURNEY TAKE?

	Mullingar	Athlone
Number of respondents	308	304
	%	%
0-10 mins	43	33
10-20 mins	35	28
20-30 mins	16	16
30-45 mins	4	12
45 mins plus	3	12

4.16 The majority of respondents had taken less than 20 minutes to get to the centre (Q4), with few having taken longer than 45 minutes. As expected, food and grocery shoppers had had shorter journeys but the difference was not all that great.

4.17 In Athlone, for example, 66% of food and grocery shoppers had taken less than 20 minutes, compared with 54% of other shoppers. There were some longer journeys including tips from outside the eight internal zones of the County Westmeath portion of the Study Area – 8% of the overall total in Mullingar and 34% in Athlone. Once again, comparing the food and grocery shoppers with other shoppers, smaller proportions of the former category had come from outside County Westmeath.

4.18 In both towns (Mullingar and Athlone) more than 60% of those interviewed visited once a week or more often. When asked to name another centre visited most frequently for shopping, around one sixth of the sample in each centre did not state an alternative centre for shopping. Among those who did, Central Dublin and Tullamore were the most important alternatives to both towns. In addition, respondents in Mullingar noted Athlone and Liffey Valley as other alternative shopping destinations, whilst Galway was mentioned as an alternative for those in Athlone. Visits to these other town centres were much less frequent than to either Mullingar or Athlone, and in most cases were generally less than weekly trips.

4.19 Questions about the use of these alternative centres, together with respondents' evaluations of Mullingar and Athlone were in line with other surveys carried out by the consultants. With medium-sized centres like Mullingar and Athlone, people prize above all the advantages of proximity and easy access (Q13).

Q13 WHY DO YOU USE MULLINGAR/ ATHLONE CENTRE?

	Mullingar	Athlone
Number of respondents	306	303
	%	%
close to home	76	58
close to work	26	16
easy to get to	32	36
good public transport links	0	3
sufficient car parking	3	6
reasonably priced car parking	2	1
good selection/quality of shops	18	33
good mix of shopping and leisure	5	7
to visit specific shops	6	22
pleasant shopping environment	13	6
good standard of street clean'ss	1	0
visit the market	1	1
safe shopping environment	1	3
other	0	1

4.20 The percentages in the table above, and others, may add to more than 100 because respondents were allowed to give more than one specific reply. It will be seen that the great majority of these replies covered “close to home”, “close to work” and “easy to get to”.

4.21 The main criticisms of Mullingar and Athlone, and corresponding reasons for favouring the larger alternative centres, generally centred on the superior shopping facilities on offer within theses larger centres. It will be seen from Q11 (that gives the reasons for using the alternative centres) below that most responses related specifically to a “good selection/quality of shops” or “to visit specific shops”.

4.22 Even so, Q13 (above) shows that positive evaluations of the shopping offer were still quite important in both Mullingar and Athlone, especially in the latter. It seems that to an extent there has been a happy trade-off between the conflicting advantages of ease of access to Athlone and Mullingar and the level of shopping offer in each town centre.

Q11 WHY DO YOU USE THIS OTHER PLACE?

	Mullingar	Athlone
Number of respondents	245	256
	%	%
close to home	12	37
close to work	5	7
easy to get to	28	25
good public transport links	6	19
sufficient car parking	12	9
reasonably priced car parking	2	3
good selection/quality of shops	58	54
good mix of shopping and leisure	29	23
to visit specific shops	30	16
pleasant shopping environment	11	5
good standard of street clean'ss	0	1
visit the market	0	0
safe shopping environment	2	3
relatives/friends/for a change	7	1

4.23 The respondents' evaluations of the problems of the two centres were reflected in their overall suggestions for improvements (see Q16). It will be seen that the most common suggestions relate to the range and quality of the shopping offer, but in addition there were numerous requests for an improvement of car parking facilities.

Q16 SUGGESTIONS FOR IMPROVING CENTRE

	Mullingar	Athlone
Number of respondents	299	304
	%	%
no, nothing	21	22
make the centre easier to get to	1	4
provide more parking	36	42
more shops	25	22
provide better range of shops	32	27
provide specific shops	10	6
provide particular leisure facil	7	4
improve street cleanliness	7	7
pedestrianise particular street	8	6
improve pedestrian environment	9	4
bypass etc needed	6	7
more public transport	1	1

5 TOWN CENTRE APPRAISAL

Introduction

5.1 The Retail Planning Guidelines indicate that there are a variety of reasons and factors which contribute to the successful and vibrant health of a town centre. The vitality and viability of town requires a balance to be struck with a choice of key qualities that can be classified centres into four broad categories, consisting of: attractions, accessibility, amenity and action.

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

5.2 In this section of the report we provide a summary of the health checks of Athlone and Mullingar, on the basis of our interpretation and assessment of the four ‘A’s’ by identifying the overall key strengths, weaknesses, opportunites and threats (SWOT) applicable to each town centre. These summaries have drawn upon the findings of the health check and consultation process carried out during the study.

Athlone

Attractions

5.3 Athlone is one of the principal towns in County Westmeath. The River Shannon effectively splits the town in two, with Athlone Castle acting as a focal point in the town (on the west bank). The shoppers’ survey shows that Athlone attracts trade from a significant area outside Athlone Town and County Westmeath, including that part of County Roscommon which is outside the area defined for study as part of the previous Retail Study 2002 and parts of Counties Offaly and Galway also. This wider catchment area, encompassing a population of up to 60,000 and increasing, results in substantial in-flows of comparison spending to Athlone.

5.4 The town attracts tourists, many from boating related trips taken along the Shannon. The area around the Castle has grown in recent years through the increase in restaurants, tourist and gift shops, and overnight accommodation.

5.5 In tourism terms, Athlone occupies a prime geographical location which is further enhanced by its scenic setting on the River Shannon. Nonetheless, the town of Athlone has not harnessed its full tourism potential, which is not aided by the relatively poor link between the ‘west bank’ and the traditional town centre shopping area. The tourism offer has improved in recent years with the redevelopment of the Prince of Wales Hotel at Church Street, and the new Radisson hotel on the waterfront. This improvement is somewhat lessened by the prominence of areas of poor environmental quality in key tourism areas, i.e. in respect of property dereliction and vacancies.

5.6 Despite the dominance of the River Shannon in the town, and the recent development of some riverside apartments and a marina, the development potential of the riverside has still to be fulfilled. This can be achieved through the creation of improved linkages between the riverside areas and various points within the core town centre.

5.7 The traditional core shopping streets in the town centre are concentrated to the east of the River Shannon and broadly comprise Church Street, Dublin Gate Street and Sean Costello Street. This area has a traditional streetscape with narrow building plots and mainly two to three storey buildings. There are a limited number of key anchor outlets within the town centre. The Burgess department store (in operation since 1839) is a key anchor which attracts customers to this part of the town centre.

5.8 The Golden Island Shopping Centre (which opened in 1997) and the Irishtown and Inis Oir retail centres (located opposite Golden Island) are Athlone's primary retail areas. The Golden Island Centre has a gross retail floorspace of approximately 16,000 sq m and contains more than 40 shops, including a choice of national, international and multiple retailers. This makes the Golden Island Centre appeal as a significant retailing destination within Athlone. There is also an IMC operated multiplex cinema adjacent to the shopping centre.

Accessibility

5.9 The main thoroughfares for local traffic through the town centre are Church Street and Dublin Gate Street. The commercial core of the town is frequently congested. The only recognised area of pedestrianisation in the town centre is at the Bawn located off Church Street, where there are a handful of small shop units. Despite the limited pedestrianisation, the town centre has benefited to some extent from the N6 bypass.

5.10 The provision of dedicated off-street car parking throughout Athlone is of varied quality combined with a limited choice of on-street parking. The largest proportion of car parking in the town centre is 'pay and display' although there is free parking to be found at the Golden Island Shopping Centre, and at the small car park adjacent to the Dunnes Stores.

5.11 For many years there has been a large temporary 'town centre' surface car park area located to the immediate rear of the Church of Ireland, which provided through pedestrian access on to Church Street. Previous survey work has suggested that use of this car park has not been maximised due to concerns over general safety. However, since the last retail study the car park has made way for the new Athlone town centre (Gallico) development scheme, for which construction has commenced and car parking will be provided on site.

5.12 Finally, there is a car park located nearby at Fairgreen, Ballymahon Road, which is linked to the town centre by Gleeson Street.

5.13 Many of the existing footpaths in the town centre would appear to have potential to benefit from a programme of improvement. There are a small number of dedicated pedestrian crossing facilities in Athlone town centre.

5.14 The primary retailing areas are located outside the traditional core of the town centre at the Golden Island Shopping Centre, Inis Oir and Irishtown retail units. The shopping environment in this part of the town centre area is attractive and easily accessible by car. Dunnes Stores and the Golden Island Centre are served by large surface level car parks, both well laid out with good hard surfacing, marking, signs and landscaping. These car parks offer in the region of 1,300 car parking spaces. Unfortunately, the height of some barriers is perceived as a visually negative feature.

5.15 Pedestrian access to these retail areas is relatively good with wide footpaths which facilitate use by the disabled as well as parents with younger children. Pedestrian crossings for the blind (with noise activated signals) have also been installed in this area. As the use of car parking facilities at Golden Island is free this undoubtedly appeals more to the car borne shopper/visitor than elsewhere in the town centre.

5.16 Public transport accessibility to Athlone is reasonable. The town is also served by a choice of national bus routes operated by Bus Eireann (Nos. 20, 21, 25, 70-73 and 75-78) linking Athlone to major destinations such as Galway and Dublin. There are local buses operating in the town, stopping at locations such as the Golden Island, Bus Station, Willow Park, Monksland and Garrycastle. There are also local taxis operators trading in Athlone.

5.17 Athlone is also served by an Irish Rail train station which is situated a short 5 minutes walk from the town centre. Athlone lies on the Dublin-Galway line with up to 11 daily weekday services operating through to Dublin and Galway.

5.18 In the town centre there appears to be fairly limited accessibility for cyclists, with limited provision of cycle tracks within the town and its environs. There is at present no dedicated cycle parking in the town centre or at the Golden Island Shopping Centre. There is some small scale provision made at Athlone Shopping Centre.

Amenity

5.19 The traditional shopping core within Athlone town centre appears to have suffered from a lack of overall investment in recent years, which has resulted in retail locations such as the purpose built Golden Island Centre and nearby Dunnes Stores taking over as the key shopping areas in the town.

5.20 The overall quality of public realm and streetscape is generally poor, particularly on Dublin Gate Street and also Church Street, where many of the shop units are showing signs of neglect, with poor shop fronts and low quality of signage and fascia.

5.21 Throughout the town centre many pavements remain in a relatively poor condition, especially in side streets and lanes running off the main thoroughfares, such as Church Street. Many of these provide linkages from the shopping areas to the quayside and riverside, and should therefore be improved to enhance the wider vitality and viability of the town.

5.22 Athlone as a whole has limited provision of street furniture and displays of public art. Those that stand out at present are the small paved area outside Dunnes Stores, a water feature on the Strand, a sculpture on Dublin Gate Street, as well as the public seating available at the Church of Ireland and the Civic Centre.

5.23 The streetscape in the vicinity of the Castle is attractive. Paving has recently been upgraded and there is good directional signage, street furniture and shop and building frontages. This helps the profile and attractiveness of this part of Athlone. The effect is short lived however, as further to the west along O'Connell Street the poor condition of streetscape is noticeable.

5.24 There is a good mix of facilities, public toilets and seating areas at Golden Island Shopping Centre. There is also good linkage between the Golden Island Centre and the nearby Dunnes Stores. The overall quality of the public realm at Golden Island is of a higher standard than elsewhere in the town centre. Nearby, John Broderick Street was upgraded with good modern paving and a new road surface, which along with more modern shops presents an attractive and welcoming shopping environment.

Action

5.25 In order for Athlone to continue to retain and enhance its standing within the County and national retail hierarchy, a number of town centre management and public realm initiatives need to be implemented. The new Athlone town centre (Gallico) mixed use development will improve the quality of the retail offer whilst achieving the renewal of this part of town. This momentum should be continued in the medium term, through the identification and forward planning of edge-of-centre sites for future development – such as land adjacent to the Golden Island Shopping Centre.

5.26 The overall town centre and pedestrian environment within parts of the traditional core shopping area needs to be upgraded, with greater encouragement towards improved interaction between both sides of the town and River Shannon. Accessibility to the town centre also needs to be addressed. These matters along with broad options for resolving the town's parking and accessibility issues are detailed in Section 7.

Mullingar

Attractions

5.27 Mullingar is a busy market town and service centre for its surrounding catchment. Mullingar is centrally located within County Westmeath and draws from a catchment area which comprises central and eastern Westmeath. There is little or no spending inflow from outside the study area to Mullingar.

5.28 The majority of retailing is concentrated on Oliver Plunkett Street, Pearse Street, Mount Street, Friars Mill Road and Austin Friar Street. The town centre environment of Mullingar is attractive.

5.29 The Harbour Place Shopping Centre (9,104 sq m) is located just off the town's main shopping street. The shopping centre has a Dunnes Store as the anchor store as well as number of other mainly comparison goods shops. Harbour Place Shopping Centre is a significant retail attraction in its own right. There are current plans to develop an additional 3,000 sq m gross extension.

5.30 The Mullingar town population has grown considerably in recent years through development of new residential estates.

5.31 Mullingar is close to a number of lakes that are attractive to both residents and visitors, especially those enjoying fishing and water sports. The Royal Canal also runs through Mullingar and this helps the town in attracting tourism through its ability to act as a base for visiting Westmeath and the surrounding area.

Accessibility

5.32 The town centre within Mullingar continues to suffer from heavy traffic congestion, despite the N4 and N52 bypasses.

5.33 The provision of car parking in Mullingar is generally perceived to be inadequate (a view backed by the street survey and consultation process), despite there being a number of small and well utilised car parks lying to the rear of and adjacent to the town centre shopping streets. The town also has a limited range of on-street car parking as well as a limited choice of car parks, including those at Church Avenue, Dominick Place and Blackhall Place. There is further public parking at Harbour Place and MacCurtain Street (adjacent to Buckley's Supervalu).

5.34 The standard of car parking provision is not good with many dedicated parking spaces lacking hard surfacing, landscaping, and helpful directional signage. The car park facilities in the town centre are all fee paying, including that at Harbour Place. It would seem on this basis that the price and relative inadequate supply of car parking in Mullingar are major (negative) issues that should be addressed by the current review of the town's parking strategy (see also Section 7).

5.35 At present, Blackhall Place car park does not provide a direct pedestrian link to the traditional shopping core at Oliver Plunkett Street. This is likely to change in the short term should approval be granted for the proposed Blackhall development scheme, and the pedestrian link via Meeting House Lane.

5.36 Pedestrian accessibility in the town centre is generally reasonable, although there are no pedestrianised areas in the town centre. Mullingar, very much like Athlone, has limited provision for cyclists (i.e. parking or dedicated cycle paths).

5.37 Public transportation in Mullingar is primarily limited to the train and national bus routes with an Irish Rail station located within the town centre on the edge of the retail core. Mullingar is situated on the Dublin - Maynooth – Longford-Sligo service line and there are five daily train services running through to Dublin and Maynooth in one direction, and Longford in the other.

5.38 The town is served by a choice of national bus routes run by the Bus Eireann (Nos. 22, 23 and 70) linking Mullingar to major towns such as Dublin, Longford, and Sligo (up to 5 times daily) and Navan, Drogheda and Dundalk (via Athlone, twice daily).

5.39 There is currently no local public transport service (i.e. bus) operating within the town. Local taxi companies fill this gap in Mullingar.

Amenity

5.40 Mullingar town centre has a well established and attractive streetscape where the majority of the buildings are well maintained, and there are a number of fine civic and institutional buildings. The main streets are typical of many Irish towns with 2-3 storey buildings with a narrow frontage and small building plots.

5.41 Most shop fronts in the town centre are well maintained, some with the original fascia preserved, and other more modern shop fronts have generally been designed sympathetically to respect the traditional shop front vernacular of Mullingar. The quality of its shop fronts is one of the town's assets.

5.42 The standard of paving and footpaths throughout the town centre is high as is the public lighting. The town centre also has a high quality public realm, with good street furniture and decorations, and hanging baskets. There is a good provision of litter bins and this is evident from an overall lack of litter.

5.43 In Mullingar, the level of vacancies in the town centre is comparatively low and there does not seem to be any incidence of vandalism. There are no significant areas of dereliction within the town.

5.44 The environmental quality of some of the secondary shopping streets in the town centre is somewhat less attractive. Here there is a lack of street furniture, good quality paving stones etc. The presence of the railway bridge does to some extent act as a natural physical barrier between the core shopping area and secondary areas. Many of the backland streets running parallel to Oliver Plunkett Street and Pearse Street have an unwelcoming appearance.

5.45 In contrast, the Harbour Place Shopping Centre has a good quality, clean and well maintained shopping environment and a good mix of retail and services.

Action

5.46 In Mullingar, it is important that there is no delay in implementing new retail developments and improving car parking provision whilst maintaining the positive features of the town centre. In this way the town's retail offer could expand to meet the growth of services required for a gateway town. To continue to retain its position within the hierarchy, in the face of competition from Athlone, Greater Dublin and Liffey Valley, it will be essential for planned and proposed developments in edge-of- town centre sites (Blackhall, Lynnpark, Fairgreen etc) to be implemented to a high standard.

5.47 The future vitality and viability of Mullingar will focus on its ability to adapt to changing consumer trends and needs, no more so than in the identification of a range of sites to be brought forward and made available for development well beyond the immediate short term – thus reflecting the increasing Mullingar population. At the same time, there needs to be an improvement to car parking provision.

Summary

Athlone

5.48 In conclusion, our appraisal of Athlone highlights the promising future performance and outlook for the town. The town has a reasonable retail offer with a number of multiples and national chains. However, the town is imbalanced in terms of the concentration of retailing activities with the focus now around Golden Island as opposed to the traditional retail centre of the town.

5.49 The relative weakness of the traditional town centre is demonstrated by relatively high vacancy rates and the poor visual appearance of many properties. In addition there is little multiple retailer representation in the town centre. There is a further imbalance between the east and west sides of the River Shannon with higher rates of vacancy and dereliction to the west.

5.50 Golden Island Centre needs to be better integrated with Irishtown and Inis Oir. The presence of the Golden Island has shifted shoppers away from the traditional centre with resultant impacts on more traditional shops and businesses in town centre.

5.51 Accessibility to the town centre and Golden Island is geared towards the car user, which is worsened by the limited dedicated pedestrian links in the town centre. Recent development around the Civic Centre (as well as the forthcoming Gallico development) will assist in drawing pedestrians back into this part of the town. The Gallico town centre development will enhance retail provision in the town centre considerably.

5.52 In time, the retail offer will need to be further enhanced and balanced through an extension at Golden Island, to comprise additional retail floorspace (non-food Tesco extension, retail warehousing and additional units), residential use, hotel and car parking facilities.

Mullingar

5.53 Mullingar is an attractive and relatively vibrant town centre, where the core linear shopping streets provide a pleasant shopping environment. The Harbour Place Centre is now well established and forms an integrated part of the town centre, through being able to provide direct pedestrian linkages to other commercial areas in the town.

5.54 The town centre as a whole caters for a range of retail and service facilities, although there are limited cultural or leisure facilities. A positive aspect of Mullingar remains the relatively high level of representation of local and independent retailers within Mullingar. Car parking provision is not good, however.

5.55 The health check assessment indicates that Mullingar is a vibrant and healthy town centre, despite some limited areas of vacancy in the town centre. This is only likely to improve in the short-to-medium term as a consequence of the Blackhall retail and mixed use development and planned retail warehousing provision.

6 FUTURE FLOORSPACE REQUIREMENTS

Introduction

6.1 In this section we set out our estimates of future floorspace requirements in Mullingar and Athlone. In order to do so, we have undertaken projections of expenditure growth for the Study Area as a whole and derived the requirements for Mullingar and Athlone through an examination of existing and projected market shares. The outcome for the Study Area is then adjusted to take account of the influence of the Gateway Strategy on Athlone and Mullingar in terms of retail attractiveness and regional significance.

6.2 The steps in this process, may be summarised as follows:

Establish the Baseline Position (2004)

- Measure existing floorspace to establish the baseline shopping provision in 2004;
- Calculate expenditure per head of Study Area resident population on convenience and comparison goods, based on published data and expressed at a constant price base (2004 prices);
- Calculate market shares of this spending, based on the results of telephone surveys conducted during the previous retail study of Westmeath[2], including estimates of outflows of expenditure by residents to centres elsewhere (leakages);
- Adjust to include estimated net inflows from outside the Study Area;
- Adjust to include estimated seasonal tourist spending based on number of visitors and average expenditure per head; and
- Assess the extent to which supply and demand for shopping space is in equilibrium in the base year.

Estimate the Shopping Position in the Study Year (2006)

- Update floorspace data from 2004; and
- Update population and turnover per head based on latest available data and estimates.

Projection to 2011, 2016 and 2021

- Project population by zone;
- Project expenditure per head on convenience and comparison goods;
- Adjust these projections to take account of expected growth in inflows including tourism spend, and reductions in leakage of expenditure;
- Project resultant expenditure growth available to outlets in the Study Area and the extent to which such spending can be serviced by existing floorspace through increased efficiency in trading;
- Calculate resultant requirements for new floorspace; and
- Allocate this floorspace to sub-areas, based on continuation of existing market shares.

[2] John Spain Associates: Westmeath Retail Study, December 2002

The Baseline Position

Existing Floorspace

6.3 The distribution of existing retail floorspace (2006) in the County and sub-areas is presented in Section Two. In summary, the scale of provision is as set out in Table 6.1 below. It can be seen that in 2006 there were 72,000 sq m of retail floorspace in the Study Area, of which some 85 per cent was located in Mullingar and Athlone.

Table 6.1: Summary of Floorspace Provision (net sales floorspace sq m) 2006

Location	Convenience	Comparison	Bulky	Total
Mullingar	7,568	9,931	12,294	29,793
Athlone	10,226	12,312	8,773	31,310
Centres in Centre Zone	574	50	2,805	3,429
Centres in Northern Zone	575	133	-	708
Centres in Eastern Zone	1,898	786	-	2,685
Centres in Southern Zone	797	333	115	1,245
Centres in Western Zone	1,408	791	405	2,604
Total	**23,046**	**24,336**	**24,392**	**71,774**

Source: Westmeath County Council

Calculation of Expenditure per Head of Resident Population

6.4 The expenditure per head in 2004 of residents of the Study Area has been calculated. At a national level, the starting point is the 2003 CSO Annual Services Enquiry, which provides the most reliable estimate of turnover in Irish retail outlets. This may then be updated to 2004 using the Index of Retail Sales and by allocating items to the categories of convenience and comparison goods, deducting estimated tourist spending and dividing the result by the State population in the same year, figures of expenditure per (resident) head thus being derived.

6.5 The resultant national figure is then adjusted to take account of the socio-economic composition of the population of each Zone in the Study Area. This composition is available from the 2002 Census of Population. Data on expenditure patterns of each socio-economic group is available from the 2000 Household Budget Survey. Census data are used to weight the spending of each group to obtain an overall figure of spending per head in each zone.

Table 6.2: Deviations in Expenditure Levels per Head by County Zones

Category	Mullingar	Athlone	Centre	North	East	South	West	State
Convenience	100.3	99.5	100.3	95.6	98.8	99.0	99.5	100
Comparison	100.6	99.6	100.6	90.7	95.5	96.9	99.6	100

Expenditure Inflow Adjustment (Other than Tourism)

6.6 An adjustment to the resident expenditure was made, to allow for the significant *inflow* of expenditure to Athlone from Counties Galway and Offaly as well as that part of County Roscommon not within the Study area. There are smaller inflows to Mullingar. The level of these inflows has been estimated using the shoppers' surveys conducted in October and November 2005. It is estimated that these amounted in 2004 to €26 million and €49 million for convenience and comparison goods respectively in Athlone. The equivalent figures for Mullingar are €10 million and €17 million. These inflows reprenent current shopping patterns and the overall floor space requirements are adjusted upwards to take account of the Gateway status of the two towns in Section 6.25 of this report.

Tourist Spending Adjustment

6.7 A further adjustment to the resident expenditure was made, in order to include estimated tourist spending based on number of visitors and average expenditure per head. It has been calculated by Failte Ireland [3] that €35 million of revenue accrued to County Westmeath from tourism activity in 2004. If national proportions apply, then 15.2 per cent will be on shopping, of which 80 per cent is estimated to be on comparison goods - a total of €4.27 million in 2004. All of this expenditure has been allocated to Athlone, which is the principal tourist shopping destination of the County.

Market Shares

6.8 Earlier on we reported on the derivation of market shares for each of the individual geographical zones. By applying market share estimates within the seven defined zones to our assessment of total available retail spending potential, the model establishes a baseline expenditure level for residents of each zone separately for convenience and comparison goods. This expenditure is then allocated to specified centres, itemised in Table 6.3, but aggregated to Zone level. The total spend at each of these centres is then modified to allow for cross-border flows in each direction and tourist spending. The base year is 2004.

Table 6.3: Centres Defined for Expenditure Allocation

Athlone	Collinstown	Kilbeggan	Multyfarnam
Ballinalack	Coole	Killucan	Raharney
Ballinea	Crookedwood	Kinnegad	Rathconnel
Ballymore	Delvin	Lismacaffrey	Rathowen
Ballynacarregy	Drumcree	Milltownpass	Rochfordbridge
Ballynagore	Dysart	Moate	Streete
Castlepollard	Finea	Mount temple	Tyrellspass
Castletowngeoghan	Glasson	Moyvore	
Clonmellon	Horseleap	Mullingar	

6.9 Details of the market shares adopted are contained in the Appendix to this report, and this includes the reported level of leakages from each zone.

Updating Spending to the Study Year (2006)

6.10 National expenditure per head figures have been updated to obtain a 2006 estimate at 2004 prices. Department of Finance and ESRI data are used to measure consumption growth in the period. The observed relationship between spending on retail goods and overall consumption is then used to obtain aggregate retail spending, and this is then divided by the April 2006 population (2006 CPO) to obtain spending per head.

6.11 Zone spending figures for 2006 were obtained by applying the index figures set out in Table 6.2 to the national figures.

Extent of Equilibrium in Base Year

6.12 When undertaking estimates of future retail floorspace requirements based on projections of change in consumer retail spending it is normal to assume that the retail system being studied is in some form of equilibrium in the base year.

6.13 Examination of the derived turnover per square metre (sales density) in Mullingar and Athlone in 2006 suggests that there is a shortage of convenience floorspace in

[3] Failte Ireland - Tourism Facts 2004 - Midlands East Region

Mullingar reflected by a much above average sales density. An allowance for correction of this shortage has been incorporated into the projections of required floorspace.

Projections to 2006, 2011 and Beyond

Population Projections

6.14 The latest available population figures for the Study Area relate to 2006. Estimates for 2004 are derived by interpolation.

6.15 Projections for 2011, 2016 and 2021 (set out in Table 6.4) are derived from NSS targets for the Gateways of Mullingar and Athlone, together with an assumption of restraint elsewhere.

Table 6.4: Population Projections for Study Zones

Zones	2006 (actual)	2011	2016	2021
Centre	32,674	38,140	44,741	52,798
Of which:				
Mullingar and environs	18,529	22,622	27,679	33,977
Remainder	14,145	15,518	17,062	18,821
East	8,293	9,098	10,003	11,035
North	6,251	6,858	7,540	8,318
South	5,737	6,294	6,920	7,634
West	36,644	41,977	48,453	56,414
Of which:				
Athlone	19,387	23,721	29,090	35,793
Remainder	17,257	18,256	19,364	20,621
TOTAL	89,599	102,366	117,657	136,197

Projections of Expenditure per Head

6.16 Projections of expenditure per head at the national level follow the projections of consumption in the ESRI Medium Term Review (MTR)[4] High Growth Model to 2015. The High Growth model is preferred because it is more likely in the shorter term and from a planning perspective, will provide a scenario which will facilitate more robust planning decisions in terms of making adequate retailing provision. For the period 2016 to 2021, where the outlook is much less certain, a high figure of 4.7 is used, again for the purpose of providing a robust planning environment. This figure is also intended to reflect the impact of critical mass as the Gateways mature. However, changes in economic indicators relating to the longer term projection period will need to be monitored before final decisions are made on retail allocations for post-2011.

Table 6.5: Projections of per capita consumption at State level

Year	2006	2007	2008	2009	2010	2011	2012-2015	2016-2021
% per annum	5	3.7	3.5	3.3	4.7	4.1	3.7	4.7

6.17 Consumption growth rates have been transformed into expected increases in expenditure on convenience and comparison goods, through observation of the historic relationship between them – a function of income elasticity of demand for such goods. Details are contained in the Appendix to this Report. Rates of capita growth

[4] Fitzgerald et al *Medium Term Review 2005 - 2012*, Economic and Social Research Institute, December 2005 August 2007

derived in this way at national level are assumed to apply to the residents of the Study Area.

6.18 These data give rise to the following per capita spending levels for the Study Area as a whole, based on national per capita growth rates and regional and local differentials as set out previously.

Table 6.6: Per Capita Expenditure Levels and Annual Growth Rates (2004 Prices)

Type of Good	Expenditure per Head (Euros)				Growth per annum (%)		
	2006	2011	2016	2021	2006-2011	2011-2016	2016-2021
Convenience	2951.5	3020.7	3174.9	3426.6	0.5	1.0	1.5
Comparison	2894.9	3577.6	4549.3	6165.6	4.3	4.9	6.3

Projection of Resultant Expenditure Growth

Convenience Goods

6.19 Based on expected population growth and growth in expenditure per head, together with increased inflows, it is projected that the total expenditure growth for convenience goods will be €217 million between 2006 and 2021 of which €26 million will be absorbed by sales density efficiency increases (which are assumed to grow at 0.5% per cent per annum). Thus, after these adjustments, €191 million will be available to support further convenience goods floorspace by 2021 – i.e. this is the amount available to the local retail sector, taking into account expected outflows and inflows.

Comparison Goods

6.20 Based on expected population growth and growth in expenditure per head, together with increased inflows and a reduction in the level of leakages to Dublin and elsewhere as the Gateway centres of Athlone and Mullingar increase their retailing scale and quality of offer, it is projected that total expenditure in the Study Area will increase from €264 million in 2006 to €874 million in 2021, for all comparison goods, of which €92 million could be accommodated in existing floorspace. We assume an increase in sales density efficiency of 1.5 per cent per annum across the Study Area - i.e. this is the amount available to the local retail sector, taking into account expected outflows and inflows and Special Forms of Trading (SFT).

6.21 Special Forms of Trading (SFT) includes catalogue sales and E-tailing. These are assumed to relate to the comparison goods sector only (web grocery sales are made from supermarkets directly and not a distribution centre). The share of total comparison goods sales accounted for by this sector is assumed to rise by 0.35 percentage points per annum.

6.22 Therefore, having accounted for increased efficiency and SFT, as well as increased inflows and leakage reduction, the total expenditure growth available to support new comparison goods floorspace locally will be €519 million between 2006 and 2021.

Summary of Market Share Changes

6.23 To illustrate the relative changes in performance, Table 6.7 below sets out the market shares expected in 2006 and 2021, both in convenience and comparison goods. Table 6.11 summarises the key steps and quantitative inputs to the estimate of future retail floorspace requirements.

Table 6.7: Present and Projected Percentage Market Shares

Zone	Convenience				Comparison			
	All spending		Excluding other and mail order		All spending		Excluding other and mail order	
	2006	2021	2006	2021	2006	2021	2006	2021
Mullingar	41.5%	42.8%	41.5%	42.8%	35.7%	39.8%	35.7%	41.9%
Athlone	38.2%	39.6%	38.2%	39.6%	43.5%	44.1%	43.5%	46.3%
Remainder of Study Area	16.3%	14.1%	16.3%	14.1%	0.8%	0.7%	0.8%	0.7%
Leakages	4.1%	3.6%	4.1%	3.6%	20.0%	10.6%	20.0%	11.1%
Other and Mail Order	-	-	-	-		4.8%		
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Floorspace Requirements

6.24 We now convert the projections of spending change into guideline floorspace ranges for each of the main levels in the hierarchy of town centres. In doing this we adapt the "theoretical" outcome derived from simply applying constant market shares in order to reflect the constraints on development in certain areas, known market and consumer trends and the need for new retail formats. It should be noted that we have adopted typical, standard sales densities. Any variation in the type of retailing which is permitted will alter sales densities and monitoring will need to reflect this.

Impact of National Spatial Strategy

6.25 As outlined previously, Mullingar and Athlone are designated in the National Spatial Strategy as constituent towns in the Midland Gateway with Tullamore, County Offaly As such, and given current investment levels in retailing in both towns, it is expected that there will be a significant increase in the retail catchment as these towns become more attractive, substantive and diverse as retailing centres. It is estimated that this increase amounts to an additional 70,000 population in the Athlone catchment and 50,000 in the Mullingar catchment, by 2021[*]. It is considered reasonable to assume that 50% of this additional catchment population would gravitate to Athlone and Mullingar as their primary shopping town resulting in an effective increase of 35,000 in Athlone and 25,000 in Mullingar. The floorspace requirements in both towns have been increased proportionately to take account of this projected increase population by 62% in Athlone and 47% in Mullingar.

Convenience Goods

6.26 Table 6.8 sets out the overall convenience goods floorspace requirements based on the projections of population, expenditure per head, and sales density efficiency growth. The existing average convenience goods sales density for the Study Area is just under €11,800 per sq m. This includes significant above average trading in Mullingar which is not sustainable in the long term. Consequently we have projected the requirement for additional convenience floorspace on the basis of an 'average' sales density of €11,000 sq m in new development. However, if a significant proportion of new convenience goods development is to come forward in the form of smaller supermarkets or discount stores in neighbourhood centres then these types of outlets will trade at markedly lower sales densities (about half that assumed for the main supermarkets) so this would mean that the projected floorspace requirements given in Table 6.8 below could increase by 30% or so. It will be necessary to monitor both the **amount** of convenience goods floorspace which is permitted and the **type** of retailing operation.

[*] Based on population projections for 30km catchments of Mullingar and Athlone prepared for Mullingar to Athlone Rail Link, Westmeath County Council, June 2006.

Table 6.8: Convenience Floorspace Requirements in Sq m net (rounded to nearest 500m²)

Location	2006-2011	2011-2016	2016-2021	Total
Mullingar	3,000	3,500	5,000	11,500
Athlone	2,500	4,000	5,500	12,000
Remainder of Study Area	1,000	1,500	2,500	5,500
TOTAL (whole Study Area)	6,500	9,000	13,000	29,000

(note: totals may not add due to rounding)

6.27 A further amount must be added to the total for Mullingar in Table 6.8, in order to eliminate the overtrading recorded in 2006. We estimate this is in the range of 2,500 to 3,000 sq m (net sales area).

Comparison Goods

6.28 Table 6.9 shows the potential increase in comparison goods floorspace within the Study Area. This comprises: the growth of pure comparison goods arising from projections of population, expenditure per head, sales density growth, net inflows (leakage reductions are set out in Table 6.7) and losses to special forms of trading; and similarly driven retail warehousing space.

Table 6.9 Comparison Floorspace Requirements in Sq m net (to nearest 500 sq m)

Location	Pure Comparison Goods				Retail Warehousing
	Total 2006-2011	*Total 2011-2016*	*Total 2016-2021*	*Total 2006-2021*	*Total 2006-2021*
Mullingar	9,000	14,000	24,500	47,000	28,000
Athlone	10,000	15,500	27,000	52,000	35,000
Remainder of Study Area	0	500	500	1,000	0
Total (Study Area)	19,000	30,000	52,000	100,000	63,000

6.29 A 2006 sales density of €5,000 per square metre has been assumed for new pure comparison outlets and €2,800 per square metre for retail warehouse outlets.

6.30 Table 6.9 indicates an overall need for some 100,000 square metres (net sales area) of pure comparison floorspace over the period 2006 to 2021, based on the assumption that 75 per cent of the increased turnover in comparison goods accrues to pure comparison goods outlets in Mullingar, and 73 per cent in Athlone. As can be seen the great majority of the projected comparison goods floorspace is likely to be attracted to Athlone and Mullingar in the remainder of the County the changes in market share indicated in Table 6.7 result in a need for a small amount of additional floorspace. Clearly, if an application for more than this was quantum was to be received then it would not be appropriate to rule it out simply on the basis of the indicative guideline given in Table 6.9 (and Table 6.8 also in relation to convenience goods floorspace). The key tests would be location within a County town centre and no adverse retail impact.

Retail Warehousing

6.31 The final component of the retail hierarchy is the planned provision of new retail warehouse parks. Currently the Study Area is somewhat low in its provision of modern retail warehouses[5] compared with mature retail systems in Britain and some more developed areas in Ireland. It is estimated that currently 16% of comparison goods turnover is in modern retail warehousing in Mullingar, and 21 per cent in Athlone

[5] Excludes some older units selling bulky goods

6.32 It is proposed that retail policy should aim to reflect an expenditure pattern whereby 25 to 27 per cent of incremental expenditure in the period 2006 to 2021 accrues to modern retail warehousing. This would give rise to the requirements set out in Table 6.9 – a total of 63,000 sq m by 2021. At the end of this period, the share of comparison spending going to modern retail warehousing would be 22% in Mullingar and 25% in Athlone.

Estimated Requirements and Proposed Floorspace

6.33 Proposals include an important town centre development (Blackhall) which will contain comparison goods shopping rather than retail warehousing and should be permitted in anticipation of the longer period to 2016 and the need to anchor retailing in the town centre as the Gateway status of the town is developed.

6.34 In Athlone, pure comparison proposals total 21,500 sq m. As in Mullingar, it is important that the major Gallico development in the town centre is implemented successfully in order to underpin the Gateway status of the town.

6.35 These guideline floorspace requirements should be treated in a flexible manner and, as recommended in the Retail Planning Guidelines and not treat them in a prescriptive manner. In particular, it should be recognised that there is a considerable 'lead' time for retail development, especially within town centres or on the edge of town centres. Thus, it is unlikely that any application for a major development which is received in 2008 will not be permitted, constructed and fully occupied much before 2011. Consequently, applications coming forward in late 2008 will be permitted, constructed and fully occupied much before 2011. Consequently, applications coming forward in late 2008 and early 2009 in reality are likely to count against the projected floorpace requirements in the next programme period – i.e 2011 – 2016 – together with any residual capacity in the 2006 – 2011 period. Application of these floorspace guidelines for development control purposes requires sensitive interpretation and regular monitoring in relation to the type of development which has already been permitted and which is proposed in the future.

7 RETAIL STRATEGY AND POLICIES

Introduction

7.1 In this section we bring together the output and key findings of our study, and set out a strategy for planning for future retail development in Athlone and Mullingar. This in turn will help guide the review of the County Development Plan.

7.2 The purpose of this retail study is to provide a review of the current retail strategy for the County of Westmeath with a particular focus on Athlone and Mullingar, and one which seeks to achieve:

- A broad indication of the quantum of development to be provided at Athlone and Mullingar;
- A general indication of criteria for selection of development opportunity sites;
- Advice on the appropriate policy approach for assessing retail proposals; and
- Guidance on an appropriate approach to monitoring and implementation, and the need for strategy flexibility over time to reflect data monitoring.

7.3 The projections of potential retail floorspace requirements set out in Chapter 6 should not be treated prescriptively, nor should they be considered as upper limits. They are simply indicative of the scale of new floorspace required to meet the needs of the existing outdated or poorly located retail floorspace. The floorspace projections should be considered flexibly and should be seen as minimums rather than maximums. The key consideration is the location of new floorspace. The quantum only becomes a critical consideration where new floorspace is proposed outside the defined retail core of any town or village and the issue of likely impact on the town centre as a whole arises.

Retail Strategy

Introduction

7.4 The great majority of any future retail floorspace requirements will be provided within the town centres of the two gateway settlements of Athlone and Mullingar. This additional floorspace will strengthen the town centres and their respective roles and function. There may, however, be future retail development which may not be able to be accommodated within the established town centres, and where this occurs there will be a need to facilitate edge-of-centre sites for this purpose.

Westmeath County

7.5 In the County, the focus of the retail strategy will be to consolidate the role and function of the existing settlement hierarchy, including the secondary tier (such as Moate, Kinnegad, Kilbeggan and Castlepollard) as well as lower tier centres, by encouraging the retention of retail and services appropriate to each centre. Where a future need emerges to serve the local population then appropriate provision should be made in order to enhance the vitality and viability of the County towns and reduce the incidence of trade leakage outside the study area.

7.6 In general, there is unlikely to be a major increase in retail requirements in the short-to-medium term, especially in the smaller, local and lower tier centres within County Westmeath. The main type of additional retail provision is likely to be in the form of new foodstores. This position should of course be reviewed over time.

Role of Town Centres

7.7 The relative retail hierarchical role and function of each town centre within County Westmeath is illustrated in graphical form in Map 7.1.

7.8 The town centres in Mullingar and Athlone have also been mapped (see the opposite page) to define the core retail shopping area within each town centre. The maps also show the location of planned and proposed major retail developments.

Key Policy Issues and Location for Development

Criteria for Assessment

7.9 The hierarchical role of each of the towns and settlements within Westmeath has been devised with a view to encouraging the improvement of all town centres in the Study Area. To strengthen the respective role of each town centre, it is necessary for the Development Plan to incorporate a set of criteria for assessing retail developments.

7.10 The current provisions of paragraphs 55 to 65 of the Retail Planning Guidelines outline the main principles for assessing new retail proposals. These should be referred to in the Development Plan to inform site selection, scale and form of development, access and servicing arrangements, linkages and support for creation of a competitive retail market in the County.

7.11 The preferred location for retail development is within the existing town centres in both Mullingar and Athlone. In instances where towns cannot accommodate retail provision within the defined town centres then edge-of-centre locations require to be identified. The precise distance to and from the defined core shopping area will vary according to the unique local circumstances of each town but nonetheless this should preferably be of no more than 300-400m from the edge of the central area.

7.12 Initially in the period up to 2011 and beyond, it is envisaged that retail development in Mullingar will be focused in the town centre, and on edge-of-centre sites immediately adjoining the town centre. On the basis of existing commitments and proposals this would comprise comparison and convenience shopping provision in the major Blackhall Place mixed use development scheme, the Fairgreen and Harbour Place Shopping Centre. The preferred locations for retail warehousing will be on the edge of centre site identified at Lynn and consolidation of existing provision at Lakepoint.

7.13 In Athlone, it is anticipated that the major town centre development scheme by Gallico will act as a catalyst to town centre regeneration whilst also meeting the additional short-term need for more convenience and comparison shopping requirements in Athlone. It will also create a more balanced town centre focused on the traditional shopping core, including the Connaught Street area (in which significant niche shopping potential exists), with Gallico and Golden Island at either end of the 'dumb-bell'. Again, the longer-term retail requirements would best be accommodated in and/or around the fringes of the existing town centre, including, for example, the site at Loughanaskin and Grace Park Road. Retail warehousing provision will be best located on established sites at Arcadia, Golden Island and the Dublin Road.

District and Neighbourhood Centres

7.14 Where an area is planned for additional population growth it is necessary to consider the need for expanding existing local District or Neighbourhood Centres or providing purpose-built new ones. This is especially important in towns such as Athlone and Mullingar where considerable population growth is envisaged. The requirement for additional non-town centre retail provision is to ensure a more localised level of retail and service outlets at a reasonably convenient level of proximity to the main housing areas.

7.15 The prime function of this more localised level of retail development is to meet local needs for regular convenience goods shopping and more day to day comparison goods (such as pharmaceutical products) or services. In broad terms the choice is between providing one or possibly two larger scaled District Centres or a greater number of Neighbourhood Centres. The relative merits of the two options are that District Centres can provide a wider range of goods in one location whilst Neighbourhood Centres provide a greater spread of retail availability which can be more readily accessed by foot or cycle.

Role and Functions

7.16 At present there are no formally designated District Centres in or outside either town. The Retail Planning Guidelines at paragraph 71 and in Annex 1 indicate that a purpose built District Centre can be within the built up area or a suburban location on the edge of an urban area and would usually contain at least one food supermarket/superstore together with non-retail services. They serve the local community within a 15-20 minute drive time and, outside Dublin, typically comprise up to some 10,000 square metres. This is in terms of the gross floorspace.

7.17 The key element of a new purpose built District Centre is the foodstore. It is this that justifies the scale of development and extent of catchment area. Generally speaking it is to be expected that a District Centre would draw on a local catchment population of about 20,000 at least, and a total population of 40,000 or so. In order to function in a sustainable manner a purpose built District Centre should be served by good quality public transport services so that the local population, in particular, can access it by non-car modes. If a District Centre is located adjacent to other trip generators this could be an advantage if it encourages an improved standard of public transport services and allows a car trip to serve more than one purpose – i.e. the promotion of linked trips on the same journey. A purpose built District Centre is likely to function most sustainably where it is located so as to serve a focused concentration of new development.

7.18 In the Retail Planning Guidelines local or neighbourhood centres are defined in the following terms: small groups of shops, typically comprising a newsagent, small supermarket/general grocery store, sub-post office and other small shops or a local nature serving a small, localised catchment population. No specific quantitative criteria for a Neighbourhood Centre are provided.

7.19 We are aware that because the lower limit for a District Centre is given as 10,000 square metres then it might be claimed that a Neighbourhood Centre can comprise 9,900 square metres or so of retail space. This interpretation does not represent the thrust of the guidance set out in the Retail Planning Guidelines.

7.20 The essence of Neighbourhood Centres is that they serve quite localised catchment areas in a way which is convenient to the population served. The distribution of such facilities cannot be too widespread however, as this would negate the benefits of a local focus of provision and development could be unviable. Thus, there needs to be a reasonable quantum of scale to provide a good local range and provide a viable focus of shopping and service outlets. In the context of peripheral or suburban Athlone or Mullingar a local catchment population for Neighbourhood Centres of some 5,000 – 10,000 would be appropriate and this could justify up to 2,500 – 5,000 square metres gross of total retail and services floorspace. Maximum gross retail sales space permissible within an anchor store of 1,500M^2 would be appropriate and will be determined by the extent of catchment area to be served within the neighbourhood.

7.21 Westmeath County Council has begun to identify current distribution of Neighbourhood Centres, existing out-of-centre shops and local shops. This demonstrates that there is already a relatively broad distribution upon which to base the longer term provision of new Neighbourhood Centres or a District Centre.

7.22 In Athlone, the majority of projected convenience and comparison goods retail requirements up until 2016 can be met on town centre or edge-of-town centre sites. Therefore, it is very unlikely that it will be necessary to consider the designation of a purpose built District Centre, although localised Neighbourhood Centre provision within new housing areas should be made. The preferred locations for the establishment of neighbourhood centres in new development areas is as follows : Cornamaddy, Lissywollen, Garrycastle and as identified in Local Area Plans for new development areas.

7.23 In Mullingar, much of the new housing growth will be focused in three new Action Area or Local Area Plan schemes at Robinstown, Ardmore/Marlinstown and Grange. It would not be appropriate to provide each of these new housing areas with a District Centre level of provision. Existing nodes at Millmount, Newbrook and Green Road serve established development areas for local shopping needs. It is the intention to have each major new development area served by a local centre then a Neighbourhood Centre standard of retail provision should be planned for. On the basis of the current distribution of the planned development, the following locations are appropriate for the development of neighbourhood centres to best serve emerging local retailing needs :- Ardmore/Marlinstown, Lakepoint and Mullingar Westside off the C-Ring. In the longer term, retail provision in the Robinstown area will be determined by reference to the Robinstown Local Area Plan with the intention that in character and form it shall replicate the traditional street pattern of the older town.

7.24 The following considerations will be taken into account in relation to development proposals:

- The quantum of space to be provided at each location should not be too small as this could result in a failure to achieve the necessary focus.
- The new centre should be conveniently located to serve newly developed housing areas and should serve catchment populations of not less than 5,000 people.
- The new centre should not be located so close to any existing local centre that it would draw trade away from it.
- The proposal should not have an adverse affect on the relative amenity of adjacent premises or on the surrounding area.
- The proposal can be adequately serviced.
- The proposal can accommodate parking in accordance with development control policies.

Large Foodstores

7.25 We have examined the issue of the present upper threshold cap applied on superstore provision, as outlined in the Retail Planning Guidelines. Despite the recent amendment in 2005 to lift aspects of thresholds relating to large scale retail warehouse developments in the key gateway towns across the State, the 3,000 sq m maximum threshold cap for convenience stores still applies in the Mullingar/Athlone/Tullamore linked gateway. We do not consider that there is any localised justification for amending this floorspace cap.

7.26 Where practicable, new large convenience foodstore developments should be located within or on the edge of a town centre or rather within a designated District Centre (if appropriate) serving a large residential area and community. Large scale foodstores of 3,000 square metres of net sales area are not appropriate within Neighbourhood Centres. The degree of accessibility by all modes of transport is vital – more so for pedestrians and those utilising public transportation – in choosing the location of new foodstores.

7.27 However, as large foodstores tend to attract high volumes of shoppers undertaking less frequent but larger weekly grocery trips, the availability of convenient and easily accessible car parking is a pre-requisite. Thus, in the future, large scale foodstores in town centre or edge-of-centre locations are likely to require decked car parking given the constraints on site availability.

Retail Warehousing

Retail Warehousing and Retail Parks

7.28 It is recognised within the Retail Planning Guidelines that retail warehousing is not, as a rule of thumb, very easily accommodated within the confines of a town centre, mainly due to the physical requirements and need for large on-site parking areas. On this basis, it is more appropriate to plan retail parks on the edge-of-town centres (should sites be available) where one or more retail warehouse unit could preferably be accommodated, and no alternative town centre site is suitable, or on out-of-centre sites should no edge-of-centre site be available.

7.29 In Mullingar, there is land designated for retail warehousing at Lynn Business Park and on adjacent lands to the south, situated along the N52 Tullamore Road. In Athlone, retail warehousing is appropriate in Arcadia, adjacent to Golden Island and on the Dublin Road from AIT to Creggan.

7.30 In assessing the suitability of any retail warehousing it will be important to consider the scale, design and character of development; the vehicular access and movement arrangements, as well as the quantitative and qualitative need for such development.

7.31 The Retail Planning Guidelines indicates that individual retail warehouses should not be less than a minimum of 700 sq m gross floorspace (with no permission to sub-divide), but yet no more than 6,000 sq m in size. It is also important that all retail warehousing is restricted solely to the use of bulky household goods. The use of planning conditions (and subsequent enforcement powers) will ensure that the range of goods sold from these premises will tend to comply with DIY and garden materials, carpets, furniture and white electrical goods. Increasingly in Ireland retail warehouse parks have been allowed which sell toys and sports goods. There should be a presumption in Westmeath that the range of uses allowed should be limited to what is recommended in the Retail Planning Guidelines so as to ensure that there is not an adverse impact on any town centre. If the range of goods recommended in the Guidelines is to be exceeded then only a limited proportion of the overall scheme should be devoted to goods which are not truly 'bulky'.

Retail Warehouse Clubs

7.32 Retail warehouse clubs, as identified in the Retail Planning Guidelines, should be treated in the same way as other large scale retail developments, as they share a similar number of characteristics.

7.33 Retail warehouse clubs are best located on the edge of the existing town centres or on out-of-centre sites if no sequentially preferable sites are available within the hierarchy, and there should be a clear and demonstrable quantitative and qualitative need for its development prior to receiving approval. In addition, particular consideration must be given to the details of design, scale, format and characteristics, as often they will not be compatible or in keeping with the wider town centre environment. As the retail warehouse clubs will tend to be focused more towards the provision of bulky goods they should have adequate car parking.

Other Forms of Retailing

Discount Foodstores

7.34 Discount format convenience retailing represents a niche market sector and one that is increasingly dominated by the continental European retailers such as Aldi and Lidl. It is considered that these supermarket formats will complement supermarkets and larger superstores through the provision of additional variety and competition in the retail market. Discount supermarkets have been established in Westmeath towns.

7.35 Discount foodstores will typically comprise about 1,500 sq m gross and are served by a surface car park with up to 100 spaces. The preferable location for a discount foodstore would be town centre or edge-of-centre, in a designated District Centre (if applicable) or in a larger Neighbourhood Centre. The potential role for a discount foodstore to act as the anchor in a small centre is acknowledged by the Retail Planning Guidelines.

7.36 The main criteria that can be adopted to assess the suitability of discount foodstore proposal may include the likely impact of the store on the urban design, character and amenity of the town or area, as well as its overall accessibility by all means of travel, and its impact on the vitality and viability of the town centre.

Factory Outlet Centres

7.37 Factory outlet centres are not currently part of the retail hierarchy or provision within the County of Westmeath. In general, the factory outlet centre is deemed to be an inappropriate development if sited in close proximity to higher order comparison centres such as Athlone and Mullingar. This is due to the direct competition offered through the provision of fashion related retail outlets and products.

7.38 Factory outlet centres offer a niche format of retailing which can be accommodated in unique or special circumstances, perhaps in or close to a smaller town within the retail hierarchy, that may benefit significantly from being an established destination for tourism-led trading, and only where there may be potential for creating stronger linkages with the nearby town centre.

7.39 It is stated in the Retail Planning Guidelines that the success of the factory outlet centres will normally depend on drawing customers and visitors from a wide catchment area, including tourists and there may be implications for existing tourist facilities and established town centres, even those some distance from the proposals.

7.40 Criteria for assessing this form of development should primarily focus on whether the development is located in a truly strategic location with the capability to capture sufficient tourism based expenditure. In terms of sustainability the preferred location would be close to or in an existing town centre, and as with many forms of retailing - highly orientated towards car users.

Markets

7.41 Markets are a popular form of traditional retailing which meets local shopping needs, often with a range of other specialist and tourism related shopping. Markets are sometimes perceived as creating adverse environmental effects such as noise, litter, and traffic congestion. To this end it would be appropriate for the County Council to develop and initiate a markets strategy for Athlone and Mullingar.

7.42 In broad policy terms, the County Council may wish to grant permission for the creation of a street, off-street or covered market (or individual stalls) provided that broad policy criteria and conditions such as those below, are met:

- There should be no adverse effect on adjacent residential amenity, any nearby conservation areas, the general town centre environment or existing shops;

- Existing road network should have sufficient capacity to take any additional traffic generated by the proposal market introduction; and
- The proposal should include adequate arrangements for customers and traders vehicle parking, servicing, storage, as well as the disposal and recycling of refuse and storage of market stalls.

Petrol Filling Station and Forecourt Convenience

7.43 Convenience retail floorspace associated with petrol filling station forecourts is a growing and expanding sector of the Irish retail market. The location for proposed petrol filling stations is often designated by the development plan, and is situated on the edge-of-town and town development limit. The shops have a part to play in serving the needs of some of the more isolated and rural communities in the County.

7.44 It is acknowledged, though, that care should be taken given that the development of such joint facilities on out-of-town sites may have a detrimental effect on the performance of an established town centre, and more importantly on the convenience shopping outlets within that town centre. Thus, reflecting the guidance provided by the Retail Planning Guidelines, local policies should be put in place that restrict the maximum floorspace for retailing at petrol stations to no more than 100 sq m.

8 IMPLEMENTATION & MONITORING

Review of the Strategy

8.1 The guidelines and policy outlined in this strategy are not intended to be treated inflexibly. It is essential that in the context of changing market conditions that the retail strategy is reviewed subsequently and updated where applicable. Consequently, monitoring procedures need to be put in place. For monitoring purposes Table 8.1 contains the key data inputs and assumptions adopted in projecting retail floorspace potential. Any significant changes in these inputs (say population) would have an effect on the projected outcome.

8.2 This Strategy should be read alongside the criteria outlined in the Retail Planning Guidelines.

Collation of Retail Data

8.3 A GIS based system for retailing should be established in the Council to report and capture relevant data, such as floorspace and land uses for all individual properties across the town centres. This system would be helpful in ensuring regular and efficient updating of town centre floorspace data, in particular that from planning applications and permissions, as well as less frequent details on change of uses.

8.4 A retail GIS system would perform as a data storage, information management and analysis tool that would be beneficial for the continuing development of the retail strategy and other planning matters.

Implementation

8.5 It is envisaged that the GIS dataset would comprise a range of information. The most recent survey undertaken in 2005 would form the basis of such a system. The data to be captured would typically comprise:

- Geographical reference;
- Unique geo-directory reference identification (providing a link to the address of the property as contained in any dataset);
- Name of the town or retail centre;
- Measure of floorspace area (sq m) for all shops and premises, irrespective if they should be occupied or vacant; and
- Use category, based on up to 5 retail and 4 non-retail types.

APPENDIX ONE

FLOORSPACE SURVEY

APPENDIX TWO

HOUSEHOLD / SHOPPERS SURVEY

APPENDIX THREE

CONSULTATION EXERCISE

APPENDIX FOUR

FLOORSPACE REQUIREMENTS