CONTENTS

EXECUTIVE SUMMARY

i. The Retail Planning Strategy has been prepared for Roscommon County Council as required under the Retail Planning Guidelines for Planning Authorities. The Strategy sets out current and future retailing levels and requirements within the county. The Strategy provides a framework to guide the Council in both preparing development plans, and assessing applications for planning permission. The Retail Planning Strategy will also help retailers and developers in formulating development proposals for the period 2002 to 2007.

ii. The Strategy is designed to ensure that there is a sufficiency of retail floorspace to accord with population and expenditure growth, and that it is located in an efficient and equitable manner.

iii. Reliable quantification of the scope for new development is dependent on the achievement of sound baseline information. To enable this the Strategy has been supported by an extensive household survey, a retail floorspace and a retail business survey.

Retail Floorspace survey

iv. The study included the undertaking of a floorspace survey to ascertain the current level of convenience and comparison floorspace within the county. This survey also identified levels of vacancy within individual town centres. It is estimated that there was nearly 30,000 square metres of retail floorspace in the main towns and villages in County Roscommon at the time of the survey in February 2002. The survey also identified a three tier retail hierarchy with Roscommon town as the county retail centre.

Health check assessment

v. The study also included the undertaking of a health check within individual centres in the County. This included an assessment of the strengths and weaknesses of town centres and is based on a qualitative analysis of factors such as range and quality of activities in a centre, its mix of uses, its accessibility to people living and working in the area and its general amenity, appearance and safety.

Household survey

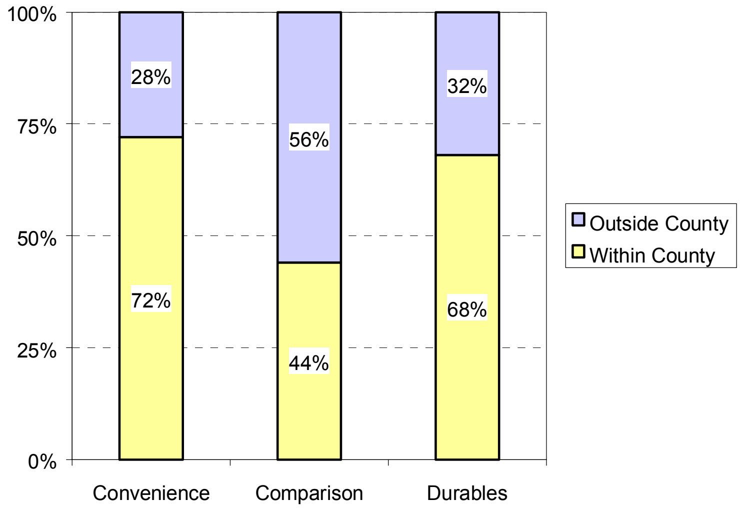
vi. A household survey was undertaken as part of the strategy. The survey comprised a postal survey of 5,926 of the 19,834 households in the County. The survey stimulated a valid response from 1,681 households representing a response rate of nearly 30%.

vii. The survey established where people travel to shop; their mode of transport; how frequently they shop; how long it takes to reach their shopping destination; how satisfied they are with their shopping environment; what are their main reasons for dissatisfaction and what improvements would they most want to see in their shopping environment.

viii. The survey identified the following spending patterns within County Roscommon. The County suffers from significant levels of leakage to surrounding counties and

centres. This is most significant in regard to comparison spend, where 56% of all spending by County Roscommon residents is outside the County. Most leakage was to Athlone, Longford and Sligo.

Levels of spend within and leakage out of the County



ix. The household survey clearly illustrates that the retail strategy should facilitate and stimulate the improvement of the retail environment throughout the county, with particular emphasis on developing Roscommon town as the county retail centre to serve and provide high quality and modern convenience, comparison and durable shopping for all the county. Creating this focus for retail activity will enable the county to regain some of the high levels of 'leakage' that is a current characteristic of the county's retail patterns.

Retail business survey

x. The survey of retail outlets established the net floorspace of retailers, the composition of customers in terms of distance travelled, the business outlook and the perceived main threats and opportunities. The survey identified a highly positive outlook amongst the business community.

xi. There is a clear perception that businesses could grow significantly, either on the back of a further strengthening of the economy, or motivated by a perception of room to 'catch-up' with broader developments of the past decade which may not yet be fully reflected in the current state of the county's retail sector. The likely increase in the future provision of retail outlets is, seen by at least some businesses as a potential threat.

Future floorspace requirements

xii. The location and scale of new retail development must have regard to the planning context for the county and in particular the RPG, County Development Plan and Town Development Plans. The Strategy has also taken cognisance of the findings of the Westmeath Retail Strategy.

xiii. Retail provision in smaller villages and local centres should be maintained and enhanced in the interests of sustainability. This will ensure that all residents of the county have easy access to basic convenience and comparison goods.

xiv. The reduction in travel times to nearby centres such as Sligo, Longford and Athlone may result in further leakage of expenditure, and in particular comparison spend to these centres. It is important to try and counteract this by improving the range and choice of shopping in Roscommon town.

xv. An assessment of floorspace capacity was undertaken in section 7 and 8 of the study. The forecasts and assumptions are subject to economic and policy change. The Strategy focuses on the period of the Roscommon County Development Plan and Town Development Plans which run to 2007. The Strategy also has regard to the long-term development of retailing as well as allowing for flexibility in the strategy for future retail development in the county. The following table sets out the indicative level of new floorspace required for County Roscommon.

Indicative new retail floorspace requirements between 2002 and 2007

	Convenience	**Comparison**
County Roscommon	1,870 - 6,800 sqm	4,900 – 7,530 sqm

xvi. New retail floorspace provision will reflect existing and projected population distribution in the county and the identified retail hierarchy. New retail floorspace should primarily be provided in the county retail centre of Roscommon town and other centres. This will enable significant levels of leakage expenditure to be retained within the County and the establishment of a more sustainable and viable retail environment within County Roscommon.

xvii. Additional convenience and comparison retail floor space should be provided where possible within the existing town centre of Roscommon and in the centres of other towns and villages in the county. Local convenience retail floorspace, in the form of local shops, may also be appropriate in locations to serve new residential areas. Retail warehousing may be met on the periphery of Athlone on appropriately zoned lands. Smaller scale retail warehousing may also be appropriate on suitable locations in Roscommon town.

xviii. The floorspace requirements are indicative of both the scale of new floorspace required to meet the needs of existing and future population and expenditure in the county. It is also representative of the level of growth required to restore the county's retailing share adequately to reflect its population share.

xix. Additional new floorspace may be proposed that could replace some existing outdated, poorly located or vacant retail floorspace. The key consideration in regard to new retail floorspace is its location. The quantum only becomes a critical consideration where new floorspace is proposed outside of the defined retail core of any town or village and the issue of likely impact on the town centre as a whole arises.

1. INTRODUCTION

1.1 The Department of the Environment and Local Government issued "Retail Planning Guidelines for Planning Authorities" in December 2000. The Guidelines require local authorities to prepare a retail planning strategy and policies to provide a framework to guide local authorities in both preparing development plans, and assessing applications for planning permission. The retail planning strategy will also help retailers and developers in formulating development proposals for the period 2002 to 2007.

1.2 County Roscommon will require additional retail floorspace for the sale of both convenience and comparison goods due to a projected increase in the levels of spending during this period. It is important that new retail floorspace is located in a way that is efficient, equitable and sustainable. This will best be achieved if strategic retail policies and proposals are incorporated in the development plans. These in turn will have to take account of a range of influences including the Retail Planning Guidelines, land use, transportation, infrastructure and other strategic planning matters.

1.3 The study is based and initially seeks to establish a solid foundation upon which to build the strategy through the generation of retail floorspace statistics for all shopping facilities in County Roscommon, together with householder and retailer surveys to help identify existing shopping patterns and expenditure flows. Future shopping requirements will be influenced by population and expenditure growth, as well as the scale and nature of outstanding planning permissions. The study provides a quantification of likely future retail floorspace requirements over the period 2002 - 2007.

2. RETAIL AND PLANNING CONTEXT

2.1 This section outlines a number of considerations that will influence and provide the context within which the Retail Planning Strategy is placed.

Retail Planning Guidelines

2.2 The Retail Planning Guidelines for Planning Authorities (RPG) were published in January 2001. The RPG outline a number of strategic policy objectives which seek to accommodate additional retail development in a way that is efficient, equitable and sustainable. The statutory development plan process, the role of the town centre and adherence to sustainable land use and transportation principles are central to the RPG.

2.3 The RPG attaches fundamental significance to town centres and recommends that retailing is retained as a core function of town centres. A sequential approach to the location of retail development is proposed. This essentially means that the preferred location for new retail development where practicable and viable, is within the town centre. Only where it can be demonstrated that there are no town centre or edge of centre sites, which are suitable, viable or available, should alternative out of centre sites be considered for significant retail developments.

2.4 All new retail development in County Roscommon must have regard to the specific provisions of the RPG.

Roscommon County Development Plan

2.5 The Roscommon County Development Plan was adopted on the 29th July 2002. The following is an assessment of the policies and objectives of the Plan. The Plan does not include any detailed retail strategy but contains a number of specific retail policies. The main retail objective is to encourage the development and expansion of a vibrant and strong retail sector focussing new development into the town centre and local centres.

2.6 The Plan recognises that there is a high level of expenditure outflow from within to outside the County. A number of the towns within the county also have large rural hinterlands that extend outside the County. The Plan supports the strengthening of existing retail centres, to create further employment, give greater choice and convenience to shoppers in the County and improve the attractiveness of the towns and villages for tourism. A new local shop may be acceptable in a rural location that is without an existing facility and which is a considerable distance from any town or village.

2.7 The improvement of the environment, access and car parking provision of existing retail areas is encouraged. The Plan states that all retail proposals are to be assessed against the criteria and recommendations set down in the RPG.

2.8 The Plan contains a number of retail objectives, including the following :

- To promote town centres as the main retail location within each settlement;

- To promote Roscommon town as the principal retail centre in the County;
- To permit new shopping developments within the existing shopping areas of the towns and villages only, or on suitably zoned land immediately adjoining the main shopping areas except as stated below;
- To facilitate and encourage the appropriate provision of retail facilities in areas that are an inconvenient distance from existing retail centres in order to service local needs;
- To assess proposals for the rebuilding and extension of rural shops having regard to the retail scale of the outlet and the overall retail policy;
- To encourage the use of upper floors of retail and commercial outlets for residential use;
- To restrict shops and motor fuel filling stations to town and village locations except where it can be established that there is a need in a rural locality due to remoteness from existing urban centres;
- To ensure that visual and residential amenity is not impaired by a proliferation of motor fuel filling stations; and
- To support and encourage the retention and development of local village and rural shops.

Town Development Plans

2.9 Development Plans exist for the settlements of Roscommon, Boyle, Ballaghaderreen, Castlerea and Athlone Environs. The Plans have recently been adopted and do not include any detailed retail strategy but contain a number of specific retail policies and zonings. The following is an assessment of the town plans.

2.10 The Plans aim to encourage the development and expansion of the retail sector by ensuring that future retail is located within the town centre. This will retain the vitality and viability of each of the town centres and facilitate employment creation and provide shoppers with greater choice and convenience.

2.11 The Plans aim to promote the town centres through the implementation of environmental improvements such as better car parking and access as well as urban design treatments. The objectives and policies of the Plans promote the same principles as set down in the County Development Plan. The Plans include the zoning objective "*Primarily Town Centre Uses*". The zoning provides for the development and improvement of appropriate town centre uses. The Plans also contain a "*General Development*" zoning within which large scale retail developments will not be acceptable as it would be contrary to the policy of containing retail developments in the town centre to strengthen its economic performance.

2.12 The Athlone Environs Development Plan identifies both land for local retail provision and a Reserved Site for a mixed use development. This zoning allows for an appropriate level of retail warehousing as part of the overall mix of uses. The zoning does not permit other retail uses or activities that generate significant levels of car usage.

2.13 Whilst the policies of the different plans have undoubtedly been successful in enhancing the retail function of the individual town centres and improving their environment, the growth in the economy and changes in retailing require that these

policies are updated to reflect new retail formats. The updated policies will also help to balance restrictive policies with proactive proposals to carry forward the regeneration and environmental improvement that has been undertaken over recent years.

County Westmeath Retail Strategy

2.14 The Strategy relates to the whole of County Westmeath including the Athlone Town Council area that lies adjacent to County Roscommon. The Strategy identified that the town drew shoppers from a wide catchment of which approximately 19% were from County Roscommon.

2.15 The Strategy identifies that there is nearly 50,000 sqm of retail floorspace within Athlone of which over 7,000 sqm is currently vacant. The Strategy identifies that Athlone has an extensive range of convenience and comparison shopping as well as entertainment facilities, restaurants, nightclubs and pubs. In view of its current role the Strategy states that it is likely to sustain its position as a major town centre.

2.16 The Strategy has estimated that there is a need for approximately 1,800 - 2,100 sqm of additional convenience floorspace, 4,700 - 66300 sqm of additional comparison floorspace and 4,600 - 6,600 sqm of bulky household goods floorspace in Athlone by 2008.

2.17 The qualitative assessment has identified a significant weakness in the existing retail structure of Athlone town centre. This relates principally to high levels of vacancies, a low level of multiple representation and poor environmental quality of the traditional main shopping areas of Church Street and Dublin Gate Street and adjoining streets.

2.18 The Strategy recommends that the land in the immediate vicinity of Golden Island Shopping Centre be identified for retail warehousing and that the provision of retail warehousing elsewhere in the town and its environs be restricted.

Connaught Regional Waste Management Plan

2.19 The Retail Strategy presents an opportunity to incorporate an emphasis on integrated waste management as outlined in the Waste Management Plan for the Connaught Region. Assessments of proposed retail developments should take into consideration the consumer waste recovery facilities and systems which they propose to provide. Roscommon County Council shall also seek the co-operation of existing and future retail outlets with the provision of Bring Banks at the required number of locations as set out in the Regional Waste Management Plan.

3. RETAILING IN COUNTY ROSCOMMON

3.1 In this section the retail hierarchy and environment in County Roscommon is described, and the vitality and viability of the main centres is assessed, with reference to the methodology presented in the Retail Planning Guidelines (RPG). The study included the undertaking of a retail floorspace survey, in February 2002 to ascertain the current level of convenience and comparison floorspace within the county. This survey also identified levels of vacancy within individual town centres.

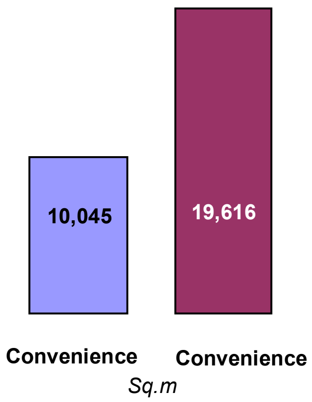
3.2 The RPG identify a four-tier national retail hierarchy. Towns in adjoining centres such as Athlone, Longford and Sligo are identified as third-tier towns within this hierarchy. No other town in or adjoining the county is identified within this national hierarchy. For the purpose of this county level study the basis for these tiers is clearly too broad. The retail hierarchy of Roscommon reflects the settlement structure of the County with Roscommon town providing the main administrative and service functions within the county. The following is a definition of the retail hierarchy in regard to centres in the County.

Table 3.1 Retail hierarchy of County Roscommon

Hierarchy level	Centre type	Description
Level 1	*County retail centre*	Roscommon town
Level 2	*Town centres*	Boyle, Ballaghaderreen, Castlerea, Strokestown.
Level 3	*Local and neighbourhood centres*	Cortober, Monksland, smaller villages, rural shops (post offices, petrol stations)

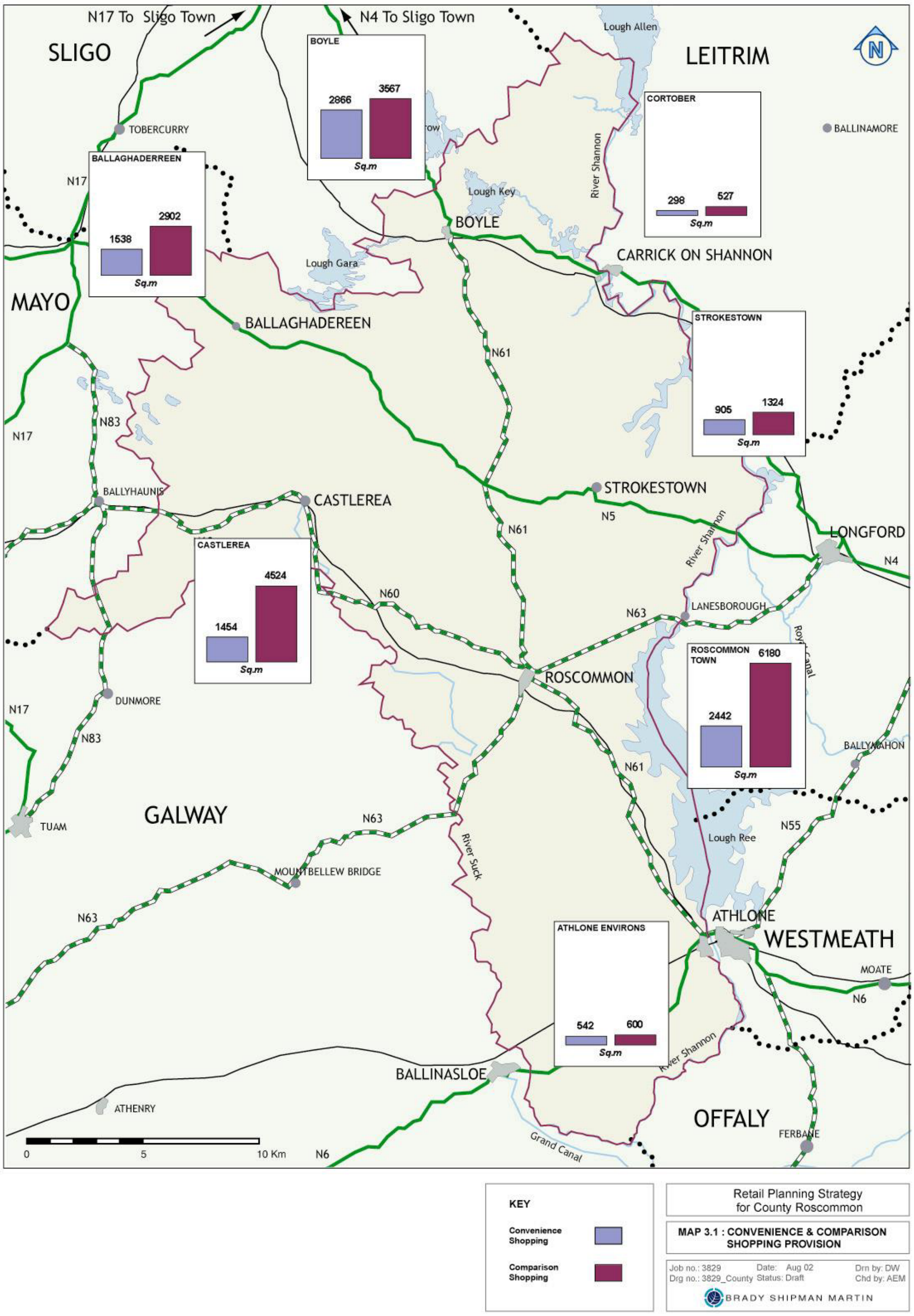
3.3 Roscommon town is the main / county retail centre and as such is at the top of the county retail hierarchy. Towns such as Boyle, Ballaghaderreen, Castlerea and Strokestown provide a local town centre role for a more local catchment and provide the second level of the county hierarchy. The third level of the hierarchy is provided by local and neighbourhood centres such as Monksland and Cortober which function as neighbourhood centres of existing towns such as Athlone and Carrick as well as local village and rural shops that are located throughout the County. The towns of Athlone, Longford, Sligo, Ballinasloe and to a certain extent Galway, provide an important retail function for the population of County Roscommon.

Figure 3.1 Retail floorspace in County Roscommon



3.4 Many of the smaller towns and villages are compact enough for all retail needs to be focused on the main street. The large number of family run and owned businesses provide an important contribution to the vitality of towns and villages in the County. Although the majority of these outlets have low levels of turnover per square metre a small number contribute to a significant level of the turnover for the whole County. These stores also contribute significantly to sustaining the rural resources and facilities of the County.

Map 3.1 Convenience and comparison shopping provision in County Roscommon



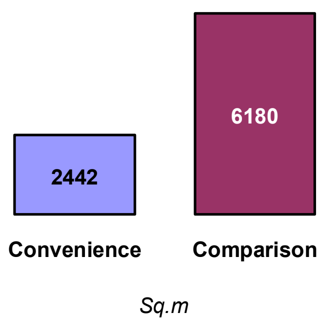
3.5 There is currently approximately 30,000 sqm of retail floorspace in County Roscommon. The County also has a large level of vacancy which provides for a further 11,664 sqm of floorspace within the main towns. Current provision is spread throughout the county, and is almost entirely made up of national and local retailers. There is currently no large supermarket food store of over 2,000sqm within the county. Retail provides an important employment function throughout the county and provides jobs for approximately 1,000 people.

Roscommon Town

3.6 Roscommon Town is the administrative capital of the County as well as the service center for an extensive rural hinterland. The town is the most important retail and commercial centre within the county and has an established central shopping area, which is based around the Main Street. The retail catchment of the town is limited by the current quantity and quality of retail provision within the town and the proximity of the towns of Sligo, Athlone and Longford.

3.7 The town contains nearly 8,500 sqm of net retail floorspace, the equivalent of over 25% of all retail floorspace in the county. Within the town there are 16 convenience retail units comprising 2,442 sqm and 60 comparison retail units comprising 6,180 sqm. There is a significant level of vacancy - 2,784 sqm - especially on the edges of the town centre.

Figure 3.2 Retail floorspace in Roscommon town



3.8 There are three main convenience outlets within the town centre. The largest store functions as the main food shopping destination for local people and is located on the Main Street. Recently an application for an extension to this store has been granted. Other convenience provision is concentrated in the other two stores. There is also a range of other food stores including butchers, bakers and small specialised shops. Outside the town centre there are a number of medium sized convenience stores, such as Londis, serving local neighbourhoods and catchments.

3.9 Comparison shopping within the town is poor. There are a number of clothing and footwear stores but these are mainly local stores although some now provide a wider range of products. The town centre contains a number of small household and DIY stores. The town also has a significant level of service providers, pubs, hotels and restaurants that is commensurate with its role as the county town.

3.10 There are two planning applications, currently on appeal, for large retail developments in Roscommon town. These are for a single storey food store with approximately 2,325 sqm net sales floorspace (55% convenience and 45% comparison), with 241 car parking spaces. The proposal is located to the east of Roscommon's Market Square, between the rear of Main Street and the town's livestock mart and north of an existing car park. The store will offer a wide range of convenience food products with a limited choice of comparison products. The store will be directly linked to the Market Square via a proposed pedestrian mall, which is the subject of a second retail application.

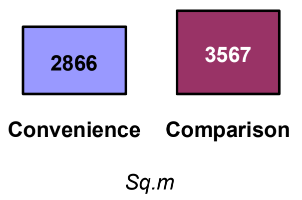
3.11 The mall would include 10 shopping units and a café with a total gross floorspace of 2,006 sqm. This mall would be occupied by a variety of comparison shopping outlets. The foodstore site is within the area that is zoned for town centre uses in the Roscommon Town Development Plan, with the entrance to the proposed store approximately 150m from the main shopping street. Retailing already faces onto the existing car park and there is pedestrian activity between it and the primary shopping core. Access to the proposed store and the existing car park would be via a one-way system feeding off Circular Road.

3.12 The town is the focus of other retail proposals that include a current application for a Lidl supermarket of approximately 1,000sqm as well as a number of other schemes that are currently at the pre planning stage.

Boyle

3.13 Boyle has an array of attractive buildings. The traditional layout of the town centre and the presence of the Boyle River flowing through the town, combine to make Boyle an attractive place to live, work and visit. Boyle is an important retail and commercial centre serving an extensive area in the north of the county.

Figure 3.3 Retail floorspace in Boyle



3.14 The town contains nearly 6,400 sqm of net retail floorspace, the equivalent of approximately 20% of all retail floorspace in the county. There are 14 convenience retail units comprising 2,866 sqm and 46 comparison retail units amounting to 3,567 sqm within the town. There is some vacancy - 1,810 sqm - especially on the edges of the town centre. A planning application for the development of 10 units comprising 700sqm of retail floorspace has recently been granted.

3.15 The town and surrounding area is fairly self sufficient in regard to convenience shopping due mostly to the development of the Super Valu store in the town centre.

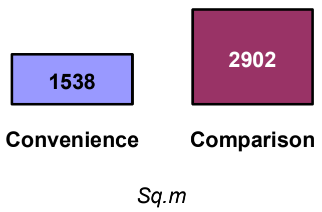
In regard to comparison shopping the town's catchment area is limited due to the level of local provision and the proximity of Sligo to the north, Roscommon town to the south as well as Longford to the east.

3.16 The demand for additional commercial facilities will be dependent on population increase and an increase in per capita expenditure, and would be accommodated by ensuring that future demand for retail development can be met. Ongoing tourism developments may provide greater impetus to commercial and service activities that are already considerable.

Ballaghaderreen

3.17 The Main Street is dominated by two and three-story nineteenth century residential and/or commercial buildings, which are typical of Irish country towns and which, combined with the historic buildings, provide Ballaghaderreen with a sense of identity and a feeling of enclosure in the Main Street.

Figure 3.4 Retail floorspace in Ballaghaderreen



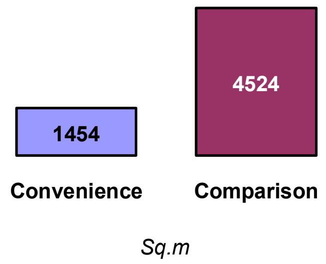
3.18 The town contains approximately 4,400 sqm of net retail floorspace, the equivalent of approximately 15% of all retail floorspace in the county. There are 11 convenience retail units comprising 1,538 sqm and 31 comparison retail units amounting to 2,902 sqm within the town. There is a significant level of vacancy, 2,856 sqm, especially on the edge of the town centre accounting for approximately 2,856 sqm of other commercial floorspace.

3.19 The town is an important retail and commercial centre within County Roscommon. The retail catchment of the town is, however, limited by the proximity of other retail centres that contain a higher level of retail provision and serve considerable areas to the north and north east.

Castlerea

3.20 The town contains nearly 6,000 sqm of net retail floorspace, the equivalent of 20% of all retail floorspace in the county. There are 16 convenience retail units comprising 1,454 sqm and 39 comparison retail units amounting to 4,524 sqm within the town. There is a significant level of vacancy accounting for approximately 1,382 sqm of other retail and commercial floorspace.

Figure 3.5 Retail floorspace in Castlerea

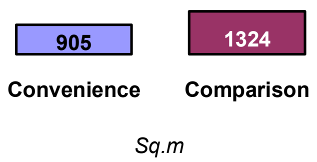


3.21 The catchment area is limited, however, by the proximity of the retail centres of Roscommon Town and Boyle which serve considerable areas of the north of the county. The demand for additional commercial facilities will be dependent on population increase and an increase in per capita expenditure, and will be accommodated by ensuring that future demand for retail development can be met in the right location.

Strokestown

3.22 Local and neighbourhood scale retail facilities are located in Strokestown. These serve an important function in providing vitality to the area and sustaining it as a place to live and work. The town contained approximately 7% of all retail floorspace in the county.

Figure 3.6 Retail floorspace in Strokestown

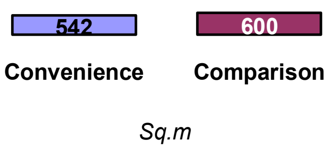


3.23 Of the total floorspace of 2,229 sqm, there are 7 convenience retail units comprising 905 sqm and 11 comparison retail units amounting to 1,324 sqm within the town. A significant level of commercial / retail floorspace was vacant at the time of the survey.

Athlone Environs

3.24 The Athlone Environs area is strategically important to the development and growth of County Roscommon. The industrial estate at Monksland contributes significantly to the economy of the County. The economic stability and growth of this part of the County, underlines the important strategic role of Athlone as a service and employment centre for County Roscommon. The area had some vacant shop units within the Monksland development.

Figure 3.7 Retail floorspace in Athlone Environs



3.25 The area has a number of functions that include an employment centre; residential and population centre; strategic transport node; and tourism and recreation location. The area will continue to contribute to sustaining the economic stabilisation and growth of County Roscommon. The area will also continue to be the focus of new employment opportunities through the utilisation of the tourism potential of the River Shannon and Lough Ree and new development close to the junction of the N6 and N61. The area will continue to provide local retail facilities for the working and resident population.

Cortober

3.26 Cortober is located on the County Roscommon side of the river from Carrick on Shannon. The area provides local neighbourhood retail facilities for the local population. At the time of the retail survey there was under 1,000 sqm of net retail floorspace of which 300sqm was convenience and 527 sqm was comparison floorspace. The recent construction of a SuperValu store has added an additional 1,000sqm of convenience floorspace and a number of other retail units are also under construction at Caper Cross in the town.

Other retail facilities

3.27 Local and rural retail facilities in the form of shops at petrol filling stations, local foodstores, butchers, agricultural based supplies, and specialist stores such as craft shops and florists were found throughout the County. These were located in villages and throughout the rural areas of the County. Local shops in rural areas provide a valuable service in sustaining rural communities.

Athlone

3.28 The area defined as Athlone here is that which is located outside of County Roscommon. The following information has been taken from the County Westmeath Retail Strategy. The town centre has become degraded and has been displaced as the primary shopping area by the Golden Island Shopping Centre (opened in 1997) and recent developments nearby. Golden Island has a gross floorspace of 15,994 sqm and accommodates a number of national and international multiple retail outlets. There are plans to extend the Golden Island Shopping Centre. The shopping environment in this area is attractive and easily accessible particularly by car.

3.29 Athlone contains more floorspace than is evident in all the main settlements of County Roscommon. The town also contains multiple convenience operators such as Tesco and Dunnes, as well as large international comparison traders.

Table 3.10 Retail floorspace in Athlone, Co. Westmeath

	Convenience	*Comparison*	*Bulky Household goods*	*Vacancy*	***Total***
Net floorspace	12,030	16,913	11,207	7,614	***47,764***

3.30 The majority of convenience outlets in Athlone town centre are operated by national multiples such as Tesco, Dunnes, SuperValu, Centra, Spar and Vivo. There is also an out of centre Dunnes Stores to the north of the town. It is of poor quality and in an isolated location. There are also retail warehouse parks as well as free standing retail warehouse units in both the Roscommon and Westmeath environs of Athlone.

4. RETAILING TRENDS

4.1 There have been substantial changes in the retail sector, both in Ireland and internationally over the last 30 years. The pace of change in the economy over the last decade has significantly accelerated the structural changes in the retail sector in the country. Consumers have become more mobile, tastes have changed, and a new emphasis on price has emerged which is likely to alter Ireland's reliance on independent retailers and specialised shops, which have characterised the Irish retailing sector.

4.2 The aim of this section of the report is to highlight the main retail trends in Ireland, to enable the Council to formulate their own specific retail proposals which can enhance the town centres and other retailing areas in the County.

4.3 The Irish national policy and advisory board for enterprise, trade, science and technology (FORFAS) has identified four key trends in international retailing that are now affecting Ireland:

- A trend towards large sized units, particularly in food retailing;
- Diversification, particularly by food retailers, into new product areas (e.g. DIY, clothing and household products), new geographic markets, and into new businesses (e.g. Marks and Spencer's move into retail financial services);
- Provision of improved services to customers, such as scanning at checkouts, home shopping, and home deliveries; and
- Centralised supply chain networks.

Irish Retail Trends

4.4 The number of retail outlets in Ireland has increased significantly since the late 1970's (39,697 in 1977 to 52,764 in 1998). While the number of grocery and clothing outlets has declined, this has been more than offset by the increase in the number of other outlets. The growth in outlets has been driven mainly by specialised outlets, such as DIY, jewellers and hairdressing salons. The fall in the number of grocery retailers reflects the low growth in consumer expenditure, coupled with competition between retailers. The one segment within the grocery trade, which has seen substantial growth is garage forecourt shops.

4.5 Food retailing has experienced significant concentration in the number of stores operating. Currently Dunnes Stores has approximately 22% of the market followed by Tesco with approximately 16%. The growth of symbol shops such as Super Valu, Spar and Centra has also been a feature of the past decade. Independents have a 15% market share, which represents almost 87% of the retail outlets.

4.6 There has been a decline in the number of clothing outlets in Ireland since the late 1980's (4,744 in 1988 to 4,259 in 1998). The major organisations in clothing are Dunnes and Penneys, both of which aim at the lower end of the market, and between them they have a 40% share of the market.

4.7 A further concentration of ownership in the food sector is likely, particularly through the entry of further UK supermarkets. Tesco has already entered the market; other retailers such as Sainsbury, Safeway or US retailer Wal-Mart/Asda may enter the market. The planning limits introduced in 1998 are likely to be a significant deterrent to UK retailers in the food sector, as they prevent them from operating in their preferred formats.

4.8 Independent retailers are likely to have more of a future in Ireland than they have elsewhere in Europe. Cultural differences, population densities and deterrents to market entry from the UK and other European multiples should ensure a strong future for Irish Independents. However, a major problem for independent retailers has been the growth in garage forecourt shopping. The numbers of independent retailers is, however, predicted to continue falling. Some may join the symbol group as way of maintaining competitiveness.

4.9 Forecourt retailing is a rapidly developing concept in Ireland, particularly through the link-up between petrol companies and symbol groups. This is something of a European revolt from the petrol companies who have seen their market share reduced by supermarket petrol stations.

4.10 Experience elsewhere in Europe suggests that supermarket retailers will attempt to launch new formats to increase market share: top-up shops in town centre or convenience sites; compact stores in edge of town or market town locations; and stand alone petrol stores with wider than usual product ranges.

4.11 Hard discounters (e.g. Aldi and Lidl) have entered the Irish market. The retail format originates principally from northern mainland Europe. They operate within their own sectors, but do hit certain sectors such as dry goods, pet food and confectionery.

4.12 Concentration in the clothing sector is likely. The lower end of this market is currently dominated by Dunnes Stores and Penneys. Concentration is likely to occur through the entry of UK and other European retailers into the Irish clothing sector. The easiest way for these retailers, such as Next and Oasis, to gain a foothold is through the opening of new shopping centres. This is the easiest and cheapest way for these retailers to get suitably sized units.

4.13 This trend is already growing, as international retailers are taking up units in new shopping centres. The market split between the two dominant players of Tesco and Dunnes should enable the existing independent food retailers to remain strong as long as out of town and car based retailing does not become dominant. This would result in a threat to their viability as well as the traditional town centre in the same way as it has been in the UK.

4.14 Outside of the new shopping areas, the influx of UK retailers is likely to be most marked in the larger Irish towns and cities. The uniformity of high streets in Britain is likely to spread to these Irish locations. This has already been evident in locations such as Cruises Street in Limerick.

4.15 The pressure for factory outlet retailing are likely to continue in Ireland, following the huge growth in this sector in the UK, and recent applications and permissions within Ireland. These centres comprise groups of manufacturers who trade from individual units on a common site, selling mainly end of lines or seconds, at significantly reduced prices.

4.16 These outlet centres are part retail, part tourist attraction, but manufacturers prefer them to be located in out-of-town locations so that they are not competing with stores selling full-price products on the high street. Forfas estimates a capacity for only three or four factory outlets in Ireland, and they are likely to remain a very difficult planning issue.

4.17 Retail warehouse parks saw a huge growth in the UK in the 1980's and into the 1990's. More recently, they have started to be developed in Ireland, and demand for these parks is likely to remain high for the foreseeable future. Typically, they are locations for bulky items not easily bought on the high street (DIY, white electrical goods and carpets).

European Comparison/Bulky Goods Retailers

4.18 Traditional mid-market high street and department stores, have lost out to large scale specialist stores focused on segments of the market. Department stores have lost out to large DIY, household, or other product specialist stores. Mid-market clothing retailers such as Marks and Spencer, C&A, Littlewoods and BHS have performed not as well as discount stores such as Matalan and New Look.

Non-Store Retailing

4.19 A market that was once seen as relatively mature (e.g. mail order catalogue shopping) is now witnessing substantial change due to the growth in Internet and television shopping. The growth in this market has been marked, but also somewhat fragmented, with many new entrants losing out and a number of traditional retailers finding a foothold.

4.20 This market is currently seeing intense change, and the growth potential is likely to be substantial on a long-term basis, particularly for non-bulky comparison items such as books, CD's and computer software. One area likely to see substantial growth is "super-specialised" shopping. The size of the overall market allows traders, particularly new entrants into the market, to specialise in a much narrower range of products than a high street store, but with far greater depth.

4.21 Village and local shops often play a vital role in maintaining the quality and range of shopping in rural areas and assist in anchoring the surrounding rural economy, particularly in less densely settled areas of the county. They can provide a valued service, catering particularly for the daily or casual needs of nearby residents or of those passing by. Local shops encompassing both foodstores and important non-food outlets such as pharmacies have significant social and economic functions; they offer a particularly important service for those who are less mobile, especially elderly and disables people, families with small children, and those without access to a car.

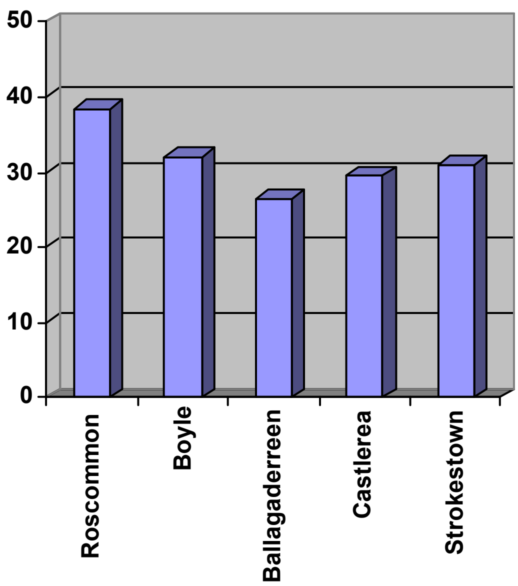
5. ASSESSING THE VITALITY AND VIABILITY OF TOWNS

5.1 The current Retail Planning Guidelines set out a standard methodology for assessing the vitality and viability of town centres. A health check of the main towns in the county has been undertaken in February 2002 in accordance with the Retail Planning Guidelines (2000).

5.2 A health check assessment of the principle towns in County Roscommon is an integral part of the retail strategy. This assessment was carried out for the principle town centres in the county and does not include the smaller towns and villages, nor the environs of the larger towns in the county.

5.3 A health check assessment essentially analyses the strengths and weaknesses of town centres and is based on a qualitative and subjective analysis of factors such as the range and quality of activities in a centre, its mix of uses, its accessibility to people living and working in the area and its general amenity, appearance and safety. The results indicate the relative vibrancy, attractiveness, accessibility and amenity of each centre. Scoring base for this assessment is indicated in Appendix 2.

Table 5.1 Health Check Assessment Scores for individual towns in County Roscommon



5.4 The Retail Planning Guidelines provide a comprehensive checklist of information to be included in a health check assessment. It is stated in the guidelines that a healthy town centre, which is vital and viable, balances a number of qualities including:

5.5 **Attractiveness –** these underpin a town and comprise the range and diversity of shopping and other activities which attract 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. It should be attractive in terms of environmental quality and urban design. It should be safe and should have a distinct identity 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 co-ordintated town centre management initiatives to promote the continued improvement of the centre.

5.6 In addition to the above factors the guidelines also recommend a number of other indicators that can be used in order to determine the vitality and viability of existing town centres. However, some of the information set out in the guidelines is not available for centres outside of the main metropolitan areas, for example – shopping rents: pattern of movement in retail rents within primary shopping areas.

5.7 In order to determine the vitality and viability of town centres in County Roscommon – the following indicators were utilised.

- Viability;
- Vitality and diversity;
- Accessibility; and
- Environment / image.

5.8 Using the above indicators, which included an assessment of the diversity of uses and multiple representation, a health check assessment was undertaken for the following centres in February 2002.

- Roscommon;
- Boyle;
- Ballaghaderreen;
- Castlerea; and
- Strokestown.

Roscommon Town

5.9 Roscommon town is an attractive market town, which has had little investment in recent years. There are only a couple of national multiples in the town. Little new retail development has occurred apart from the recent retail development in the Old Jail. There is a significant level of dereliction around the edge of the town centre. The town contains a wide range of commercial and other services that add to its attractiveness as a commercial and retail service centre. This was represented in the level of pedestrian and shopping activity occurring on the Main Street.

5.10 Urban Renewal within Roscommon town has mainly been concentrated on residential development. The town was also designated under the Town Renewal Scheme but there has been very little uptake.

5.11 Parking is mainly on street with some disabled parking in market square and a significant level of double parking along Main Street. There is one zebra crossing in the town centre. There is a significant level of through traffic in the town centre. There is a lack of soft and hard landscaping within the town and the standard of shopfronts and townscape is generally poor, and they have scope for improvement. There is very little graffiti and litter in the town and there is a high perception of safety.

Boyle

5.12 Boyle has had very little investment apart from the further development of the Super Valu store in recent years. There are no other national multiples in the town. The town does however have a pleasant townscape and functions as a tourism location. The standard mix of uses are prevalent within the town centre and levels of vacancy are again fairly high around the edges of the town centre.

5.13 Parking is mostly on street, footpaths are narrow and there are no pedestrian crossings. There is off street parking behind the post office and Super Valu stores. There is traffic congestion, which is further heightened due to the lack of pedestrian facilities. There is again a high perception of safety within the town.

Ballaghaderreen

5.14 Ballaghaderreen has had very little commercial investment in the town centre in recent years. There are no national multiples in the town. Shopfronts and the townscape are in need of renewal and are generally of poor quality. Levels of vacancy are high even in the Main Street. Parking is all on street and there are no pedestrian crossings. There is scope for upgrading the footpaths. There is a fairly high level of through traffic.

Castlerea

5.15 Castlerea is a fairly vibrant centre with a reasonable diversity of uses. There are no national multiples in the town. Shopfronts are in reasonable condition and are mainly traditional in design and in the quality of produce sold. Levels of vacancy are moderate and there is a high level of traffic congestion and pedestrian movement. There are off street parking areas but these are significantly under utilised. Parking is mainly on-street. There is a new recently constructed pedestrian crossing and footpaths are in reasonable repair.

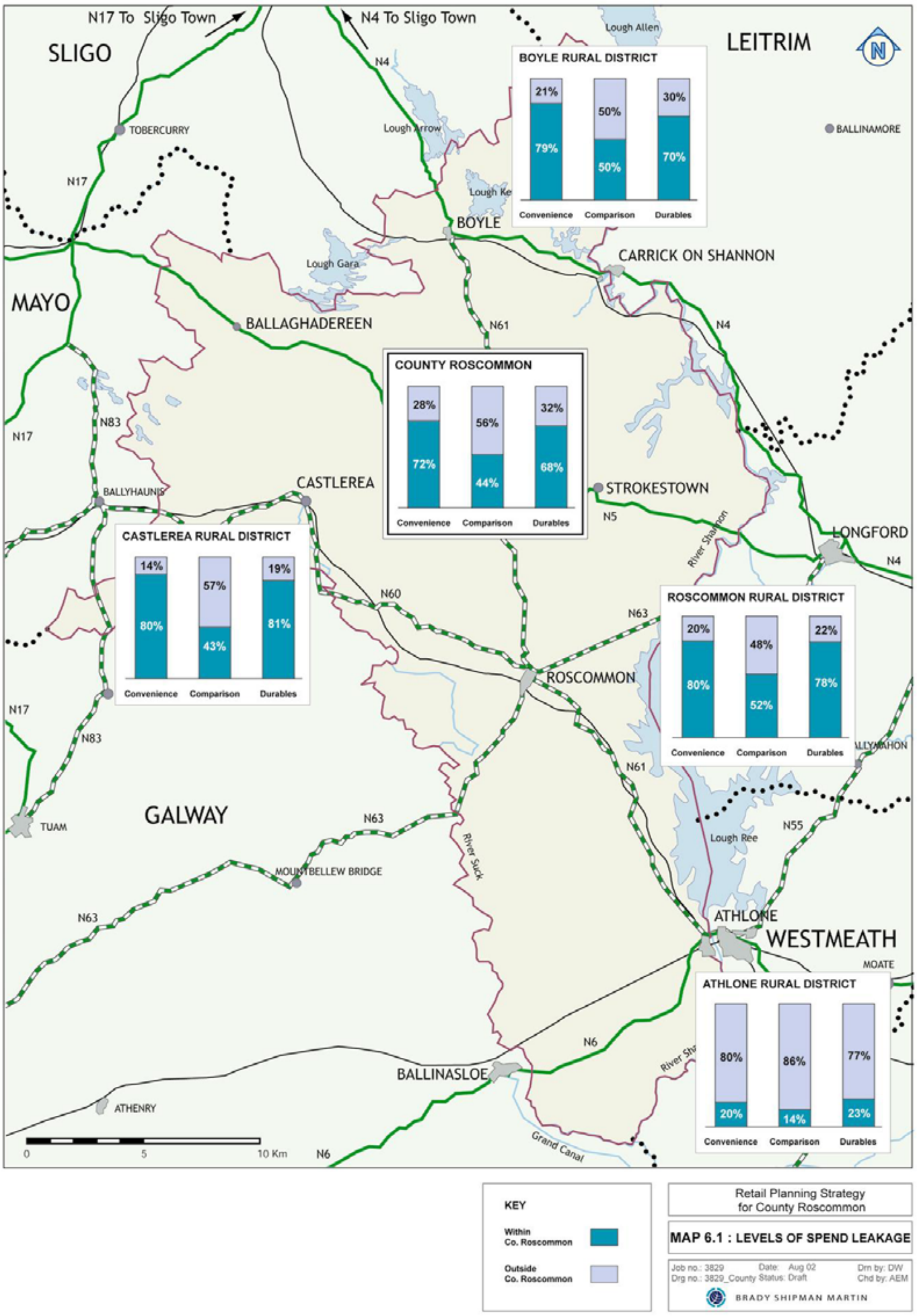
Strokestown

5.16 Strokestown has a small retail base and provides neighbourhood / local retail services to a relatively local catchment. Although having a low representation of retail provision the townscape is good with excellent levels of parking compared to demand. This provides for a good pedestrian environment despite the lack of landscaping, facilities and crossings.

6. HOUSEHOLD AND RETAIL BUSINESS SURVEY

6.1 The following section is an assessment of the key findings from the large-scale Household (the results of which are indicated below on Map 6.1) and Retail Business surveys, which were conducted throughout Roscommon during Spring 2002.

Map 6.1 Levels of spend leakage



Household shopping survey

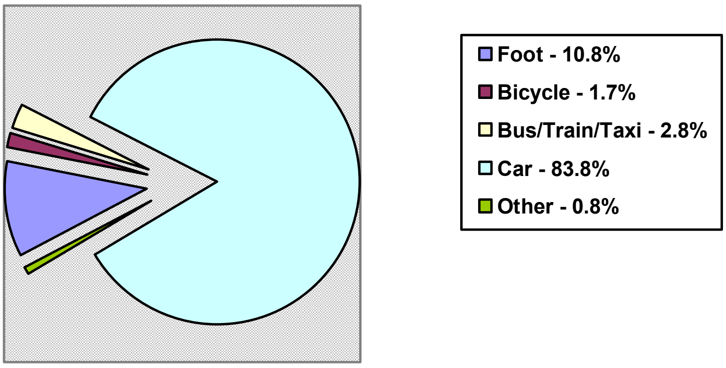
6.2 The household survey comprised a postal survey of 5,926 of the 19,834 households in County Roscommon. This represented approximately every third household being included within the survey. The survey stimulated a valid response from 1,681 households representing a response rate of nearly 30%. The large sample size of the survey, combined with the high response rate allowed a detailed and robust assessment of retail shopping patterns.

6.3 The Household Survey aimed at establishing the retailing patterns and views of shoppers in the county. These included the following key issues :

- where people travel to shop;
- their mode of transport;
- how frequently they go shopping;
- how long it takes them to reach their shopping destination;
- how satisfied they are with their shopping environment;
- if they are dissatisfied, what are their main reasons; and
- what improvements would they most want to see in their shopping environment.

6.4 Shopping activity is strongly based on the car as a mode of transport. This reflects the rural character of the county, with 84% of convenience shopping, 87% of comparison shopping and 90% of durables shopping being undertaken by car.

Chart 6.1 Means of Transport for Convenience Shoppers

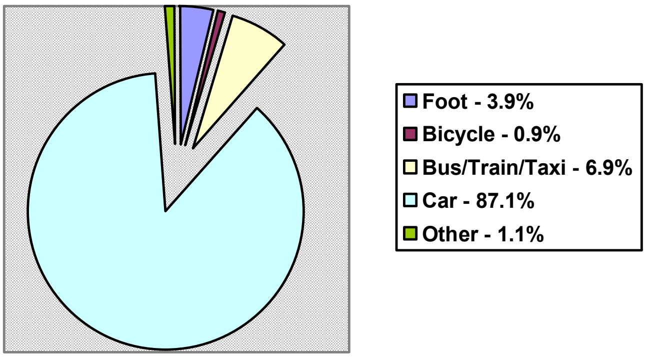


6.5 It is widely recognised that once a shopper has started their journey by car, they will often travel a few extra miles to a perceived better shopping destination. This use of the car for the majority of shopping trips makes the county particularly vulnerable to competition from the towns in neighbouring counties.

6.6 The level of shopping done by residents outside the county is borne out by an analysis of the locations normally visited on a shopping trip. This identifies that there is a large leakage of shopping potential and spend from inside to outside the county. This is borne out by the fact that 30% of convenience, 60% of comparison and approximately 30% of durables shopping are regularly done outside the county.

6.7 Whilst the proportion of durables shopping in larger towns outside the county is not unusual, the proportions for convenience and comparison shopping are possibly twice as high as they could reasonably be expected.

Chart 6.2 Means of Transport for Comparison Shoppers

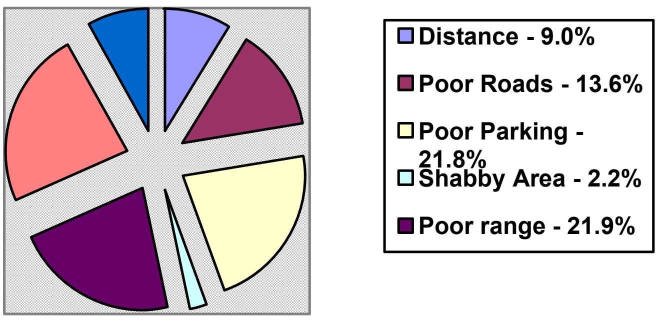


6.8 The high proportion of 'leakage' to neighbouring counties entails both a loss in revenue to the county's retailers and also an unnecessarily high usage of road infrastructure for shopping trips. Such a high level of leakage also points to an underdevelopment of the retail sector in terms of the quality, diversity and choice offered within the county.

6.9 The two main findings, the high dependency on car-based shopping and the leakage of significant revenue (due to a lack of sufficiently-sized supermarkets and variety of shops within reasonable distance) are further reflected in the comments made by the survey's respondents. They represent the two most frequently mentioned improvements that shoppers would like to observe :

- nearly 40% of respondents identified the need for larger supermarkets and a greater variety of shops; and
- 40% also mentioned the need for improved parking facilities and roads as their greatest concerns.

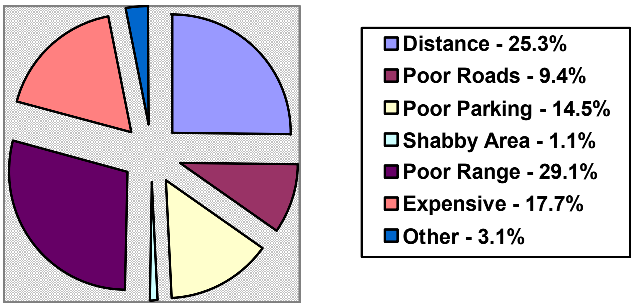
Chart 6.3 Reasons for Shoppers Dissatisfaction with Convenience Shopping



6.10 The survey also identified that people perceived that there was a shortfall in the range and variety of goods offered in the comparison sector. In regard to the main reason for being dissatisfied with their shopping location, 30% of respondents identified a lack in the range of comparison goods on offer. This was lower within both the

convenience and durable shopping market, where only22% stated that they were dissatisfied with the goods on offer.

Chart 6.4 Reasons for Shoppers Dissatisfaction with Comparison Shopping in County Roscommon



6.11 This is reflected in the longer distances currently being travelled for comparison shopping compared to convenience and durables shopping and the strongly expressed requirement that comparison goods be available nearer to their place of residence.

6.12 Approximately 25% of respondents state the distance for comparison shopping as a major reason for dissatisfaction, compared to 9% for convenience shopping and 14% for durables shopping.

6.13 It is clear from the survey results that Roscommon town is the most often mentioned location for which shoppers are seeking improvements. Approximately 25% of shoppers are seeking improvements to convenience, 30% to comparison and 30% to durables shopping in Roscommon town.

6.14 The household survey clearly illustrates the need for the retail strategy to be based on facilitating and stimulating improvement of the retail environment throughout the county, with particular emphasis on developing Roscommon town as the county retail centre to serve and provide high quality and modern convenience, comparison and durables shopping for all the county.

Survey of retail outlets

6.15 The Survey of Retail Outlets aimed at establishing the following information :

- the net floorspace of existing retailers;
- the composition of customers in terms of distance travelled;
- the business outlook for the next five years; and
- the main threats and opportunities as perceived by existing businesses.

6.16 The survey comprised a postal survey of all 848 retail businesses in the county. Valid returns numbered 130, equal to a response rate of 15%. The survey broadly confirmed the average floorspace estimates of the floorspace survey.

6.17 Higher results for the average net floorspace in the convenience category are explained by the high response rate of supermarkets (11 out of 14) and the low

response rate amongst family-run convenience outlets like groceries, bakers and butchers etc.

6.18 Post and Telecommunication operators provide the most local service to customers with about 90% of customers originating from within a five-mile radius. Convenience shops also provide a local service with over 80% of customers coming from within a five-mile radius. Comparison shops serve a more extensive catchment with 60% of customers originating from within a five-mile radius.

Table 6.1 Origin of customers within County Roscommon

Category	local	under 5 miles radius	rest of county	from outside county	tourism
Post & Telecommunication	68%	21%	8%	2%	1%
Retail - Convenience goods	55%	27%	13%	4%	1%
Banking & Finance	50%	27%	17%	6%	0%
Hospitality	43%	19%	7%	9%	22%
Retail - Comparison goods	37%	25%	16%	18%	4%
Car Sales & Repair	30%	18%	19%	28%	5%
Other	25%	20%	22%	29%	4%
Wholesale	18%	16%	22%	43%	1%
Tourism & Transport	13%	10%	14%	60%	3%

Sources: Retailers survey results

6.19 The business outlook of operators was positive when the survey was undertaken in the Spring of 2002. Over half of respondents (56%) expect their business to expand over the next 5 years; 41% expect it to remain about the same, and only 3% expect it to be contracting.

6.20 This clearly reflects a highly positive outlook amongst the business/retail community and may be indicative of a feeling that there is still some room for retail businesses to catch-up with developments of the previous decade, outside the county. The most important opportunities identified by shop owners are as follows:

- 35% believe that they can expand, diversify and/or improve the services and facilities; and
- another 14% believe that increased population within their catchment area will be beneficial.

6.21 The most important threats identified by shop owners are as follows:

- 15% envisage increasing costs to be a major factor;
- 13% highlight the lack of employment and local development, as well as a possible downturn of the economy as a major threat;
- 21% perceive competition to be a serious threat, including the arrival of large-scale supermarkets or multinational chains and the granting of planning permissions for large-scale developments; and
- 9% quote the poor roads and lack of parking as a major hurdle.

6.22 The Retail Outlet Survey is indicative of a highly positive outlook amongst Roscommon's business community. There is a clear perception that businesses

could grow significantly, either on the back of a further strengthening of the economy, or motivated by a perception of room to 'catch-up' with broader developments of the past decade which may not yet be fully reflected in the current state of the county's retail sector.

6.23 The likely increase in the future provision of retail outlets is seen by at least some businesses as a potential threat. The next section provides an assessment of the level of additional retail floorspace that County Roscommon could absorb based on sustainability criteria.

7. FUTURE FLOORSPACE REQUIREMENTS

7.1 This section quantifies the requirements for additional retail floorspace until the year 2007. It is divided into several sub-sections. The first section is an assessment of national trends in consumer spending. The second section assesses national trends in retail volume until 2002. The third section outlines the predictions of retail growth until 2007 and the fourth section evaluates how the predicted growth in retail volume translates into floorspace requirements. The final section analyses whether the study area should deviate from the national trends outlined in the first three sections. Particular attention is paid to the robustness of the estimates in the light of different scenarios of economic development and the long-term sustainability of the level of retail floorspace.

National trends in consumer spending

7.2 This section deals with the following three categories of consumer spending.

Personal consumption

7.3 This comprises the total expenditure of private households; i.e. total shop-based consumption plus costs for housing, fuel, transport, recreation and services.

Shop-based consumption

7.4 This comprises all those items, which are purchased within shops or department stores. The forecasts of future shop-based consumption provides the basis for the estimation of future floorspace requirements. Shop-based consumption excludes the motor sales category.

Convenience and comparison shopping

7.5 Shop-based consumption is made up of convenience and comparison shopping. The former comprises items such as food, beverages, tobacco, alcoholic beverages consumed at home and other non-durable grocery items. The latter comprises of items such as clothing, footwear and durable household items.

7.6 Estimates of the level and trends in personal consumption and retail sales are based on the following three central components.

- National Income and Expenditure accounts (CSO);
- Retail Sales Index (CSO); and
- Short and medium term economic forecasts for personal consumption as published by the Economic and Social Research Institute (ESRI) in the Quarterly Economic Commentary and Medium-Term Review: 2001-2007.

7.7 Each of these data sources provides data on the value of retail sales, which refers to current expenditure, and the volume of sales, which refers to the value of sales after accounting for inflation. The latter is generally expressed as the level of expenditure in the prices of a particular base year and thus is indicative of the real change in purchasing behaviour. Changes in retail volumes over time provide an input into the estimation of future floorspace requirements. Unless otherwise stated, the data

presented in this section deals exclusively with the changes in retail expenditure net of inflation.

Trends in Retail Sales, 1990-2000

7.8 The level of retail sales or shop-based consumption may be derived either from the *Annual Services Inquiry* or the *National Income and Expenditure* accounts. The *Annual Services Inquiry* provides the most accurate estimate of the level of retail activity at certain points in time (e.g. 1996), but does not provide consistent information over longer periods of time. Therefore, trends in shop-based consumption or the level of expenditure on convenience and comparison goods may only be derived from the *National Income and Expenditure* accounts or the *Retail Sales Index* as indicated in table 7.1.

Table 7.1 Change in Consumer Expenditure between 1990 and 2000

Category	1990 (€m)	2000 (€m)	Cumulative Change	Average Annual Change
Convenience	6,004	8,448	40.7%	3.5%
Comparison	4,213	10,159	141.1%	9.4%
Shop-based consumption (NIE)	10,217	18,607	82.1%	6.2%
Retail sales (RSI)	-	-	68.4%	5.5%
Personal consumption	25,078	42,894	71.0%	5.5%

Source: CSO *National Income and Expenditure*, Table 14;
Data for *Retail Sales Index* based on ESRI *Quarterly Economic Commentary*, Table 5.

7.9 Three important observations can be made from the *National Income and Expenditure* data and the *Retail Sales Index* with regard to the volume of retail sales:

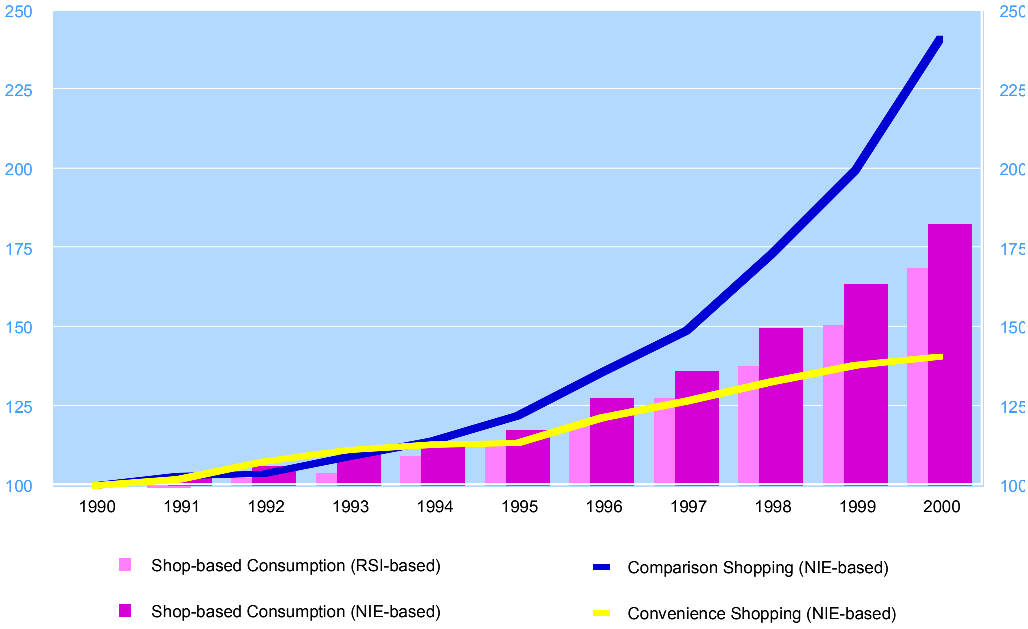
- Expenditure on comparison goods has grown at a significantly faster rate than on convenience goods (9.4 % against 3.5% per annum);
- As a consequence, the share of convenience shopping in total shop-based consumption has dramatically fallen from 58.8 % in 1990 to 45.4 % in 2000; and
- The share of shop-based consumption in total personal consumption is slowly increasing over time.

7.10 The diverging trends in convenience and comparison shopping can easily be understood when considering the underlying processes involved:

- Over 80% of convenience shopping is made up of food. But people can only eat so much. As incomes rise, as has been the case in the economic boom of the 1990s, they may buy a more expensive cut of meat or a better bottle of wine, but the quantity they purchase remains essentially the same.
- In relation to comparison goods, however, people may decide not only to buy more expensive goods as incomes rise, but also to buy more goods and buy them more frequently, thus resulting in significantly greater sales volumes.

7.11 Figure 7.1 illustrates the annual data as provided by the two data sources for the years 1990 to 2000.

Figure 7.1 Volume of Retail Sales, 1990-2000



Sources:

CSO *National Income and Expenditure*, Table 14
ESRI *Quarterly Economic Commentary*, Table 5

Predicting Retail Growth for 2000-2007

7.12 The Retail Planning Guidelines have adopted a new approach in estimating future floorspace requirements by linking retail sales to econometric forecasts of future consumer spending.

7.13 The most accepted forecast for the future development of the Irish economy is the ESRI medium-term forecast *(Medium-Term Review: 2001-2007,* Economic and Social Research Institute, September 2001). The 2001-2007 forecast builds on Irish economic data until the end of 2000 as well as taking account of the long-term demographic trends, the external environment and likely domestic policy. The report offers a number of different forecasts that relate to different scenarios of the future development of the world economy, demographic development in Ireland and labour supply functions. For the purpose of this study, the central forecast of the *Mid-Term Review* is used.

7.14 The forecast predicts a continuous expansion of the Irish economy with expected growth rates well in excess of the European average. The recent strong growth performance is already resulting in bottlenecks in labour supply and higher than European-average inflation. This has already started to result in a gradual slowing down of the economy, which is likely to continue over the medium term.

7.15 Despite concerns about the long-term sustainability of the excessive growth rates during the second half of the 1990s, the growth in personal consumption for 1999 and 2000 has turned out again to be higher than previously anticipated. A combination of

the *Medium Term Review* and the latest ESRI short-term forecasts for the years 2001 to 2003 are used (*Quarterly Economic Commentary*, Spring 2002, Tables 5, 9 and A1). The assumptions for the 2001-2007 period are indicated in table 7.2.

Table 7.2 Forecast, Out-turn & Adjusted Assumption for Personal Consumption, 2001-2007

Year	ESRI Medium Term Review	ESRI short-term forecast	Adjusted Assumption
2001	7.2%	5.5%	5.5%
2002	6.9%	4.3%	4.3%
2003	2.5%	4.4%	4.4%
2004	2.0%		4.1%
2005	1.7%		3.8%
2006	4.3%		3.5%
2007	3.7%		3.2%

Source: ESRI *Medium-Term Review* and *Quarterly Economic Commentary*

7.16 The proportion of retail sales (shop-based consumption) to total personal consumption has been growing by an average 0.3 % per annum during the period between 1990-2000. As the growth predicted for the years ahead is still substantial, but lower than over the past few years, for the purpose of this study, it has been assumed that the share in retail sales in personal consumption will continue to grow at an annual rate of about 0.2 % for the 2000-2007 period.

7.17 Comparison goods sales increase at a faster rate than convenience goods sales. The proportion of convenience goods in total shop-based consumption has declined by 1.3 % per annum over the 1990-2000 period. As the growth predicted for the years ahead is still substantial, but lower than over the past few years, it has been assumed that the share in retail sales in personal consumption will continue to grow at an annual rate of about 0.7 % for the 2000-2007 period. The following table summarises the cumulative and average annual growth rates of personal consumption and retail sales for the periods 1990-1995, 1995-2002 and 2002-2007.

Table 7.3 Personal Consumption and Retail Sales, 1990-2007

Category	Change	1990-1995	1995-2002	2002-2007
Personal Consumption (in constant prices)	cumulative	17.5%	60.2%	20.5%
	(avg. annual)	(3.3%)	(7.0%)	(3.9%)
Volume of Shop-based Consumption (NIE)	cumulative	17.0%	72.6%	22.8%
	(avg. annual)	(3.2%)	(8.1%)	(4.3%)

Source: CSO *National Income and Expenditure*
ESRI *Quarterly Economic Commentary*
own calculations as set out in Table 7.2

7.18 Table 7.4 summarises the cumulative and average annual growth rates for convenience and comparison shopping for the periods 1990-1995, 1995-2002 and 2002-2007.

Table 7.4 Convenience and Comparison Shopping, 1990-2007

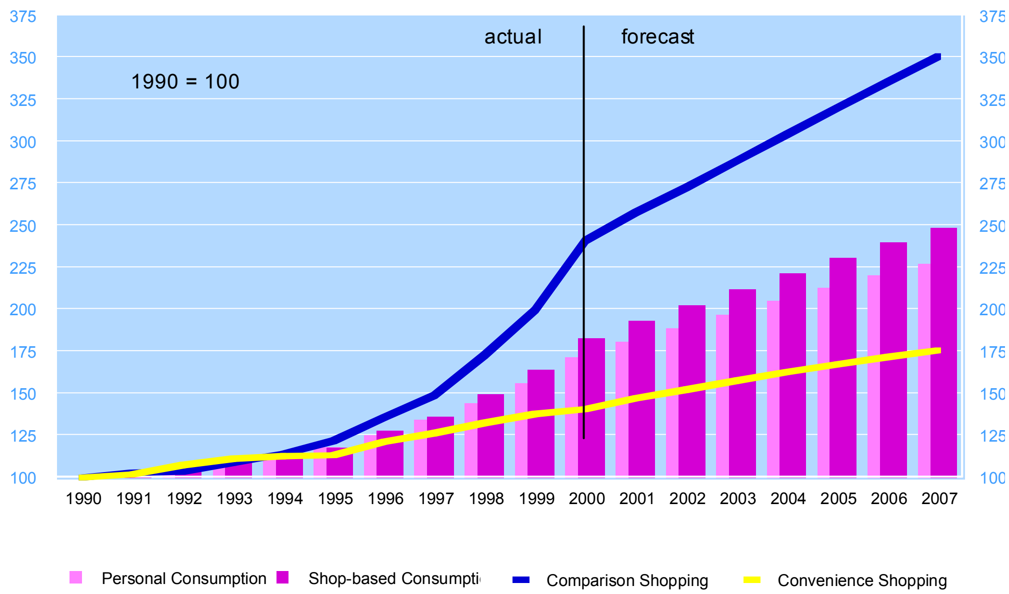
Category	Change	1990-1995	1995-2002	2002-2007
Convenience Shopping	cumulative	13.4%	33.1%	12.5%
	(avg. annual)	(2.6%)	(4.2%)	(2.5%)
Comparison Shopping	cumulative	22.0%	125.0%	30.8%
	(avg. annual)	(4.1%)	(12.4%)	(5.6%)

Source: CSO *National Income and Expenditure*
ESRI *Quarterly Economic Commentary*
own calculations as set out under paragraph 7.12

7.19 The data presented in tables 7.3 and 7.4 illustrates that the expected growth in the years 2002 to 2007 are much akin with the experience of the first half of the 1990s. The 1995 to 2002 period was an exceptional growth experience, which is unlikely to continue in the future.

7.20 Figure 7.2 illustrates the data summarised in tables 7.3 and 7.4. The data mirrors the booming Irish economy of the second half of the 1990's with growth peaking during 1999 and 2000. The positive outlook of the ESRI's Central Forecast is reflected in the expected continuous growth, albeit at rates more similar to those prevailing during the first half of the 1990's.

Figure 7.2 Personal Consumption and Retail Sales, 1990-2007



Sources:

CSO *National Income and Expenditure*, Table 14
ESRI *Quarterly Economic Commentary*, Table 5

Forecast::

ESRI *Medium-Term Review*, 2001
ESRI *Quarterly Economic Commentary* Spring 2002
and own calculations

7.21 The continued strong growth projections for the volume of retail sales until the year 2007, have to be evaluated against their long-term sustainability. The development of the maximum possible floorspace, based on current growth predictions, could result in considerable 'thinning-out' of retail outlets if the economy should slow down

more drastically in the future. As newly-established shopping centres are likely to be better poised to weather a period of slow growth or even recession than smaller shopping units, it would be the more traditional retail outlets which would be affected if such a downturn occurred.

Retail floorspace requirements

7.22 The latest baseline figures of national retail floorspace are contained in the 1988 Census of Services. National estimates for 1996 are contained in the Retail Planning Guidelines (RPG). The RPG figures are based on survey data collected through industry sources and Planning Authorities, as well as published data from the Centre for Retail Studies, University College, Dublin (Parker, Kyne & Cunningham (1997) *The Irish Shopping Centre Digest)*. The following table summarises these best available estimates.

Table 7.5 Estimated national retail floorspace in 1987 and 1996

Category	Floorspace in 1987	Estimated floorspace in1996	Change in floorspace 1987-1996	Change in floorspace 1987-1996
Convenience	993,541 sqm	1,115,494 sqm	121,953 sqm	12.3%
Comparison	903,095 sqm	1,205,316 sqm	302,221 sqm	33.5%
Total	1,896,636 sqm	2,320,810 sqm	424,174 sqm	22.4%

Source: CSO *Census of Services*, 1987
Department of the Environment *Retail Planning Guidelines,* 1999

7.23 Annual changes in expenditure on convenience and comparison shopping are used to calculate annualised floorspace changes due to retail floorspace estimates only being available for 1988 and 1996. An assumption based on the period 1990-1996 accounting for two-thirds (6 out of 9 years) of the growth in floorspace between 1987-1996 indicates that convenience floorspace grows at 40% of the rate at which the expenditure on convenience shopping grows (net of inflation). The same assumption results in comparison floorspace growing at just under 60% of the rate at which the expenditure on comparison shopping grows. The following table indicates the estimates for past and future floorspace requirements.

Table 7.6 Growth in retail floorspace, 1990 - 2007

Category	Change	1990-1995	1995-2002	2002-2007 (estimate)
Convenience shopping	cumulative	5.2%	12.7%	5.9%
	(avg. annual)	(1.0%)	(1.7%)	(1.2%)
Comparison shopping	cumulative	12.6%	62.5%	16.2%
	(avg. annual)	(2.4%)	(7.2%)	(3.1%)
Total retail floorspace	cumulative	8.8%	38.1%	12.1%
	(avg. annual)	(1.7%)	(4.7%)	(2.3%)

Floorspace: DoE *Retail Planning Guidelines,* 1999 and own estimates

7.24 The following table compares the estimated floorspace requirements of the RPG in 1999 with current estimates.

Table 7.7 Comparison of estimates of floorspace requirements 1996-2003

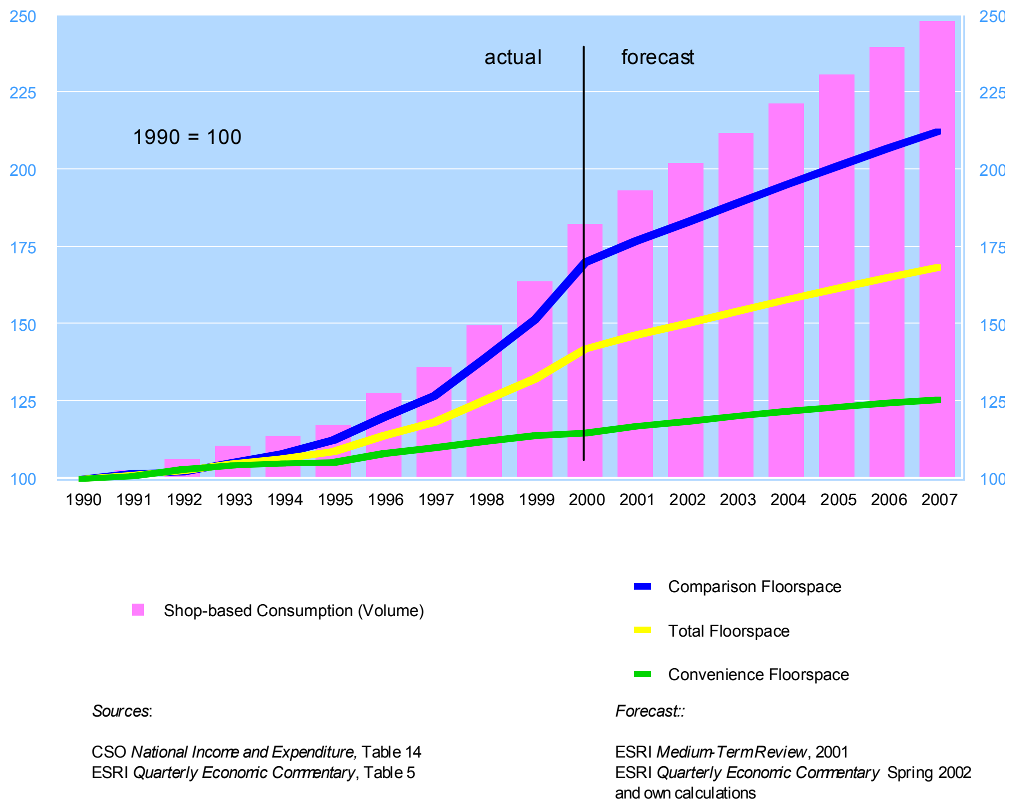
Category	Change	Estimates of Retail Planning Guidelines	Current estimates
Convenience Shopping	cumulative	11.2%	11.2% (1.5% annual avg)
Comparison Shopping	cumulative	36.7%	57.6% (6.8% annual avg)
Total Retail Floorspace	cumulative	24.4%	35.2% (4.4% annual avg)

Floorspace: DoE *Retail Planning Guidelines,* 1999 and own estimates

7.25 The estimates of floorspace requirements for the 1997-2003 period provide a very reasonable update of those contained in the RPG. In regard to convenience floorspace, current estimates of 11.2% growth for the seven year period, undertaken as part of this study, are identical to that contained in the RPG. This is unsurprising as convenience floorspace is largely a function of population growth and only marginally influenced by changes in the relative affluence of the population as a whole.

7.26 The prediction of 57.6% growth in comparison retail floorspace is almost 60% higher than the estimates contained in the RPG. This is again unsurprising as personal consumption has grown at a significantly higher rate than forecasted at the time of the publication of the RPG, and the growth in comparison floorspace is highly sensitive to changes in the relative affluence of the existing population.

Figure 7.3 Retail sales and floorspace, 1990-2007



7.27 Total retail floorspace is estimated to have grown by 35.2% between 1996 and 2003, an annual average rate of 4.4%. Rather than constituting a difference in the principal assumptions, the current estimates undertaken as part of this study provide an update of the RPG figures on the basis of the latest-available information. Figure 7.3 shows the annual changes of the predictions undertaken as part of this study.

7.28 As is evidenced in figure 7.3, the 2000 to 2007 period is likely to be a very similar experience to the first half of the 1990's. In contrast, the 1995 to 2000 period was one of unprecedented growth, resulting in exceptional increases in comparison shopping.

Table 7.8 Estimated national retail floorspace in 1990, 1995, 2002 and 2007

Category	1990	1995	2002	2007
Convenience shopping	1,034,000 sqm	1,088,000 sqm	1,226,000 sqm	1,299,000 sqm
Comparison shopping	1,004,000 sqm	1,130,000 sqm	1,836,000 sqm	2,133,000 sqm
Total retail floorspace	2,038,000 sqm	2,218,000 sqm	3,063,000 sqm	3,432,000 sqm

Floorspace: DoE *Retail Planning Guidelines,* 1999 and own estimates

7.29 This increase has created a significant shift in the share of comparison shopping in total retail activity. However this trend cannot continue indefinitely, particularly in face of a gradual slow-down in the economy. Table 7.8 and table 7.9 summarise the estimated floorspace for selective years and the estimated growth in floorspace for the three time periods and the annual growth pattern respectively.

Table 7.9 Growth in retail floorspace, 1990 - 2007

Category	Change	1990-1995	1995-2002	2002-2007
Convenience shopping	cumulative	54,000 sqm	138,000 sqm	73,000 sqm
	(avg. annual)	(11,000 sqm)	(20,000 sqm)	(15,000sqm)
Comparison shopping	cumulative	126,000 sqm	706,000 sqm	297,000 sqm
	(avg. annual)	(25,000 sqm)	(101,000 sqm)	(59,000 sqm)
Total retail floorspace	cumulative	180,000 sqm	844,000 sqm	369,000 sqm
	(avg. annual)	(36,000sqm)	(121,000 sqm)	(74,000 sqm)

Floorspace: DoE *Retail Planning Guidelines,* 1999 and own estimates

Sustainability of additional retail floorspace

7.30 The estimates of floorspace requirements for the 2002 to 2007 period are based on sustainable development principles as outlined in the following paragraphs.

Convenience Shopping

7.31 Convenience shopping floorspace has effectively been growing at a constant rate. It is inelastic to the economic cycle and reflects the medium-run population growth, which Ireland is currently experiencing. The latest population projections of the Central Statistics Office (CSO) estimate that the population will either continue to rise in the long-run, or that this growth may gradually slow down.

7.32 A return to high levels of emigration is believed to be comparatively unlikely in the foreseeable future. A growth in convenience floorspace of approximately 1.2% per annum is fully sustainable in the long term.

Comparison Shopping

7.33 The comparison retail sector, in contrast to convenience shopping, is highly elastic. The sector grows at a more-than-proportionate rate at times of economic boom, but may also contract at times of economic stagnation or even depression. The economic boom during the second half of the 1990's and the confidence arising from this has created significant floorspace demand.

7.34 Comparison shopping floorspace has grown by over 60% between 1995 and 2002 and is predicted to grow by another 16% during the next five years. An increase in comparison floorspace at the rate experienced during the 1995 to 2002 period would be unsustainable in the longer term. The 16% growth in comparison floorspace for the 2002 to 2007 period is therefore more sustainable and will not have any significant impact.

8. FUTURE FLOORSPACE REQUIREMENTS OF CO. ROSCOMMON

8.1 The past and future national developments in retailing have been outlined in detail in the previous section. This chapter assesses the future floorspace requirements of County Roscommon. The following table is a comparison of the estimates of the number of convenience and comparison outlets contained in the 1988 Census of Services and that identified in the floorspace survey undertaken throughout the County as part of this study in February 2002.

Table 8.1 Number of shops in County Roscommon, 1987 and 2002

Category	Number of outlets in County 1987	Number of outlets in towns and villages 2002
Convenience	268	69
Comparison	182	194
Total	**450**	**263**

Sources: CSO *Census of Services*, 1988, Table 2
BSM *Roscommon Floorspace Survey,* 2002

8.2 Table 8.1 illustrates, even allowing for the different databases, that the number of convenience shops has declined significantly between 1987 and 2002. There has only been a marginal increase in the number of comparison shops in the County.

8.3 The change in the level of convenience floorspace is less dramatic (but nevertheless still significant), than indicated by the reduction in the number of outlets, and in contrast to a national growth in convenience floorspace. Comparison floorspace, in contrast, has risen considerably, but again at a much lesser rate than nationally.

Table 8.2 Net retail floorspace in County Roscommon, 1987 and 2002

Category	Floorspace 1987	Estimated floorspace in towns and villages in 2002
Convenience	12,881 sqm	10,045 sqm
Comparison	11,496 sqm	19,616 sqm
Total	**24,377 sqm**	**29,661 sqm**

Sources: CSO *Census of Services*, 1988
BSM *Roscommon Floorspace Survey,* 2002

8.4 The following table 8.3 indicates the hypothetical scenario and level of retail floorspace in County Roscommon if the level of floorspace had developed and grown at the same rate as at a national level between 1990 and projected growth to 2007.

8.5 Table 8.3 indicates a share of the total national retail floorspace for Roscommon of 1.28% in 1990. As the scenario assumes a floorspace growth equal to the national level, the Roscommon share in the national floorspace remains constant in 1995, 2002 and 2007. This share of retail floorspace is below that of its national population share, which was 1.5% in 1990 declining to 1.3% in 2002 and beyond.

8.6 The retail floorspace survey undertaken as part of this study revealed that the retail sector in the county had developed at a very different rate. This indicated that there

had been a growth in comparison floorspace well below the national level and a significant reduction in convenience floorspace.

Table 8.3 Net retail floorspace in Co. Roscommon (assuming hypothetical growth at the national rate)

	1990	1995	2002	2007
Convenience	13,410 sqm	14,110 sqm	15,900 sqm	16,840 sqm
Comparison	12,780 sqm	14,380 sqm	23,370 sqm	27,150 sqm
Total	**26,190 sqm**	**28,490 sqm**	**39,270 sqm**	**43,990 sqm**
Convenience	1.30%	1.30%	1.30%	1.30%
Comparison	1.27%	1.27%	1.27%	1.27%
Total	1.28%	1.28%	1.28%	1.28%

Sources: CSO *Census of Services*, 1988
Floorspace survey undertaken as part of this study, 2002

8.7 The following table 8.4 sets out the amount of actual floorspace in County Roscommon in the years 1990, 1995, 2002 and the assumed floorspace in 2007 if the same under-performance compared to national retail figures was to continue. The figures are based on an assumption that the percentage decline has developed evenly over the period.

Table 8.4 Net retail floorspace growth in County Roscommon between 1990 and 2007

	1990	1995	2002	2007
Convenience	13,410 sqm	11,670 sqm	10,040 sqm	8,550 sqm
Comparison	12,780 sqm	12,820 sqm	19,620 sqm	21,830 sqm
Total	**26,190 sqm**	**24,490 sqm**	**29,660 sqm**	**30,380 sqm**
Convenience	1.30%	1.07%	0.82%	0.66%
Comparison	1.27%	1.13%	1.07%	1.02%
Total	1.28%	1.10%	0.97%	0.89%

Sources: CSO *Census of Services*, 1988
BSM *Roscommon Floorspace Survey,* 2002

8.8 However the Roscommon share in the total national convenience floorspace has declined from 1.3% in 1990 to 0.82% in 2002. The continuation of this trend will result in a further reduction of the convenience floorspace share of County Roscommon. The share in comparison shopping has also fallen from 1.27% to 1.07% in the same time period. The level of comparison floorspace has however grown. These figures indicate the significant growth in the demand for comparison floorspace in recent years and the significant leakage of retail spend that has developed over the past decade to centres such as Athlone, Longford and Sligo.

8.9 It is clear that considerable effort needs to be undertaken to stop the increasing leakage of retail turnover into neighbouring counties. The aim should be to reverse the downwards trend of the past decade and make the county more self sustaining in terms of retail provision.

8.10 In order for the county to reverse this trend in retail provision three scenarios have been used to ascertain future retail requirements. The first scenario assumes that County Roscommon achieves a growth in retailing (and retail floorspace) equal to the national growth pattern. This would require convenience floorspace to grow by 600 sqm and comparison floorspace by 3,170 sqm over the next five years. This would effectively 'freeze' the county's share in total retailing and prevent further decline. But the share remains low when compared to a population share of 1.3 % of the national population.

Table 8.5 Growth in net retail floorspace, 2002 to 2007 based on Co. Roscommon achieving a growth in retailing equal to the national growth pattern (low scenario)

	1990	1995	2002	2007
Convenience	13,410 sqm	11,670 sqm	10,040 sqm	10,640 sqm
Comparison	12,780 sqm	12,820 sqm	19,620 sqm	22,790 sqm
Total	**26,190 sqm**	**24,490 sqm**	**29,660 sqm**	**33,430 sqm**
Convenience	1.30%	1.07%	0.82%	0.82%
Comparison	1.27%	1.13%	1.07%	1.07%
Total	1.28%	1.10%	0.97%	0.97%

Source: own calculations

8.11 The second scenario, as shown in table 8.5, assumes that the County succeeds in implementing a retail strategy, which, over time, is able to recapture some of the loss in retail capacity and gradually restores the level of retail floorspace close to the same share as the county's share of 1.3% of the national population.

Table 8.6 Growth in Net Floorspace, 2002 to 2007 based on the County achieving a growth in retailing significantly greater than the national growth pattern (med. scenario)

	1990	1995	2002	2007
Convenience	13,410 sqm	11,670 sqm	10,040 sqm	11,910 sqm
Comparison	12,780 sqm	12,820 sqm	19,620 sqm	24,520 sqm
Total	**26,190 sqm**	**24,490 sqm**	**29,660 sqm**	**36,430 sqm**
Convenience	1.30%	1.07%	0.82%	0.92%
Comparison	1.27%	1.13%	1.07%	1.15%
Total	1.28%	1.10%	0.97%	1.06%

Source: own calculations

8.12 This growth scenario is based on an assumption that convenience shopping will grow at three times the national rate, and comparison shopping at one-and-a-half times the national rate. These changes in convenience and comparison floorspace represent a significant change in retail provision within the county, but are reflective of a catch up scenario where retail provision in County Roscommon has developed at a much slower rate than both national rates and a number of surrounding counties.

8.13 There is clearly a need therefore to create a more vibrant and vital retail environment within the county. The development of a county that is more self-sustaining will help support this scenario. To enable this all levels of the retail hierarchy should be

appropriately developed. The 3 per cent increase in the County's population as evidenced in the preliminary Census 2002 figures, and the resultant increase in available spend, will support the implementation of this Strategy.

8.14 This scenario, as shown in table 8.6, would result in convenience floorspace growing by 1,870 sqm and comparison floorspace by 4,900 sqm over the next five years. This would raise the county's share in national retailing from the current 0.97% to just over 1.06% in 2007. It should be noted that, if such above-average performance was to be sustained, it would still take some 15-20 years to restore the county's retailing share adequately to reflect its population share.

8.15 There are a number of significant retail planning applications including the Tesco and associated development, a new Lidl supermarket, extension to existing and new Super Valu stores, as well as other proposals under consideration by the planning authority and An Bord Pleanala. These new developments should go some way towards the development of a more self-sustaining retail environment within County Roscommon. There is a need to take account of these proposals in the scenarios and therefore a high or 'catch-up' scenario has been developed.

8.16 This catch-up scenario would bring the level of floorspace close to the counties share of national population of 1.3% and to the ratio of retail floorspace within the county compared to national figure as was evident in 1990 (1.28%).

8.17 The high growth scenario shown in Table 8.7, would result in convenience floorspace growing by 6,800sqm and comparison floorspace by 7,530sqm over the next five years. This would raise the county's share in national retailing from the current 0.97% to 1.28% in 2001. This is not unreasonable given the need to redress the level of retail provision in County Roscommon.

Table 8.7 Growth in net retail floorspace, 2002 to 2007 based on Co. Roscommon achieving a growth in retailing significantly higher than the national growth pattern (high scenario)

	1990	2002	2007
Convenience	13,410 sqm	10,040 sqm	16,840 sqm
Comparison	12,780 sqm	19,620 sqm	27,150 sqm
Total	**26,190 sqm**	**29.960 sqm**	**43,990 sqm**
Convenience	1.30%	0.82%	1.30%
Comparison	1.27%	1.07%	1.27%
Total	1.28%	0.97%	1.28%

8.18 Since undertaking the survey in the spring of 2002 a number of applications for retail development have been constructed, granted or placed on appeal. There is a clear need to redress the decline in retail provision compared to national trends in County Roscommon. This scenario would allow this to happen and still support the sustaining of local and neighbourhood retail facilities away from the main towns and villages.

9. CONCLUSIONS

9.1 The location and scale of new retail development must have regard to the planning context for the county and in particular the RPG, County Development Plan and Town Development Plans. The Strategy has also take cognisance of the findings of the Westmeath Retail Strategy.

9.2 The retail hierarchy and environment in County Roscommon should be reinforced and sustained. Roscommon town should develop its function as the County retail centre to meet the needs of existing and future residents as well as customers of the County.

9.3 The second and third tier of the retail hierarchy should also retain and reinforce their roles. Retail provision in smaller villages and local centres should be maintained and enhanced in the interests of sustainability. This will ensure that all residents of the county have easy access to basic convenience goods.

9.4 The current Town Development Plans all contain land use zonings that provide for retail development within and on the edge of the town centre. The zoning objectives also allow for local retail facilities elsewhere in the town. The principal location for future population and employment growth is likely to be Roscommon town. In accordance with this the majority of future retail development will also be concentrated there.

9.5 The reduction in travel times to nearby centres such as Sligo, Longford and Athlone may result in further leakage of expenditure, and in particular comparison spend to these centres. It is important to try and counteract this by improving the range and choice of shopping in Roscommon town.

9.6 An assessment of floorspace capacity was undertaken in section 7 and 8 of this study. The forecasts and assumptions are subject to economic and policy change. This strategy focuses on the period of the adopted Roscommon County Development Plan and Town Development Plans which run to 2007. The Strategy also has regard to the long-term development of retailing in the county. The following table sets out the indicative, rather than strictly prescriptive, level of new floorspace required for County Roscommon.

9.7 It is not intended that the floorspace levels, indicated in table 9.1, will limit any specific modernisation and expansion of existing retail development. The Planning Authority will also bear in mind the need to avoid any action, which would have an adverse impact on competition in the retail market.

Table 9.1 Indicative new retail floorspace requirements between 2002 and 2007.

	Convenience	Comparison
County Roscommon	1,870 –6,800 sqm	4,900 – 7,530 sqm

9.8 The estimates indicate a need for between 1,870 and 6,800sqm of additional convenience floorspace and between 4,900 and 7,530sqm of additional comparison floorspace by 2007.

9.9 New retail floorspace provision will reflect existing and projected population distribution in the county and the identified retail hierarchy. The higher proportion of new retail floorspace should be provided in the County retail centre of Roscommon town. This strategy is reflected in current retail development trends within the County. The strategy will enable significant levels of leakage expenditure to be retained within the County and the establishment of a more sustainable and viable retail environment within County Roscommon.

9.10 Additional convenience and comparison retail floor space should be provided where possible within the existing town centre of Roscommon and in the centres of other towns and villages in the county. Local convenience retail floorspace, in the form of local shops, may also be appropriate in locations to serve new residential areas and rural areas. Retail warehousing may be met on the periphery of Athlone on appropriately zoned lands. Smaller scale retail warehousing may also be appropriate on suitable locations in all other towns.

9.11 The floorspace indicated in tables 9.1 are indicative of both the scale of new floorspace required to meet the needs of existing and future population and expenditure in the county. It is also representative of the level of growth required to restore the county's retailing share adequately to reflect its population share.

9.12 Additional new floorspace may be proposed that could replace some existing outdated, poorly located or vacant retail floorspace. The key consideration in regard to new retail floorspace is its location. The quantum only becomes a critical consideration where new floorspace is proposed outside of the defined retail core of any town or village and the issue of likely impact on the town centre as a whole arises.

Roscommon town

9.13 The regeneration of the town centre would benefit from the creation of new major retail attractions, combined with high quality new car parking provision, integrated with the main streets, and associated environmental and other street and townscape improvements. The opportunities to achieve this are available and large multiples are already assessing this opportunity.

9.14 The development of a new retail development such as a supermarket or high quality comparison high street stores would increase the attractiveness of the town as a shopping location. It would be imperative that such a development be integrated within the town centre and located within, adjacent, or linked to it.

9.15 The provision of new comparison goods floorspace may require the amalgamation of shop units to provide the size of shop units modern retailers prefer. The strategy would keep the town centre of Roscommon as the key and main shopping location within the county.

9.16 There are plans to improve the town centre in Roscommon through environmental and other landscaping works. This will improve the shopping environment of the town and make it more attractive to the shopper. Improvements to the traffic management

in the town may facilitate the upgrading of the public realm in the town centre. This should include measures such as :

- New high quality paving, preferably using natural stone;
- Widened footpaths and pedestrian only areas;
- The placing underground of all overhead wiring; and
- The introduction of new coordinated and well designed street furniture, including signposting, lamp standards and seating.

9.17 This strategy will also enable the creation of high quality and attractive new pedestrian links from the town centre to areas such as the railway station, public buildings and potential new development areas.

9.18 A lack of new retail investment in the town is likely to result in the continuing decline in the shopping function of the traditional town centre, with increased levels of vacancy. Retail development, other than if performing a purely local function, should primarily be within the town centre.

9.19 A retail development proposal outside this town centre zoned area would be incompatible with the retail policy of containing retail developments in the town centre to strengthen the town and County's economic and retail performance. Such a development is likely to undermine the prospects for revitalising the town centre and will hasten its further decline.

Retail Warehousing

9.20 It is recognised by the RPG that retail warehouses selling bulky household goods such as DIY products, carpets, furniture etc require large display and storage and adjacent surface level car parking and are often unsuitable for town centre locations.

9.21 It is desirable that this form of retailing should be provided at accessible locations. The optimum location for this type of use is at a location on the edge of the town that has good access and does not conflict with existing traffic management.

9.22 The western environs of Athlone, in County Roscommon would be such a site and it is therefore recommended that retail warehousing be focused on suitably zoned land in this location and that the provision of retail warehousing elsewhere in the County be restricted. Smaller scale retail warehousing may also be appropriate on suitable locations in other towns in the county.

Other towns and villages

9.23 The towns and villages of County Roscommon, apart from Roscommon town, are of a lesser scale. The general principles in relation to the location and scale of new development will apply to these towns as set out in Appendix 1. It is important to retain the existing retail roles of all these centres in the interests of sustainable development and maintaining a balanced distribution of facilities throughout the county.

9.24 There are plans to improve the town centre in Ballaghaderreen through environmental and other landscaping works. This will improve the shopping environment of the town and make it more attractive to the shopper.

9.25 Small convenience stores provide an important function in the community of small towns and villages especially for those sectors of the population without access to a car. The closure of local convenience shops will have a significant negative impact on the quality of life for this sector of the population and further erode the socio-economic fabric. It is an aim of the Strategy to resist where possible the loss of retail floorspace in small towns and villages.

9.26 The Strategy aims to sustain and develop existing and new local convenience facilities outside the main two towns. The Strategy recognises the important community function that small convenience stores provide in these locations. Smaller stores provide customers, as evidenced by the findings of the Excellence Ireland Customer Satisfaction Survey for the Supermarket section, with a more satisfactory provision of convenience goods. The Strategy aims to ensure that new large scale convenience outlets will not have a negative impact on smaller retail outlets in other towns and villages.

APPENDICES

APPENDIX 1

CRITERIA FOR ASSESSING FUTURE RETAIL PROPOSALS

1. All applications for significant retail development should be assessed against a range of criteria as set out in this appendix. It should be noted that it is not appropriate to assess all applications for new retail development against all the criteria. This is particularly where developments are clearly in accordance with the strategy and where they are small local scale developments.

The Sequential Test

2. The Retail Planning Guidelines state that :

"The preferred new location for new retail development where practicable and viable is within a town centre (or district or major village centre). Where it is not possible to provide the form and scale of development that is required on a site within the town centre then consolidation can be given to a site on the edge of the town centre so as to encourage the possibility of one journey serving several purposes. An edge of centre site, for the purposes of these guidelines, is taken to be one which is within an easy and convenient walking distance from the primary shopping core of a town centre. The distance considered to be convenient will vary according to local circumstances but typically is unlikely to be much more than 300 – 400 metres from the edge of the prime shopping area, and less in smaller settlements.

Having assessed the size, availability, accessibility and feasibility of developing both sites and premises, firstly within a town centre and secondly on the edge of a town centre, alternative out of centre sites should be considered only where it can be demonstrated that there are no town centre or edge of centre sites which are suitable, viable and available. This is commonly known as the sequential approach to the location of retail development."

3. All significant applications for retail developments should be subject to the sequential test. Where an application for a retail development outside of the town centre is lodged to the planning authority, the applicant should demonstrate that all town centre options have been assessed and evaluated and that flexibility has been adopted by the retailer in regard to the retail format.

4. The Retail Planning Guidelines also recommend that the applicant addresses the following criteria:

- Supports the long-term strategy for town centres as established in the development plan and does not materially diminish the prospect of attracting private sector investment into one or more town centres.
- Causes an adverse impact on one of more town centres, either singly or cumulatively with recent development or other outstanding planning permissions, sufficient to undermine the quality of the centre or its role in the economic and social life of the community.
- Diminishes the range of activities and services that a town centre can support.

- Causes an increase in the number of vacant properties in the primary retail area that is likely to persist in the long term.
- Ensures a high standard of access both by public transport, foot, private car so that the proposal is easily accessible by all sections of society.
- Links effectively with an existing town centre so that there is likely to be commercial synergy.

5. Other criteria that should be considered in the assessment of significant applications include:

- That there is a quantitative and qualitative need for the development
- The contribution of the development towards the improvement of the town centre in terms of urban design
- The contribution of the development towards site or area regeneration
- The role of the development in improving the competitiveness of the town against other competing centres
- Compliance of development plan policies and objectives.
- The development is easily accessible to the elderly and disabled.

Convenience Food Shopping

6. Where practicable new convenience retail development should be located within a town centre or within a designated local centre serving a large residential community. As large convenience shops attract customers carrying out large weekly shopping, it is important that such development should also be served by adequate car parking. Out of centre sites for this type of retail development should be avoided, subject to the sequential test. The maximum size for a supermarket is 3,000 sqm net sales area as defined in the RPG.

Discount Food Stores

7. Discount food stores typically have a floor area of up to 1,500 sqm and are served by a surface car park with approximately 80 to 100 spaces. The preferable location for such development is again in the town centre or designated local centre. The potential role that discount food stores have in anchoring small centres or neighbourhood centres is recognised in the Retail Planning Guidelines and thus it is appropriate to permit such development within smaller centres.

8. Important criteria in assessing applications for a discount food store include impact of the development on the urban design character of the town and accessibility, particularly by car.

Districts Centres

9. It is unlikely that there will be a demand for the development of district centres in County Roscommon. There may be pressure for such a centre in Athlone and its environs.

Retail Warehouse Parks

10. It is recognised in the Retail Planning Guidelines that in general retail warehouses do not fit easily into town centres given their size requirements and the need for good car parking facilities. They are often best located in areas outside the town centre so that there is relief from additional traffic within a congested town centre.

11. Criteria for assessing retail warehouse applications include scale and design of the development, appropriate vehicular access and the quantitative need for such development.

12. As stated in the Retail Planning Guidelines individual retail units should not be less than 700 sq metres and not more than 6,000 sqm. These figures are gross floor area, including storage and garden centres. It is essential that the range of goods sold is restricted by planning condition to bulky household items such as DIY products, carpets, furniture, and electrical goods.

Factory Outlet Centres

13. It is unlikely that there will be pressure for a factory outlet centre to be developed in the County as they depend on drawing customers and visitors from a wide catchment area. Their location may also have an impact on existing tourist centres and established town centres, even those some distance from the proposal.

14. Criteria for assessing such development should therefore focus on whether such a development is located in a strategic enough location to capture expenditure from a very wide catchment area. Such a development should be located adjacent to or even within an existing town centre. Again, as such facilities are primarily geared towards the car borne customer, vehicular accessibility and adequate car parking are key factors.

Local Shops and Petrol Filling Stations

15. Local shops play an important role in providing for daily top up shopping. They are also often easily accessible to the elderly and disabled. The development of such local shops should be encouraged in the smaller towns and villages in the county and also in new large residential areas. Such developments should be easily accessible to all sections of society.

16. Local shops attached to petrol filling stations are a growing sector of the retail market. Such facilities play an important role, particularly in serving some of the more isolated rural communities. However, care should be given to the development of such facilities on the edge of town centres as they may have a negative impact on established convenience outlets within the town centre. As stated in the Retail Planning Guidelines, the size of such retail units should not exceed 100sqm or other limits in accordance with future reviews of the Retail Planning Guidelines.

APPENDIX 2

HEALTH CHECK ASSESSMENT

Roscommon Town

Viability	Remarks	Score
Level of representation by national multiples	Very few but including Heatons and Super Valu.	1.5
Vacancy / dereliction	Significant levels of vacancy around the edge of the town centre.	2.5
Recent and new retail and other investment	Little new investment	1.5
Change of Use (residential to commercial)	Only a few have occurred	1
Vitality and Diversity		
Diversity of uses	The town contains a wide range of commercial and other services	3
Pedestrian numbers	The town centre was busy with shoppers and other pedestrians	4
Use of above shops for residential/ Retail/ Office use		2.5
Accessibility		
Quality of parking	Parking is available mainly on-street and around the square	2.5
Quantity of parking	No significant levels of off street parking. Car parks are not directly accessible to shoppers off retail streets.	2
Traffic management	There is one zebra crossing in the town centre. There was a significant level of double parking along main street.	1.5
Level of provision for Special need groups (Kerbs, Ramps, Parking etc)	Some car parking spaces marked for disabled parking in market square and remoter car parks.	1.5
Environment / Image		
Levels of traffic through the town centre	Quite busy and constant level of through traffic.	2
Physical quality of townscape (clutter, litter and graffiti)	Very little soft or hard landscaping. Townscape could be improved. Little litter graffiti etc	2.5
Quality of shopfronts	Standard quality shopfronts Some new shopfronts evident	2
Quality of footpaths, landscaping and open spaces	Quality of footpaths were ok. Little landscaping.	2.5
Perception of safety		4.5
Pedestrian movement along and across street	Pedestrian movement is made difficult by only one crossing and the high levels of traffic.	1.5
TOTAL		**38.5**

Boyle

Viability	Remarks	Score
Level of representation by national multiples	Low levels and only including Super Valu.	2
Vacancy / dereliction	Some levels of vacancy around the edge of the town centre.	2.5
Recent and new retail and other investment	Very little new investment	2
Change of Use (residential to commercial)	None was evident	1
Vitality and Diversity		
Diversity of uses	The town contains a standard range of commercial and other services	2.5
Pedestrian numbers	The town centre was not busy but with some concentration around Super Valu	2
Use of above shops for residential/ Retail/ Office use	Only a very few were in use	1.5
Accessibility		
Quality of parking	Parking is available mainly on-street and around the square	2
Quantity of parking	All on street parking	1.5
Traffic management	There are no pedestrian crossings.	1
Level of provision for Special need groups (Kerbs, Ramps, Parking etc)	No provision	1
Environment / Image		
Levels of traffic through the town centre	Quite busy and constant level of through traffic.	2.5
Physical quality of townscape (clutter, litter and graffiti)	Very little soft or hard landscaping. Narrow footpaths and old shopfronts. No use is made of river.	2
Quality of shopfronts	Old shopfronts in bad repair.	1.5
Quality of footpaths, landscaping and open spaces	Narrow footpaths and no landscaping.	1.5
Perception of safety		3.5
Pedestrian movement along and across street	Difficulty due to no crossings.	2
TOTAL		**32**

Ballaghaderreen

Viability	Remarks	Score
Level of representation by national multiples	There were no national multiples	1
Vacancy / dereliction	There were high levels of vacancy in and on the edge of the town centre.	1
Recent and new retail and other investment	Very little new investment	1.5
Change of Use (residential to commercial)	None was evident	1
Vitality and Diversity		
Diversity of uses	The town contains food and hardware shops	2.5
Pedestrian numbers	The town centre was not very busy	2
Use of above shops for residential/ Retail/ Office use	Only one above shop premises was in use	1
Accessibility		
Quality of parking	Parking is available mainly on-street	2.5
Quantity of parking	Parking at east end of town poorly marked out and utilised	1.5
Traffic management	There are no pedestrian crossings.	1
Level of provision for Special need groups (Kerbs, Ramps, Parking etc)	No provision	1
Environment / Image		
Levels of traffic through the town centre	Quite busy and constant level of traffic.	2
Physical quality of townscape (clutter, litter and graffiti)	High quantity of old and vacant properties. No soft or hard landscaping.	1.5
Quality of shopfronts	Old shopfronts in bad repair.	1.5
Quality of footpaths, landscaping and open spaces	Footpaths in poor condition and no landscaping.	1
Perception of safety		2.5
Pedestrian movement along and across street	Low numbers of pedestrians. Crossing is difficult due to no crossings.	2
TOTAL		**26.5**

Castlerea

Viability	Remarks	Score
Level of representation by national multiples	There were no national multiples	1
Vacancy / dereliction	There were high levels of vacancy in and on the edge of the town centre.	2
Recent and new retail and other investment	Very little new investment and a number of traditional shops	1
Change of Use (residential to commercial)	None was evident	1
Vitality and Diversity		
Diversity of uses	The town contains a standard range of commercial and other services	2.5
Pedestrian numbers	The town centre was fairly busy	2
Use of above shops for residential/ Retail/ Office use	Only a few above shop premises were in use	1.5
Accessibility		
Quality of parking	Parking is available on and off street and around market square.	2.5
Quantity of parking	Off street parking was poorly utilised.	2
Traffic management	There are no pedestrian crossings and moderate levels of double parking. (A pedestrian crossing has since been constructed)	1.5
Level of provision for Special need groups (Kerbs, Ramps, Parking etc)	No provision	1
Environment / Image		
Levels of traffic through the town centre	Busy and constant level of traffic leading to traffic congestion.	1.5
Physical quality of townscape (clutter, litter and graffiti)	The townscape was of average quality with only a small number of attractive buildings.	2
Quality of shopfronts	Standard.	2
Quality of footpaths, landscaping and open spaces	Footpaths in reasonable condition and no landscaping.	2
Perception of safety		2.5
Pedestrian movement along and across street	Low numbers of pedestrians. Crossing is difficult due to no crossings.	1.5
TOTAL		**29.5**

Strokestown

Viability	Remarks	Score
Level of representation by national multiples	There were no national multiples	1
Vacancy / dereliction	There were high levels of vacancy in and on the edge of the town centre.	2
Recent and new retail and other investment	Very little new investment	1
Change of Use (residential to commercial)	None was evident although significant levels of residential uses within commercial centre	1
Vitality and Diversity		
Diversity of uses	The town contains only a small number of shops with little diversity.	1
Pedestrian numbers	The town was quiet with a low level of pedestrian movement	1.5
Use of above shops for residential/ Retail/ Office use	High level of residential use above shops	2.5
Accessibility		
Quality of parking	Parking is badly marked out and available mainly on-street	2
Quantity of parking	Large levels of parking available for level of retail provision	2.5
Traffic management	There are no pedestrian crossings and level of provision results in no traffic problems	2.5
Level of provision for Special need groups (Kerbs, Ramps, Parking etc)	No provision	1
Environment / Image		
Levels of traffic through the town centre	Low level of through traffic.	1.5
Physical quality of townscape (clutter, litter and graffiti)	Good quality townscape	2.5
Quality of shopfronts	Traditional shopfronts	2
Quality of footpaths, landscaping and open spaces	Footpaths in reasonable condition	2
Perception of safety		3
Pedestrian movement along and across street	Crossing is easy but there are no pedestrian crossing points. The low levels of traffic mean that this does not cause a problem	2
TOTAL		**31**

APPENDIX 3

GLOSSARY OF TERMS

i. This glossary has been adopted from the Retail Planning Guidelines. It covers forms of retail development and types of retail location. Because retail is dynamic, it should be noted that new forms of retailing may evolve which are inadequately described by current terminology.

Types of retail floorspace

ii. ***Net lettable retail area*** – total floorspace (measured from inside the shop walls) which is let to a retailer.

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

iv. ***Net retail sales area*** – the area of a shop or store that is devoted to the sales of retail gods (including the area devoted to checkouts)

Types of retail goods

v. Although there is a trend for "scrambled merchandising" whereby some retail businesses sell both convenience and comparison goods, greater definitional clarity is obtained by adopting a goods based retail classification. Retail goods categories are defined by reference to the National Income and Expenditure Accounts and can be divided into convenience goods and comparison goods as follows:

Convenience	Food Alcoholic and non-alcoholic beverages Tobacco Non-durable household goods
Comparison	Clothing and Footwear Furniture, furnishings and household equipment (excluding non- durable household goods) Medical and pharmaceutical products, therapeutic appliances and equipment Educational and recreation equipment and accessories Books, newspapers and magazines Goods for personal care and goods not elsewhere classified. The value of repairs is excluded in all cases.
Bulky Goods	Goods generally sold from retail warehouse where DIY goods or goods such as flatpak furniture are of such a size that they would normally be taken away by car and be manageable by customers travelling by foot, cycle or bus, or that large floor areas would be required to display them e.g. furniture in room sets, or not large individually, but part of a collective purchase which would be bulky e.g. wallpaper, paint.

Types of convenience goods shopping

Discount food store	single level, self -service store normally of between 1,000 – 1,500 sqm of gross floorspace selling a limited range of goods at competitive prices, often with adjacent car parking.

Supermarkets	single level, self-service stores selling mainly food, with a net sales area of less than 2,500 sq.m, often with adjacent car parking.
Superstores	single level, self service stores selling mainly food, or food and some non-food goods, usually with at least 2,500 sq.m net sales floorspace with dedicated surface level car parking.
Hypermarket	single level, self-service stores selling both food and a range of comparison goods, with net sales floorspace in excess of 5,000 sqm with dedicated surface level car parking.
Convenience Outlet	single level, partially self-service store with no adjacent car parking, selling food or other convenience items, with a net sales area of not more than 500 sqm, and a product range less than that carried out by a supermarket. Such stores are characterised by longer opening hours than supermarkets.

Types of comparison goods shopping

Retail mall	purpose built centres (either in centre or out-of-centre) incorporating a mix of larger stores and individual shops usually concentrating on comparison goods, together with some convenience shopping and sometimes commercial leisure and/or a food court.
Regional centres	out-of-town retail malls generally of 50,000 sqm gross retail floorspace or more, typically embracing a wide range of clothing and other comparison goods with extensive dedicated car parking. Regional shopping centres do not normally incorporate retail warehouses.
Retail parks	a single development of at least three retail warehouses with associated car parking.
Retail warehouse	a large single level store specialising in the sale of bulky household goods such as carpets, furniture and electrical goods, and bulky DIY items, catering mainly for car-borne customers and often in out-of-centre locations.
Warehouse clubs	generally out-of-centre retailers specialising in bulk sales of reduced price, quality goods in unsophisticated buildings with dedicated car parkas. The operator may limit access to businesses, organisations or classes of individual, through membership restrictions.
Factory shop	a shop adjacent to the product unit and specialising in the sale of manufacturers' products o the public.
Factory outlet centres	group of shops, usually in out-of-centre locations, specialising in selling seconds and end-of-line branded goods at discounted prices.

Types of centre

Town centre	in this guideline, the term "town centre" is used to cover city, town and district centres which provide a broad range of facilities and services and which fulfill a function as a focus

for both the community and public transport. It excludes retail parks, local centres and small parades of shops of purely local significance.

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

Local centre / neighbourhood centre small groups of shops, typically comprising a newsagent, small supermarket/general grocery store, sub post office and other small shops, of a local nature serving a small, localised catchment population.

Types of location

Retail area that part of a town which is primarily devoted to shopping

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

Edge-of-centre a location within easy walking distance (usually not more than 300 to 400 metres) of the retail area of the town centre, and providing parking facilities that serve the centre as well as the new development thus enabling one trip to serve several purposes.

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

Out-of-town an out-of-centre development on a green field site, or on land not clearly within the current urban boundary.