

1 INTRODUCTION

- 1.1 **DTZ** were appointed in October 2006 by Athy Town Council (the Council) to prepare a Retail Study to identify strategic sites for new retail development within Athy as required by Policy RS10 of the Athy Town Development Plan 2006 – 2012. The study has been undertaken to provide a guiding document in order to assist the Council in its decision making process. In the process of the study, it was agreed that the format of the report should be that of a Retail Strategy prepared in accordance with the requirements of the Department of the Environment, Heritage and Local Government (DoEHLG) 'Retail Planning Guidelines for Planning Authorities' (RPG), as revised in 2005.

BACKGROUND TO THE STUDY

- 1.2 The Athy Town Development Plan 2006 – 2012 (the Development Plan) came into effect in May 2006 and was adopted to improve the quality of life and sustainability of Athy and its surrounding hinterland. Chapter 7 of the plan notes that it is a goal to promote and encourage major enhancement of the retail floorspace and town centre functions of Athy, to further develop its competitiveness with nearby towns such as Carlow and Portlaoise and its importance as a Sub County Town Centre in the County and wider Greater Dublin Area (GDA) and to promote greater social inclusion.
- 1.3 In accordance with the RPG, which seek to ensure that retail development is most appropriately located, **Policy RS10** of the Development Plan states:

'It is the policy of the Council to carry out a special study to identify strategic sites for retailing within Athy, focusing firstly on the town centre and applying a sequential approach, as per the Retail Planning Guidelines. Subsequent to such a study the Council will actively pursue the development of identified sites in order to enhance the retail provision in the town. The study will be completed within the calendar year 2006.'

- 1.4 The study has been commissioned in response to the commitment to the preparation of a specific retail study for the town as set down in Policy RS10 of the Development Plan.

STUDY APPROACH

- 1.5 The study has been undertaken with the objectives of national, regional and local planning policy at its core. It has sought to address the requirements of the RPG by:

- i. Updating the quantitative and qualitative information obtained during the preparation of the Draft County Retail Strategy for Kildare;
- ii. Reviewing a range of relevant planning and related documentation specifically in relation to Athy and its catchment area;
- iii. Undertaking site visits; and
- iv. Extensive consultation with Kildare County Council (the County Council), the Town Council and a range of other stakeholders as set out below.

Consultation Framework

- 1.6 The study was advertised in the national and local press during October/November 2006. The advert requested comments on the brief and submissions on potential sites and issues that should be considered in the preparation of the Draft Retail Study.
- 1.7 Consultation, in the form of a workshop, was undertaken with Council Members and held at the Town Council Offices on 7 November 2006. This workshop provided the opportunity for Members to be informed of the results of the household and shopper surveys, the preliminary findings of the capacity assessment, to provide advice as to the local context of the work and to highlight potential retail sites within Athy. The Town Engineer was consulted with regard to the selected sites so that these could be understood in the context of all relevant future transport and infrastructure proposals.
- 1.8 To ensure that the study took full account of all emerging retail proposals within the town, all key businesses intending to develop retail schemes in Athy were confirmed with the Council and consulted on the study.

Study Framework

- 1.9 The framework that was adopted for the preparation of the study is summarised below, with the detail of the different stages outlined in the paragraphs which follow:
 - **Stage 1:** Baseline Review & Audit
 - **Stage 2:** Capacity Assessment
 - **Stage 3:** Preparation of Strategic Framework
 - **Stage 4:** Reporting.

Stage 1: Baseline Review and Audit

- 1.10 The baseline information which was reviewed and audited to set the context for Athy and its catchment area is summarised below. The freeze date for baseline data was the end of February 2007.
- 1.11 **Policy Review:** the study commenced with a review of all relevant policy frameworks. This included the: National Spatial Strategy (NSS), RPG, Retail Planning Strategy for the Greater Dublin Area (GDA Retail Strategy), Regional Planning Guidelines Greater Dublin Area (RPGGDA), Transport 21, Kildare County Development Plan, Athy Town Development Plan and the Kildare Draft County Retail Strategy.
- 1.12 **Population Projections:** past population projections and the results of the 2006 Census of Population, were examined in relation to Athy and its catchment area (defined as comprising a 15 minutes drive time of the town). These were then considered in the light of the Central Statistics Office (CSO) Regional Population Projections and RPGGDA forecasts along with the projections set out in the County and Athy Development Plans.
- 1.13 **Town Centre Health Check:** an update of the health check of Athy Town Centre set out in the Draft County Retail Strategy was undertaken whereby the up to date characteristics of the town were examined against the floorspace survey information derived during the preparation of the Draft County Retail Strategy.
- 1.14 **Overview of Competing Centres:** in order to fully understand the potential and/or issues which prevail in Athy's retail offer, an overview of the offers – existing and emerging – of competing centres was undertaken. These centres were identified as Carlow, Kildare Town, Naas, Newbridge and Portlaoise.
- 1.15 **Review & Understanding of Shopping Patterns:** this review was based on household and shopper surveys commissioned by the Council in December 2004 as part of the preparation of the Development Plan. The findings from this analysis provided important inputs to the broad assessment of the requirement for additional floorspace in the town and its environs over the period of the Development Plan, the next plan and to 2020, the end year of the NSS.
- 1.16 **Broad Assessment of Additional Floorspace:** using the updated population forecasts and a review of the list of extant retail planning permissions in the derived

Athy Town catchment area, an estimate of the indicative additional retail floorspace that could be sustained in the town was provided.

- 1.17 **Roads & Other Infrastructure:** the policy review provided an understanding of the roads and other infrastructure proposals and issues that could influence the delivery of potential retail sites. This baseline was enhanced through consultations with the Town Engineer to ensure that all the emerging proposals and issues were fully understood.
- 1.18 **Identification & Review of Potential Sites:** a range of potential sites was identified through the desktop review of information, a Study Area Tour and consultations with Council Members and Officers. The suitability of the identified sites for retail development was reviewed and appraised on the basis of a number of factors and criteria.

Stage 2: Capacity Assessment

- 1.19 The capacity assessment provides the broad appraisal of the requirement for additional retail floorspace in Athy and its catchment area over the period to 2020. The inputs to the assessment were derived from the Baseline Review and Audit and were based on:
- i. Population baseline and projections for current year, the period of the Plan, that of the next plan through to 2020 to enable short, medium and longer term scenarios to be generated for the town and its catchment area;
 - ii. Application of population data to per capita convenience and comparison figures derived from published sources at the most recently published price year;
 - iii. The derivation of Gross Retail Expenditure Potential using the above data and inputs on the effects of market share (expenditure retention) and trade draw (expenditure inflows);
 - iv. The calculation of Net Retail Expenditure Potential which essentially removes the potential expenditure captured by spend on the internet and other sources (such as mail order), floorspace efficiency and retail floorspace which has already been granted full planning consent;
 - v. Derivation of the average convenience and comparison turnover of the town's derived catchment area to establish whether there is either over or under trading in floorspace set against what would be likely to be expected. These both to differing degrees open up reservoirs for additional retail floorspace capacity; and
 - vi. Translation of the Net Expenditure Potential figures into what are the indicative figures for additional retail floorspace, both convenience and comparison, over the different timescale horizons with the emphasis that the conclusions are indicative and not caps on the potential which could be achieved.

Stage 3: Preparation of Strategic Framework

- 1.20 The findings from Stages 1 and 2 provide the foundations for establishing the strategic framework for new retail development in Athy over the different timescale horizons identified above. The adoption of looking at the longer term reflects the need to ensure that decisions today do not prejudice the longer term potential of Athy Town Centre as it grows over the periods of the different planning policy frameworks.

Stage 4: Reporting

- 1.21 This report is the study **Final Report**. It incorporates all agreed comments and amendments following consideration of the **Draft Final Report** by Council Members and Officers between March 2007 and January 2008. In accordance with the November 2007 requirements of the Council, it is provided in the format of a retail strategy – the **Athy Town Retail Strategy**.

STRUCTURE OF REPORT

- 1.22 The remainder of the report is set out as follows:
- **Section 2:** presents the land use and policy context for the study
 - **Section 3:** sets out the key findings from the baseline review and audit
 - **Section 4:** provides the health check of Athy Town Centre, including a comparative review against other GDA Sub County Town Centres
 - **Section 5:** presents the review of the competing centres
 - **Section 6:** details the appraisal of the capacity potential for additional floorspace
 - **Section 7:** summarises the assessment of potential retail sites
 - **Section 8:** outlines the aims, strategic framework, policies and proposals of the Athy Town Retail Strategy.