NEW ROSS

APPENDIX B
DEMOGRAPHICS, BUSINESS & TOURISM DATA
2023

NEW ROSS
TOWN CENTRE FIRST PLAN

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New Ross Town Centre First Plan

APPENDIX B – Demographics, Business, Tourism Data

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Appendix B:

Demographics

New data for 2022 anticipated on 21st September 2023

Introduction

While it is agreed that New Ross needs economic growth and greater social sustainability, these needs are not in any way unusual in contemporary rural Ireland. There has clearly been a low and static population in the town centre of New Ross. There is also a high number of vacant properties, many of which are ex-retail, as well as derelict properties. However, these patterns are not unusual in that much recent population growth in rural towns across Ireland has occurred in the suburban environs and rural hinterland. Much economic and retail development has been on the edge of towns in industrial estates and shopping centres which are convenient to reach by road.

Indeed, **Table 1** shows that the population of New Ross as a whole has been increasing steadily since 1996 with the exception of 2011-2016 when growth rates slowed for many rural towns. A significant increase in population was experienced between 2002-2006 in the outskirts of the town in the Electoral Division (ED) of New Ross Rural, albeit from a relatively low base. The ED of New Ross Urban includes much of the town, and much of the built area of Rosbercon. The ED of New Ross Rural surrounds that of the Urban ED to the east of the river and includes a large rural hinterland as well as some of the town's suburbs. Rosbercon ED is located to the west and is predominantly rural.

The CSO also provides population data for the "settlement" of New Ross which, in 2016, consisted of 8,040 persons. The settlement boundary includes Rosbercon. However, the CSO changed the definition of the town at this time so that the figure is not directly comparable with earlier figures. The town figures for the latest Census in 2022 are expected to be published along with other detailed Census data in September 2023.

The population of the rural environs has continued to increase since 2002, while that of the urban centre has declined. However, between 2016 and 2022 there has been an increase in population here too, which is a positive change. Some of this increase in the more urban part of New Ross would appear to have been due to new migrants, particularly from Poland. Poles account for 6.6% of the population of the urban ED, although they do constitute a greater proportion of the rural ED at 12.4%.

Table 1: Population: New Ross

Electoral Division	**2002**	**2006**	**2011**	**2016**	**2022**
New Ross Urban	4402	4034	3907	3768	3938
Percent change	*-4.9%*	*-8.4%*	*-3.1%*	*-3.6%*	*4.5%*
New Ross Rural	2052	3367	4014	3942	4178
Percent change	*44.6%*	*64.1%*	*19.2%*	*-1.8%*	*6.0%*
Total	6454	7401	7961	7710	8116
Percent change	*6.9%*	*14.7%*	*7.6%*	*-3.2%*	*5.3%*

Source: CSO

Table 2 shows the figures for *age* and confirm an outward movement of the population to the suburbs where there is a much higher proportion of children below the age of 14 and higher proportions of other age classes below 50 years, especially of people between 30 and 40. These data on the age profile are supported by those for *family cycle*. These Family Cycle figures in **Table 3** show a much higher proportion of households in New Ross Rural belonging to the 'early school', 'pre-adolescent' and 'adolescent' categories than for New Ross Urban. The proportion of people over 65 years is much higher in New Ross Urban at 20.6% than for New Ross Rural at 13.9% and this corresponds to a higher proportion of 'retired' people at 10.3% compared with 6.7%.

Table 2: Age 2016

	New Ross Urban		New Ross Rural		All New Ross	
Age 0-15	607	16.1%	1032	26.2%	1639	21.3%
Age 16-29	632	16.8%	675	17.1%	1307	17.0%
Age 30-39	499	13.2%	685	17.4%	1184	15.4%
Age 40-49	492	13.1%	578	14.7%	1070	13.9%
Age 50-64	533	20.6%	145	13.9%	390	17.2%
Age 64 +	760	20.0%	424	10.0%	1184	15.4%

Source: CSO

Table 3: Family Cycle 2016

	New Ross Urban		**New Ross Rural**		**All New Ross**	
	families	***persons***	***families***	***persons***	***Total families***	***Total percent***
Pre-Family	6.1%	4.3%	7.5%	5.3%	136	6.5%
Empty Nest	14.6%	10.3%	10.8%	7.6%	254	12.1%
Retired	14.6%	10.3%	9.6%	6.7%	242	11.5%
Pre-school	9.2%	9.3%	11.9%	12.5%	211	10.0%
Early school	7.9%	9.5%	16.9%	21.2%	248	11.8%
Pre-adolescent	9.5%	12.3%	15.5%	21.5%	250	11.9%
Adolescent	13.5%	17.2%	16.7%	22.7%	302	14.4%
Adult	24.6%	27.0%	21.4%	26.0%	460	21.9%

Source: CSO

In terms of education, the figures in **Table 4** indicate a high proportion of people with an "Upper secondary" qualification within the town as a whole (Urban and Rural EDs) at 22.7%. A Lower secondary education was attained by 17.9% of the population while 15.1% have a "Primary education" only.

Table 4: Education

	None or primary	**Lower 2nd**	**Upper 2nd**	**Tech or vocation**	**Advanced or Higher**	**Degree**	**Honours degree**	**Postgraduate**
Number	837	843	1066	636	532	254	303	230
percent	*17.8%*	*17.9%*	*22.7%*	*13.5%*	*11.3%*	*5.4%*	*6.4%*	*5.0%*

Source: CSO

Figure 1 provides an illustration of occupations in all New Ross (Urban and Rural). It indicates a high number of people working in "Processing, Plant and Machinery" (17.5%) and "Skilled Trades" (15.7%). These figures are for the previous Census in 2016. New figures are due to be published in September from the 2022 Census, but It is likely that the proportions will not have changed very much since this time.

Figure 1: Occupations (Source: CSO)

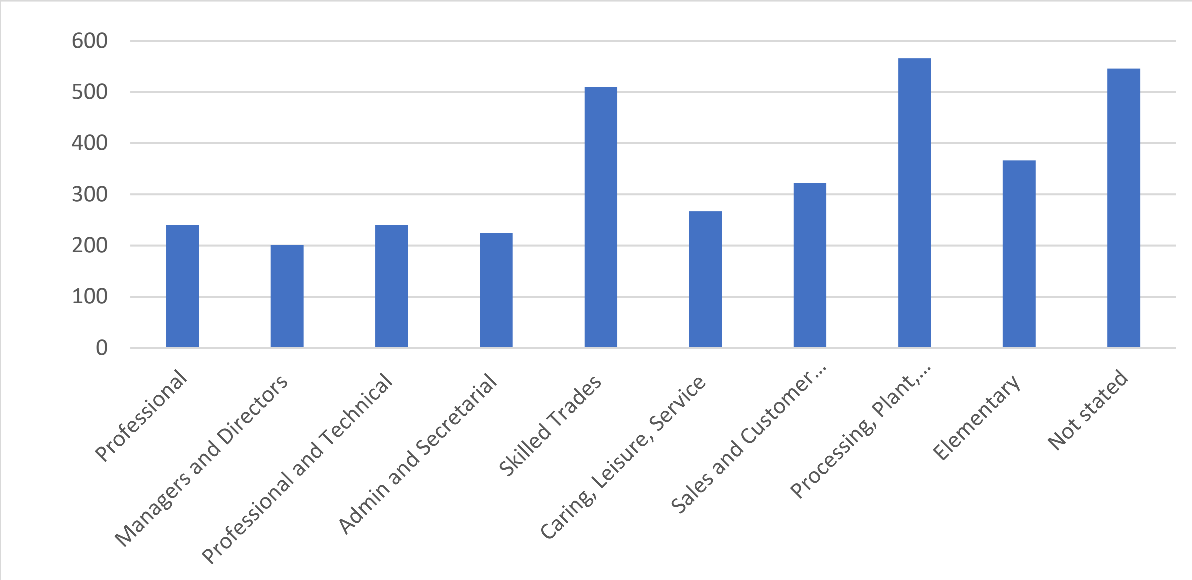
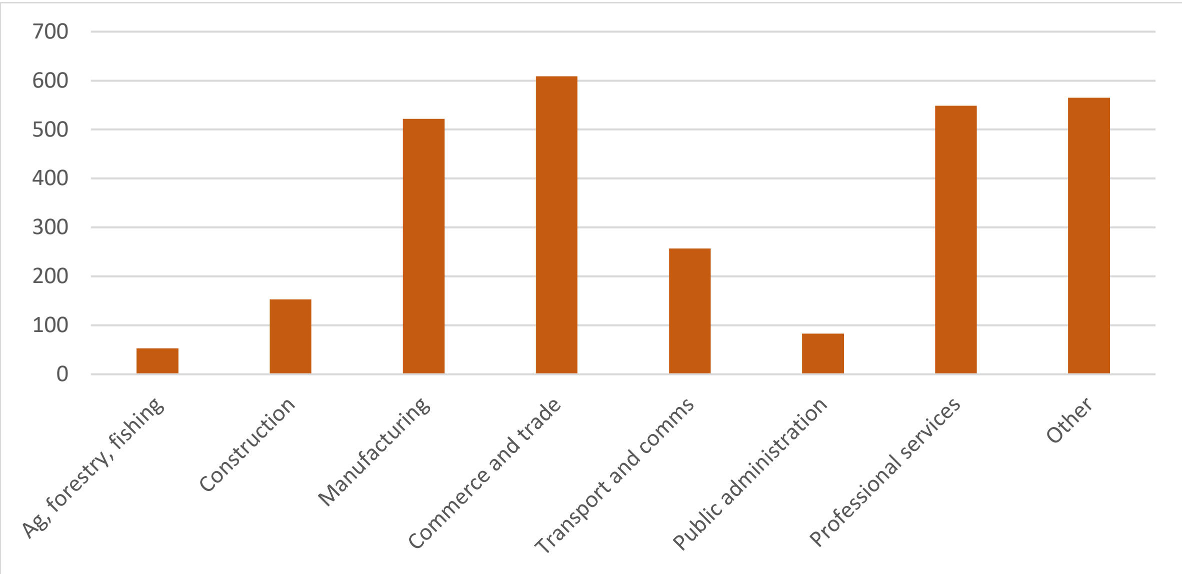


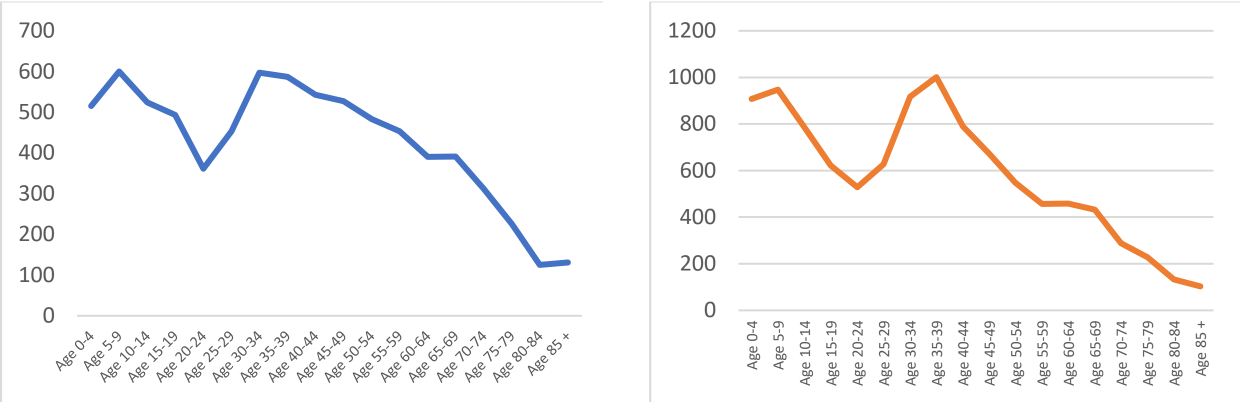
Figure 2 provides a similar picture for industries, with the highest number of people shown to be engaged in "Commerce and Trade" (21.8%), followed by "Professional Services" (19.7%) and "Manufacturing" (18.7%). A very small proportion are involved in "Agriculture, Forestry or Fishing" (1.9%) despite New Ross being at the centre of a large rural area.

Figure 2: Industries (Source: CSO)



More information will be provided in the final report by which time it is possible that the 2022 Census data will have been published. At this stage, for the purpose of providing a better understanding of the above figures, it is useful to make a comparison with other rural Irish towns. Gorey is a town which is often compared with New Ross, largely because it is of a similar size, but is perceived to have had more recent success economically. A comparison between the two towns indicates that Gorey has a similar profile, but a more even population structure with a higher proportion of inhabitants in their 30s and 40s. This more even age structure is also apparent for the Gorey Urban ED. The pattern for Family Cycle is similar, but there are fewer families with early school or pre-adolescent children (11.8% and 11.9%) than in Gorey (15.1% and 13.8%) and more households of retired people (11.5% compared with 8.9%).

Figure 3 : Age classes New Ross (left) and Gorey (right)



Social class indicates a higher proportion of people in Gorey belong to the “Managerial and Technical class” (22.4% in Gorey as compared with 17.8% in New Ross). Patterns of Educational Achievement are very similar between the two towns, although there are higher proportions with more advanced qualifications, e.g. Honours Degree at 9.0%, in Gorey compared with 6.4% in New Ross. Occupational patterns indicate a higher proportion of Professional workers at 11.6% in Gorey compared with 7.4% in New Ross, but also a slightly lower level of Managers and Directors at 5.7% compared with 6.2%. There are relatively more people employed in Commerce and Trade in Gorey at 24.8% compared with 21.8%, and a smaller proportion working in Manufacturing at 15.5% compared with 18.7%.

A more distinct difference can be noted when comparing the proportion of people in the urban centre who are in deprivation (i.e. compared with Ireland as a whole) as defined by the Relative and Absolute Deprivation Indices used by Pobal. Here, Gorey scores better on both counts at -11.5 and -7.1 in 2016, compared with New Ross at -18.6 and -14.4 (the national average is zero), with Gorey also having realised a greater improvement in reduced absolute deprivation since 2011. Levels of Disability are similar for both Gorey and New Ross, although both reveal much higher levels in the Urban EDs at 21.7% and 20.5% respectively compared with figures for the Rural EDs of 12.5% and 12.6%, a factor partly influenced by relative age differences.

Relevance of Demographics to Town Plan

The demographics indicate that New Ross is not so different from many other rural towns with evidence of a rather skewed population in the centre and some deprivation, being balanced by relative prosperity on the outskirts of the town. It does indicate that New Ross is missing some of the younger demographics, including people of an age with young families, which suggests that people may have left (or not moved in) due to employment opportunities elsewhere. New Ross also lacks a third level college and this is demonstrated by the fact that only a modest segment of the population falls within the 18-25 age range, potentially compounding the problem of there being rather little for young people to do as reported by many of the project meeting participants and survey respondents. However, the comparison with Gorey shows no extreme differences. The Design Team will undertake a comparison with more towns if time permits us to examine the latest CSO data once this is released.

The relatively low level of younger population segments does present an issue in that young people often have more disposable income, or at least are willing to spent this on consumerables and nights out. Young families typically engage in higher spending activity too. What money is spent on nightlife occurs largely in Irishtown which is located outside of the town centre. However, the location is still relatively peaceful with nightspots elsewhere, only more active than the centre of town where most of the very limited activity occurs around John Street and Mary Street. The low level of activity means that the problem of on-street drinking, a problem found in every town, is more evident in New Ross because of the quiet surroundings.

Appendix B:

ECONOMIC AND SOCIAL BENEFITS OF THE PROPOSED SOUTH-EAST GREENWAY INCLUDING FOR NEW ROSS

ECONOMIC AND SOCIAL BENEFITS OF THE PROPOSED SOUTH-EAST GREENWAY INCLUDING FOR NEW ROSS

Prepared by Optimize (www.optimize.ie) as a contribution to the New Ross Town Centre Health Check being prepared by Cunnane Stratton Reynolds and Associates. July 2023.

Contents

1. Introduction

This document reviews the potential levels of use on the South East Greenway and how expenditure by visitors could convert in economic benefits. It examines what measures could be needed to allow New Ross to share in these economic benefits. It also contains some commentary on the public good benefits.

2. Economic information

This section presents estimates of the prospective economic and social benefits of the planned South East Greenway for New Ross. The principal anticipated benefits are due to:

- Conventional economic benefits
  - Local benefits in terms of expenditure by cyclists and walkers
  - Regional benefits due to new tourism income
  - Employment benefits

- Public good benefits
  - Amenity-related benefits to well-being for users and the local community
  - Public good and personal health benefits

Although numerous studies have examined the benefits of greenways internationally, there have been rather few studies to their potential economic and social benefits. In Ireland, a small number of studies have looked at the economic benefits of walking routes, for example URS/Scott Wilson for West Cork (2012), Bergin and O'Rathaille (1998) and O'Donnell and Boyle (1999) and forest and wilderness trails, for example Fitzpatrick Associates (2005) and Louise Browne and Associates (2012).

The Great Western Greenway and Waterford Greenway represent two examples for which some estimates of the economic benefits of greenways have been prepared. Data on the former were assessed by Deenihan *et al* (2013) and Failte Ireland (Fitzpatrick Associates, 2011). Preliminary estimates of expenditure for the Waterford Greenway were collected by AECOM in 2017.

At a national level, Failte Ireland estimates that 5% of domestic holidaymakers engaged in cycle tourism in 2019. A total of 175,000 visitors and 105,000 holidaymakers participated in cycling (Failte Ireland, 2019, Failte Ireland, 2013). Greenways have a particular appeal given that they tend to have few inclines and are safe for trips with children. Indeed, 42% of the domestic cycling tourism is by people with children (Failte Ireland, 2013). There is evidence that cycling, including touring cycling and mountain biking, but especially off-road cycle routes, can make a significant contribution to the local economies. It can also provide significant public good benefits in terms of well-being and health.

User characteristics

Three broad types of user can be identified, namely local recreational users, users based within the regional area, and tourist users who visit from further afield, including from overseas. However, these categories should not be too rigidly defined because local people might choose to use the greenway for occasional trips as well as for activities that typically characterise tourism. Visitors from further afield will include people making dedicated trips to use the greenway and others who might choose to make the greenway part of a longer visit to the region. The availability of complementary infrastructure helps, for example connecting cycle networks, cycle parking and bike hire, as well as facilities such as tourist information, accommodation, cafes, and other tourist destinations.

The characteristics of the cyclists themselves will determine how far they travel and what parts of a cycle trail network they choose to use. The characteristics will include whether the user is a local, based elsewhere in Ireland or a visitor from abroad, and whether they are cycling alone, as a member of group or within a family, their age and level of fitness.

Surveys also indicate that many users are walkers. This is particularly so for short distances and for greenway sections which are close to towns.

Cycle Trail Networks in Ireland and abroad

Ireland

Ireland now has quite a number of greenways. This new infrastructure has complemented earlier networks of national cycle routes such as the Kingfisher Trail in County Leitrim and Beara Way Cycling Route. The only detailed economic study of greenway or cycle trail is that for the Great Western Greenway in County Mayo undertaken for Failte Ireland by Fitzpatrick Associates (2011). The original trail was 18km long, but has now been extended to 42km by connecting Westport with Mulhranny. The greenway was a rather unexpected success due largely its off-road character and consequent ability to attract families and general tourists. In 2014, the total number of trips (less returns) was estimated at 291,000. Eighty per cent of users cycled rather than walked. All socio-demographic groups are represented, although there was much use by families with parents in the 31-49 age category accounting for 38% of users. In 2014, 25% of users were from abroad (including 9% UK) and 75% were from Ireland, of whom 29% were from Dublin and 21% were from County Mayo (*Pers comm*. Mayo Trails).

Domestic holiday makers using the Great Western Greenway stayed in the Mayo area on average for five days. For overseas tourists, the average length of stay was over seven days. For 70% of domestic users, the greenway was an important factor in the decision to visit the area (Fitzpatrick Associates, 2011). West Mayo has many attractions to encourage people to stay in the region. Nevertheless, it is evident that the greenway has been a significant draw to the area in its own right.

UK

Of cycle trials in the UK, Downward, Lumsdon and Weston (2009) examined the use of four conventional cycle trails in the north of England by asking sample users to complete diaries of their trip activities. The average group size was two. Of users

- “tourist users” = 23%,
- cyclists making longer linear trip = 22%,
- cyclists making longer circular cycles = 11%,
- short breaks = 17%,

- day trips = 17%,
- brief trips = 26%,
- trips a particular purpose (e.g. commuting to work) = 1.6%.

There is some cross-over between these categories. The nature of users also evolved over time as the cycle routes became more established such that the number of tourists and longer trips increased.

Lumsdon, Downward and Cope (2004) examined user patterns on sections of the European North Sea Cycle Route in Northern England. The route was only a few years old at the time. They found that seasonal factors were important with one of the routes receiving more tourist use during the summer whereas use on another was greater outside of the high season due to the higher proportional of recreational users. The authors report that the largest proportion of trips were short circular trips of less than three hours (26%), followed by short out-and-back trips (23%), short 2-3 day breaks (16%), touring holidays (17%), one day trips (10%), and particular destination 8%. Most users were from the region (66%), while 28% were from elsewhere in the UK and 6% were from abroad. Forty one per cent of users were solo riders and 49% were in small groups.

Most of the users in the Lumsdon *et al* survey were cycling for one day or less (74%). Two-day trips accounted for 2.8% and three days trips for more at 7.6% with remaining trips extending for anytime to over 15 days. The age range was fairly wide with the highest proportion of users belonging to the 40-49 years category (29%), followed by 30-39 years (24%), 50-59 year (c20%) and 10-19 years (17%). Curiously, young people between 20-29 years accounted for only around 8% of users. Just under three-quarters of users were male.

It is important to note, though, that Downward *et al* and Lumsdon *et al* studies were both of a conventional cycle trail and not a greenway. Only around one quarter of the cycle routes were traffic free. Consequently, the types of use and users are likely to rather different.

3. Economic impact and expenditure

Great Western Greenway economic impact

Expenditure by domestic tourist cyclists using the original section of the Great Western Greenway was estimated at €49.85 per day, for non-domestic tourists, at €50.71 per day and for locals at €27.31 per day (Fitzpatrick Associates, 2011). Total expenditure was estimated at €7.24 million in 2011 of which locals spent an estimated €939,000, domestic tourists €3.5 million and non-domestics €2.75m.

For studies at national level, economists tend to discount this expenditure as it is seen as displacing other tourism activities which contribute to economic benefits (*displacement*). However, this information is relevant locally or regionally. Of the total expenditure, €3.8 million (53%) was considered to have been additional to other tourist activities that might have been undertaken in County Mayo in the absence of the greenway. Given that the construction cost of original length of the greenway was €5.6 million, these annual figures demonstrate a very positive benefit to cost ratio.

Patterns of use are not static. Use of the greenway increased significantly following the extension to Westport. It has also involved more out-of-season stays and use by people living or staying in the town. In 2012, daily use levels were up to 400 in the summer, but still averaged 100 in the winter months (Deenihan *et al*., 2013). By 2014, the average expenditure per user was estimated to have increased slightly to €62 (including accommodation). (*Pers comm*. Mayo Trails). As a consequence of the greenway's success an extension was built from Westport to Croagh Patrick.

UK studies economic impacts

In the aforementioned study by Downward *et al.* in the north of England, the key variables determining use patterns were user preferences, group income and group size. The figures reveal that users are likely to be making longer trips when they are members of a group (including families). They also suggest that users are inclined to spend more when they are a member of a group. These findings make intuitive sense given the need to spend on accommodation on longer trips and the greater likelihood of eating out by groups.

Furthermore, the study found that the user composition evolves over time as routes become more established. Expenditure patterns change too. In this case, average whole trip expenditure, for an average group size of two, increased by a factor of four from £80 in 2001 when the trails opened, to £314 in 2006 for an average duration of 39.3 hours.[1] In their model, Downward and colleagues projected average expenditure by each additional group member at between £16 and £33.

Expenditure by cyclists in the study by Lumsdon et al. averaged £37.72 per day before transport costs (for the average group size of two people). Levels of expenditure are given for number of days, of which the most reliable evidence of an overnight is represented by two-day trips for which average total expenditure was £51.12. For trips of one, two and three days, daily group average daily expenditure comprised £16.53 (44%) on accommodation and £19.74 (52%) on food and drink. In this case, bicycle related expenditure was just £0.80 and gift purchases just £0.65. Total expenditure over a period of two days (typically including one night) was £89.71 and over three days (typically including two overnights) was €122.55. This expenditure is estimated to contribute £9.4 million per year to the local economy or £13.4 million to the wider economy (Institute of Transport and Tourism, 2007).

Other European studies economic impacts

EuroVelo, the organisation behind the European cycle route network, has collected figures for various national networks. Although the study methodologies and the network characteristics vary, the average overnight and daily expenditure figures are quite similar to one another allowing for familiar differences in national cost of living. Across the EuroVelo network of European cycle trails, average expenditure by day users is estimated at €15.39 or €57.08 per day by cyclists staying overnight (EuroVelo, 2012). Per kilometre, this expenditure works out at 30 cent for day users, €1.53 by cyclists on short breaks and €2.24 by cyclists on longer trips, averaging overall 56 cent. On average 40% is spent on accommodation , 30% on food and drink and 30% on other expenses including shopping. Day users across the network spend 60-75% on food. On EuroVelo trails in Denmark spending by day users is €2

[1] It is not clear how many days this equates to.

higher for 40-49 year olds than those below 30 years and €3 greater for 50-64 year olds.

Table 1. Average expenditure by different national cycle networks

	average daily trip spend with overnight	one day trip spend
Lumsdon et al *	€36.04	€18.72
C2C UK	€53.00	€15.50
EuroVelo average	€57.08 *	€15.39
EuroVelo Austria examples	€75.00	€28.95
EuroVelo Belgium examples	-	€9.59
EuroVelo Swiss examples	€78.70	€14.22
EuroVelo Germany examples	€58.88	€16.64
EuroVelo Denmark examples	€55.53	€11.35
EuroVelo France examples	€67.50	€12.25
EuroVelo Netherlands	€66.00	€11.29

* at exchange rate of 1.41 13/11/2015

The benefits of direct and indirect expenditure

Businesses benefit from expenditure by the users of cycle trails. The various studies introduced above provide examples of the businesses that typically benefit from this activity including accommodation providers (hostels, B&Bs, hotels), cafes, pubs and cycle hire/shops. Positive impacts occur for new businesses, expansion to existing businesses and changes in turnover. In County Mayo, local businesses reported a 47% increase in turnover due to the greenway (Fitzpatrick Associates, 2011). In particular, new cafes and cycle shops have sprung up in response to the 50-60% of visitors who hire bikes on arrival. Almost one third of businesses claimed to have increased their expenditure in the local area. Many of these businesses have opened in the villages of Newport and Mulhranny which had previously been rather deficient in the range of facilities needed to underpin a tourist economy. The Mulhranny Hotel is amongst the establishments which has been most proactive in providing accommodation packages tailored to the needs of cyclists and walkers.

Thirty seven new jobs were believed to been supported directly by the greenway. The addition to employment was estimated at 25 seasonal positions and 12.5 full time equivalent (fte) at the time of the original section in 2011. An additional 40 local jobs are estimated to be supported largely due to the presence of the Greenway.

These benefits to local businesses are driven by the nature of greenway use. For instance, family use dominates over the summer school holidays, but a further benefit of the Great Western Greenway is that it has extended the tourist season beyond the peak months as Irish people take advantage of quiet weekends or good weather to make excursions on the trail.

This expenditure has a knock-on benefit that is captured through *economic multipliers* due to purchases by the sector (direct), purchases made by supplier businesses (indirect) and spending due to employee salaries (induced). Multiplier estimates can be contentious depending, for example, on assumptions regarding the recycling of government tax income back into the tourism sector. These assumptions are discussed by the CSO (2014) in arriving at an estimate of combined direct and indirect output multiplier for the tourism sector of 1.074, for tourism events of 1.101

and recreation services of 1.073. The high employee related compensation of 0.636 reflects the sector's labour intensity and implies a high level of induced expenditure due to employee salaries. Taking into account outflows due to imports and taxes and domestic expenditure implies a net multiplier effect of 1.76. This ratio is broadly in line with previous studies from Ireland and the UK.[2]

Lessons from earlier greenway projects

The lesson from these studies is that higher levels of expenditure are likely where there are things to spend money on. In Boulogne, for instance, Eurovelo found that cyclist expenditure was almost zero due to absence of facilities. The chicken-and-the-egg scenario applies where more users encourage businesses to open and the presence of more businesses, such as accommodation, cafes, pubs and bike hire/maintenance (as noted above) attracts more users. Although self-evident, this could still require the public authorities to provide incentives and assurances that will encourage the entry of such businesses in the early years.

4. Public good benefits

In addition to the economic stimulus of expenditure, the provision of cycle trails provides non-marketed public good benefits for users and at local and national level. These public good benefits are economic benefit in that they represent an addition to economic welfare. Public good benefits arise from:

- Wellbeing benefits to users
- Quality of life and local development benefits
- Health benefits

These are important benefits and were discussed at length in the original report on which the current report is based. In particular, the health benefits can be very significant for regular users of a greenway, particularly where they were not exercising frequently before. Many instances of heart disease, type-2 diabetes, breast cancer and colon cancer could be avoided by maintaining a moderate level of activity for 30 minutes each day[i] (Bize et al., 2007, Lee et al., 2012). These benefits accrue both to the individual and their families, and also to the State in terms of substantial savings on heathcare.

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[2] Hurley et al (1994) estimated an aggregate multiplier for Ireland at 1.58, Henry (1991) estimated the direct and indirect multiplier at 1.24, while Henry and Deane estimated the direct and indirect multiplier at 1.187, or 2.11 with the inclusion of induced expenditure. On the basis of an international review for an assessment of walking trail income, URS and Scott Wilson applied an estimated at 1.28 for expenditure (direct and indirect) and 1.25 for employment (induced), amounting to a composite multiplier of 1.6.

5. Benefits of proposed South East Greenway

Introduction

The economic benefits of the greenway are realised as:

- Private benefits in terms of turnover and employment due to visitor expenditure;

- Public benefits in terms of the well-being of users, health and local development.

Of the first of these, the preceding discussion of expenditure revealed that levels of daily and overnight expenditure are rather similar for cycle networks across Europe. Greenways are rather different. The key to an economic analysis for the South East Greenway is the projected level of use. This will depend on the quality and distinctiveness of the experience offered.

Although there are various UK and international examples of the benefits, the main example for comparison to date has been the Great Western Greenway. In 2014, the number of trips on this trail was 465,742. As the trail is a linear one rather than providing a round trip, most of these trips included return journeys. Once the number of return and one-way trips is accounted for, the number of users is estimated to be 291,000. Of this number, 84% were from Ireland and 16% were from abroad, mostly the UK.

Experience of Waterford Greenway

The Waterford Greenway is 24km long and has 290,000 users. It has several key attractions; the viaducts at Kilmachthomas and Durrow, the 300m Ballyvoyle Tunnel, the riverside stretch close to Waterford, the cafe complex at xx and the links to the beach north of Dungarvan and to Congreve Gardens. There are some lovely views of the Comeragh Mountains, but these are often limited by the height of the hedging.

In 2017, a survey was undertaken of Waterford Greenway users by AECOM and Amárach. Of interviewees, 47% were aged 45-64, 34% were aged 25-44, 15% were aged 65+ and 5% were 18-24[3]. Just over half of users were accompanied by their family at 52%, and 23% by children. Half of the users were from Waterford and Dungarvan, 29% were from elsewhere in the region, and16% were from elsewhere in Ireland. Only just over 2% were from overseas. People who used the greenway on a daily basis amounted to 15%. The proportion of weekly and monthly users was high at 43%. Just over a quarter were on their first visit, while 8% used the greenway once or twice a year. Most users (91%) were making a round trip on the greenway, although the length of this trip was not stated. Twenty-six percent hired a bike. The majority of respondents (71%) did not intend to visit any other sites along the greenway.

In terms of expenditure, 16% of the respondents were staying overnight, of whom 80% were in paid accommodation. Of these, 35% stayed for one night, 32% for two nights and 29% for more than two nights. It is likely that the greenway was therefore the main destination for over a third of visitors. Forty-five percent of paid overnights were in Dungarvan. The average spend across the entire sample was €16.90 per individual per day or €109.50 per night for the 11% of the sample who stayed over

[3] The rather low proportion of young people may have been due to the over-sampling of walkers.

night and answered the question. Just over half (52%) claimed to spend nothing at all. If the total number of visitors of 290,000 is assumed to exclude children, these figures suggest total direct expenditure of **€4.78 million** per year. The figure may be a small under-estimate as the interviewers understandably found it more difficult to sample cyclists who are possibly more likely to spend than walkers (many of whom might have been regulars on short trips).

The South East Greenway

The South East Greenway should attract good level of use from an early stage given that it represents an extension to the original greenway. It has attractions of at least equal value. The best of these are close to New Ross, including the Mount Elliot Tunnel, the Red Bridge and Woodville House Gardens. Users will be able to cross into New Ross using dedicated a cycle lane. For those cycling the whole way to Waterford there will also the opportunity to make the return journey by river boat, a major draw.

The South East Greenway is therefore of the same length and will have a similar appeal to the Waterford Greenway. Given the prestige of the incumbent, the South East Greenway could be expected to attract 225,000 users and bring in expenditure of around €3.7 million in its early years based on the spending characteristics of users of Waterford. Given that 45% of overnight users of the Waterford Greenway stayed in Dungarvan rather than Waterford, New Ross should be able to attract a similar proportion. At an average overnight spend of €110, this would suggest local direct expenditure of €1.42 million per year. If on top of this, New Ross or Rosbercon were to attract 20% of day-trippers and half of these were to spend some money in the town, then this could add further direct spending of €320,000 per year. There is a good prospect of people visiting New Ross or Rosbercon given that two of the principal highlights are located nearby.

Direct expenditure will have a knock-on multiplier impact in terms in indirect and induced expenditure. A total multiplier effect of 1.76 is assumed which could raise the total value to over €3 million per year. A portion of this benefit would be due to the effect of displacement from the existing greenway, unless we assume a cumulative benefit from the longer route. The economic gain would be realised by the South-East Region, but only the expenditure derived from overseas tourists can be considered a net gain to the Irish economy as a whole. Nevertheless, much income would be directed to New Ross and this will provide employment benefits to the town and the local area.

At present, the Midlands and East (excepting Dublin) receive only 55% of the number of tourists as the West, but it does attract almost as many domestic tourists (Failte Ireland, 2019). However, as the greenway becomes more established and better known, the number of users will increase. If the extension can offer a high quality distinctive experience, it will develop a reputation that will attract a much higher proportion of visitors from more distant parts of Ireland and from amongst foreign visitors. The number of greenway users is certain to increase too, especially if the greenway is ultimately extended to Rosslare. Groups, such as cycling clubs, are more attracted by longer routes as these provide more options for side trips. People in groups also tended to spend more than if cycling on their own.

More people will be attracted to both New Ross and Rosbercon once the tunnel and Red Bridge have been included in the greenway. Of course, there are still a number of key provisos which would need to be addressed for this income to be realised. At present, New Ross has very little budget accommodation and the number of hotels, guest houses, AirBnBs and hostels would need to increase if it were to attract overnight stays. In addition:

- Dedicated car parking should be made available in New Ross. If car parking for the greenway is only promoted along the route itself or at end points, local daytime expenditure will be more attracted to Rosbercon;
- Cycle lanes with good separation from traffic will be needed on O'Hanrahan's Bridge if expenditure is to be attracted into New Ross and not restricted to Rosbercon;
- A good cycle path along the R700 from Mount Elliot would attract expenditure in New Ross;
- Given the length of the greenway, it is likely that many return trips will be by the Barrow Princess boat to the marina.
- Measures to increase the attractiveness of the town and to draw people into the central area where most shops and cafes are located.

The fact that much expenditure will be attracted to Rosbercon is still a good outcome as it is part of the larger urban area and the same economy. It also has its own need for urban regeneration. Despite the width of the river, the attractions of New Ross should encourage many people to cross the bridge. The Dunbrody Famine Ship will be very visible from the west bank. In addition, the Barrow Princess will bring some greenway users directly into the town. Mannion's Farm Shop and Pub and Woodville House and Gardens will provide additional incentives to exit the greenway and travel into town from Mount Elliot despite the hill climb.

6. Public good benefits of South East Greenway

Users of the greenway will realise benefits to their personal wellbeing This is realised, amongst other things, through the opportunity for exercise, to enjoy in the countryside or through time spent with family or others. This contribution to wellbeing is a social benefit, but also an economic good in just the same way as other government investments in social infrastructure. The only difference is that these benefits are not priced by the market.

The opportunity to exercise also provides health benefits. These have an economic value when they are realised by the individual user, especially where a person previously engaged in low levels of exercise or inactivity. In addition, there are wider public good benefit in terms of reduced public healthcare expenditure and additions to the productivity of people in work.

When quantified, health benefits can often be considerable. People tend to place a very high value on their health even if this is not always backed up by a commitment to maintain good levels of exercise. Economists have estimated a Value of Statistical Life (VSL) based on people's willingness-to-pay (for example through health insurance) to avoid premature death. This figure is regularly used in relation to issues such as road safety and for Europe averages €2.59 million per person. The figure does not take account of costs to the state or the private sector which, of course, is a major part of government expenditure.

There is a need to be realistic about the contribution any one facility can make to health. The exact nature of the relationship between exercise and health is unclear. Some scientists argue that every marginal addition in exercise has a positive effect.

In this case, the benefits are mainly realised by regular users who will tend to be locals. Most benefits will be realised by those who might otherwise be inclined to infrequent exercise.

An approximate estimate of the public good benefits can be achieved by using the Health Economics Assessment Tool (HEAT) developed for the World Health Organisation (WHO) The tool averages the benefits across the general adult population. The model estimates benefits for adults based only on reduced *mortality* using the VSL. Although there are significant benefits to reduced *morbidity*, including savings on the enormous cost to healthcare.

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[i] As recommended by the Irish Heart Foundation (http://www.irishheart.ie/iopen24/physical-activity-t-7_19_73.html) Similar recommendations are made by the U.S. Dept. of Health and Human Services. *2008 Physical Activity Guidelines for Americans*. 2008.

Appendix B:

Business Survey Frontline

Frontline results from New Ross business survey

A total of 71 businesses responded to the business survey. Of this number, 72% are located in the town centre, 20% on the outskirts, 3% in Rosbercon and 6% out of town. Of these, 45% are retail businesses, 33% are services, and 18% are café's, restaurants or hospitality. Small numbers were recorded for Commerce/Trade/Warehousing, Transport/Communications, Construction/Building supplies, Food/Agricultural, and Industrial/Manufacturing.

Dependence on customers or clients visiting premises

Of the businesses, 73% believe themselves to be *highly dependent* on customers or clients visiting their premises, while 13% are *moderately dependent*. Of the total, 41% are *very dependent* on pedestrian footfall and 24% describe their business as being *moderately dependent*. In addition, 27% stated that their business was dependent on nearby car parking.

Impact of bypass and the effect of traffic

The largest proportion of responses at 39% stated that their business is *positively affected* by traffic movement in the town, but 20% considered this factor to have a *negative* impact, while for 27% this was considered *neither positive or negative*, and for 14% not applicable. Several respondents added that they believe that traffic flows make their business more visible, while others suggested that parking was the greater issue, including paid parking, with one arguing that parking on Mary Street is "deplorable". When asked about the impact of the bypass on their business, 33% thought there had been *no change*, while 27% believed there had been a *small improvement* and 20% *a large improvement*. Only 13% believed there had been a *reduction* in business, with one thinking this had caused a large reduction. As trading patterns have changed post-pandemic, some respondents found it difficult to judge and thought also that other factors could be responsible of the changes in the business environment. Three respondents believed that the bypass had made it easier for customers to come into town, including from Rosbercon, Counties Waterford and Kilkenny. It is worth noting here that, in some other towns, bypasses have had a negative effect on passing trade and businesses, whereas in New Ross the improved environment and reduced congestion has been welcomed.

Source of customers and clients

For 24% of businesses, most customers were believed to be *located in* New Ross, but a *larger proportion* at 47% stated that most of their customers were from Counties Wexford and Kilkenny including from within 10km of the town. Note that the proportions do not add up to 100%.

Figure 1: Source of customers

Answer Choices		Response Percent	Response Total
In New Ross		24.29%	17
Within 10km of the town		47.14%	33

In Counties Wexford or Kilkenny		52.86%	37
Elsewhere in Ireland		21.43%	15
Outside of Ireland		12.86%	9
		answered	70
		skipped	1

Dependence on visitors to tourists

Half of the businesses surveyed had *no dependence* on visitors, but for 14% the dependence is *high* while for 38% it is *slight*. These outcome indicates that, while New Ross is in the process of promoting itself as a tourism Destination Town, the current level of dependence is modest, although it could, of course, be advantageously increased. Some respondents noted that tourists tend to arrive by coach and not have time to shop in town or otherwise do not have many options to overnight.

Figure 2: Dependence on visitors and tourist visitors

Answer Choices		**Response Percent**	**Response Total**
Yes (slight dependence)		38.03%	27
Yes (high dependence)		14.08%	10
No		50.70%	36
		answered	71
		skipped	0

Availability of business services in New Ross

46% of respondents acknowledged that there are *services* which the business needs which *cannot be found* in New Ross, although for 19% of businesses the question was not applicable. An absence of printing services, a phone shop, cloud-based services and couriers was noted by one business while another mentioned a lack of informal meeting places such as suitable cafes. The absence of sufficient numbers of businesses catering for tourists was mentioned by one respondent, namely restaurants, accommodation, campsites, river activities, bike hire and water points.

Availability of qualified employees

While 13% of businesses reported having *no difficulties* finding suitable employees, 35% acknowledged that it *can be difficult* and the largest proportion at 44% replied that they found it *very difficult*. Of course, what is meant by suitability varies from business to business. It could mean technically qualified or just responsible and hard working. Some feedback on this was provided by a follow-up question in which 48% of businesses referred to *specific skills* and 50% to *insufficient qualifications or capability*. Others referred to a lack of affordable accommodation, a shortage of young people and a lack of transport. One business reported having few applications in response to vacancies. As respondents were allowed to tick more than one box the figures do not amount to 100%.

Figure 3: Reasons why if it difficult to find suitable employees

Answer Choices	**Response Percent**	**Response Total**
Affordable accommodation	21.67%	13
Lack of public transport	16.67%	10
Specific skills needed	48.33%	29
Insufficient qualified or capable employees	50.00%	30
Not enough young people in the town	20.00%	12
Other (please specify):	13.33%	8
	answered	60
	skipped	11

Owning or renting business premises

The largest proportion, 62%, of respondents *own their premises*. 39% rent their premises. Small numbers work from home or the business hub. Of those renting their premises, half (50%) agreed that the rental situation *did impact on their willingness to invest* in the business while 39% stated that it *did not*. For the remainder, the question as not applicable. One respondent said that he/she was not prepared pay for improvements to the exterior, while another referred to the short length of the lease. One respondent replied that the high rent did not leave sufficient funds to make investment while another said their business was ready to expend, but was unable to find suitable properties to either rent or purchase.

Can anything be done of a practical nature to improve the town's attractiveness for business?

Most respondents (81%) thought that things could be done to improve the town's attractiveness for business. 10% did not and 9% did not know. There were numerous responses to this question. These cannot be categorised exclusively. Among the responses relevant to the urban realm were the need to reduce *vacancy and dereliction* (7), *pedestrianisation* (3), a *covered entertainment area*, more *events/festivals*, a *crafts hub/market, better lighting*, more *street art*, *clean shop fronts*, a *meeting space*, *signage* and *maps* (2), *public toilets* (2), *litter* and improved *footpath maintenance* (3), *cycle paths* and *legible road markings*. Parking, including *free parking* (5) (including for short stops) or a *lack of parking* (2) was mentioned by several respondents. A need for *overnight accommodation* (2), more large *retail chains* in centre (2), more *tenancies, cafes* and *restaurants* (5), and *nighttime activities* (2), including a food market, (2). Other suggestions included *direct bus services* to Dublin, *tourism promotion*, a *business incubation centre*, *earlier bin collections*, and more *business collaboration* and cross-promotion. Many respondents referred to the need to tackle *anti-social behaviour* (7), including on-street drinking, with CCTV or a higher Garda presence.

Many of these proposals were apparent from the community consultation, including town centre living, the nighttime economy, more diversity of shops, more restaurants, activities/places for teenagers, meetings places, outdoor dining, pedestrianisation, walking routes, wayfinding, public toilets, disabled facilities and easier mobility for older people, cinema, safe streets, taxi services.

Can anything be done to increase the number of people coming into the town centre?

Again, there were numerous responses to this question. The responses provide more evidence of agreement across the sample than the individual suggestions to the preceding question. Respondents gave their highest overall ranking to vacancy and dereliction (75%), followed by more diversity of food/eating options (65%), accommodation options (53%), retail diversity (50%) and town centre appearance (50%).

Figure 4: Rating of what can be done to increase the number of people coming into the town centre.

Answer Choices			Response Percent	Response Total
1	Improve footpaths, seating, etc.		19.12%	13
2	Provide cycle lanes and cycle parking		14.71%	10
3	Improved walking and cycle facilities on the bridge		25.00%	17
4	Change or improve car parking		30.88%	21
5	Improve signage		16.18%	11
6	Improve appearance of town centre		50.00%	34

7	Improve visitor/heritage information		13.24%	9
8	Address problems of vacancies and dereliction		75.00%	51
9	More retail diversity		50.00%	34
10	More diversity of food/eating options		64.71%	44
11	More accommodation choice		52.94%	36
12	Evening or Sunday opening hours		29.41%	20
13	More events (e.g. music, arts, food, heritage, etc)		30.88%	21
14	Improve sense of daytime safety		30.88%	21
15	Improve nighttime safety		33.82%	23
			answered	68
			skipped	3

New Ross Business Survey

1. Page 1

1. In which part of New Ross is your business located?

	Answer Choices	**Response Percent**	**Response Total**
1	Town centre	65.15%	43
2	Town outskirts	16.67%	11
3	Rosbercon	3.03%	2
4	Out of town	6.06%	4
5	Street (if you wish to add):	27.27%	18
		answered	66
		skipped	0

Street (if you wish to add): (18)

1	27/07/2023 16:13 PM ID: 223141641	South Street
2	27/07/2023 17:28 PM ID: 223147294	North
3	27/07/2023 17:33 PM ID: 223147585	Mary street
4	27/07/2023 21:29 PM ID: 223157138	South St
5	27/07/2023 21:50 PM ID: 223157736	On the quay ,new ross.
6	27/07/2023 22:15 PM ID: 223158423	Irishtown

1. In which part of New Ross is your business located?		
7	27/07/2023 22:18 PM ID: 223158502	South street
8	28/07/2023 11:05 AM ID: 223176544	Quay street
9	28/07/2023 11:10 AM ID: 223176901	South Street
10	28/07/2023 13:40 PM ID: 223188879	South Street/Quay Street/Charles Street.
11	31/07/2023 14:40 PM ID: 223313732	Priory St
12	31/07/2023 14:41 PM ID: 223313768	Priory St
13	08/08/2023 16:55 PM ID: 224028562	Priory
14	08/08/2023 17:28 PM ID: 224032793	Mary Street
15	08/08/2023 18:19 PM ID: 224037973	South
16	08/08/2023 22:12 PM ID: 224052765	John Street
17	09/08/2023 09:26 AM ID: 224074536	South
18	09/08/2023 10:32 AM ID: 224081317	The Quay

2. What type of business is it?

Answer Choices			Response Percent	Response Total
1	Retail		45.00%	27
2	Cafe/restaurant/hospitality		18.33%	11
3	Services (e.g. legal, financial, etc)		33.33%	20
4	Commerce/Trade/Wholesale		3.33%	2
5	Transport/communications		3.33%	2
6	Construction/Building supplies		3.33%	2
7	Food/Agricultural		3.33%	2
8	Industrial/Manufacturing		5.00%	3
			answered	60
			skipped	6

Other or more detail: (16)

1	16/07/2023 19:01 PM ID: 222475579	Tourism
2	27/07/2023 16:13 PM ID: 223141641	Hairdressing
3	27/07/2023 21:29 PM ID: 223157138	Bakery
4	28/07/2023 13:40 PM ID: 223188879	Menswear Shop ,Ladieswear Boutique and Shoe Shop. Trading in New Ross for over 50 years.
5	31/07/2023 14:40 PM ID: 223313732	Community Art & Advocacy Gallery A social enterprise with a collective of creatives.
6	31/07/2023 14:41 PM ID: 223313768	Community Art & Advocacy Gallery A social enterprise with a collective of creatives.

2. What type of business is it?

7	02/08/2023 18:06 PM ID: 223469124	Publisher
8	08/08/2023 16:42 PM ID: 224027185	Clothing
9	08/08/2023 17:28 PM ID: 224032793	Guesthouse
10	08/08/2023 18:19 PM ID: 224037973	Solicitors
11	08/08/2023 19:03 PM ID: 224041498	Craft
12	08/08/2023 20:12 PM ID: 224046289	Driving school
13	08/08/2023 21:07 PM ID: 224049442	Farm shop
14	09/08/2023 09:26 AM ID: 224074536	Business centre
15	09/08/2023 10:32 AM ID: 224081317	Selling Cleaning equipment
16	09/08/2023 13:04 PM ID: 224096005	2 businesses in rosbercon

3. How dependent is your business on customers/clients visiting the premises?

Answer Choices			Response Percent	Response Total
1	Not dependent		12.31%	8
2	Moderately dependent		13.85%	9

3. How dependent is your business on customers/clients visiting the premises?

		Response Percent	Response Total
3	Highly dependent	72.31%	47
4	Other (please specify):	4.62%	3
		answered	65
		skipped	1

Other (please specify): (3)

1	27/07/2023 21:29 PM ID: 223157138	Essential
2	28/07/2023 13:40 PM ID: 223188879	Online only minimum as age profile older and goods more expensive.
3	09/08/2023 13:04 PM ID: 224096005	retail section highly dependent, manufacturing section not dependent

4. Are you dependent on pedestrian footfall (numbers)?

	Answer Choices	Response Percent	Response Total
1	No	28.79%	19
2	Not applicable	3.03%	2
3	Yes (partly)	21.21%	14
4	Yes (very)	39.39%	26
5	Dependent on nearby car parking	28.79%	19
		answered	66
		skipped	0

5. Does traffic movement in the town impact your business positively or negatively?

	Answer Choices	Response Percent	Response Total
1	Positively	38.46%	25
2	Negatively	21.54%	14
3	Neither	27.69%	18
4	Not applicable	12.31%	8
		answered	65
		skipped	1

Comments: (9)

1	11/07/2023 11:08 AM ID: 222057508	Not too bad, but business would be more visible without it.
2	27/07/2023 17:33 PM ID: 223147585	Parking in the town in general is what most of them give out about
3	27/07/2023 20:37 PM ID: 223155455	Not many people use public transport or taxi to to gain access to town as they are not available
4	28/07/2023 13:40 PM ID: 223188879	People want to park near or outside our shops, very dependent on access and parking near the shops.
5	02/08/2023 18:06 PM ID: 223469124	Staff coming to work
6	08/08/2023 17:28 PM ID: 224032793	Parking on Mary Street is absolutely deplorable and I cannot stress that strongly enough.
7	08/08/2023 18:19 PM ID: 224037973	There's no free car parking
8	08/08/2023 19:33 PM ID: 224043786	no parking outside our shop one way system down town to quay only

5. Does traffic movement in the town impact your business positively or negatively?

9	09/08/2023 10:32 AM ID: 224081317	Parking spaces along the streets are more important than traffic flow. Too many spaces are occupied by permit holders who can stay in one position all day.

6. Have you experienced a change in levels of business since the bypass opened?

	Answer Choices	Response Percent	Response Total
1	No change	34.85%	23
2	Small improvement	25.76%	17
3	Large improvement	21.21%	14
4	Small reduction	12.12%	8
5	Large reduction	1.52%	1
6	Not applicable	4.55%	3
		answered	66
		skipped	0

Comments: (15)

1	11/07/2023 11:08 AM ID: 222057508	Difficult to tell with Covid too
2	14/07/2023 14:04 PM ID: 222334705	Less traffic in afternoons mean people cross bridge in afternoon
3	27/07/2023 16:13 PM ID: 223141641	More clients from South Kilkenny and County Waterford. Days are easier to fill as rush hour is no longer a factor
4	27/07/2023 17:28 PM ID: 223147294	Covid changed the business pattern so difficult to judge
5	27/07/2023 20:37 PM ID: 223155455	Huge noise reduction now that large trucks don't have to use the town

6. Have you experienced a change in levels of business since the bypass opened?

6	28/07/2023 13:40 PM ID: 223188879	Yes I think it's very positive and can only improve more as time goes on.
7	31/07/2023 14:40 PM ID: 223313732	No evening or weekend economy
8	31/07/2023 14:41 PM ID: 223313768	No evening or weekend economy
9	31/07/2023 20:22 PM ID: 223336637	Not entirely down to bypass. There other factors largely responsible for improvement in business
10	02/08/2023 18:06 PM ID: 223469124	Much easier and quicker for staff getting to work
11	08/08/2023 16:42 PM ID: 224027185	We receive higher numbers from rosbercon/Kilkenny area due to less traffic on Bridge later in the afternoon
12	08/08/2023 16:56 PM ID: 224028647	Driving into the town for a purpose rather than through with frustration
13	08/08/2023 18:19 PM ID: 224037973	Customers are more willing to come into the town.
14	09/08/2023 10:32 AM ID: 224081317	Through traffic bypassing the town has to be be good. Bin collections and shop deliveries should be scheduled for early morning and late evening
15	09/08/2023 13:04 PM ID: 224096005	Retail business opened after bypass opened,

7. Where are most of your customers or clients located?

	Answer Choices		Response Percent	Response Total
1	In New Ross		26.15%	17
2	Within 10km of the town		47.69%	31

7. Where are most of your customers or clients located?				
3	In Counties Wexford or Kilkenny		52.31%	34
4	Elsewhere in Ireland		21.54%	14
5	Outside of Ireland		12.31%	8
			answered	65
			skipped	1

Comments: (12)

1	11/07/2023 11:08 AM ID: 222057508	But some people passing through too
2	19/07/2023 19:18 PM ID: 222694340	Not applicable
3	27/07/2023 13:43 PM ID: 223128383	Mixed Waterford also
4	28/07/2023 13:40 PM ID: 223188879	We have a huge catchment area in the Southeast. Wexford.Kilkenny.Carlow.Waterford.
5	31/07/2023 14:40 PM ID: 223313732	Online
6	31/07/2023 14:41 PM ID: 223313768	Online
7	08/08/2023 16:42 PM ID: 224027185	Mainly from outskirts of town and also nationwide
8	08/08/2023 16:56 PM ID: 224028647	all
9	08/08/2023 16:59 PM ID: 224029232	And elsewhere
10	08/08/2023 19:25 PM ID: 224043140	And waterford

7. Where are most of your customers or clients located?

11	09/08/2023 09:26 AM ID: 224074536	Within approx 20km includes Waterford
12	09/08/2023 13:04 PM ID: 224096005	Retail section wexford and kilkenny, Manufacturing section all over Ireland

8. Does your business have a high dependence on visitors or tourist visitors?

	Answer Choices	Response Percent	Response Total
1	Yes (slight dependence)	39.39%	26
2	Yes (high dependence)	13.64%	9
3	No	48.48%	32
		answered	66
		skipped	0

Other/Comment: (9)

1	11/07/2023 11:08 AM ID: 222057508	Yes, tourists especially
2	27/07/2023 20:37 PM ID: 223155455	Unfortunately there is no place for visitors to stay, yet 40% of properties in the town (for more than 10 years) or derlict.
3	28/07/2023 13:40 PM ID: 223188879	Yes we do depend on Visitors and Tourist Visitors all year round not just the summer months.
4	31/07/2023 12:18 PM ID: 223301482	Most come on a bus and leave without visiting the town. The rest will come and shop
5	31/07/2023 14:40 PM ID: 223313732	No bus in evenings into new Ross or home Waterford Wexford

8. Does your business have a high dependence on visitors or tourist visitors?

6	31/07/2023 14:41 PM ID: 223313768	No bus in evenings into new Ross or home Waterford Wexford
7	08/08/2023 16:56 PM ID: 224028647	For holiday homes sales
8	09/08/2023 09:26 AM ID: 224074536	No dependence but some business from visitors.
9	09/08/2023 10:32 AM ID: 224081317	People on holidays don't buy cleaning equipment.

9. Are there services which your business regularly uses which are not found in New Ross? (excepting services available over the internet)

Answer Choices		Response Percent	Response Total
1	Yes	44.44%	28
2	No	34.92%	22
3	Not applicable	20.63%	13
		answered	63
		skipped	3

Comments: (8)

1	14/07/2023 14:04 PM ID: 222334705	Restaurants in the evenings
2	28/07/2023 13:40 PM ID: 223188879	Printing,Courier,Paper e.g bags etc,and more services from time to time. We do our utmost to keep business in town if we can at all, sometimes even paying more for products and services rather than outsourcing.
3	31/07/2023 14:40 PM ID: 223313732	Accommodation like campsite camper van parking, no, Public street Festivals, water points, bike hire , river activities

9. Are there services which your business regularly uses which are not found in New Ross? (excepting services available over the internet)

4	31/07/2023 14:41 PM ID: 223313768	Accommodation like campsite camper van parking, no, Public street Festivals, water points, bike hire , river activities
5	02/08/2023 18:06 PM ID: 223469124	Cloud based services
6	08/08/2023 17:17 PM ID: 224031547	specialist services not available locally due to nature of business
7	08/08/2023 18:28 PM ID: 224038709	Decent commercial premises for out of office meetings. The town has no decent cafe, restaurant or pub
8	09/08/2023 10:32 AM ID: 224081317	Our phone business shop closed.

10. How easy it is to find suitable or qualified employees in New Ross or locally?

	Answer Choices	Response Percent	Response Total
1	No difficulties	13.64%	9
2	Can be difficult	33.33%	22
3	Very difficult	43.94%	29
4	Not applicable	12.12%	8
		answered	66
		skipped	0

11. If so, why is this?

Answer Choices	Response Percent	Response Total

11. If so, why is this?

1	Affordable accommodation	21.82%	12
2	Lack of public transport	16.36%	9
3	Specific skills needed	50.91%	28
4	Insufficient qualified or capable employees	47.27%	26
5	Not enough young people in the town	20.00%	11
6	Other (please specify):	10.91%	6
		answered	55
		skipped	11

Other (please specify): (6)

1	11/07/2023 11:08 AM ID: 222057508	Young people are too lazy these days
2	26/07/2023 22:43 PM ID: 223094831	little for young people to do
3	27/07/2023 16:13 PM ID: 223141641	Industry shortage
4	27/07/2023 21:29 PM ID: 223157138	Social welfare
5	08/08/2023 17:28 PM ID: 224032793	Not applicable
6	08/08/2023 20:12 PM ID: 224046289	Not applicable

12. Do you own or rent your current business premises?

	Answer Choices	Response Percent	Response Total
1	Own	60.61%	40
2	Rent	42.42%	28
3	Work from business hub	1.52%	1
4	Work from home	3.03%	2
5	Other (please specify):	1.52%	1
		answered	66
		skipped	0

Other (please specify): (1)

1	27/07/2023 13:53 PM ID: 223129143	One of each

13. If you rent your current premises, does this affect your willingness or ability to invest in your business?

	Answer Choices	Response Percent	Response Total
1	Yes	29.17%	14
2	No	22.92%	11
3	Not applicable	47.92%	23
		answered	48
		skipped	18

If "Yes", in what way? (8)

1	11/07/2023 11:08 AM ID: 222057508	Not prepared to make investments on exterior.

13. If you rent your current premises, does this affect your willingness or ability to invest in your business?

2	27/07/2023 13:53 PM ID: 223129143	Not enough lease Length to recoup a large investment in a fitout
3	27/07/2023 22:15 PM ID: 223158423	High rent requiring higher turnover
4	31/07/2023 14:40 PM ID: 223313732	Cost and rates
5	31/07/2023 14:41 PM ID: 223313768	Cost and rates
6	08/08/2023 16:48 PM ID: 224027719	Length of lease
7	08/08/2023 17:27 PM ID: 224032679	business ready to grow but no available properties to purchase or rent that will accommodate this growth
8	09/08/2023 10:32 AM ID: 224081317	Less likely to spend money on rented premises.

14. Can anything of a practical nature be done in New Ross to improve the town/town centre's attractiveness for your business?

Answer Choices			Response Percent	Response Total
1	Yes		81.13%	43
2	No		9.43%	5
3	Don't know		9.43%	5
			answered	53
			skipped	13

What could be done? (47)

14. Can anything of a practical nature be done in New Ross to improve the town/town centre's attractiveness for your business?		
1	11/07/2023 11:08 AM ID: 222057508	More attractions, less drinking on the streets
2	14/07/2023 14:04 PM ID: 222334705	Yes lots the quay area needs derelict units to be occupied
3	16/07/2023 19:01 PM ID: 222475579	Improve tourist attractions
4	19/07/2023 19:18 PM ID: 222694340	Free parking
5	27/07/2023 13:53 PM ID: 223129143	Reduce rates and keep improving public realm (a lot done so far in fairness) a direct bus service to and from Dublin would also help.
6	27/07/2023 16:13 PM ID: 223141641	If there was more night time restaurants bars and night time entertainment it would help with our blowdry and styling trade.
7	27/07/2023 17:28 PM ID: 223147294	No pedestrianisation and more visible Garda Presence to ensure that customers feel safe shopping. Car parking is essential too
8	27/07/2023 17:33 PM ID: 223147585	Causes more cautious spending due to possible rent increases
9	27/07/2023 20:37 PM ID: 223155455	A 100 bedroom hotel would be good (owner operator).
10	27/07/2023 21:07 PM ID: 223156446	Not particularly but a rising tide lifts all boats so anything which can improve business and residential amenities is good.
11	27/07/2023 21:37 PM ID: 223157379	The footpaths in North st are always filthy and look very bad to visitors. They really need to have something done with them.
12	27/07/2023 21:50 PM ID: 223157736	Encourage good after 6pm eating and entertainment in our town ,
13	27/07/2023 21:55 PM ID: 223157870	Pedestrianidation

14. Can anything of a practical nature be done in New Ross to improve the town/town centre's attractiveness for your business?		
14	27/07/2023 22:14 PM ID: 223158383	Buildings kept clean tidy that are vacant and put to purpose.
15	27/07/2023 22:15 PM ID: 223158423	Promoting tourism not just for the famine ship but also for outskirts.
16	28/07/2023 11:10 AM ID: 223176901	Help with parking every customer mentions lack of parking
17	28/07/2023 13:40 PM ID: 223188879	Derelict buildings and closed premises are having a very negative impact on the Town and we hear it from our Customers regularly. Signage is very important for parking and other facilities. Toilet facilities are required. A proper Tourist information Office on the Quay is badly needed and a stand alone one, with toilet facilities and maybe a nice cafe. More Garda on the Town. More bins.
18	31/07/2023 12:33 PM ID: 223302830	Encourage tourists to explore the town when tours arrive to visit the Dunbrody.
19	31/07/2023 14:40 PM ID: 223313732	Covered entertainment area or awning , water point and public toilet,
20	31/07/2023 14:41 PM ID: 223313768	Covered entertainment area or awning , water point and public toilet,
21	31/07/2023 20:22 PM ID: 223336637	Pedestrian of Quay Street would seem the wrong area. Incoming traffic from the bridge will be forced up Charles Street and over South Street instead causing traffic congestion. I believe pedestrianisation should be considered on North Quay instead. Also shopkeepers SHOULD be consulted on this subject.
22	02/08/2023 18:06 PM ID: 223469124	Better bike to work access with bike paths. Entrance to Waterford Road Business Park from greenway so that staff could use this to get to work
23	02/08/2023 19:41 PM ID: 223473402	A cleaner, safer town with ease of car parking, No pedestrianisation of Quay Street. Better signage for car parking areas and meters. CCTV in lanes and development of same especially the ones joining main streets to yhe Quayfront. Tackle and fine owners of derelict properties especially shops in main shopping streets and approach roads
24	08/08/2023 16:35 PM ID: 224026487	More restaurants/ hospitality

14. Can anything of a practical nature be done in New Ross to improve the town/town centre's attractiveness for your business?		
25	08/08/2023 16:42 PM ID: 224027185	Better cleaning of streets on North street and alleyways as we have a lot of rubbish due to neighboring takeaways and pubs. A lot of antisocial behavior in alleyways early morning and late afternoon which causes concern for our older customers
26	08/08/2023 16:43 PM ID: 224027270	encourage new buisnesses . no rates for two years.
27	08/08/2023 16:48 PM ID: 224027719	Just keep to up the councils good work so far, improving the public realm and tacking derelict buildings. Link the new greenway with the town.
28	08/08/2023 16:55 PM ID: 224028597	Large meeting room space downtown for business events - other than the scout hall / YMCA hall
29	08/08/2023 16:56 PM ID: 224028647	Tax incentive to renovate upper floors of all commercial buildings therefore creating living accommodation along with a better safer greener pedestrian environment in the town centre, good for all business!
30	08/08/2023 16:59 PM ID: 224029232	More eatery’s
31	08/08/2023 17:14 PM ID: 224031180	Increase free parking to 30 minutes before you need to pay for it.
32	08/08/2023 17:17 PM ID: 224031547	improved lighting, lots of non-functioning light fixtures which are not serviced often enough. switch on the under-bridge floodlighting
33	08/08/2023 17:27 PM ID: 224032693	We need to make the town more attractive for new businesses to come to New Ross. More nightime restaurants
34	08/08/2023 17:28 PM ID: 224032793	Parking is a disgrace, there are numerous dirty and run down properties throughout town, outdoor dining facilities are not needed due to the the very low volume of business in town and also contribute to poor traffic flow in built up areas/narrow streets, etc
35	08/08/2023 18:19 PM ID: 224037973	re introduce residential properties to it.
36	08/08/2023 18:28 PM ID: 224038709	The level of private investment is awful. The council have done a decent amount to improve the town. The Gardai should be patrolling more to stop open and explicit drug dealing in broad daylight on our town centre streets. The pedestrianised zone in Quay needs to be fast tracked with preferential rates for decent food establishments

14. Can anything of a practical nature be done in New Ross to improve the town/town centre's attractiveness for your business?		
37	08/08/2023 19:03 PM ID: 224041498	A crafts hub highlighting the crafts people and crafts of New Ross for example: lace making. As well as an affordable space for local craftspeople to work, exhibit/ sell or teach. This Crafts Hub could be achieve in collaboration with Design Crafts Council of Ireland. A proposal was presented to the council sometime ago. If you would like a copy of the original proposal please email info@soul-scribe.com
38	08/08/2023 19:25 PM ID: 224043140	We badly need a hotel to assist visitios. We need cinema etc for teens. We need to know the skills of people collecting the dole and get them to work to help stop the black market.
39	08/08/2023 19:33 PM ID: 224043786	pedestrianize streets, more variety of shops at affordable prices closer to town centre, e.g. penny's or dunnes, too many shops on outskirts not encouraging people to stay in town centre, lower rates to encourage new business, lower parking charges, designated parking area for workers in town shops free of charge - issue scan passes for loyal workers to park free during their working day.
40	08/08/2023 20:12 PM ID: 224046289	Re-paint Road markings to give learners/tourists better safe instructions. This would make it easier and safer to use/understand the rules of the road. There are many areas in town where the markings have worn out to a state that can't be read at all.
41	08/08/2023 22:12 PM ID: 224052765	Overload of similar business in town, eg coffee shops/ hairdressing shop which included barbers.
42	08/08/2023 23:49 PM ID: 224056556	If some of the vacant premises could be filled with viable services that will bring and keep more customers in the town.
43	09/08/2023 09:26 AM ID: 224074536	Attractive walkways and routes in town eg map with km signs for lunch time walks. Outdoor seating. Keep all day parking a priority.
44	09/08/2023 10:32 AM ID: 224081317	Improve the range of goods available in the town. Encourage people to take up tenancies in unoccupied shops, where they can live upstairs. ARtisans : Woodworkers, metal workers, sculptors, knitters, shoemakers furniture makers. Give the premises a holiday on rates. Encourage the owners to promote the premises with special rental deals.
45	09/08/2023 13:04 PM ID: 224096005	litter is a problem in rosbercon, although work has been completed which helped it is still a problem. Antisocial behavior can also be a problem, Flooding is a constant threat, Work has been completed to help this aswell but it still is a problem.
46	10/08/2023 09:15 AM ID: 224159993	Quayside attraction is extremely poor. Lack of eateries, taxi rank, public amenities (Toilets) and retail /souvenir shops non existent- therefore the result = motorists/tourists/possible town visitors mostly drive straight past the quayside onto Wexford/Waterford
47	10/08/2023 15:09 PM ID: 224196674	Parking is a serious issue

15. Is there anything which you believe can be done to increase the number of people coming into the town centre?(please tick no more than six, - or, if you wish, rank 1=most important, 2 = next most important, etc.)

Answer Choices			Response Percent	Response Total
1	Improve footpaths, seating, etc.		20.63%	13
2	Provide cycle lanes and cycle parking		14.29%	9
3	Improved walking and cycle facilities on the bridge		25.40%	16
4	Change or improve car parking		31.75%	20
5	Improve signage		17.46%	11
6	Improve appearance of town centre		47.62%	30
7	Improve visitor/heritage information		12.70%	8
8	Address problems of vacancies and dereliction		73.02%	46
9	More retail diversity		47.62%	30
10	More diversity of food/eating options		63.49%	40
11	More accommodation choice		55.56%	35
12	Evening or Sunday opening hours		31.75%	20
13	More events (e.g. music, arts, food, heritage, etc)		30.16%	19
14	Improve sense of daytime safety		31.75%	20
15	Improve nighttime safety		31.75%	20
			answered	63
			skipped	3

Other/Comment: (22)

15. Is there anything which you believe can be done to increase the number of people coming into the town centre?(please tick no more than six, - or, if you wish, rank 1=most important, 2 = next most important, etc.)		
1	11/07/2023 11:08 AM ID: 222057508	Reduce drinking on teh streets.
2	27/07/2023 13:53 PM ID: 223129143	We have tried Sunday openings for a few years and also again recently but just not enough footfall to be viable to keep it up.
3	27/07/2023 17:28 PM ID: 223147294	Dereliction needs to be addressed first and foremost. Presence of a litter warden to ensure takeaways remove their rubbish. Make them responsible for removing their customers litter too. Perhaps brand their packaging to identify which is which.
4	27/07/2023 20:37 PM ID: 223155455	When you drive into New Ross from Waterford the first thing you see in Rosbercon is 6 (Six) derlict shops, which are to let since they were built 20 years ago. You don't need a Masters in town planning..... hello is this water wet.
5	27/07/2023 21:07 PM ID: 223156446	Improve lighting. A lot of lights on the quays spend more time broken than working. Additional light fixtures should be added to all main streets. Feature lighting on bridge is never used….why not?? Opportunity for additional feature lighting may be present ie theatre, st Catherine’s school, old courthouse if it wasn’t derilict.
6	31/07/2023 12:18 PM ID: 223301482	Alot of things in town are aimed for older people. There is nothing to bring home collage students and young workers. Alot will heat out of town for food drinks and social life.
7	31/07/2023 14:40 PM ID: 223313732	Lots of positive achievements to be built on that won't happen over night as our if remit of tc improvements but an investment in a standout feature like a kids lit floor fountain around Brennans Barrack Lane improvements would be visually attractive, interactive, low cost, sustainable
8	31/07/2023 14:41 PM ID: 223313768	Lots of positive achievements to be built on that won't happen over night as our if remit of tc improvements but an investment in a standout feature like a kids lit floor fountain around Brennans Barrack Lane improvements would be visually attractive, interactive, low cost, sustainable
9	02/08/2023 18:06 PM ID: 223469124	Better access ways and paths around town would certainly make the environment in which we live better. That alone makes retention of staff and recruitment easier.
10	02/08/2023 19:41 PM ID: 223473402	Tackle dereliction and more Garda on street presence. Monitor which type of shop is opening on each street and avoid major duplication such as takeaways, too many in the one street in certain areas. Tackle litter from these establishments too and fine owners.
11	08/08/2023 16:43 PM ID: 224027270	more contact between traders and local council
12	08/08/2023 16:48 PM ID: 224027719	We have opened on Sundays for a few years but closed due to costs and lack of footfall. We tried again with both of our shops recently but again electricity and wage costs combined with lack of footfall just doesn’t pay. Rates also need to be looked at for bricks and mortar businesses in general as they are partly being used for roads which in turn leads to us subsidising delivery of goods for our online only competitors.

15. Is there anything which you believe can be done to increase the number of people coming into the town centre?(please tick no more than six, - or, if you wish, rank 1=most important, 2 = next most important, etc.)		
13	08/08/2023 16:55 PM ID: 224028597	Covered outdoor space with seating on the quay / on Quay street / in library park area, would be great for more events
14	08/08/2023 16:56 PM ID: 224028647	As per above comments
15	08/08/2023 17:27 PM ID: 224032679	plenty of money around the outshirts of town these people are choosing to go to waterford and wexford to eat and drink.. people like to go to acclaimed eateries and we dont ve this in the centre of new ross also if people want to do so there are no taxis waiting no taxis advertised on signage in the town centre , new ross has a lot of great areas and looks really well but there is lot of peolpe hanging around daytime drinking drug taking on the quay , town no longer feels safe garda visibility is greatly lacking and is the number 1 complaint i hear from the public
16	08/08/2023 17:28 PM ID: 224032793	Running and working in a busy centrally located B&B we have a direct insight into the attitudes of tourists visiting New Ross and I am sorry to say, particularly over the last year or so New Ross is not leaving a good impression on tourists. Far from it in fact. The main bones of contention are the lack of events in town, particularly during the later hours. Quite often we have guests booked into our premises for multiple nights but often leave after a single night as there nothing to do or see in town. The chronic lack of varied restaurants especially serving after 6pm is also a huge issue for tourists. We have so many guests arriving into town off the 6:45pm Rosslare ferry and their first question upon check-in is where can they eat. We find ourselves quite embarrassed that there are very little options available to them and guests more often than not inform us the following morning that they ended up eating takeaway chips or pizza. This is a major, major issue for tourists. As touched upon earlier, parking is beyond contempt in town and also the outdoor dining facility spaces contribute to this. Rarely if ever are they busy and being frank are little more than an eyesore. Varied retail outlets is also an issue, there is very little variety in town and most if not all of our guests travel outside New Ross to shop. There is also the issue of anti-social behaviour throughout town. During March & April we were extremely fortunate to have been selected as a filming location for the 'Small Things Like These' feature. The production staff on more than one occasion shared their hopes that said feature would inject some life into New Ross on a long term basis as they highlighted to us the diversity of the town and friendly welcome they received. The town really came alive during their stay here but served to highlight how badly needed some kind of semi-regular event is needed in town. Going back a few years the Dunbrody Festival was the undoubted highlight of the New Ross calendar and fast forwarding to the present, in fact this very August bank holiday weekend, Enniscorthy, a town similar in stature to New Ross was described to us by our guests and I quote " a hive of activity". Likewise though admittedly a larger City, so was Waterford. New Ross meanwhile presented a sad sight over the same period. These are opinions shared directly to me by my guests and are something that I suggest are taken on board in an urgent and very serious matter should New Ross have any hope of competing with neighbouring towns and counties. Mark Doyle, Inishross House.
17	08/08/2023 18:19 PM ID: 224037973	NR is too hilly for cyclists

15. Is there anything which you believe can be done to increase the number of people coming into the town centre?(please tick no more than six, - or, if you wish, rank 1=most important, 2 = next most important, etc.)		
18	08/08/2023 19:25 PM ID: 224043140	We have no public toilets in the nights. We have too many of the same businesses. No taxi service
19	08/08/2023 21:07 PM ID: 224049442	A good quality town centre hotel.
20	09/08/2023 09:26 AM ID: 224074536	All of the above are important. It is essential to have a diversity of people coming and living in the town. Increased footfall makes longer opening hours more attractive. There is always a knock on effect. Planning department should be proactively helping not persecuting property owners eg provide free planning guidance meetings, business incentives, vat relief on developments not penal commercial rates, threats of derelict sites register etc. And the big one allow semi private companies to use listed buildings which cannot provide full modern building standards due to restrictions placed on them.
21	09/08/2023 10:32 AM ID: 224081317	Enforce 2 hour parking in the retail area of the town. Turn the houses in South St that are bad offices back to houses for accomodation. Use business premises for office accomodation. Set up another housing co-op and build more houses in New Ross. Consider roofing South St. and North St. then they could be pedestrianised . Put an escalator from South St. to Barrack Lane or at the side of the Royal Hotel Garden. Establish a community council which might replicate the Town Council.
22	09/08/2023 13:04 PM ID: 224096005	There is an abundance of vacant commercial business premises in new ross, I believe there is a reason that business are closing in the town, If these were back operating it would help the town and improve the overall experience of the town, The greenway is a great addition to the town,