

CHAPTER 1 - INTRODUCTION

INTRODUCTION

The Retail Planning Guidelines (RPGs) for Planning Authorities, issued by the Department of the Environment and Local Government (DoELG) in January 2001, require Local Authorities to prepare retail strategies and policies for their areas and to incorporate these where appropriate into their development plan. In 2005, RPS Mc Hugh Planning and Environment Consultants prepared a comprehensive Retail Strategy for the County Wexford.

However, considering the growth in population and increased demand for retail services that the County has experienced since the adoption of the strategy, it was considered that the time was opportune to review the County Retail Strategy in tandem with the preparation of the new County Development Plan.

John Spain Associates were commissioned to review and revise as necessary the existing strategy and to provide advice regarding the quantum, scale and type of retail development required. This report should be read as review and update of the 2005 County Retail Strategy, rather than a new retail strategy in total.

THE PURPOSE OF THE RETAIL STRATEGY

The purpose of the retail strategy is to implement the objectives of the RPGs. Wexford County Council have requested the review considers in particular the following:

1. Consideration of new retail trends, best land use planning practice and changes in national policy and market shifts.
2. The impact of the National and Regional Planning Guidelines:
 - i) In particular the Inter-relationship of Wexford Town with Waterford.
 - ii) The designation of Wexford Town as a Hub in the region and its status having regard to the existing towns in the region.
 - iii) Identification of existing shortfalls in floorspace by comparing Wexford Town with the identified Hubs and the growth of similar centres at the regional and national level.

3. Updated economic rates.
4. Population growth based on the 2006 Census.
5. The vitality and viability of the existing centres of Wexford, Enniscorthy, Gorey and New Ross including a
 - i) Review changes in land use within the centres.
 - ii) Review growth in demand and rental prices.
 - iii) Review suitability of existing floorspace.
 - iv) An assessment of proposed developments on the retail profile and structure of the towns.
6. The impact of major retail development in the Greater Dublin Area e.g. Dundrum, Bray and Arklow on the retail function of the County.

APPROACH

The approach taken in the formation of the review of the retail strategy, undertaken between August and October 2006 included the undertaking of baseline survey and research. This comprised the following components:

Policy Analysis: National and local policy were reviewed in the context of the retail strategy with particular reference to the retail hierarchy and existing and emerging development plan policies.

Retail Trends: A review of recent retail trends was carried out and an assessment made of their impact and influence on the retail profile and function of Wexford.

Economic Context: Retail expenditure is influenced by the economic performance of the County. The economic context for our analysis was therefore established.

Qualitative Survey: A qualitative health check survey was carried out in order to assess the current level of vitality and viability of the key centres in the County – Wexford Town, Enniscorthy, Gorey and New Ross and to assess their strengths and weaknesses in retail terms. Opportunity sites for retail development and expansion were also identified.

Analysis of Competing Centres: Major competing centre with the greater Dublin Area including Dundrum Shopping centre and Bray Town centre were assessed to identify their retail offer and roles in the context

of Wexford. The competing centres of Kilkenny, Carlow and Waterford were also reviewed

Quantitative Analysis: Population analysis, sourcing of expenditure data, expenditure analysis, turnover analysis and overall analysis was carried out.

PREPARATION OF RETAIL STRATEGY

The qualitative and quantitative analysis and other inputs as outlined above are fundamental in the capacity assessment of the County's need for future convenience and comparison floor space. In brief, the assessment comprised the following principle elements:

- (i) Population forecasts provided by Wexford County Council for the period 2006 to 2011 and 2011 and 2016
- (ii) Establishing convenience and comparison expenditure between 2006 and 2016.
- (iii) Establishing the extent of existing floor space and its turnover.
- (iv) Analysing the above data to determine the potential convenience and comparison spend available to support new retail floor space to 2016.

The final component of the study was to determine the retail strategy for County Wexford to 2016. The factors influencing this included:

- Retail hierarchy.
- Population size and distribution.
- Sequential test.
- Nature of retail provision and need – convenience, comparison and retail warehousing.
- The shopping environment and mechanisms to enhance the vitality and viability of town centres.
- The need to sustain and enhance Wexford's regional role and prevent unnecessary leakage of expenditure to competing centres.
- Recognition of the predominantly rural nature of the County and the need to ensure the strategy served all sectors of the community in a way, which is efficient, equitable and sustainable.

STRUCTURE OF THE REPORT

The remainder of the report is structured as follows:

Section 2 Policy Analysis: This section considers national and local policy in the context of the retail strategy.

Section 3 Retail Trends: This section provides a review of recent retail trends.

Section 4 Economic Context and Population: This section provides a review of relevant economic policy in the context of the retail strategy.

Section 5 Health Check Qualitative Assessment: This section includes health checks of Wexford Town, Gorey, New Ross and Enniscorthy.

Section 6 Assessment of Competing Centres: The section assesses competing centres such as Dundrum, Bray and Waterford.

Section 7 Quantitative Analysis and Capacity Assessment: This section provides a broad assessment of the requirement for additional retail floor space.

Section 8 Strategic Guidance on Location and Scale of New Retail Development: This section provides specific recommendations relating to suitable locations and appropriate scales of all new types of retail development.

Section 9 Conclusions: This section includes recommendations to encourage the improvement of town centres and policies regarding the assessment of future planning applications for retail development.

CHAPTER 2 - POLICY CONTEXT

INTRODUCTION

The purpose of this chapter is to review the relevant spatial and sectoral policy documents which will guide the development of Wexford and influence the future expansion of retail services in the County. The previous retail strategy contains a comprehensive listing of the policy documents in place which impact on Wexford. The purpose of this chapter is to highlight the principle documents guiding the development of the county and in particular, any significant changes which have taken place in policy context since the previous Strategy.

NATIONAL LEVEL

National Spatial Strategy

The National Spatial Strategy (NSS) was published on 28th November 2002. The NSS provides a broad planning framework for the location of development in Ireland over the next 20 years. The key objective of the National Spatial Strategy is the achievement of more balanced regional development. The strategy examines the growth patterns of the various regions in the country and provides guidance on the future direction of this growth. It also identifies potential development patterns for different areas and sets out overall policies for creating the conditions necessary to influence the location of different types of development in the future.

The Strategy predicts that the population of the state will increase to between 4,391,000 persons and 5,013,000 persons in 2020 depending on economic growth. Within the South East Region there will be an increase in population from 424,000 (2002 figures) to 440,000 persons. The 2006 Census preliminary results however show that population growth is already significantly than predicted in the National Spatial Strategy.

The Strategy also sets out the future spatial structure of Ireland. Within the South East Region, the spatial structure is concentrated on the gateway city of Waterford with the twin hubs of Kilkenny and Wexford (see Figure 2.1). These centres together form a nationally strategic 'growth triangle'. The N11 is identified as a strategic radial corridor along the east of the country, linking Wexford to Dublin and on to Belfast via the M1.

Map 3

South East Region

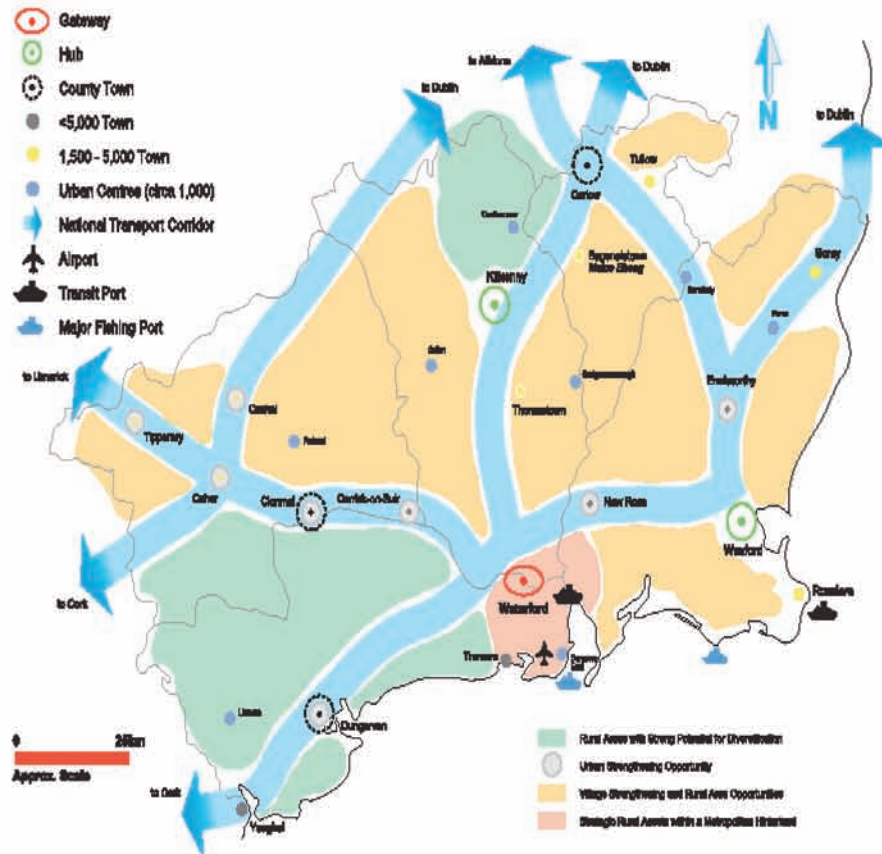


Figure 2.1: Spatial Structure for South East Region (Source: NSS)

Wexford has been designated as a hub due to its strategic location in the Southeast, close to Rosslare Port and on the national road and rail networks. It is also noted that the town has substantial capacity for development and has a variety of employment, retailing, services and administrative functions. The town can contribute to creating a 'triangle of strength' with Waterford and Kilkenny. It is envisaged that this will significantly strengthen and energise the Southeast region. According to the NSS, hubs should reach a population of between 20,000 and 40,000 persons. This compares to a population of in excess of 100,000 for gateway centres.

Enniscorthy and New Ross are designated as towns with an 'Urban Strengthening Opportunity'. It is stated that such towns have capacity to grow and should be the focus of the settlement policies of local authorities. Gorey taken account of the significant increased population as recorded in the 2006 Census should now be considered with Enniscorthy & New Ross as an 'Urban Strengthening Opportunity'.

Rosslare, Ferns and Bunclody are towns with populations 1,500 to 5,000 people.

Within the Southeast Region, Waterford City, as the Gateway Centre, is the principle urban settlement. It is envisaged that the gateway centres will be:

"Nationally significant centres, whose location and scale support the achievement of the type of critical mass necessary to sustain strong levels of job growth in the regions."

The role of the hubs includes linking the capabilities of the gateways to other areas.

As a hub centre, Wexford has a supporting role. The NSS does not envisage hub centres as growing to the same extent in population as the gateway centres. Furthermore, the services and infrastructure in place in the hubs is targeted to a local level, as opposed to the regional/national level services to be provided in gateway centres. Following this through to the provision of retail services, it is likely that Waterford would have the most expansive range of retail services in the region, including specialist services. However, Wexford would still be expected to provide a wide range of retail services, catering for convenience and higher order comparison goods.

In order to assess the quantum of retail floorspace provision in Co. Wexford in the context of the other hub towns identified in the NSS, a comparison study was made of the net retail floorspace in each of the hub towns. (see Table 2.2 below). In this case, the 2002 population figures for the towns are used. Although, preliminary population figures are available from the 2006 Census, population statistics at a town level will not be available until 2007. The use of 2002 population figures would also be consistent with the floorspace figures used, which in most cases date from 2002 – 2004, when the relevant county retail strategies were prepared.

A figure of 55,744 sq.m. net retail floorspace is provided for Wexford town in the 2005 County Retail Strategy. This figure however, includes applications which had just been granted permission and were not yet under construction. Added to this, retail warehousing also accounts for a significant proportion of the floorspace figure. The floorspace figure for Wexford town was therefore adjusted to 46,837 sq.m. in order to be consistent with the retail floorspace figures provided for the other hub towns.

Table 2.1 illustrates how there is a substantial variation in the ratio of retail floorspace to population between the hubs. Mallow records the lowest ratio, at a rate of 1.28 sq.m. of net retail floorspace per person. Castlebar and Monaghan have the largest floorspace to population ratios, at 2.82 and 3.14 respectively. However, it should also be noted that permission has recently been granted for large new retail schemes recently in both Ennis and Kilkenny, which would have an impact on the floorspace ratios in these centres. In comparison Wexford has a ratio of 2.72.

Comparison to the other hub centres therefore illustrates that Wexford has an average provision of retail floorspace with the fourth highest ratio of floorspace to population. Given its level of retail floorspace with respect to the other hubs, the town can be considered to be a good position to strengthen its retail base in order to ensure that the future retailing requirements can be met.

Table 2.1: Comparative Retail Floorspace in Hub Centres

Centre	Status in NSS & Retail Planning Guidelines	2002 Population	Net Retail Floorspace Area (sq.m.)	Ratio of Population to Retail Floorspace (sq.m. per person)
Wexford	Third Tier	17,235	46,837	2.72
Ennis	Third Tier	22,051	35,816	1.62
Mallow	Third Tier Level 2	8,937	11,400	1.28
Tralee-Killarney	Killarney Third Tier Level 2	Killarney 13,137	No floorspace figures available	-
	Tralee Third Tier	Tralee 21,987		
Cavan	Third Tier Level 2	6,098	No floorspace figures available	-
Kilkenny	Third Tier	20,735	50,667	2.44
Monaghan	Third Tier	5,936	18,618	3.14
Tuam	Fourth Tier	5,947	13,286	2.23
Ballina-Castlebar	Ballina Third Tier Level 2	Ballina 9,647	27,071	2.81
	Castlebar Third Tier	Castlebar 11,371	32,069	2.82

Sources: Census of Population 2002.

The National Development Plan

The National Development Plan covers the period from 2002 to 2006. The plan sets out a national development strategy in the areas of physical, social and community infrastructure. It involves the investment of €57 billion of public, private and EU funds on a nationwide basis. There are four core objectives of the strategy:

- 1. "to continue sustainable national economic and employment growth,*
- 2. to strengthen and improve Ireland's international competitiveness,*
- 3. to foster balanced Regional Development,*
- 4. to promote Social Inclusion."*

Information is available on the expenditure from the National Development Plan in Wexford since the previous Retail Strategy was implemented. According to the website of the National Development Plan, in 2005 investments have been made in a wide range of areas including roads, enterprise, social inclusion, water services and rural transport.

The current 2000-2006 National Development Plan is drawing to a conclusion, and work is underway of the preparation of a new National Development Plan to cover the period from 2007 to 2013. The key tenants of the new plan are likely to be¹:

- Commitment to economic and budgetary sustainability;
- Further major enhancement of our economic and social infrastructure, including Transport, Environmental Services, Social and Affordable Housing, Health, Education, Broadband and Energy,
- Major investment in Education at all levels,
- Support for the productive sector including manufacturing, agriculture, tourism and services generally,
- Promotion of social inclusion,
- Balanced regional development,
- Promotion of better North/South economic cooperation and of the all-island economy
- Environmental sustainability.

¹ Presentation by Minister for Finance to Joint Oireachtas Committee on Finance and the Public Service on NDP 2007-2013, 14th June, 2006

It is intended that the new plan's aim of balanced regional development will occur through following the framework established in the National Spatial Strategy, providing assistance to the gateways which will allow them to contribute to the overall economic and social performance of the State. The Plan is expected to be published in November 2006.

Sustainable Development: A Strategy for Ireland

The Sustainable Development: A Strategy for Ireland document was published in 1997 with the principle aim of providing a:

"comprehensive analysis and framework which will allow sustainable development to be taken forward more systematically in Ireland."

The document provides both a strategic framework for, and sectoral guidance on, the issue of sustainable development. The specific sectors discussed in the document include agriculture, forestry, marine resources, energy, industry, transport, tourism and trade.

It is noted that land use planning can contribute to sustainable development by encouraging efficiency in the use of energy, transport and natural resources through careful location of residential, commercial and industrial development, the efficient use of existing developed areas, protection and enhancement of the natural environment and ensuring that new development needs are accommodated in an environmentally sustainable and sensitive manner.

Retail development can contribute to the drive for more sustainable development through the appropriate development of new retail services, e.g. at a scale and locations which serve to reduce the need to travel, will fulfil the social requirements of the community and will represent efficient land use practice.

Transport 21

The Transport 21 Programme was launched in November 2005 and contains the plans for the capital investment in the national transportation system for the 10 year period to 2015. The Transport 21 Programme has two separate strands: a Greater Dublin Area Programme and a National Programme. For the latter, the focus is on the national roads network, public transport network, and improved regional and local public transport. The principal objectives of the Programme include:

- to create a high quality, efficient national road and rail network consistent with the objectives of the National Spatial Strategy;
- to strengthen national, regional and local public transport services;

The programme contains a number of elements influencing the transportation network in Wexford which include:

- **Intercity Rolling Stock:** Since 2002, Iarnród Éireann has ordered new intercity railcars and carriages for the national rail service. In late 2005, an order was placed for 30 railcars to facilitate the expansion and extension of improvements in Intercity rail services on the Rosslare and Sligo lines. By 2008, it is envisaged that the existing service on the Dublin-Rosslare line will be supplemented by additional commuter services from Gorey and Arklow.
- **N11 National Route:** The Gorey bypass is underway and is expected to be completed by the end of 2007. The bypass will remove 10,000 vehicles from the town centre every day.²
- **N30 Enniscorthy/Clonroache:** This scheme involved the construction of approximately 5.3 km of standard 2-lane carriageway, and improves the access between Enniscorthy and New Ross. The scheme was opened in April 2006.
- **N11/N30: Enniscorthy By-Pass:** This proposes a bypass of the town to the east and west. The eastern route commences at the in the existing N11 and N80 junction in Clavass and terminates at a proposed roundabout with the N11 in Scurlocksbush. The western route commences with a proposed roundabout in the vicinity of the existing N11, 250 metres south of the N11/N80 junction and terminates at the realigned N30 south of Dunsinane at a proposed roundabout.

Retail Planning Guidelines

The Retail Planning Guidelines provide national level policy guidance in relation to retailing. The guidelines provide clear objectives for retail policy, set out guidance in relation to specific retail formats and issue advice in relation to the location of new retail development. The guidelines represent a plan led approach to retail development at a

² Source: National Development Plan website

national level, which is then followed on by the use of county retail strategies to guide development at a localised level.

One of the key features of the guidelines is the introduction of the sequential test approach in relation to assessing retail applications, with the focus on town centres as the preferred location for new retail development. Where there are no town centre sites available, the next preferred option is edge of centre sites. Out of centre sites should only be considered where there are no town centre or edge of centre sites available or where satisfactory transport accessibility realistically cannot be ensured within a reasonable period of time.

The previous retail strategy for County Wexford had been prepared in the context of the Retail Planning Guidelines 2000. These guidelines were subsequently amended, with the revised Guidelines issued in January 2005. The policies of the Guidelines have essentially remained the same, with the revision affecting policy in relation to the cap on the floorspace of retail warehouses. The 2000 Guidelines had placed a cap of 6,000 sq.m. on the floorspace of single retail warehouse units. The revised Guidelines state that this cap will not apply in areas which are the subject of Integrated Area Plans, under the Urban Renewal Act, 1998, in the Gateway centres designated in the National Spatial Strategy. As Wexford has no designated gateways in the National Spatial Strategy, the cap of 6,000 sq.m. will continue to apply to retail warehouse units in Wexford.

REGIONAL LEVEL

Regional Planning Guidelines

The Regional Planning Guidelines for the South East Region were adopted by the regional authority on 24th May 2004. The Guidelines cover the period from 2004 to 2020 and aim to achieve a better spatial balance of social, economic and physical development throughout the region. The projected population for the South East region in 2020 is 500,000 persons. This will require 72,000 additional housing units in the region, i.e. 4,555 units per annum between 2004 and 2020.

The settlement strategy for the region is based on a hierarchy of urban centres which include the Gateway, Hubs, County Towns, Large Towns and District Towns (see Figure 2).

The role of the various urban centres in the region is outlined in Table 2 below. The Guidelines reiterate the supporting role of the hubs as outlined

in National Spatial Strategy. However, it is also noted that they are strategic urban centres which reach out to wider rural areas of the region. They would therefore be required to have a high level of service provision, including retail.

It is noticed that a number of towns, including Enniscorthy, have recently experienced significant levels of population growth, and continue to remain attractive locations for new residential development. The Guidelines advise that care should be taken to ensure that the expansion of these towns is matched by similar development of community, social and retail developments. The Guidelines also note the presence of a well developed network of smaller towns and villages across the region which has an important role as service/retail/residential centres.

The policies of the Regional Planning Guidelines serve to channel population growth and development into a hierarchy of settlements. However, they also emphasise that these centres should also provide the necessary services to cater for this growth. In terms of retail planning, it will therefore be necessary to ensure that the appropriate level of retail development is provided which will match the role of towns and villages in the settlement hierarchy.

Table 2.2: Function of Urban Centres in the South East Region (Source: Regional Planning Guidelines for the South East Region)

Gateway	Waterford City	Strategically placed, national scale urban area, which individually and in combination will be key elements for delivering a more spatially balanced Ireland and driving development in their own regions.
Hubs	Kilkenny Wexford	Strategic urban centers, that support and are supported by the gateway and reach out to wider rural areas of the region that the RPGs are targeting for significant levels of growth.
County Towns	Carlow Clonmel Dungarvan	Critical elements in the structure for realising balanced regional development, acting as a focus for strengthening their own areas.
Large Towns	Enniscorthy Tramore New Ross Carrick-on-Suir Gorey Tipperary Town	Towns with a population in excess of 5,000 pop (that are not gateways, hubs or county towns) that the RPGs might be: (a) targeting for growth or (b) that have recently experienced high levels of population growth where the objective is that more measured growth is desirable in a manner that allows community, social and retail development to catch up with recent rapid phases of mainly residential development.
District Towns	Cahir Cashel Bagenalstown Tullow Dunmore East Thomastown	Towns with population between 1,500 and 5,000 that might perform an important role in driving the development of a particular spatial component of the overall region.

LOCAL LEVEL

Wexford County Development Plan

The Retail Strategy for County Wexford was prepared in the context of the Wexford County Development Plan 2001. This plan will be superseded by the Wexford County Development Plan 2007. Since the preparation of the 2001 County Development Plan, the National Spatial Strategy and Regional Planning Guidelines have been published, both of which have implications for the future spatial structure and development trends in the county.

At the time of carrying out this review, the draft Wexford County Development Plan has been prepared. The draft plan notes that the county has experienced substantial population growth in recent years, with the population increasing by 12.9% from 2002 to 2006. The increase in population largely occurred through in-migration to the county. This growth was principally concentrated in eastern and south-eastern areas, of the county, along the national road network, in coastal areas and in proximity to the main towns, particularly Wexford, Gorey, Enniscorthy and New Ross. The trends in population growth indicate that overspill has occurred from Dublin to Wexford.

The settlement structure guiding the development of the county has been prepared to take account of both the National Spatial Strategy and the Regional Planning Guidelines. Table 3 below outlines the settlement hierarchy for the county.

The policy of the draft development plan is to direct development into the designated settlements of the National Spatial Strategy and the Regional Planning Guidelines. With regards to Wexford town, it is noted that that the target population of 40,000 by 2020. This will represent significant growth of the town from the current population of 17,235 (2002 Census) and will require a substantial expansion of services to cater for the additional population.

In relation to New Ross and Enniscorthy, the draft plan envisages that these towns become essentially self sufficient centres, with a high level of employment activity, higher order shopping and social and educational facilities. The plan acknowledges that the development of Gorey in the short to medium term is likely to continue to be driven by commuter development owing to the proximity of the town to Dublin.

Table 2.3: Settlement Hierarchy Draft Wexford County Development Plan 2007

Primary Growth Area	Wexford
Secondary Growth Area	New Ross, Enniscorthy, Gorey
Strategic Growth Areas	Bunclody, Ferns, Oilgate, Clonroche, Camolin, Bridgetown, Wellington Bridge, Rosslare Harbour
District Growth Areas	Fethard, Coolgreaney, Kilmuckridge, Kilmore Quay, Taghmon, Castlebridge, Carrick on Bannow, Courtown
Local Growth Areas	Craanford, Rosslare, Duncormick, Arthurstown, Duncannon, Curracloe

However, it is stated that as the town continues to develop, a critical mass will be achieved which will facilitate the provision of services and industry in Gorey and serve to reduce its dependence on Dublin in the long term.

The centres in the lower levels of the hierarchy range serve a varying catchment, which ranges from a local area to a wider rural catchment.

The retail policies for the county will need to have due regard to the functional role of settlements as outlined in the proposed settlement structure for the county.

'Remodelling the Model County': A Strategy for the Economic, Social and Cultural Development of County Wexford 2002 - 2012

The above strategy was produced by Wexford County Development Board (CDB). The Board was established in 2000 with the aim of co-ordinating and improving the delivery of all services, including physical planning, education, health, social services, agriculture, local development and industrial development, in Wexford. It is a key objective of the CDB to oversee a move towards devolution of decision making to a local level.

The document is organised around the themes of economy, society and culture. With regards to economic development, the strategy aims to

develop a vibrant local economy with employment opportunities for all sectors of the community. It is also a specific goal to promote Wexford as a gateway for development.

The social goals of the strategy include improving the quality of life of residents of the county, promoting social inclusion and reinforcing the ideal of public service in society. The need to ensure access for each household to affordable, good quality and acceptable housing is also emphasised.

The cultural goals of the strategy emphasise sustainable development, the need to maintain a high quality environment and socially inclusive society. More specifically, it is a goal to develop the county as a centre of arts and culture and increase sports participation. It is noted in the strategy that access to services is a difficulty for those living in rural areas and it is a strategic objective to support rural villages. This is significant given the relatively large proportion of the population living in rural areas, which amounted to 67.5% of the population in 2002.³

The strategy therefore represents a holistic view to the future development of the county, involving a multidisciplinary approach. It aims to ensure that balanced development occurs in the county over the lifetime of the strategy.

Town Renewal Schemes

Urban renewal schemes were produced for Gorey, Taghmon, Ferns and Bunclody in 1999, with the aim of improving the built environment of these towns by reusing, restoring and converting existing buildings and enhancing the general appearance of the towns. Specific sites were designated in each of the towns which qualified for incentives.

As rural settlements, Taghmon, Ferns and Bunclody are noted as having important strategic value. There is a need to ensure adequate access to services for rural communities, particularly in the context of the objectives of the 'Remodelling the Model County' strategy as outlined previously.

³ Source: Draft Wexford County Development Plan

CHAPTER 3 – CURRENT TRENDS IN RETAILING

INTRODUCTION

The rapid expansion in the retail market in Ireland has been associated with emergence of a number of distinct trends in retailing. The previous Wexford Retail Strategy identified and discussed some of the key trends which were prevalent at the time of preparation of the strategy. In the intervening time since the original study and this review some of these trends are increasingly evident, e.g. concentration of ownership, discount retailers, international multiples and the requirement for larger floorspace. The purpose of this chapter is to examine the principle trends which are likely to have an impact in the development of the retail sector in Wexford.

GENERAL TRENDS IN RETAILING

Increase in Expenditure and Extended Opening Hours

One of the most notable trends has been a marked increase in expenditure on comparison goods, with forecasts indicating that this will continue in the future. Figures published in the most recent Retail Sales Index outline how "the volume of retail sales increased by 5.5% in August 2006 compared to August 2005. If motor trades are excluded the annual increase was 8.4%⁴.

Ancillary shopping has become interlinked with social and leisure activity. This is becoming evident in the extension in the range of facilities on offer in shopping centres e.g. inclusion on cinemas in Liffey Valley and Blanchardstown shopping centres. This integration of leisure and retail use is particularly evident in Dundrum Town Centre in Dublin where the retail sector forms part of a wider mix of leisure facilities including a cinema, theatre and a variety of restaurants which front onto the central plaza. This mix of uses has added to the life and vitality of the town centre and increased the overall attractiveness of the centre. There is also an increase in 24 hour store opening, although this is concentrated in the convenience section.

⁴ Retail Sales Index, CSO, 13th October 2006

The inclusion of additional leisure activities to shopping centres does have the benefit of increasing activity in shopping areas, bringing vitality and vibrancy. However, the ability of centres and individual stores to extend opening hours is biased towards larger retailers, with smaller retailers at a disadvantage in terms of relative costs involved and smaller trade volumes. As longer opening hours become more common, this could put smaller retailers at a competitive disadvantage and could lead to a reduction in their market share.⁵

Home Shopping

Parker⁶ outlines how “one of the major trends shaping Ireland’s retail future is the rise of online shopping”. According to IMRG (2006)⁷, 10% of all retail sales now take place online.

Home shopping traditionally took the form of catalogue/mail order shopping but has more recently diversified into internet shopping and television shopping, through ‘infomercials’ and specialised shopping channels. The proportion of retailing carried out online is likely to increase in the coming years.⁸ This form of retailing is particularly suited to non bulky comparison goods, such as books, CDs, DVDs, clothing.

However websites such as eBay have considerably extended the range and profile of internet shopping. In some instances, the internet has been used by traditional mail order service providers as a means of extending their range of customer service and providing a second means of shopping. Online convenience retailing has also increased in popularity in recent years with food retailers such as Tesco providing this facility to consumers. The centre for retail studies UCD estimates that 30% of the population have already made one purchase on the internet. APACS (2006)⁹ found that in 2005 over half of all adults in the UK (25 million people) made an online purchase. This equated to 74% of internet users and represented an increase of 11% of internet users over 2004. Furthermore, the average number of purchases made online also increased in 2005: from 13.6 in 2004 to 18.5 in 2005.

⁵ BCSC (2004) The Smaller Towns Report: Delivering retail-led renaissance in towns and smaller cities. Westminster: London

⁶ Brophy C. Ireland’s Shopping Meccas

⁷ IMRG (2006). Press release 24/5/2006. Accessed at www.imrg.org

⁸ Dawson, J. (2000) ‘Future Patterns of Retailing in Scotland.’ The Scottish Executive Central Research Unit.

⁹ APACS (2006) Press release 31/7/06. Accessed at www.apacs.org.uk

It also provides an opportunity for retailers to extend their product line to their advantage. Dawson (2000)¹⁰ quotes the example of Thorntons chocolates who achieved an average store sale of £3 increasing to £12 at Christmas and Easter. The average e-retail format sale is £25, which includes flowers and a card.

CONVENIENCE RETAILING

Increase in Retail Unit Size

There is a trend for the major convenience retailers to develop larger scale stores than have been constructed to date, notwithstanding the cap on convenience floorspace set out in the Retail Planning Guidelines of 3,000 sq.m. net floorspace (3,500 sq.m. in the Greater Dublin Area). In line with this development is an expansion in the range of goods now being sold in supermarkets, which has included the stocking of comparison goods. This has resulted in the merging of comparison and convenience retailing within one store. Examples of this trend include the Tesco in Clarehall, Carrick on Shannon and Clearwater. This has implications for planning authorities who have traditionally distinguished between these formats in the formulation of retail policy. It also requires a more complex assessment of retail impact that would previously have been required. Recent developments have also seen the decentralisation of comparison units such as TK Maxx and Next into retail parks in order to provide for larger floorspace.

Removal of the Groceries Order

The Restrictive Practices (Groceries) Order, introduced in 1987 prevented the sale of specified grocery goods¹¹ at a price (after the deduction of any discount or benefit received by the retailer) which was less than the invoice price of the goods. Where charges relating to delivery, insurance or other costs not included in the invoice had to be paid to the retailer, these charges had to be added to the invoice price.

The Order was originally introduced as an attempt to protect independent retailers from the widespread emergence of multiples into the

¹⁰ Dawson, J. (2000) 'Future Patterns of Retailing in Scotland,' The Scottish Executive Central Research Unit.

¹¹ grocery goods for human consumption (excluding fresh fruit, fresh vegetables, fresh and frozen meat, fresh fish and frozen fish which has undergone no processing other than freezing with or without the addition of preservatives) and intoxicating liquors not for consumption on the premises and such household necessities (other than foodstuffs) as are ordinarily sold in grocery shops, and includes grocery goods designated as "own label", "generic" or other similar description

convenience market, which it was argued, could actively pursue below cost selling as a means of attracting custom to the detriment of Irish owned retailers and suppliers. More recently, the Groceries Order has been interpreted as anti-competitive and restrictive, preventing retailers from passing on discounts and maintaining prices at a higher level.

The Groceries Order was subsequently revoked with the adoption of the Competition (Amendment) Act 2006. It was anticipated that this could lead to reduced grocery prices. At this juncture, the full impact of the removal of the order has still to be ascertained, although initial indications are that the revocation has resulted in a fall in prices for goods covered.

Competition from Discounters

In recent years, there has been the distinct emergence of discount retailers, such as Aldi and Lidl. These retailers now have a share of 6% of the retail market (see Figure 3.1 below), and can no longer be considered as niche retailers. The previous Wexford Retail Study had noted that there was some scepticism from industry insiders over the likely success of this format. However, since then, the discount retailers have significantly increased the number of stores, and there are no current signs of this programme of expansion slowing down.

The Retail Planning Guidelines state that discount foodstores have a different trade draw to standard convenience retailers, however, the Guidelines also state that discount foodstore can also anchor neighbourhood centres, illustrating the wider role that these stores are playing in retail provision. The Joint Committee on Enterprise and Small Business Third Report (March 2005) noted that the entry of the discount retailers into the market has had a pro-competitive effect.

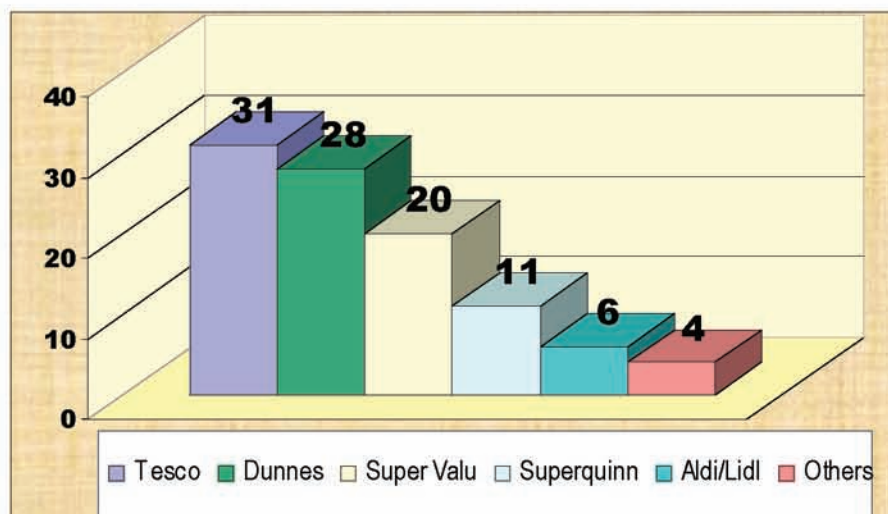


Figure 3.1: Market Share in Convenience Sector

Source: Joint Committee on Enterprise and Small Business Third Report (2005)

Concentration of Market Share

Analysis of the market share for convenience retailing in Ireland illustrates that the market is dominated by a limited number of retailers (see Figure 3.1). Tesco, Dunnes Stores and Super Valu control 79% of the market share. This trend is likely to continue in the future as the major players seek to increase their market share. Those retailers have the advantage of greater economies of scale than their smaller scale competitors, particularly in the light of the removal of the Groceries Order. It is estimated that by 2015 in Scotland, 10 companies will account for over 55% of retail sales with 5 of those companies accounting for approximately 40%.¹²

It is also noticeable that many of these major retailers have recently introduced new formats to compete in the local convenience markets which provide top-up shopping as opposed to a weekly shopping (e.g. Tesco Local, Superquinn Select, Marks and Spencer Simply Food). This was identified in the previous Wexford Retail Strategy as potential new trend. There has also been a noticeable development of convenience outlets attached to petrol service stations.

¹² Dawson, J. (2000) Op cit.

Out of Centre Convenience Shopping

While the town centre remains the preferred location for new retail development, there is an evident trend of providing convenience shopping facilities in out of centre / edge of centre sites adjacent to large residential populations in order to fulfil a neighbourhood role in shopping. This can provide a more convenient means of shopping for persons who may only wish to carry out a weekly shop without travelling a greater distance into the town centre. It would also have the benefit of removing traffic from the town centre, as the concept of a large weekly shop generally involves bulk buying and the use of private transport. In a comparison of shopping trends between 1980 and 2002, Clarke et al (2003) found that more people used their car for access to supermarkets even though they were often living closer to the store.¹³

The movement of convenience shopping to suburban locations suggests that the future role for town centres will be in the provision of higher order goods and have a greater role as a leisure destination. If the trend of dispersing convenience retailing to residential areas is to be maintained, there will be a requirement for proactive policies to retain other retailing services within town centres in order that they retain their status as a focal point in the community. Therefore it may be necessary to control suburban retail centres and convenience and retail service function.

COMPARISON RETAILING

Larger Sized Units

The trend for increased sized units evident in the convenience sector is replicated in comparison shopping. For example, it has been noted that in Scotland, growth in floorspace has overtaken growth of sales volume resulting in sales per sq.m. falling across many sectors.¹⁴ This is most clearly seen in visual comparison of the newest retail developments and those that are as little as 10 years old. It is also a feature of the newer brand multiples which have recently entered the Irish market. The trend for larger floorspace for comparison stores is illustrated in Mahon Point Shopping Centre in Cork where Zara took 1,184 sq.m.

¹³ Clarke, I., Hallsworth, A., Jackson, P., De Kervenoael, R. and Perez del Aguila, R. (2003) Real Choice in Food Grocery Shopping in Britain. European Retail Digest, 7-12.p

¹⁴ Dawson, J. (2000) Op cit.

This trend could potentially negatively impact on the ability of town centres to provide the required floorspace as the traditional built form of many town centres would not readily supply such units in a single property, thereby requiring often complex and time consuming, site assembly. New build shopping centres can represent a simpler and more cost effective way for new multiples requiring large units to enter the market. However care must be taken to protect the vitality and vibrancy of the town centre. This trend has significant implications for the future of retailing in historic town centres such as Wexford town.

International Multiples

There is now a far greater presence of European and International multiples in the Irish retail market. Even within the last few years, the retail sector has seen the introduction of new brands into the country, e.g. House of Fraser, New Look, Harvey Nichols, Zara. The current thriving economy has made Ireland an attractive location for expansion, and continued economic growth would see the continuance of this. However, a side effect of this is a degree of homogenisation of town centres, with a potential risk of eroding the inherent character of towns. BCSC (2004)¹⁵ note that this trend of homogenisation is of particular concern to smaller city and town centres as they lack the strength of the comparison offer of the large centres and thus cannot successfully compete with them on the basis of the same mix of goods and brands.

Polarisation of Retail Development

BCSC (2004)¹⁶ note that in recent years, multiple retailers have concentrated investment in the largest retail centres in order to maximise their catchment areas and achieve critical mass. The result is that a widening gap is being created between the larger centres and the remaining centres. This leads to an increasing leakage of trade from smaller centres to larger ones, with suburban and smaller metropolitan centres being particularly vulnerable.

RETAIL WAREHOUSING

The pattern of retail warehousing is now well established in Ireland, with a growing trend for a concentration of warehouse units in a retail parks. A

¹⁵ BCSC (2004) The Smaller Towns Report: Delivering retail-led renaissance in towns and smaller cities. Westminster: London

¹⁶ BCSC (2004) Op cit.

number of these are found in County Wexford. This form of retailing tends to be more reliant on private transport given the predominantly bulky nature of goods sold. It is frequently not suited to town centre sites owing to the need for a large site area to contain both the unit and the associated car parking.

The Retail Planning Guidelines state that retail warehouse parks should not adversely impact on the vitality and viability of town centres provided that the range of goods sold in the units is restricted to bulky items.

It is noted that there is a recent trend towards broadening the range of goods sold in these parks, including convenience goods and large scale comparison shopping (e.g. discount foodstores, Heaton's, Next, Argos). This could represent a potential threat to town centres as retail parks may be viewed as a more attractive location for new development, providing larger units and substantial car parking more easily than some town centre site.

CHAPTER 4 – ECONOMIC AND POPULATION CONTEXT

INTRODUCTION

In setting out this strategy it is important to assess the economic context at a national, regional and local level as current and projected economic growth can have a profound effect on factors such as expenditure change and thus on the nature and quantum of retail development that occurs. This section of the report therefore outlines the national, regional and local economic context.

NATIONAL CONTEXT

The Irish economy has experienced an unprecedented period of growth since the early 1990's. Between 1990 and 1995, for example, "the economy grew at an annual average growth rate of 4.8% and between 1995 and 2000 it averaged 9.5%". In the past number of years however Ireland has experienced somewhat of a slowdown in the national economy, largely affected by external factors. Economic growth has accelerated again in the past few years.

Although this growth rate declined after 2000, it still remains higher than the EU15 average of 1.0%.¹⁷ The future prospects of the Irish economy are therefore considered to be good. This assertion is based on the fact that:

"The fundamental factors driving the Irish economy remain favourable. The economy faces a very fortunate set of demographic circumstances over the next fifteen years. Together these will combine to give Ireland one of the lowest rates of economic dependency in the OECD area. The benefits of past investment in education will also continue to produce a significant boost to productivity for some time to come. In addition, the economy including the labour market shows considerable flexibility. The limited impact of the recent economic slowdown on the unemployment rate was indicative of this flexibility. Also the very elastic labour supply through migration means that the labour market is fast to react to changes in demand"

¹⁷ Ireland's Economic Performance, Enterprise Ireland

The Irish economy proved to be highly resilient to the global economic turndown of 2001 - 2002. This is of particular relevance given its level of trade and investment integration with the world economy. In its recent medium term review of the Irish economy the Economic and Social Research Institute (ESRI) estimates that the economy has the potential to grow at between 4% and 5% per annum to the end of the decade. While this is a significantly slower rate of growth in potential output than was experienced in the late 1990's it is still substantially greater than the EU as a whole.

The growth in the economic performance of the country has resulted in a rapid increase in private consumption. This has primarily been a result of the higher real disposable incomes and, more recently, lower interest rates which have supported consumer confidence. This has resulted in an increase in retail expenditure particularly on comparison and bulky household goods and is reflected within the Retail Sales Index. These figures outline how *"the volume of retail sales increased by 5.5% in July 2006 compared to July 2005"*.

A key feature of the economy's success has been the rapid growth in population. The preliminary Census 2006 data published by the Central Statistics Office indicated that between 2002 and 2006 national population has grown from 3,917,203 to 4,234,925, representing an increase of 8.1% over the four year intercensal period. The average annual rate of population increase in this four year period was 2 per cent which is the highest on record. This compares with 1.3% for the previous intercensal period 1996-2002 and the previous high of 1.5% which occurred between 1971 and 1979.

Unemployment levels have fallen dramatically as a consequence of Ireland's exceptionally strong economic growth and are currently amongst the lowest in the EU. In 2005 it averaged 4.3%, compared to an EU average of 8.6%, and it now stands at 4.5% (February 2006)¹⁸.

However, the very rapid rate of growth in both the national economy and population has inevitably placed pressure on infrastructure and service provision. The Medium Term Review for the 2005-2012 period prepared by the ESRI outlines that:

¹⁸ Ireland Information Memorandum 2006, National Treasury Management Agency

"The increased congestions costs and the growing pressures on the environment as a result of the rapid economic growth must both be taken into account when assessing the welfare implications of economic development over the current decade"

REGIONAL CONTEXT

County Wexford is located within the South Eastern Region. The South-East is predominately rural in character with the main urban centres being Waterford City, Kilkenny City and the towns of Carlow, Clonmel and Wexford. The region accounts for approximately 11% of the country's population and has traditionally been viewed as a poor performer in comparison to other regions in the state. Key socio economic data for the region are summarised in the following table:

Regional Authority Area	Population 2002	Population 2006	Increase in Population 2002 - 2006	Of which natural increase 2002-2006%	Of which estimated net migration 2002-2006
State	3,917,336	4,234,925	8.1%	37.3%	62.7%
South-East Region	423,616	460,474	8.7%	41.3%	58.7%

The South-East Region forms part of the wider Southern and Eastern Region which is identified as the "economic powerhouse of the country".¹⁹ However, the 2004 South East Employment Development Strategy outlines how the economic profile, and employment profile in particular, of the South East Region is fundamentally different to that of other regions in the wider Southern and Eastern Region. In this context, the South-East is characterised by greater rurality, a greater age dependency ratio and lower population density than the rest of the state. In terms of disposable income, regional incomes are below national averages and growth in household income has been significantly below the remainder of the state. The report highlights that:

"While the South East has experienced significant growth and development over the past decade, its performance is still significantly behind that of the economy as a whole and that behind that of the majority of the regions"

"The county level data while highlighting the underperformance of particular counties and providing a basis for initiatives and strategies at

¹⁹ External Competitiveness, Internal Cohesion S&E Regional Needs Analysis 2007-2013

the county level, mask the fact that the South-East continues to underperform all of the other NUTS III regions comprising the NUTS II Region and is much more similar in, terms of economic performance, to regions within the Border Midland and West NUTS II Region than to other regions within the more prosperous Southern and Eastern Region”

The report outlines how this aforementioned underperformance is reflected in all of the key economic performance metrics, Gross Value Added (GVA), Per Capita Income, secondary school retention rates, third-level participation, female participation in the labour force etc. This point is reaffirmed by the Regional Planning Guidelines for the South East Region which outline that the Region has the 2nd highest rate of unemployment in the country and income per capita is well below the national average. While the retail sector contributes significantly to growth in employment and economic growth in the region, the Regional Planning Guidelines for the South East Region acknowledge that there still remains a significant amount of leakage of retail spending to larger centres outside the region such as Cork City, Limerick City, Dublin City and the larger suburban centres in the Greater Dublin Area.

Notwithstanding the disadvantages associated with the region, the Regional Planning Guidelines for the South East Region provide a summary of the key Strengths and Opportunities for the area which should be marketed upon.

Among the major strengths of the region are:

- Well developed urban network.
- Higher than average population growth.
- A range of third level educational establishments throughout the region.
- Access to seaports and deep water berthage for freight and passenger transport to Britain and mainland Europe.
- Good agricultural land, strong agricultural production base and processing capabilities.
- A strong tradition in engineering and recent success in moving to higher value added services.
- Well developed tourism sector with a wealth of visitor attractions a high quality environment and a wide range of activities.
- Recent improvements to regional infrastructure such as wastewater treatment, water supplies, roads, energy transmission, telecommunications etc.

Certain Opportunities have also been identified for the region and these include:

- In-migration has established a local workforce and would welcome increased employment options within the region.
- Development of third level facilities and courses within the region and establishment of a University of the South East have the potential to significantly increase participation.
- Improved linkages are being developed between industry and third level educational institutions.
- Strong indigenous industrial sector with opportunities for increased levels of Research and Development.
- Improving road and rail infrastructure.
- The Regional Airport has significant capacity for growth.
- Innovative public transport systems are improving rural mobility.
- A developing retail sector is reducing leakage of retail spending to urban centres outside the region.

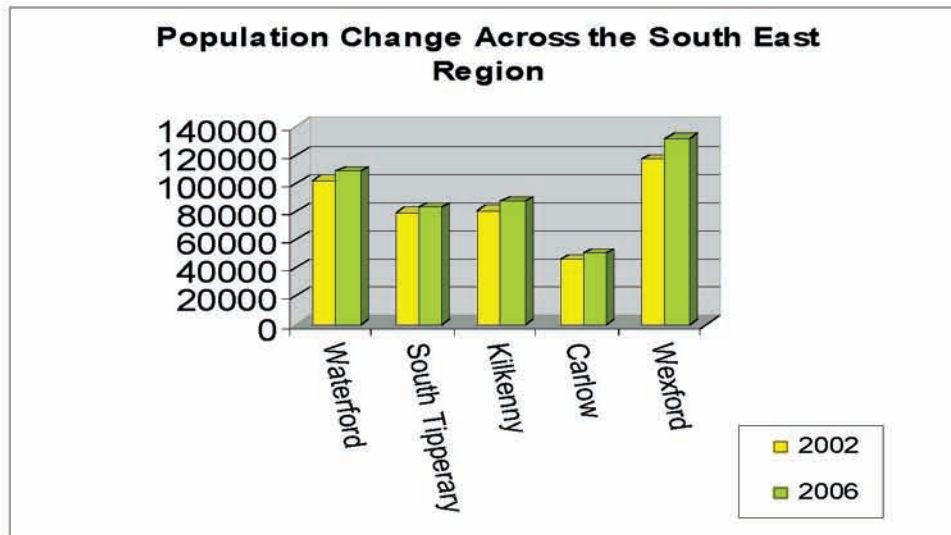
COUNTY WEXFORD

The Wexford County Development Board's document "Remodelling the Model County" is a ten year strategy for the Economic, Social and Cultural development of Wexford (2002-2012). The Strategy outlines how traditionally Wexford has been economically successful and prosperous. This prosperity was built on the basis of an efficient and thriving farm sector and on a significant industrial base, particularly in Wexford Town. However in recent times Wexford's economy has not performed as strongly as it traditionally did as the twin pillars on which the county's prosperity was built have been significantly weakened.

The 2002 Census outlines how County Wexford had an overall Unemployment rate of 10.5%. This was significantly above unemployment levels in the wider South East Region and the State which are 9.5% and 8.8% respectively.

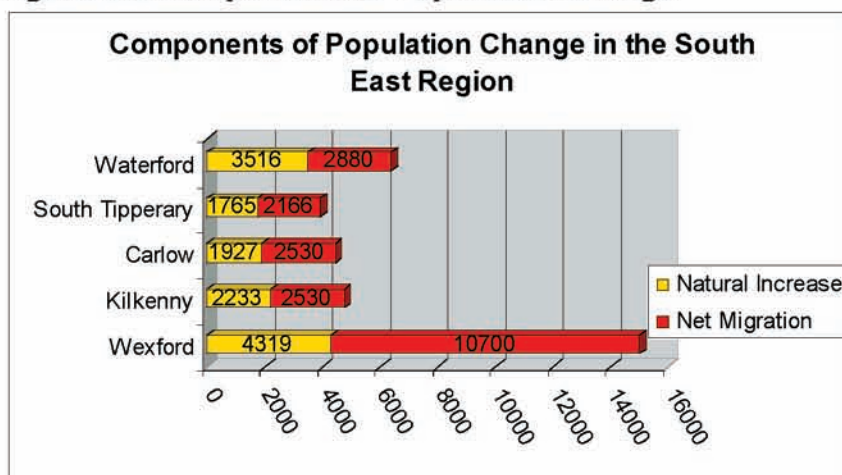
Notwithstanding the above, County Wexford is outlined as having the highest growth rate within the South East Region. Preliminary 2006 Census data issued by the Central Statistics Offices outlines how the population of the County is currently 131,615. This represents a population increase of 12.9% in the four year intercensal period since 2002. Figure 4.1 below displays the level of growth experienced within the county and compares this to other counties in the South East Region. This outlines how Co. Waterford has experienced a total growth rate of 6.3%, while Carlow, Kilkenny and South Tipperary have grown by 9.3%, 8.8% and 5% respectively.

Figure 4.1 Population Change



Population growth in Wexford has been largely attributed to a major influx of people into the county. In this context 71% of the increase in the county's population is due to inward migration. Figure 4.2 below compares the levels of migration influx into Wexford in comparison to the other counties within the South East Region.

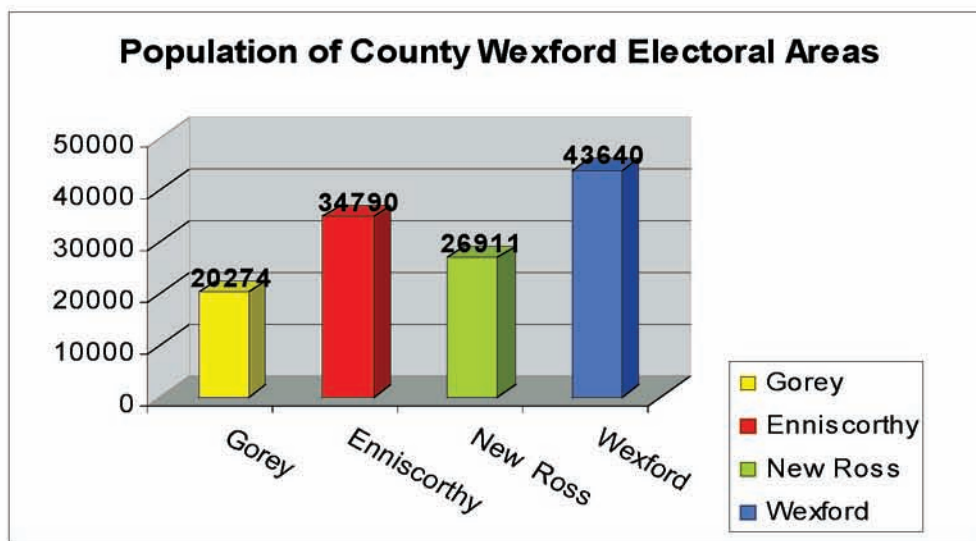
Figure 4.2 Components of Population Change



Growth in population has not been evenly spread within the County. As with the remainder of the State, recent population changes reflect increasing urbanisation and growth in towns / villages close to the main urban centres. Figure 4.3 highlights the Population of Electoral areas within the County. The Wexford Electoral Area remains the largest Electoral area with a population of 43,640 accounting for 38% of the

county's population. This has contributed to the towns overall vibrancy and made it more attractive for inward investment. Enniscorthy is the second largest electoral area at 31,790, followed by Gorey and New Ross with 29,274 and 26,911 respectively.

Figure 4.3: Population of Electoral Areas



CONCLUSION

The evidence suggests that County Wexford is lagging behind the remainder of the South East Region in terms of employment levels and economic growth. Notwithstanding this, recent estimates from the CSO outline how the county has experienced the highest growth rate in the region since 2002. It would appear that there is potential for further investment and growth in Wexford in order to reinforce its role as a hub town within the South East Region. The designation of Wexford as a hub within the National Spatial Strategy should further increase the potential of the County leading to a further increase in investment and consequent population growth.

CHAPTER 5 – HEALTH CHECK ASSESSMENT

INTRODUCTION

This section of the report provides an overview of the retail profile and health check assessment of the main urban centres in the County. (New Ross, Gorey, Enniscorthy and Wexford). In particular this section of the report assesses new major retail developments which have been permitted in each of the 4 towns since the previous retail strategy and discusses the implications of this development for the future retail role and function of the towns.

HEALTH CHECK ASSESSMENT

Annex 2 of the Retail Planning Guidelines sets out the matters that should be taken into account when determining the vitality and viability of town centres. A health check assessment of the principle towns in County Wexford is an integral part of the retail strategy. This assessment was carried out for the principle town centres in the county and does not include the smaller town and villages or the environs areas of the larger towns in the county. A health check assessment essentially analyses the strengths and weaknesses of town centres and is based on a qualitative analysis of factors such as the range and quality of activities in the centre, its mix of uses, its accessibility to people living in the area and its general amenity appearance and safety.

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

Attractions- These underpin a town and comprise the range and diversity of shopping and other activities which draw in customers and visitors.

Accessibility- Successful centres need to be both accessible to the surrounding catchment area via a good road network and public transport facilities, and to encompass good local linkages between car parks, public transport stops and the various attractions within the centre.

Amenity- A healthy town centre should be a pleasant place to be in. It should be attractive in terms of environmental quality and urban design, it should be safe and have a distinctive identity and image.

Action- To function effectively as a viable commercial centre, things need to happen. Development and improvement projects should be implemented efficiently; there should be regular and effective cleaning and maintenance and there should be coordinated town centre management initiatives to promote the continued improvement of the centre.

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

In order to determine the vitality and viability of existing town centres in County Wexford the following indicators were utilised.

- Attractions
- Accessibility
- Environmental quality/amenity
- Diversity of Uses
- Multiple Representation
- Levels of Vacancy

Using the above indicators, health check assessments were carried out in the following centres in August 2006.

- Wexford
- Enniscorthy
- Gorey
- New Ross

WEXFORD TOWN CENTRE

Health Check Assessment

Attractions

Wexford town is the administrative, retail and business capital of County Wexford and is identified as a third tier settlement within the context of the Retail Planning Guidelines 2005. The town is set in a coastal landscape of high natural amenity. Few towns have such an extensive coastline and waterfront area and this serves as one of the principle attractions to the town centre.

The town is an example of a Hiberno - Scandinavian Town which later expanded and developed as a port under the Anglo-Normans. The surviving medieval ruins of the town include a substantial stretch of the town wall including a gatehouse and three towers.

Wexford town centre has a very clear structure which is focused on a central spine in the form of the Main Street. Main Street is divided into North Main Street and South Main Street and is linked to the Quays by a series of radial lanes and side streets. The Quays also provide a broader scale of retail activity with large serviceable site divisions, which enables it to become a service edge to the dense structure of the town centre.

The town centre supports a wide range of retail and service outlets in a linear development along Main Street and the historic harbour area. Traditionally this area has been occupied by a range of independent retailers but more recent developments in the town have seen the influx of more national/international retailers. The independent specialist retailers have had the effect of acting as a back up to the multiples as well as adding to the diversity of urban life. A sample of independent businesses operating in Wexford includes Jolie Boutique on Crescent Quay, Baby Matters on Henrietta Street and Sassy on North Main Street.

Accessibility

Wexford town centre has benefited from the existence of the town's bypass. However, there still remains a significant problem of traffic congestion and car parking in Wexford Town. The main street is very narrow and currently operates as a one-way system. In certain areas of

the town there is little room for pedestrians and there are limited pedestrian crossing facilities.

The Railway station is well located in the centre of the town in close proximity to Redmond Square. The diesel railcar service provides links to Dublin. Bus Éireann provide a frequent service from Wexford to Dublin and Waterford.

There are a number of car parking facilities located throughout the town. There are three car parks including a multi-storey located along the Quays adjacent to Henrietta Street, Anne Street and Common Quay Street. There are also car parks at Redmond Square, Abbey Street, Allen Street and Bridge Street.

Environmental Quality/ Amenity

Wexford has an attractive streetscape. However, the environmental quality of the town centre has somewhat eroded in recent years by insensitive alterations to many historic buildings in the town centre, most notably by the widespread replacement of traditional window types by discordant PVC framed windows. Nonetheless, the town centre has retained much of its original form along Main Street. It is attractive to the pedestrian in both scale and use and has a series of high quality public spaces such as Cornmarket Street and the Bull Ring.

Main Street does have some spare capacity for infill development especially along its southern end and in the larger sites of under utilised lands between the Main Street and the Waterfront. Overall vacancy rates in the town centre are low.

The vacancy rates on the South Main Street are much higher than the vacancy rate on North Main Street. However, the 2002 Wexford and Environs Development Plan outlines how Urban Renewal Incentives have been used to encourage the growth in Wexford particularly on the northern end of Main Street. The Development Plan further outlines how it is proposed to support the south end by facilitating the creation of a strong corresponding node of activity accessible through the radial collector routes terminating and strengthening the end of the Main Street as a retail spine.

The majority of shop fronts in the town centre are well presented and a small number of important traditional fascia have been preserved, although they are under continuous threat. Modern shop fronts are

generally respectful of the traditional idiom. However, some of the traditional shop fronts and upper floor windows have been marred by the replacements of traditional wooden sash windows with PVC replicas.

As with most Irish Towns the quality of streetscapes have suffered from the increasing use of PVC/Aluminium windows in the upper floors of Georgian and Victorian properties. While some good examples of timber sliding sash windows remain, there is a need for a proactive approach to retain these and reinstate timber sash windows where they have been lost. The aesthetic quality of Main Street is also significantly impinged by the provision of extensive haphazard overhead wiring.

The town centre has a relatively poor quality public realm. Only a limited section of Main St. has benefited from an upgrade in paving. Most of Main St. suffers from poor quality paving with the requirements of vehicle dominant over that of pedestrians. It is noted however, that a section of North Main Street adjacent to Shaw's Department Store has recently been upgraded. This sets a standard that needs to be continued and improved upon throughout the town centre as a matter of urgency. Even here however an extensive mesh of overhead wiring remain.

Litter bins are provided throughout the town and there did not appear to be a significant problem with litter at the time of the survey. The Quays have benefited from significant investment and upgrading, although linkages to the Main Street remain relatively weak.

The traditional town centre would benefit from more pedestrian linkages with the extended town centre area which would enhance the character and accessibility of the town. The pedestriaisation of South Main Street should be implemented as a priority.

Diversity of Uses

Wexford town centre accommodates a diverse range of uses which enhances its role as the commercial centre of the County. These include a wide variety of pubs, restaurants and cafes along Main Street and the Quays and a series of high quality hotels. Other facilities in the town include a Cineplex Cinema and a conveniently located railway station. There are also a number of independent boutiques, financial institutions and service providers.

Multiple Representations

Many national retail chains are located in Wexford. The majority of the major national multiples are located along the Quays and North Main Street.

The convenience sector of the town is primarily dominated by national/international multiples such as Dunnes Store, Tesco and SuperValu and is complemented by small scale butchers, grocers and local supermarkets. The comparison sector includes Penney's, Shaw's, Dunnes Stores and Heaton's. The representation of International multiples is limited. At present it includes Benetton, Adams, and Boots.

Mall Developments

There are two main Mall developments in Wexford. Lowey's Shopping Mall is in the town centre and was originally a large furniture outlet. Redmond Square is the largest retail developments in Wexford and is anchored by Dunnes Stores. It includes 220 free parking spaces. 36% of the floorspace is convenience goods and 28% comparison goods.

Other Retailing

Out of town there are a number of examples of forecourt retailing, most notably Boggan's on Newtown Road. There is a neighbourhood centre at St Aidan's which includes a supermarket, pharmacy, a laundrette and licensed premises.

Recent Developments

Subsequent to the publishing of the 2005 Wexford County Retail Strategy, various schemes have been permitted in Wexford town which have or will increase the overall retail floorspace provision. These developments provide additional retail floorspace of 14,865 sq.m. gross to the existing retail base of the town.

The most significant of these includes the development of a Tesco Store along Distillery Road which is currently under construction. This consists of a Gross Floor Area of 8,175 sq.m. 2,641 sq.m. net convenience and 2,379 sq.m. net comparison.

A major retail proposal for the development of a mixed use scheme to include a shopping mall is also at further information stage with the

Borough Council (Reg Ref 2006/025). The proposed scheme has a gross retail floor area of 31,490 sq.m. and, if permitted, would increase the retail floorspace provision in the town to 53,781 sq.m.

The site is located on lands at Trinity Wharf and includes an adjoining foreshore/harbour area of 2.4 ha at Wexford harbour. The proposed development comprises retail, residential, hotel, office, leisure (including cinema), bars, restaurants, etc and has a gross floor space of approximately 119,342 sq.m. (The site is traversed by the Dublin-Rosslare rail line). The site is bounded on three sides by Wexford Harbour, and by Trinity Street on the landward side. The development will also consist of the provision of public and private open spaces in the form of a riverside walkway and viewing platforms along the north-eastern waterfront boundary.

If permitted, the scheme would have a profound impact on the retailing profile of the town. It would provide for the development of the Southern end of the Quays which is currently underdeveloped and set a precedent for the expansion of retail development along this area. The proposed scheme would also provide for an integrated mix of retail and leisure facilities which are currently underprovided within the town.

Suitability of Existing Floorspace

The retail profile of the town is defined by a variety of independent retail outlets which are complemented by national and international multiples along Main Street and the Quays. The independent stores play a key role in contributing to the town's unique retail sector. The town is therefore considered suitable in terms of the range and quality of retail floorspace it has to offer.

However, a future area of concern arises in relation to the integration of larger national and international multiples into the town core. In general these units require a large surface area and this can place pressure on the urban grain of traditional town centres. While the integration of these units has been successfully catered for in areas such as South Main Street, in some instances given the confined nature of the town centre and the lack of sites large enough to accommodate the requirements of the multiples, it is not considered the most suitable location to cater for this development. This issue could be addressed by the development of larger retail units outside of the traditional town centre, leaving the town centre to accommodate future specialised retail uses complemented by extensive environmental improvement works. Current proposals for the Trinity Wharf site set a precedent for this type of development along the Quays.

Development Opportunities

There are a number of areas within the town centre which have the capacity to absorb future retail development. South Main Street, for example, currently includes a series of bulky goods retail units which would be more suited to edge of centre retail parks. The Coleman Doyle's furniture premises, for example, is being relocated to a retail park and this opens up space within the town centre.


Wexford town has an extensive coastline and waterfront area and this is an asset that should be maximised. The 2005 County Retail Strategy outlined how the main problem in the town is the lack of linkages between the retail core and the waterfront, which could be exploited more fully as a retail frontage. While the relocation of the Tesco store to Distillery Road provides potential for retail development along the Quays, there are other areas along the waterfront which have the capacity to absorb future development. The railway station for example is adjoined by substantial amounts of derelict lands which could be used for retail purposes.

While on an overall basis there is little dereliction or vacancy rates within the town centre, the lanes and side streets linking the Main Street and the Quays also have potential for renewal.

Conclusion

Wexford as the county town is considered vibrant, with a range of independents and national operators. The town has an excellent range of retail and service facilities. One notable feature is the number of independent retailers, particularly in the comparison sector. This is complemented by a number of well known multiples and national chains. However, the town is somewhat unbalanced in terms of concentration of retailing activities. The primary focus of retailing is focused around North Main Street.

The quality of the public realm and physical environment of the traditional town centre would benefit from a continuation of improvement works and further investment. There are a number of sites in the traditional town centre which have the capacity to provide appropriate opportunities for delivering modern retailing formats. In addition the traditional town centre would benefit from better and more integrated pedestrian linkages with the extended town centre area which would enhance the character and accessibility of the town. The future pedestrianisation of South Main Street should be investigated further.



The health check assessment indicates that Wexford is trading well. There is little dereliction in the town centre, and recent proposals for the town, such as the Tesco and Trinity Wharf proposals demonstrate investment confidence in the town centre. It can be concluded that Wexford has a healthy, vibrant and vital town centre.

ENNISCORTHY TOWN CENTRE

Health Check Assessment

Attractions

Enniscorthy is an old Norman settlement situated on the banks of the River Slaney. It is classified as a third tier centre in the Retail Planning Guidelines for Planning Authorities 2005 and is the second largest settlement in Wexford County. The town is located to the north of Wexford on the N11 and N30 National Primary Routes.

The town dates from Norman times, and this mediaeval origin is evident in its strategic location in an elevated location immediately west of and overlooking the River Slaney. The historic pattern of streets and narrow burgage plots also reflect its origins. The town centre follows a historic street layout, which rises steeply from the river. It predominately comprises independent retailers, although there is a large Dunnes Stores supermarket along Rafter Street and a Super-Valu in the Abbey Square Shopping Centre located on Mill Park Road. The independent stores contribute to the town's unique retail sector. Other facilities in the town include the Slaney Plaza Cinema, Riverside Park Hotel and the Railway Station.

Enniscorthy town is dissected by the River Slaney which runs through the centre of the town dividing it in half, access is provided at Enniscorthy Bridge and Seamus Rafter Bridge. The Riverside Park Hotel and Leisure Club is a three star Bórd Fáilte approved accommodation located on the River Slaney.

The Market Square is the focal point of the town which is bounded to the north by the Main Street and to the south by Rafter Street. The Square provides an attractive meeting area for the town with landscaping and quality seating.

The Abbey Square shopping centre is located adjacent to the riverfront and is anchored by a Super-Valu supermarket. The shopping centre also comprises a series of smaller retail and service units such as a hair salon, newsagents and pharmacy. The Quays area is undergoing significant development at present and contains several sites with possible development potential. On Island Street, to the west of the River Slaney, a shopping centre anchored by Dunnes Stores is under construction on the former Minch Norton site is also being currently redeveloped for retail purposes.

Accessibility

Enniscorthy is currently bisected by the N11 and suffers from the effects of increased traffic flows. Added to this, the topography of the area impedes the accessibility of vehicular and pedestrian traffic in the town centre. When the proposed bypass is constructed around the town the traffic congestion within the town will be substantially reduced. This is particularly true of through traffic in the town which has no destination in the town and is currently a major contributor to congestion and the degradation of the environmental amenity in the town. Main Street which is the main route into the town suffers congestion during business hours.

At present traffic and car parking in Enniscorthy during business hours can be severely congested. On-street parking is provided along all the key retail streets in the town including the Main Street, Rafter Street and Church Street.

Enniscorthy town enjoys good levels of accessibility by both public and private modes of transport. Bus services are operated by both public and private operators from the town. Bus Éireann provide a frequent service from Templeshannon Quay in the town centre to Dublin, Wexford town, Waterford and Rosslare Harbour. Enniscorthy is located on the Dublin to Wexford (Rosslare) rail line.

Pedestrians are adequately accommodated for within the town with adequate footpaths on all roads and a number of pedestrian routes. For example Slaney Street is a pedestrian road with a number of successful retailers including Vodafone, J.J. Murphy and Garahy's Pharmacy. However, there is a lack of pedestrian crossings within the town centre.

Environmental Quality/Amenity

The town centre has a high quality public realm. This unique topography gives Enniscorthy a rather picturesque quality. Many of the shops have hanging baskets and there are attractive features and street furniture which enhance the aesthetic setting of the town. Market Square for example is an amenable area with high quality street furniture and landscaping adjacent to the county council offices which act as a focal point for the town. Modern shop fronts are generally respectful of the traditional streetscape.

There are no specific areas within the town which suffer from high vacancy rates. The majority of shop fronts are well presented and the town core maintains much of its traditional streetscape. Most of the original development consists of buildings of stone construction or tall terraces of buildings with strong vertical emphasis. As with most Irish

Towns, the streetscapes have suffered to some extent by the intensive development of modern forms PVC window frames to historic properties.

Litter bins are provided throughout the town and there did not appear to be a problem with litter at the time of the survey. The quality of paving throughout the town and the majority of paths were generally good.

Diversity of Uses

Enniscorthy town centre accommodates a wide range of functions. A number of pubs restaurants and night clubs are evident in the town centre. Other facilities in the town include the Slaney Plaza Cinema, Riverside Park and the Railway Station. The town predominantly comprises independent retailers such as Eric Barron, Billy Doyle and Burke O' Leary but national retailers are also represented, e.g. Sam McCauleys and Dunnes Stores. Both Aldi and Lidl have recently developed discount foodstores on the Killealy Road.

Multiple Representations

There are a number of national multiples in Enniscorthy including Dunnes Stores, Super Value, O' Brien's Sandwich Bar and Vodafone. There are few convenience nature national or international multiples.

Mall Developments

The Abbey Square Shopping Centre is located on the south east of the town core adjacent to the River Slaney. The anchor of the shopping centre is Super-Valu and it also contains a number of retailers including a newsagent, a pharmacy and a hair salon. There is also a shopping centre under construction on the former Minch Norton site.

Other Retailers

There are two neighbourhood centres adjacent to Enniscorthy town centre. The Gala Neighbourhood Centre is located to the east of the town centre and consists of a Gala supermarket with on-street parking provided in a residential area. The second neighbourhood centre is located to the west of Enniscorthy town centre, it consists of a Super Valu store and a number of small retail units including The Corner Pan and Aideens Beauty Studio.

Recent Developments

In total there has been an increase of approximately 1,063 sq.m. retail floorspace in Enniscorthy town centre since the adoption of the previous

County Retail Strategy. The majority of these applications related to relatively minor extensions and change of use applications.

The most significant development in the town in the past number of years has been the redevelopment of the Maltings in Enniscorthy which is currently under construction. The development is located on the former Minch Norton site and is accessed by Island Road, Irish Street and Barrack St. The scheme, when complete, will comprise 36 no apartments, 2100 sq.m. of office space, 5,500 sq.m. of retail space, 300 car spaces and includes the repaving of large areas of the streets surrounding the development. The development will achieve a key objective of the Town Development Plan, namely the development of a retail unit on the former Minch Norton site and will attract a large anchor tenant. This will expand the choice of shopping for the residents of Enniscorthy Town and will result in the enhancement of the environmental quality of the area.

A large concentration of bulky retail uses has also been developed in the environs of Enniscorthy in recent years. These include permission for the construction of a motor sales outlet development (Reg. Ref 20051594) and the development of a retail warehouse scheme off the Killealy Road (Reg. Ref 20051382).

Suitability of Existing Floorspace

The 2001 Enniscorthy Town Development Plan outlines how the town has suffered from the centralisation of shopping facilities into Wexford. In many cases shops in Enniscorthy are perceived as not meeting the needs of the next generation. The failure to modernise is reflected in some cases in poor shop-front presentation. The Minch Norton site development will help address these concerns.

Development Opportunities

There are a number of sites in the town which could be re-developed for retail use. The Murphy's Floods Hotel located on the main street is a derelict site at present and would be a suitable location for a large retailer.

The Quays area to the rear of the Abbey Square Shopping Centre also represents significant development potential. The current land uses in the vicinity include Slaney Fireplaces, Murphy's Cash and Carry and private car parking. The Quays area is an uncongested area and if retailers were to locate here this could reduce traffic pressure on the town centre.

Conclusion

Overall, Enniscorthy is considered as a healthy town centre with significant opportunities for retail expansion. It is an attractive and vibrant town with retailing clustering around the Market Square. The principle shopping streets include Main Street, Rafter Street, Weaver Street and Castle Street. The town has a pleasant shopping environment with good shop fronts, paving and relatively high quality public realm. The development currently underway on the Minch Norton Site and the retail proposal on the Killealy road/ N11 will add significantly to the town retail attraction and will enhance its vitality and future viability. There are a number of development opportunities within the town for retailers, in particular the Murphy Floods Hotel site and the Quays area offer significant development potential for retail use. The key issue facing Enniscorthy is the congestion in the town which should be addressed by the construction of the N11/M30 town bypass.

GOREY TOWN CENTRE

HEALTH CHECK ASSESSMENT

Attractions

Gorey is the principle town in North County Wexford, 52 kilometres north of Wexford Town, linked to Wexford Town and Enniscorthy by the N11 and located 100 kilometres from Dublin. The town has developed a significant role as a residential base for commuters to Dublin. Gorey is included in Tier 4 of the retail hierarchy under the Retail Planning Guidelines on the basis that the town had a population of less than 5,000 persons at the time of the last census of population. However this is in need of review given recent significant population growth. The town acts as an important retail centre for a large surrounding hinterland, including the neighbouring seaside resorts of Ballymoney and Courtown.

The existing primary retail provision in Gorey is centred on Main Street, with the secondary shopping frontage on Esmonde Street. As the town has grown so has the demand for a greater range of commercial facilities. The town centre appears to be vibrant with high pedestrian flows and the shops are generally well presented, with a low vacancy rate. The 2005 County Wexford Retail Strategy, further states that Gorey is a very successful town centre, trading better than would be expected for a town of its size. Main Street also includes a variety of pubs and restaurants.

There are two less prominent retailing streets running parallel to Main Street in Pearse Street and St Michaels Place. These side streets are more active than other streets and offer a much more subsidiary retailing function.

There are two large convenience goods stores in the town, a SuperValu outlet on Main Street and an edge of centre Tesco Store located on the Courtown Road. The Tesco Store is somewhat cut off from the town by the railway line which acts as a physical barrier to the town centre. This development is linked to the town centre by Esmonde Street and there is a gradual but noticeable proliferation of commercial activity along this street. This commercial activity is putting pressure on the residential character of this area of the town and altering its building stock through pressure to adapt the fabric to accommodate more modern and commercially viable retail outlets. An Aldi discount foodstore is also under construction on this road. There is a Lidl discount foodstore located along the N11. The Knockmullen Retail Park is located on the southwest edge of the town and consists of Dominic Smith Electrical, Deep Blue Ceramics, Costcutter, Dunnes Stores (under construction) and the 741 Restaurant.

The attractiveness of the town is at present adversely affected by the high volumes of traffic on Main Street, especially at peak times, which detracts from the overall experience of Gorey as a retail destination.

Accessibility

The main street through the town doubles as the N11 and therefore the town is very accessible from a variety of locations. At present, however, the most noticeable feature of the town is the high level of traffic, including HGV's, which pass through it. The main street is therefore prone to congestion and on street car parking is difficult to access. It is sometimes difficult for pedestrians to cross Main Street with insufficient pedestrian crossings in place. The main car parking areas are to the west of the town centre near the fire station, and to the north of the Tesco supermarket. Parking provision is also provided adjacent to Pettitts supermarket on Main Street. The general accessibility of the town will be enhanced by the Gorey Bypass due to be completed by 2007.

The No. 2 Rosslare-Dublin service runs through Gorey and offers a frequent service. Gorey is also a stop on the Dublin to Rosslare Harbour railway line. Gorey Coach and Bus Service run a local daily service between 11am and 6.30 pm.

Intensity of car parking usage decreases significantly in a sequential manner from the centre out to the more peripheral locations. Pressure for parking on the Main Street and the immediate town centre leads to delays and results in traffic flows that are continually congested and slow moving. On street car parking has been provided along most of the streets in the town centre, including Main Street, William Street Esmonde Street and adjacent side streets. Current off street car parking facilities are located at Market Square, Michaels Road, the Rams Arms car park and Pettitts SuperValu car park.

Environmental Quality/Amenity

Gorey is the best example in County Wexford of a seventeenth century plantation town. The wide street thoroughfare which served as a market place to the town centre later developed an interesting street pattern in accordance with the grid layout with minor streets feeding onto the Main street. Main Street still retains a number of older and attractive shop-fronts and the streetscape is generally colourful and vibrant.

Retail provision in Gorey has traditionally comprised small high street premises in the town centre, with no shopping centre facilities available. The town centre is vibrant with high pedestrian flows, and the shops are generally well preserved. There is a relatively low vacancy rate of retail

units in the town centre where Heaton's department store and the former Pettitt's supermarket are a dominant presence. The secondary side streets in the town are however relatively vacant and subject to dereliction and decay.

The overall environmental quality and amenity of the town is generally good with an attractive and coherent streetscape composed of colourful shopfronts and a uniform building line. Environmental improvements in the form of cobblelocking, street trees, tree guards and the addition of uniform street furniture have all enhanced the general streetscape of Main Street.

However, the heavy nature of through traffic in Gorey has negatively impacted on the environmental quality of the town centre. Problems of congestion and lack of car parking have also negatively impacted on the role of the town centre and in many instances the lack of designated loading bays has resulted in significant delays for traffic. This has negatively impacted on the viability of the town centre. This will be remedied by the completion of the N11 Gorey Bypass and the construction of the northern ring road.

Esmonde Street is a street in transition and has provided a natural expansion to the Main Street spine of commercial activity. Such development pressure would enable the existing Tesco store and the Aldi discount foodstore which is currently under construction to be linked more effectively into the retail core of the town centre.

Despite the transition on Esmonde Street there is an opportunity to promote secondary radial side streets off Main Street for small scale commercial development, as dereliction decay and under utilisation is evident in these areas and capacity already exists. There has been some expansion of commercial activity into the secondary and side streets in the town, although these streets are less active and the level of commercial activity is less intense.

Diversity of Uses

Gorey town incorporates a mixed pattern of use. The town is well catered for in terms of cafes, coffee shops, small restaurants and pubs. A number of independent boutiques, financial institutions, and some service providers are also located within the town.

Multiple Representations

Retail provision in Gorey has traditionally comprised small high street premises in the town centre. Heaton's department store and the Pettit's SuperValu supermarket are a dominant presence on Main Street. Other national/multiple developments such as Sam McCauleys are located along Main Street and Esmond Street.

The N11 has also been subject to scattered linear commercial development over the past number of years with units including a Mace Convenience Store in the Campus Petrol Filling Station and a Spar store in the Esso petrol filling station on the N11. A Lidl discount foodstore has also been developed along this road. Dunnes Stores will open in the town in 2007 in the new retail development at The Avenue.

Recent Developments

A substantial amount of retail floorspace has been granted in Gorey since the adoption of the 2005 Wexford County Retail Strategy. In total recently permitted schemes in the town would provide for an additional 27,581.3 sq.m. retail floorspace.

Recent developments in the town include permission for the construction of a shopping centre at The Avenue, Gorey (Reg. Ref. 2005/1405). This proposal incorporates a shopping centre building comprising a main anchor store and 18 no. retail/commercial units as well as basement car parking incorporating 399 car parking spaces. The total gross floorspace of this development is 18,553 square metres. The anchor retailer is Dunnes Stores.

The proposed development will enhance this area of Gorey Town and act as a catalyst for other proposals along what will eventually be a new street in Gorey Town.

The development of the Tesco store on the eastern edge of the town centre has meant that the town's commercial activity has naturally shifted towards Esmonde Street in recent years. The development of the Aldi discount foodstore at this location has enhanced the retail profile of the eastern section of the town and will act as an anchor for future retail development. However this will now be counter balanced by the new Dunnes Stores and shopping centre at the Avenue.

The town has also been subject to a substantial amount of retail warehouse development since the publication of the previous County Retail Strategy. Permission has also been granted to Amil Properties for

the development of a mixed use neighbourhood centre at Ballyowen/Ramsford Park, Gorey Co. Wexford (Reg. Ref 20052925).

Suitability of Existing Floorspace

The existing retail floorspace provision in Gorey is considered as addressing the needs of its catchment area. The town centre is primarily dominated by specialist independent retailers which enhance the unique retail profile of the town. Recent developments in the town centre have seen the influx of more national and international multiples including Tesco, Aldi, Lidl and there are current proposals for a Dunnes Store outlet. Collectively these have demonstrated investment confidence in Gorey.

Development Potential

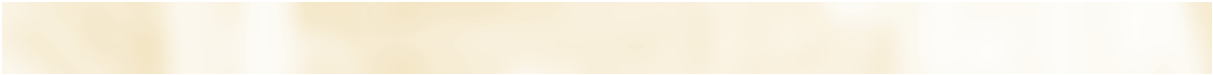
Gorey is not dissimilar to other town centres where the older commercial centre has been engulfed or enclosed by older residential areas which in more recent times both restrict and influence the future expansion of the town centre. Future expansion of the town is restricted by existing developments that immediately surround it. This places pressure on adjacent streets with relatively good access such as Esmonde Street for the conversion of units and could inevitable place pressure on out of town developments.

The most important development opportunity lies to the south west of the town centre, on lands to the south of the western end of Main Street, running west from the Dunnes Stores development, currently under construction. There is a significant area of "greenfield" land in this location which could be developed to meet the large floorspace requirements of multiple retailers, further reinforcing the retail profile of the town. This area should be promoted as an extension to the town centres retailing core.

Conclusion

The health check assessment indicates that Gorey has a healthy, vibrant and vital town centre. The overall environmental quality and amenity of the town is generally good with an attractive and coherent streetscape composed of colourful shopfronts and a uniform building line.

Notwithstanding the above the overall amenity of the town centre is somewhat impinged by high levels of congestion. It is anticipated that the town bypass will alleviate the intensity of congestion within the town centre.



Recent developments in the town centre have seen the influx of national and international multiples into the town centre including Tesco, Aldi, Lidl and there are current proposals for a Dunnes Store outlet. Collectively these have demonstrated investment confidence in Gorey.

NEW ROSS TOWN CENTRE

Health Check Assessment

Attractions

New Ross is strategically located on the banks of the River Barrow approximately 50km from Rosslare, 36 kms from Wexford and 23 km from Waterford City. It has an important inland port on a navigable river. The town is identified as a third tier Level 2 location within the retail hierarchy as set out in the Retail Planning Guidelines 2005. Its proximity to Waterford and Wexford Town, together with its limited population means its importance as a regional centre is restricted, however the town does serve as a retail and service centre for the south-west of Wexford County and the south-east of Kilkenny County.

New Ross is a linear town with the retail core located to the east of the River Barrow. The form of New Ross has been largely determined by its topography. The steep hills together with its riverside location have helped to shape the physical characteristics of the town. Irregular and steep streets radiate from the river presenting a number of challenges for future development in the town.

The main commercial centre of the town is concentrated in South Street, John Street, North Street and Mary Street. Some retailing also occurs along the Quay front, particularly close to the bridge but otherwise the Quays are characterised by a mix of commercial, residential (upper floor), vacant premises and under utilised sites.

South Street is the prime retailing street in the town with a mix of retailers such as Home Bakery, Joyce's Hardware, Nolan's Bookshop and Deegan's Discount Store. There are also a number of financial institutions located on South Street. The street is well maintained with use made of 1st and 2nd floors of all units and there are relatively few vacant units located along the street. Quay Street contains a vibrant mix of retailers including Bruce Betting, P. Nolan, Kalonial Stores and Emerald Dry Cleaners and Photo Service. North Street is also an important and vibrant street in the town and has a mix of retailers including Mooney's Hardware, Bridge Records and Electrical Suppliers and clothing retailers Lawlors Ltd.

New Ross contains a number of International multiples including two discount foodstores which are located to the south of the New Ross town

centre. Also a Tesco store with extensive car parking is located on the outskirts of the town along the Bosheen Road.

Accessibility

Traffic congestion is one of the most significant threats facing New Ross. The town centre is classified by a series of one way streets and has high levels of on street parking which leads to delays and results in traffic flows that are continually congested and slow moving. This makes access to the town very difficult.

The New Ross Town and Environs Traffic Management Study Final Report 2003 highlights that traffic on the N25 between Waterford and Wexford and the N30 currently has no means of bypassing New Ross. All traffic must pass through New Ross town centre and over O'Hanrahan Bridge. The signalised junction at O'Hanrahan Bridge is the major cause of traffic congestion.

There are sufficient car parking facilities in the town with car parks located in various locations around the town including John Street, Charles Street and in the Quay's area. Also there is adhoc parking along the town's key retailing streets which contributes to the congestion in the town.

There are good pedestrian links between Quay Street and Charles Street which are joined by a pedestrian route way. However, there are no designated pedestrian crossings in the town which hinders pedestrian flows due to the heavy vehicular traffic on all routes. Plans have been prepared for a bypass of the town on the N25.

New Ross does not have a train service, so those commuting by train must avail of the services from Enniscorthy, Thomastown or Waterford. Bus Éireann provide a frequent service from The Dunbrody Inn on The Quays travelling to Dublin, Wexford and Waterford.

Environmental Quality/Amenity

The environmental quality of New Ross is quite poor with a substantial degree of dereliction and vacant sites in the town. John Street, for example, has a large number of vacant units. Vacancy levels appear to rise in a sequential manner outside the town core. There are several derelict large sites along the waterfront which offer significant retail development potential. Also no use is made of the upper floors of retail

units and this imposes a negative impact on the streetscape. The town centre does however have a significant number of traditional shop fronts which add character to the town and should be retained.

New Ross has a concentrated retail core adjacent to the river which has been under exploited due to traffic/pedestrian interaction. The Quays is the most amenable area in the town. The area adjacent to the River Barrow is well utilised with a quality walkway for pedestrians to enjoy. However the Quays area is heavily congested with vehicular traffic.

Litter bins are provided throughout the town and there did not appear to be a problem with litter at the time of the survey. The quality of paving throughout the town was adequate with many of the footpaths in need of upgrading. The town centre has benefited from environmental improvement works. There are limited pedestrian crossing facilities in the town centre.

Diversity of Uses

A wide diversity of uses are accommodated within the town centre. There are a number of restaurants located along North Street, South Street and Quay Street. Financial Institutions are clustered along South Street with Bank of Ireland located on the Quays.

Multiple Representations

The town's retail offer is dominated by independent retailers with a number of international multiples represented including Tesco, Aldi and Lidl. There are a number of national multiples located in the town such as Sam McCauley, Supervalu, Extra-vision, O2 and Vodafone.

Other Retailers

The majority of retail development is contained within the retail core and the town is also served by a number of neighbourhood shops in areas such as the Irishtown, Rosbercon, the Three Bulletgate and Castlemoyle.

Recent Developments

There has been limited retail development in New Ross town centre since the adoption of the previous County Retail Strategy. Recent developments in the town centre have in fact lead to a loss of retail floorspace primarily through change of use applications.

However, the environs of New Ross have been subject to a significant amount of retail development since the adoption of the 2005 County Retail Strategy. These include the construction an Aldi store along the N25 (Reg. Ref 20042204) to Wexford and a Tesco store with extensive car parking along the Bosheen Road (Reg. Ref 20044620).

A substantial amount of retail warehousing has also been developed in the environs of New Ross since the adoption of the 2005 Retail Strategy. These include the construction of 6 no retail warehouse units at Hewitsland, New Ross (Reg. Ref 20042003).

Suitability of Existing Floorspace

The retail profile of New Ross town centre would not be considered as vibrant as Wexford, Gorey or Enniscorthy in terms of the range and quality of products it has to offer.

The tight urban grain of the traditional town centre restricts the development of larger retail units within the core retail area. The development of larger retail units within the town centre would therefore require the amalgam of a series of units which may prove difficult.


Development Potential

While the topography of the town acts as an inhibiting factor to the future expansion of the town centre, there are various under utilised and large vacant sites within the town centre which could be redeveloped for retail purposes. These include several derelict large sites along the waterfront and others within the core retailing area of the town centre particularly the old cinema site which offer significant retail development potential.

It is unlikely that large scale retail development would be sustainable within the town of New Ross on the basis that the population of the town is insufficient and this demand is already being catered for in neighbouring Wexford and Waterford.

Conclusion

The health check analysis conducted outlines how New Ross is significant less vibrant than other third tier towns in the County with dereliction and vacancy of smaller retail units being common particularly on the periphery of the town centre. Retail Facilities in New Ross are concentrated on the



east bank of the River Barrow and mainly comprise of standalone shops in the town centre and a number of small neighbourhood centre facilities throughout the town. The commercial centres of Waterford and Wexford dominate from a shopping perspective in New Ross.

The environmental quality of some of the more peripheral streets such as Priory Street and the upper section of John Street are defined by a high degree of dereliction and high vacancy rates. Although significant works on many footpaths have been implemented, the paving of the footpaths is also of a significantly lower standard than in the traditional town centre.

HEALTH CHECK CONCLUSION

The health checks carried out illustrate that the principle towns in County Wexford generally benefit from vibrant and vital town centres. Wexford, as the primary retail centre, has been found to be trading well with a good mix of both independent and multiple retailers. Recent retail developments suggest that there is confidence in the retail sector in the town. As a result, there exists a good foundation for meeting the future retail requirements. There is need to plan for significant additional floorspace on waterfront locations to the north and south of the existing retail core to reduce pressure for redevelopment on Main Street and to enhance the representation of national and international multiple comparison retailers in the town.

Enniscorthy and Gorey were found to be trading well. These towns also benefited from attractive town centres and high quality urban realms. It has been noted that there are town centre and edge of centre sites in Wexford, Gorey and Enniscorthy which have the potential to be redeveloped for retail use in the future.

New Ross town centre was found to be the least vibrant of the centres surveyed. From a retail perspective, the town is dominated by Wexford and Waterford. Peripheral areas of the town centre had a more neglected appearance and high vacancy rates. Recent developments in New Ross such as Tesco have been concentrated outside of the town centre. This is seen as a result of the confined nature of the traditional town centre and the need to amalgamate a number of existing units to accommodate modern floorspace requirements which may prove difficult.

CHAPTER 6 – ASSESSMENT OF COMPETING CENTRES

ASSESSMENT OF COMPETING CENTRES

This section of the Strategy provides an assessment of competing centres to Wexford. While the traditional competitor centres such as Kilkenny, Carlow and Waterford are examined as part of this review a significant proportion of this section focuses on the impact of major retail developments in the Greater Dublin Area. As part of the review of the Wexford County Retail Strategy we identified the value of looking at the quantum and quality of the offer of these competing centres to inform the strategic response required if County Wexford is to sustain its competitiveness and reduce the leakage of convenience and comparison expenditure. The baseline for the assessment of the competing centres includes the published county retail strategies and in house reports.

DUNDRUM TOWN CENTRE, DUN LAOGHAIRE RATHDOWN

Dundrum has been designated as a Level 2, Major Town Centre in the Retail Hierarchy for the Greater Dublin Area (Greater Dublin Area Retail Planning Strategy). These centres are the most important centres in the Metropolitan area of the city outside of Dublin City Centre. It is stated that:

"They will tend to serve catchment areas well beyond their immediate locality, they should have the potential for significant comparison floorspace and some already have, including some higher order shopping, and offer a wide range of non-retail services."

The Dun Laoghaire Rathdown Development Plan 2004 – 2010 is consistent with the Retail Strategy for the Greater Dublin Area, and has also designated Dundrum as Major Town Centre. The policies of the Development Plan seek to address the major issues affecting retail development in the county, which include a limited inflow of comparison shopping and the outflow of 45% of expenditure goods shopping from the County.

Major new retail development has been undertaken in Dundrum in recent years. Phase 1 of Dundrum Town Centre Scheme opened in March 2005.

The centre is situated between Dundrum Bypass and Dundrum Main St. This contains 35,000 sq.m. of gross retail floorspace, with 120 shops distributed over three levels. At the time of the opening, and to date, the centre contains many retailers which did not have any other outlets in Ireland, including House of Fraser, Harvey Nichols, Hugo Boss and Zara. The centre also contains a substantial element of leisure uses, which include a twelve-screen cinema, theatre, restaurants and cafes.

Phase 2 of the scheme is anticipated to open in 2008 and will be located on the site of the existing Dundrum Shopping Centre. The retail component of this phase includes a further 3 anchor stores, 76 retail units and one convenience foodstore, restaurants, café, hotel, leisure use, class two services and community facilities. A total of 30,517 sq. metres gross retail floor area is provided in the scheme.

The completion of the Dundrum Town Centre scheme will provide a comprehensive shopping centre, with a wide variety in retail offer. Due to the wide range of retailers, which include specialist services, and retailers unique to the centre, there is a potential for the scheme to draw trade from a wide area.

Dundrum is easily accessible on the road network in the Greater Dublin Area. It can be accessed from the M50 via the Sandyford Interchange. The M50 also connects to the N11 serving Wexford. Improvement schemes to the N11 have decreased journey times to Dublin, and could have the effect of making centres such as Dundrum Town Centre an increasingly attractive retail destination particularly for residents in North Wexford.

BRAY TOWN CENTRE

Bray is regarded as the primary retail, commercial and service centre in County Wicklow. The town is classified as a Major Town Centre within the context of the Greater Dublin Area Retail Strategy, which is the second highest designation after Dublin City Centre. As a result of Bray's designation as a Major Town Centre in the GDA, the town will retain and strengthen its role to become a regional and County centre for retail and commercial services and development.

In relation to the function and role of Major Town Centres the Retail Strategy outlines that:

"The Major Town Centres embrace the most important centres in the Metropolitan Area beyond Dublin City Centre. They will tend to serve catchments beyond their immediate locality, they should have the potential for significant comparison floorspace and some already have, including some higher order shopping, and offer a wide range of non-retail services".

Notwithstanding its Major Town Centre designation, the Draft Wicklow County Retail Strategy highlights how "the quantum and quality of Bray's retail floorspace is not comparable to that in other Level 2 Major Town Centres in the GDA hierarchy". The Town Development Plan outlines that "Bray's proximity to competing centres and its accessibility to Dublin City Centre mean that, unless the issue is addressed, Bray will continue to lag behind with resultant increasing leakage of comparison expenditure from the town and County".

Section 4.4.4 of the Town Development Plan outlines that in order to compete with other retail centres in the Greater Dublin Area the town will require "significant improvement in the quantum and quality of retail offer". The Development Plan highlights how the town's retail base is predominately made up of comparison floorspace with 50% of the County's comparison floorspace. The total net retail floorspace in Bray was 28,466 sq.m. in 2001 (31% convenience, 58% comparison and 11% Retail Warehousing). The minimum objectives set down in the 2005 Town Development Plan regarding the provision of net retail floorspace in Bray are for an additional 35,000 sq.m.

Recent Proposals

Bray Town Centre has been subject to substantial retail proposals in the past few months. Two major retail proposals for Bray are currently under appeal to An Bord Pleanála. These include applications for the Golf Course Lands and the Town Centre. Details of these applications are discussed in more detail below.

Bray Golf Course Lands:

Given that the existing town centre does not have the capacity available to accommodate increased development, the town centre has been expanded to include a significant proportion of the Golf Club Lands immediately to the north of the town centre. The expansion of the town centre into this area will substantially enhance the town's profile and importance within the GDA's hierarchy.

Recent proposals for the development of the Golf Course Lands are outlined below. These proposals were granted by Bray Town Council (Reg. Ref 05/116 and Reg. Ref 05/117) and are currently under appeal to An Bord Pleanála.

Registry Reference 05/116: This application relates to the development of 416 residential units, a crèche facility, 128 sq.m. of retail floorspace, and a community building. Further to a request for revised plans, revised proposals were submitted for a reduction from 416 to 277 residential units.

Registry Reference 05/117: The application includes 50,882 sq.m. of retail, a hotel, an 8 screen cinema, bars, restaurants crèches, doctors surgery, community building and 552 no residential units. Further to a request for revised plans, revised proposals were submitted to the council which significantly reduced the number of residential units from 552 to 347. No major changes were proposed in relation to the retail element.

The decision of the planning authority to grant permission for the proposed development was based on the assertion that there a sustainable retail base to support this development. The Planner's report which accompanies this application outlines that given the catchment area for the development, in particular north, south and west Wicklow, together with likely growth and predicted spending capacity, there is considered to be a sustainable retail base to support this development.

Bray Town Centre Lands:

The town centre is also subject to a current proposal for a mixed use scheme with a gross floor area of 18,399 sq.m. (10,187 sq.m. retail) (Reg. Ref: 05/189). The proposed development is for a 7 storey over basement development comprising retail and residential uses with associated car parking. The site is bounded by existing properties along Main Street, Quinsbrough Road, Eglinton Road and Florence Road. The Planning Report outlines how the proposed development would be a positive step towards achieving the objectives set down in the Bray Development Plan 2005 regarding the development of the retail sector.

As outlined above, these schemes are currently under consideration by An Bord Pleanála. If permitted the retail offer in Bray would be significantly enhanced in line with its designation as a Major Town Centre. These would greatly improve and enhance the attraction of Bray as a retailing

destination. Improvement schemes to the N11 have decreased journey times to Bray, and could have the effect of making the town an attractive retail destination particularly for residents in North Wexford, particularly Gorey and Enniscorthy which are 68 and 97 kilometres from Bray respectively.

CHERRYWOOD TOWN CENTRE, DUN LAOGHAIRE RATHDOWN

The Dun Laoghaire Rathdown Development Plan 2004-2010 provides for a retail floorspace cap of 35,000 square metres net of retail development in Cherrywood "with the possibility of longer term projections beyond 2010". In conjunction with Dundrum, Cherrywood is envisaged as the main location with the potential to enhance the county's retail attraction and competitiveness.

While Cherrywood is currently designated as between a Level 2 Major Town Centre and a Level 3 District Centre it is envisaged that the Council will seek to enable Cherrywood/Rathmichael to grow from a Level 3 Town Centre into a Level 2 Major Town Centre in the longer term.

Section 6.2.1 of the Development Plan Highlights that "It is the aim of Dun Laoghaire Rathdown County Council to facilitate the development of Cherrywood on a phased basis subject to the provision of rail links, a sufficient resident population and the preparation of an approved urban design Master Plan".

Although retail development in the area is currently capped at 35,000 sq.m., Cherrywood has the potential to grow to a Major Town Centre. Recent press releases have outlined how the landowner's plans for the area are to develop more than 90,000 sq.m. of retail space²⁰.

ARKLOW TOWN CENTRE

Arklow is designated as a Level 3 Sub County Town Centre within the context of the Draft Wicklow County Retail Strategy. Arklow is located in the Hinterland of the Greater Dublin Area. The town is designated as a Large Growth Town II within the context of the Regional Planning Guidelines for the Greater Dublin Area. These are considered most likely to be successful in attracting a concentration of major employment generating investment. These centres should be economically self-sustaining with a population able to support facilities such as high quality secondary education centre, a small hospital or polyclinic-type facility and

²⁰ Sunday Business Post, 18/06/2006

a comparison retail centre. It is envisaged that Large Growth Towns II will have a population 15,000 to 25,000 people.

The Arklow Town Development Plan outlines how the recent growth in Wicklow, Arklow and its Environs EDs reflects to some extent a widening of the Dublin commuter belt. The Wicklow County Development Plan projects 16,300 people for Arklow and its Environs by 2010. The population of Arklow was recorded at 9,993 in the 2002 Census.

The Arklow Town Development Plan outlines how Arklow's designation as a Secondary Development Centre in the Strategic Planning Guidelines for the Greater Dublin Area and the growing population in the town and its hinterland require the extension of the retail floorspace, in particular for middle and high order comparison goods.

The retail and commercial core of Arklow is the town centre itself and is mainly concentrated on Main Street and adjacent streets. The existing provision comprises offices, small convenience shops, low and middle order comparison shops as well as a range of pubs, restaurants and cafes. Along Wexford Road three supermarkets, Tesco, Lidl and Pettitt's, are located. A report by DTZ Pida, which assessed the retail sector in County Wicklow as a whole, concludes that Arklow has "a vibrant and strong town centre and is the only town in County Wicklow with sites in and around the town centre which are suitable for development."

Recent Developments

Recent significant developments in Arklow include a major retail development for the town known as Bridgewater Centre. This scheme is located immediately north of the Avoca River on the northern edge of the town centre. The centre, which is currently under construction, will have an overall retail area of 14,864 sq. m. (160,000sq ft) and is located on an 11-acre site on the opposite side of the River Avoca from the old town centre. It will be anchored by Dunnes Stores.

The complex will also include a six-screen multiplex cinema, four restaurants and cafés along the waterfront, 26 apartments, 2,972sq m (32,000sq ft) of offices and parking for over 1,000 cars. The complex is due to open in the autumn of 2007.

This development will give Arklow a competitive advantage. The Dunnes Stores development under construction at The Avenue, Gorey will however help counterbalance this.

CARLOW TOWN

Carlow is designated as a county town in the National Spatial Strategy and a Level 2 Tier 3 centre within the context of the Retail Planning Guidelines. The town had a population of 13,118 in 2002 with a high growth rate of 12.5 % since 1996. Recent figures issued by the CSO outline how the current population for the town is 13,898 which represents a growth rate of approximately 6% in the four year period.

Recent Developments

The 2005 Carlow Town Retail Study outlines how “several large retail developments have been built and have begun trading since the completion of the Carlow Retail Strategy in 2003”. The largest of these centres have included the Fairgreen Shopping Centre, the Aldi Discount Foodstore and the refurbishment of the Shaw’s Department Store which has not commenced. Cumulatively, these three developments account for gross retail floorspace comprising of 7,774 sq.m., comprising 1,064 sq.m. convenience and 6,710 sq.m. comparison floorspace. Added to this, the retail study outlines how, “some sixteen smaller miscellaneous retail outlets were also granted permission”. Permission has also been granted for the construction of the Hanover/Carlow Retail Park since the publication of the 2003 Town Retail Study. In addition Laois County Council have granted permission for a District Centre to the north west of the town centre of Graigecullen. The scheme will be anchored by Dunnes Stores and is currently under construction.

More recent developments within Carlow have accounted for an additional 14,083 sq.m. of net retail floorspace. These retail developments have included a mixed use development on the Doyle’s of the Shamrock site, a retail/commercial development beside Celtic Linen on the Barrow Track and retail development on Tullow Street.

WATERFORD CITY

Waterford City is designated as Gateway within the context of the National Spatial Strategy and is the regional capital of the South East Region. The city is a Tier 2 centre in the national retail hierarchy and is the only designated Gateway in the region in the NSS and SERPG. The

City Council administrative area had a population of 44,594 in 2002, an increase of 4.8% since the 1996 Census. There has been no retail strategy prepared for Waterford City and thus there is no detailed information on the quantum or breakdown of what retail floorspace there is in the city. However, the 2006 Update and Review of the County Waterford Retail Strategy outlines how the total retail floorspace in the city and environs is of the order of 60,000 sq.m. - 70,000 sq.m.

Waterford City has greatly improved its retail offer in recent years. The County Retail Strategy outlines how new retail developments include Ardkeen comprising Tesco, Next and Homebase DIY.

KILKENNY CITY

Kilkenny City is designated a 'hub' in the National Spatial Strategy and a Tier 3 centre in the national retail hierarchy. Along with Waterford and Wexford, Kilkenny is identified within the region as having substantial capacity for additional residential and employment functions. The 2002 Census outlined how Kilkenny had a population of 8,591 having grown a rate of only 1% since 1996. Preliminary 2006 Census figures issued by the central statistics office outlines how the current population of Kilkenny is 8,625 representing a growth rate of 0.4%. Kilkenny had a total net retail floorspace of 76,214 sq.m. in 2004. Kilkenny is considered as one of the most buoyant and attractive retail centres outside of Dublin and the regional capitals. Its success is linked to leisure and tourism attraction of the historic city centre and castle. The town has benefited from significant environmental improvement works in recent years.

Recent Developments

A substantial expansion of the city centre is under construction at McDonagh Station (25,115sq.m. GFA) and there is a further proposal for the development of the Mart site off Barrack Street. To manage the process of expansion and improvement and to secure an integrated approach, the Borough Council have recently commissioned a city centre Local Area Plan.

There are advanced proposals for a new District Centre at Ferryband on the N25, to be anchored by Dunnes Stores. This will be highly accessible from New Ross. There are also proposals emerging for a new town centre scheme at Michael Street. Waterford County Council have recently

granted permission for a substantial retail park on the Outer Ring Road to the west of the city.

CONCLUSION

An assessment of the competing centres within the Greater Dublin Area outlines how town centres such as Bray, Dundrum and Arklow have experienced extensive growth in the quantum and quality of retail offer provided over the past number of years. This is of particular relevance to County Wexford as improvement schemes to the N11 have decreased journey times to the Greater Dublin Area, and could have the effect of making town centres such as Dundrum, Cherrywood , Bray and Arklow attractive retail destinations particularly for residents in North Wexford. The M50 extension has made Dundrum, Cherrywood and Bray very close together in driving terms. If the Bray town projects get final planning permission and the plans for Cherrywood come to fruition this particular area is going to see some of the most intensive retail development anywhere in Ireland.

Recent developments in competing centre such as Waterford, Kilkenny and Carlow have also lead to an increase in the quantum and quality of retail floorspace offered in these centres. These areas are considered the principal competitor counties with Wexford in the South East Region. It is therefore evident that Wexford will have to provide a comparative retail offer in order to retain expenditure within its Town Centres.

These trends explain the importance of particularly developing Wexford as a major retail destination in the South East by the identification of land on the edge of the town centre for extensive new retail facilities and through continued environmental improvement and traffic management initiatives. These trends also present a challenge to Gorey in particular given its proximity to the Dublin centres.

CHAPTER 7 – CAPACITY ASSESSMENT

INTRODUCTION

In this section we carry out an assessment of the likely capacity in quantitative terms of additional retail floor space in Co. Wexford for the study period. This section reviews and updates the floorspace capacity assessment presented in the 2005 Strategy taking into account the changes to the population and population forecasts.

In the review of the Strategy, to be consistent with the new County Development Plan and the 2006 Census figures, we cover the period from 2006-2011 and 2011 to 2016. In respect of looking beyond 2011, this enables a longer term look at retail planning and potential in the County to be taken, which is consistent with the South Eastern Regional Planning Guidelines. The base year for the purposes of this capacity assessment is 2004, the latest year for which comprehensive floorspace data is available.

THE APPROACH

The approach taken is a step by step capacity assessment including the following steps:

1. Estimate the population at base and design year.
2. Estimate of expenditure per capita on convenience and comparison goods at the base year and design year.
3. Estimate of total available expenditure in the base year and design year for residents of County Wexford with adjustments to allow for inflows and outflows based on the previous household and shopper's surveys.

4. Estimate the likely increase in expenditure available for provision of additional floorspace, making allowances for existing planning permissions, increased efficiency of existing retail floorspace and changes in the proportion of expenditure on other forms of retailing such as internet or mail order.
5. Estimate the likely average turnover of new floor space in convenience and comparison bulky household goods.
6. Estimate the capacity for additional floorspace in the county.

POPULATION

The 2002 Census of Population carried out by the Central Statistics Office states that the population of County Wexford was 116,596 persons. Preliminary 2006 Census figures outlines how the population has grown to 131,615. This represents an increase of 12.9% in the 4 year intercensal period. 71% of this increase is outlined as being due to inward migration.

In order to be consistent with the Wexford County Development Plan Wexford County Council have provided us with population projections for the County up to 2016. These projections are based on both a high and low growth scenario. Scenario 1, the high growth scenario, envisages a continuation of the current level of inward migration into the county while Scenario 2, the low growth scenario, assumes 50% of the current migration levels. The following population forecasts are given for the county for the high and low growth scenarios.

Table 7.1: Scenario 1 High Growth Population Projections for Co. Wexford

2004	2006	2011	2016
124,106	131,615	153,090	177,100

Source: Wexford County Council

Table 7.2: Scenario 2 Low Growth Population Projections for Co. Wexford (based on figure of 50% of 2002-2006 Migration trend)

2002	2006	2011	2016
124,106	131,615	146,410	162,240

Source: Wexford County Council

EXPENDITURE PER CAPITA

The Retail Planning Guidelines²¹ Study examines three principal sources of data on retail planning expenditure in Ireland. These are the Annual

²¹ Retail Planning Guidelines for Planning Authorities DoEHLG, January 2005

Services Inquiry, the National Income and Expenditure Accounts and the Household Budget Survey. The survey concludes that the most reliable data source for established baseline expenditure is the Annual Services Inquiry. The most recent Annual Service Inquiry was published in 2003. This source is therefore used for the purposes of this capacity assessment. However, in order to be consistent with the base year, the figures for 2003 have been adjusted to 2004 using the Consumer Price Index.

Some adjustments to the data set out in Table 1 of the Services Inquiry are also necessary in order to ensure that goods are correctly categorised between comparison and convenience.

Firstly, it is estimated that approximately 10% of retail sales in non specialised stores is in department stores and other comparison goods. The remaining 90% is categorised as convenience sales. This is in line with the conclusions of the Tym/Blackwell study commissioned as part of the Retail Planning Guidelines for Planning Authorities.

Secondly, the Retail Planning Guidelines Study provides that the category "other retailing in specialised stores" should be taken as comparison expenditure, with the exception of a small element of forecourt sales. We have made an allowance for this. We have also utilised the 10% adjustment for department stores and comparison goods.

For the purposes of this study expenditure on pharmaceutical goods and medical articles have been omitted from the comparison expenditure estimate as many medical or pharmaceutical products that would not constitute either convenience or comparison goods by the normal definition.

EXPENDITURE ESTIMATES

Based on the 2003 Annual Service Inquiry and the Consumer Price Index, we have estimated that the total expenditure per capita in 2004 on convenience goods was €3,046. This is based on the 2002 national census figure which has been adjusted to provide an estimated figure of €3,995,683 for 2003.

For convenience goods we have assumed a high and low growth rate of 2% and 1% respectively for the period 2002 to 2006. This is based on the assessment of growth rates set out in the Retail Sales Index (CSO) and adjusted to allow for population increases. The estimate of convenience expenditure per capita in 2006 is therefore estimated at €3,107 for low growth and €3,169 for high growth.

The last Household Budget Survey (2001) for which there are breakdowns on a regional basis, show that convenience expenditure per household in the south east region was equivalent to the national average. We have no reason to assume that this position has changed. National figures for convenience expenditure are therefore used for the purposes of this capacity assessment.

The figure for convenience goods expenditure is also projected forward to 2016. Again a high growth rate of 2% per annum was used which gave a total of €3,499 per capita in 2011. Expenditure on convenience goods will amount to €3,863 per capita in 2016 at the growth rate of 2%. The low figure is based on a more conservative 1% increase in expenditure per capita per annum. This gives a figure of €3,266 by 2011 and €3,432 by 2016.

Comparison goods expenditure has also been calculated based on the Annual Service 2003 and the Consumer Price Index. This gives a per capita expenditure figure of €2,781 in 2004 prices.

We have made an adjustment however for Wexford to allow for lower expenditure per capita on comparison goods. A CSO publication on regional per capita income (2001) outlines Wexford's per capita income at approximately 85.2% of the national average. For the purposes of this study we have assumed that expenditure on comparison goods in Westmeath is approximately 90% of the national average. This equates to a figure of €2,503 in 2004.

Expenditure growth on comparison goods has been substantially higher than expenditure growth on convenience goods. This is because most household's requirements in respect of convenience products have been largely satisfied and most additional expenditure has gone into products such as clothing, footwear, household goods, electrical goods, carpets, furniture and so on. Exceptionally high levels of growth in comparison goods sales were experienced in the late 1990's up to 2001. Growth figures have also been strong in the most recent years. Based on the Retail Sales Index we have estimated that expenditure on these categories of goods increased at a rate of 8% per annum for the period 1997 to 2002.

It is clear that expenditure growth is now somewhat lower than in the recent past. We have therefore used a more conservative long term average for projecting forward and we have assumed a high scenario growth rate of 7% per annum per capita and a low growth rate scenario of 5% per annum per capita for comparison goods.

Based on the high growth rate of 7% per annum we estimate that the expenditure per capita in comparison goods will reach €4,019 in 2011 and €5,637 by 2016 (all 2004 prices).

Based on the low growth rate scenario of 5% per annum per capita by 2011 the expenditure on comparison goods per capita will be €3,522 rising to €4,495 by 2016 (2004 prices).

Table 7.3: Expenditure per Capita

Year	Convenience	Comparison	Total
2004	€3,046	€2,503	€5,549
2006	€3,107-€3,169	€2,759-€2,865	€5,867-€6,035
2011	€3,266-€3,499	€3,522-€4,019	€6,787-€7,518
2016	€3,432-€3,863	€4,495-€5,637	€7,927-€9,500

Source: Price Year 2004

TOTAL AVAILABLE EXPENDITURE

The total available expenditure is set out in Table 7.4. This is calculated by multiplying the population by the expenditure per capita for each category for each year.

In 2006 we estimate the total available for convenience expenditure is between €409m and €417m assuming the high growth scenario for convenience goods and between €363m and €377m for comparison goods. By 2011 comparison expenditure will exceed convenience under the high growth scenario by a significant margin. We estimate there will be between €539m and €615m of comparison expenditure in the county compared to between €500m and €535m convenience expenditure.

This trend is reflected under Scenario 2, the low growth Scenario. By 2011 it is estimated that expenditure on convenience goods will be between €455m and €512m, and between €516m and €588m on comparison goods.

The projections for 2016 are somewhat conjectural. However, having regard to the assumptions set out above we estimate that by 2016 convenience expenditure will be between €608m and €684m and comparison expenditure in 2016 will be between €796m and €998m under the high growth scenario. Under the low growth Scenario it is estimated that convenience expenditure will be between €557m to €627m and comparison expenditure will be between €729m and €915m.

Table 7.4: Scenario 1: Total Available Expenditure

Year	Convenience	Comparison	Total
	€ Million	€ Million	€ Million
2004	€378	€311	€689
2006	€409 - €417	€363 - €377	€772 - €794
2011	€500 - €536	€539 - €615	€1,039 - €1,151
2016	€608 - €684	€796 - €998	€1,403 - €1,682

Source: Tables 7.1 and 7.3. 2004 prices

Table 7.5: Scenario 2: Total Available Expenditure

Year	Convenience	Comparison	Total
	€ Million	€ Million	€ Million
2004	€378	€311	€689
2006	€409 - €417	€363 - €377	€772 - €794
2011	€455 - €512	€516 - €588	€971 - €1,101
2016	€557 - €627	€729 - €915	€1,286 - €1,541

Source: Source Tables 7.2 and 7.3. 2004 prices

It is necessary to adjust total available expenditure to allow for inflows and outflows for the county. In other words, to allow for people living outside Wexford County who shop in Wexford Town or Gorey or elsewhere in the county and to allow for the expenditure generated by the population of the county which goes to centres outside Wexford.

A figure of 10% is used to accommodate for inflow of expenditure into the county for comparison goods expenditure and 10% for convenience goods expenditure. This figure is to take into account tourist expenditure and holiday home owners.

The 2005 Wexford County Retail Strategy highlighted that the findings of the shopping survey commissioned as part of the Strategy outlined that there is approximately 2% leakage of convenience expenditure and 10% leakage of comparison expenditure. These leakage figures are assumed for the purposes of this capacity assessment. The relevant figures are outlined on Tables 7.6 and 7.7 below and the overall increase in expenditure is summarised in Tables 7.8 and 7.9.

Table 7.6: Scenario 1: Total Available Expenditure Allowing for Inflow and Outflows and Adjusted for Increase in Turnover of Existing Floor Space

Year	Convenience	Comparison	Total
	€ Million	€ Million	€ Million
2006	€441 - €450	€360 - €373	€800 - €823
2011	€539 - €577	€534 - €609	€1,073 - €1,187
2016	€655 - €738	€788 - €988	€1,443 - €1,726

2004 prices

Table 7.7: Scenario 2: Total Available Expenditure Allowing for Inflow and Outflows and Adjusted for Increase in Turnover of Existing Floor Space

Year	Convenience	Comparison	Total
	€ Million	€ Million	€ Million
2006	€441 - €450	€360 - €373	€800 - €823
2011	€490 - €552	€510 - €583	€1,001 - €1,135
2016	€600 - €676	€642 - €805	€1,242 - €1,480

2004 prices

Table 7.8: Scenario 1: Increase in Expenditure

Year	Convenience	Comparison	Total
	€ Million	€ Million	€ Million
2006-2011	€98 - €128	€174 - €236	€272 - €364
2011-2016	€116 - €160	€254 - €379	€371 - €539

2004 prices

Table 7.9: Scenario 2: Increase in Expenditure

Year	Convenience	Comparison	Total
	€ Million	€ Million	€ Million
2006-2011	€50 - €103	€151 - €209	€200 - €312
2011-2016	€110 - €123	€131 - €222	€241 - €346

2004 prices

TURNOVER AND FLOOR SPACE CAPACITY

It is possible to derive the existing average turnover rate per sq metre of existing floor space by dividing the total available expenditure in 2006 by the floor space in each category. However, complications arise in respect of the comparison category as very different levels of turnover will apply to town centre comparison goods such as clothing and footwear and smaller household durables than would apply to bulky household goods sold in retail warehouses. Having regard to the Household Budget Survey and experience elsewhere in this respect it is estimated that approximately 20% of expenditure will be accounted for by bulky household goods in retail warehouse type premises.

We have applied an average turnover per sq.m. for all floorspace in County Wexford for 2006 for convenience goods of €10,000 per sq.m., €4,500 for comparison goods and €2,400 for bulky goods at 2004 prices. These figures have been adjusted to grow at a rate of 1% per annum to allow for efficiency gains by retailers. The figures are based on published retail industry data and have regard to the average turnover per sq.m. calculations established in the Retail Planning Guidelines Study 1999 (Tym and Blackwell). They reflect the average turnover levels retailers will require to sustain a healthy level of activity. They do not count in the high levels of overtrading that have existed in many areas in recent years.

These figures show the average turnover per sq metre of existing floor space overall in the county. They disguise significant differences in turnover for different shops. In general, multiple branches of national and international multiple shops are located within purpose built shopping centres or other prime locations. Prime town centre shop units will have substantially higher turnover per sq metre than shops which are less well located or situated in older inefficient premises and are operated as independents. In particular, it is likely that smaller units and units outside the main town have substantially lower turnover per sq. metre than these averages whilst the largest supermarket operators have substantially higher turnover rates per sq. metre.

Table 7.10: Floorspace Requirements Scenario 1

Year	Convenience	Comparison	Bulky	Total
	sq.m.	sq.m.	sq.m.	sq.m.
2011 Low	51,279	90,282	42,320	183,881
2011 High	54,941	103,030	48,295	206,265
2016 Low	59,322	126,827	59,450	245,599
2016 High	66,767	159,054	74,577	300,378

Table 7.11: Floorspace Requirements Scenario 2

Year	Convenience	Comparison	Bulky	Total
	sq.m.	sq.m.	sq.m.	sq.m.
2011 Low	46,662	86,342	40,473	173,477
2011 High	52,543	98,534	46,188	197,265
2016 Low	54,344	103,276	48,411	206,031

2016 High	61,164	129,519	60,712	251,395
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In order to calculate the quantity of future retail floorspace required for the county, the existing provision of retail floorspace should be subtracted from the totals outlined in Tables 7.10 and 7.11 above. The 2005 Wexford County Retail Strategy outline that in 2004 the existing convenience floorspace was 43,319 sq.m. and comparison floorspace was 84,184 sq.m. We assume that this comparison figure includes Clonard Retail Park which includes 4,995 net sq.m. of bulky retail floorspace. Based on the 2004 floorspace figures, table 7.12 and 7.13 below outline the additional floorspace capacity for convenience, comparison and bulky floorspace in the county.

Table 7.12: Scenario 1: Additional Floorspace Capacity in County Wexford

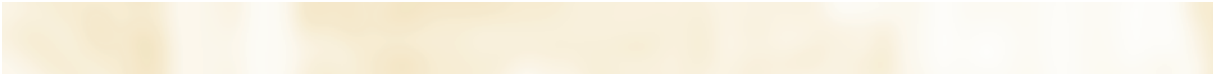
Year	Convenience	Comparison	Bulky	Total
	sq. m.	sq. m.	sq.m.	sq. m.
2011	7,690-11,622	11,093-23,841	37,325-43,300	56,378-78,762
2016	16,003-23,448	47,638-79,865	54,445-69,562	118,096-172,875

Table 7.13: Scenario 2: Additional Floorspace Capacity in County Wexford

Year	Convenience	Comparison	Bulky	Total
	sq. m.	sq. m.	sq. m.	sq. m.
2011	3,343-9,224	7,153-19,345	35,478-41,193	45,974-69,762
2016	11,025-17,845	24,087-50,330	43,416-55,717	78,528-123,892

It can be seen from Scenario 1 Table 7.12 that the capacity for additional convenience floor space by 2011 ranges from approximately 7,690 sq. metres to 11,622 sq. metres and for comparison goods between 11,093 sq.m. and 23,841 sq.m. For bulky comparison goods in the form of retail warehousing, there is scope for between 37,325 sq.m and 43,300 sq. metres of additional floor space.

Figures for 2016 under the high growth scenario outline how there is capacity for between 16,003 to 23,448 sq.m. for convenience expenditure and 47,638 and 79,865 sq.m. for comparison expenditure. Additional floorspace capacity for Bulky goods is between 54,445 and 69,562 sq.m.



The low growth scenario outlined in Table 7.13 highlights how the capacity for additional convenience floor space by 2011 ranges from approximately 3,343 sq.m. to 9,224 sq.m. The equivalent demand for comparison floorspace is between 7,153 and 19,354. For bulky comparison goods in the form of retail warehousing, there is scope for between 35,478 sq.m and 41,193 sq.m of additional floor space.

The 2016 projections under the low growth scenario outline how there is capacity for between 11,025 and 17,845 sq.m. for additional convenience floorspace, 24,087 and 50,330 sq.m for comparison floorspace and between 43,416 and 55,717 for bulky warehouse floorspace.

CHAPTER 8 – STRATEGIC GUIDANCE ON LOCATION AND SCALE OF NEW RETAIL DEVELOPMENT

INTRODUCTION AND KEY PRINCIPLES

The principle aim of this chapter is to provide a review of the recommendations contained within the 2005 Wexford County Retail Strategy regarding locations for retail development, their suitability and whether there are alternative sites that should now be identified. This section also advises on the quantum of new retail floorspace that is required and identifies where this floorspace should be located.

The health check assessment and quantitative review outlines how the principle towns within Wexford are performing at present. The role of this strategy is to advise on the scale of new retail floorspace is required in order to maintain and enhance the performance and where this new floorspace should be located. In this context the location and scale of new retail development must have regard to the planning context for the county and in particular the Retail Planning Guidelines, the County Development Plan and the Town Development Plans.

A key principle in the provision of future retail floorspace is the need to reinforce the existing retail hierarchy of the county and in particular existing town and village centres. It is particularly important that the principle town of Wexford continues to develop its function to meet the shopping needs of residents of the county and to ensure a healthy and competitive retail environment.

One of the principle conclusions of the study is that the confined nature of much of the town centres does not provide for the size and quality of floorspace required by major national and international retailers. There is also a requirement to upgrade the existing floorspace as well as providing new space.

An important consideration in defining the strategy is the likely impact of the completion of the proposed bypasses at Gorey, Enniscorthy and New Ross. This will greatly increase the accessibility to key centres along these routes and the accessibility to residents of Co. Wexford to competing centres within the Greater Dublin Area and Waterford City.

The comparative assessment of the County and its main centres against other main centres in adjoining counties has identified that the County requires to greatly improve and enhance the quality and quantum of its retail floorspace if it is to remain competitive and reverse both convenience and comparison expenditure leakage to centres outside of the County.

The retail hierarchy as set out in Section 7 of the 2005 Wexford County Retail Strategy outlines that while Enniscorthy and New Ross fit into their roles as third tier settlements there is potential for Gorey to be upgraded from a fourth to a third tier settlement and Wexford to be upgraded from a third to a second tier settlement. Improvements in the retail provision of these towns would therefore be necessary to meet this aim.

DISTRIBUTION OF FLOOR SPACE REQUIREMENTS

A capacity assessment has been undertaken in the previous section of this report. This is based on a number of forecasts and assumptions which may be subject to change and therefore a range has been set out for 2011 and 2016. In this strategy we will concentrate on the period of 2011. The base floorspace figures are for 2004 including full permission granted at the time but not implemented.

The capacity assessment outlines that under the high growth scenario, Table 8.1 below, there is a need for approximately 7,690 sq.m. to 11,622 sq.m. of convenience goods floorspace and for comparison goods between 11,093 sq.m. and 23,841 sq.m in 2011. For bulky comparison goods in the form of retail warehousing, there is scope for between 37,325 sq.m and 43,300 sq. metres of additional floor space.

Figures for 2016 under the high growth scenario outline how there is capacity for between 16,003 to 23,448 sq.m. for convenience expenditure and 47,638 and 79,865 sq.m. for comparison expenditure. Additional floorspace capacity for Bulky goods is between 54,445 and 69,562 sq.m.

Table 8.1: High Growth Scenario

Year	Convenience	Comparison	Bulky	Total
	sq. m.	sq. m.	sq.m.	sq. m.
2011	7,690-11,622	11,093-23,841	37,325-43,300	56,378-78,762
2016	16,003-23,448	47,638-79,865	54,445-69,562	118,096-172,875

The low population growth scenario outlined in Table 8.2 highlights how the capacity for additional convenience floor space by 2011 ranges from

approximately 3,343 sq.m. to 9,224 sq.m. The equivalent demand for comparison floorspace is between 7,153 and 19,354. For bulky comparison goods in the form of retail warehousing, there is scope for between 35,478 sq.m and 41,193 sq.m of additional floor space.

The 2016 projections under the low growth scenario outline how there is capacity for between 11,025 and 17,845 sq.m. for additional convenience floorspace, 24,087 and 50,330 sq.m for comparison floorspace and between 43,416 and 55,717 for bulky warehouse floorspace.

Table 8.2 Low Growth Scenario

Year	Convenience sq. m.	Comparison sq. m.	Bulky sq. m.	Total sq. m.
2011	3,343-9,224	7,153-19,345	35,478-41,193	45,974-69,762
2016	11,025-17,845	24,087-50,330	43,416-55,717	78,528-123,892

The distribution of new retail floorspace should reflect the settlement strategy as outlined within the County Development Plan. However, there is a particular need to develop an enhanced retail role in Wexford Town, as it is the principle retail centre in the county.

Additional convenience and comparison retail floorspace should be provided where possible within the existing town centres. Limited convenience floorspace may be appropriate in neighbourhood centres in Gorey and Wexford town to serve existing and new housing areas. Additional bulky household goods floorspace should be met either in town centres or in purpose built retail warehouse parks situated on the edge of existing town centres where possible. Specific objectives in relation to each centre are set out below.

The figures outlined in the capacity assessment should not be considered as upper limits, merely as indicative of the scale of new floorspace required to meet the needs of existing and future population and expenditure in the county. Additional new floorspace may be proposed and this could replace some existing outdated or poorly located retail floorspace. The quantum only becomes an important consideration where new floorspace is proposed outside of the defined retail core of any town or village and the issue of likely impact on the town centre as a whole arises.

WEXFORD

Wexford has a well established retail core and is the most important retail centre in the County. The 2005 County Retail Strategy outlines that the main issue in the town is the lack of linkages between the retail core and

the waterfront, which could be exploited more fully as a retail frontage creating a more cosmopolitan atmosphere. The previous retail strategy also highlights a series of sites which could be redeveloped for town centre purposes. Wexford should be developed as a retail centre of regional significance for the South East. Significant additional floorspace for high order comparison retailers, including leading national and international multiples is needed in the short term to ensure that the retail floorspace needs of the county are met and to counter balance improved retail offers in Dublin, Waterford and Carlow.

Town Centre Development Opportunities

The health check assessment undertaken in section 5 of this strategy also highlights how much of the floorspace available in the town does not provide the size and quality of floorspace demanded by major national and international retailers. The strategy recommends that this issue could be addressed by the development of larger retail units outside of the traditional town centre, leaving the town centre to accommodate more specialised retail uses to be complemented by extensive environmental improvement works. Current proposals for the Trinity Wharf site may set a precedent for this type of development along the Quays.

In addition to the sites outlined for redevelopment potential within the 2005 County Retail Strategy it is considered that there are other areas along the waterfront which have the capacity to absorb future development. The railway station for example is adjoined by substantial amounts of derelict lands which could be used for retail purposes.

ENNISCORTHY

Enniscorthy is an old Norman settlement situated on the banks of the River Slaney. The town has a concentrated retail core to on the western bank of the river with little retail provision and few opportunities for development to the east.

Town Centre Development Opportunities

The 2005 County Retail Strategy outlines how the main focus of the Development Strategy for Enniscorthy Town is the refurbishment/upgrade of existing stock, to make better use of available space particularly at the Abbey Centre Mall. Added to this, it is considered that the Quays area to the rear of the Abbey Square Shopping Centre also represents significant development potential. The new Dunnes Stores and shopping centre development on the Minch Norton site in the town centre and the retail park development on the Killealy Road will greatly strengthen and improve the town's retail offer.

GOREY

Gorey has a small, extremely vibrant retail core concentrated on Main Street. The 2005 County Retail Strategy outlines how the only significant issue identified with the town is that there is no obvious retail linkage to the Tesco Store at the end of Esmonde Street. This position is now changing however as additional retail facilities are being developed on Esmonde Street.

Town Centre Development Opportunities

There is a particular need to provide for future significant retail floorspace in Gorey to help counter balance the increased attraction in Arklow, Bray, Cherrywood and Dublin. The most important development opportunity lies to the south west of the town centre, on lands to the south at the western end of Main Street, running west from the Dunnes Stores development, currently under construction. There is a significant area of "greenfield" land in this location which could be developed to meet the large floorspace requirements of multiple retailers, further reinforcing the retail profile of the town. This area should be promoted in preference to any out of centre locations.

NEW ROSS

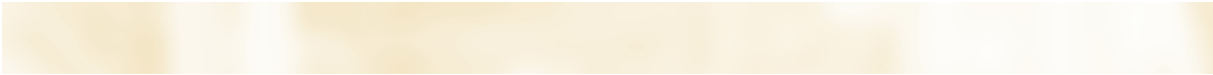
New Ross also has a concentrated retail core adjacent to the river, although like Wexford this has not been fully exploited due to poor traffic/pedestrian interaction.

Town Centre Development Opportunities

While the topography of the town acts as an inhibiting factor to the future expansion of the town centre, there are various under utilised and large vacant sites within the town centre which could be redeveloped for retail purposes. These are outlined within the 2005 County Retail Strategy and include several derelict large sites along the waterfront which offer significant retail development potential.

OTHER TOWNS

The towns and villages of Wexford, other than Wexford, New Ross, Gorey and Enniscorthy are of a relatively small scale. Clear policy frameworks for their future development are being prepared separately by Wexford County Council in the form of village and town plans. The general principles in relation to the location and scale of new development will



apply to these centres in the interests of sustainable development and maintaining a balanced distribution of facilities throughout the county.

Small convenience stores provide an important function in the community of small towns and villages especially for those sectors of the population without access to a car. The closure of local convenience shops will have a significant negative impact on the quality of life for this sector of the population and further erode the socio economic fabric.

CHAPTER 9 – POLICIES, ACTIONS AND CRITERIA FOR ASSESSING FUTURE RETAIL DEVELOPMENT

The principle aim of this chapter is to provide recommendations to encourage the improvement of the town centres and policies regarding the assessment of future planning applications for retail development.

SUMMARY OF POLICIES AND ACTIONS

This section will provide a brief summary of the appropriate policies and actions to encourage the improvement of town centre which follows from the qualitative assessment of Wexford, Enniscorthy, Gorey and New Ross outlined in Chapter 5 of this study.

WEXFORD

Wexford as the county town is considered vibrant, with a range of independents and national operators. Few towns have such an extensive coastline and waterfront area and this serves as one of the principle attractions to the town centre. However, the quality of the public realm and physical environment of the traditional town centre would benefit from a continuation of improvement works and further investment.

Parts of Main Street suffer from poor quality pavements with the requirements of vehicles dominant over that of pedestrians. A section of North Main Street has recently been upgraded and this sets a standard which should be continued and improved upon throughout the town centre.

The various lanes and sides streets which function as linkages from The Quays to Main Street should be upgraded and enhanced.

The traditional town centre would benefit from more pedestrian linkages with the extended town centre area which would enhance the character and accessibility of the town. The pedestrianisation of South Main Street in particular should be implemented as a priority.

The aesthetic quality of the town centre is impinged by an extensive mesh of overhead wiring. These overhead wires should be relocated underground, as is common practice in town centres.

Design guidelines for shop frontages and upper floors of buildings should be prepared and advice given to property owners and retailers on urban design. This should include the retention and the reinstatement of existing traditional shop fronts and timber sash windows in upper floors.

An initiative should be taken to encourage “living over the shop” in the town centre.

ENNISCORTHY

Overall, Enniscorthy is considered as a healthy town centre with significant opportunities for retail expansion. The town centre follows a historic street layout, which rises steeply from the river. It is an attractive and vibrant town with retailing clustering around the Market Square. Notwithstanding this the town would benefit from environmental enhancement and upgrading.

Limited use is made of the upper floors of retail units and this imposes a negative impact on the streetscape. An initiative should be taken to encourage “living over the shop” in the town centre to enhance its overall vibrancy.

Design guidelines for shop frontages and upper floors of buildings should be prepared and advice given to property owners and retailers on urban design. This should include the retention of existing traditional shop fronts and timber sash windows in upper floors.

The Quays area to the rear of Abbey Street Shopping Centre would benefit from environmental enhancement and upgrading.

GOREY

The health check assessment indicates that Gorey has a healthy, vibrant and vital town centre. The overall environmental quality and amenity of the town is generally good with an attractive and coherent streetscape composed of colourful shopfronts and a uniform building line. However, the town would benefit from further environmental improvements outlined below.

There are limited pedestrian crossing facilities within the town centre. More frequent pedestrian crossing facilities should be developed within the town centre. The main street has a lot of good traditional shopfronts which need to be retained. The historic fabric of the street needs to be preserved and protected.

The secondary side streets in the town are relatively vacant and subject to dereliction, decay and underutilisation. These areas have

capacity to absorb small scale commercial activity. These areas should be upgraded and enhanced.

NEW ROSS

New Ross has a concentrated retail core adjacent to the river which has been under exploited due to traffic/pedestrian interaction. The Quays is the most amenable area in the town. The area adjacent to the River Barrow is well utilised with a quality walkway for pedestrians to enjoy.

The town centre has benefited from recent environmental enhancement. These environmental enhancement schemes should be continued within the town centre and include:

- The upgrading of pavements, particularly on the fringes of the town centre
- Widening of pavements at regular intervals to break up the lines of parked cars
- Under grounding of remaining overhead wires

Design guidelines for shop frontages and upper floors of buildings should be prepared and advice given to property owners and retailers on urban design. This should include the retention of existing traditional shop fronts and timber sash windows in upper floors.

There are limited pedestrian crossing facilities within the town centre. The traditional town centre would benefit from more pedestrian linkages with the extended town centre area which would enhance the character and accessibility of the town.

Limited use is made of the upper floors of retail units and this imposes a negative impact on the streetscape. An initiative should be taken to encourage "living over the shop" in the town centre to enhance its overall vibrancy.

CRITERIA FOR ASSESSING FUTURE RETAIL DEVELOPMENT

All applications for significant retail development should be assessed against a range of criteria. These criteria are set out below. It should be noted that it is not appropriate to assess all applications for new retail development against all the criteria, particularly developments which are clearly in accordance with strategy in Section 8 and small scale developments.

The Sequential Test

It is stated in the Retail Planning Guidelines:

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

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

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

In addition to the sequential test, the Retail Planning Guidelines recommend that the applicant should address the following criteria:

- Support the long term strategy for town centres as established in the development plan and not materially diminish the prospect of attracting private sector investment into one or more town centres.
- Cause and adverse impact on one of more town centres, either singularly or cumulatively with recent development or other outstanding planning permissions, sufficient to undermine the quality of the centre or its role in the economic and social life of the community.
- Diminish the range of activities and services that a town centre can support.
- Cause and increase in the number of vacant properties in the primary retail area that is likely to persist in the long term.
- Ensure a high standard of access both by public transport, foot, private car so that the proposal is easily accessible by all sections of society.

- Link effectively with an existing town centre so that there is likely to be commercial synergy.

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

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

CRITERIA FOR ASSESSING PARTICULAR TYPES OF DEVELOPMENT

This section sets out the criteria for assessing planning applications for different types of retail development.

Convenience Food Shopping

Where practicable new convenience retail development should be located within a town centre or within a designated neighbourhood or district centre serving a large residential community. Accessibility is the key to the success of such developments and such proposals should be accessible by all modes of transport particularly pedestrians and public transport. As large convenience shops attract customers carrying out large weekly shopping, it is important that such development should also be served by adequate car parking. Out of centre sites for this type of retail development require careful assessment, subject to the sequential test assessment and their potential impact on nearby centres. The maximum size of supermarkets is 3,000 square metres net sales as defined in the Retail Planning Guidelines

Discount Food Stores

Discount food stores typically have a floor area of approximately 1,500-1,800 sq metres gross and are served by a surface car park with approximately 80 – 100 spaces. The preferable location for such development is again in the town centre or designated district centre or neighbourhood centre. The potential role that discount food stores have in anchoring small centres or neighbourhood centres is

recognised in the Retail Planning Guidelines and thus it is appropriate to permit such development within neighbourhood centres.

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

District Centres

It is likely that as Wexford continues to grow in population terms, that there may be demand for the development of district centres to cater for newly developing residential estates. District Shopping Centres can play an important role in the County retail offer, especially in the convenience provision within the county.

Retail Warehouse Parks

It is recognised in the Retail Planning Guidelines that in general retail warehouses do not fit easily into town centres given their size requirements and the need for good car parking facilities. It is therefore appropriate to group these facilities into planned retail parks on the edge of the town centre if such sites are available or in an out of centre site, if the applicant can demonstrate that there are no suitable edge of centre sites available. Criteria for assessing retail warehouse applications include scale and design of the development, appropriate vehicular access and the quantitative need for such development.

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

Factory Outlet Centres

It is stated in the Retail Planning Guidelines that the success of these centres depends on drawing customers and visitors from a wide catchment area, including tourists, and there may be implications for existing tourist centres and established town centres, even those some distance from the proposals. Criteria for assessing such development should therefore focus on whether such a development is located in a strategic enough location to capture expenditure from a very wide catchment area. Such a development must be within easy reach of Dublin and in the interest of sustainability, preferably be located adjacent to or even within an existing town centre. Again, as such facilities are primarily geared towards the car borne customer, vehicular accessibility and adequate car parking are key factors.

Retail Warehouse Clubs

Retail Warehouse clubs as stated in the Retail Planning Guidelines share many of the characteristics of large retail outlets and therefore should be treated as any other large retail development. Such development should therefore be located within or on the edge of existing town centres and there should be a demonstrable need for its development both qualitatively and quantitatively. Particular consideration should be given to the design of such developments as often they have a retail warehouse type format and thus may be inappropriate within the traditional town centre. As such facilities are geared towards bulky shopping such facilities must also be served by adequate car parking.

Local Shops and Petrol Filling Stations

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

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