Wexford County Retail Strategy

Draft Wexford County Development Plan 2013-2019
Volume 4: Wexford County Retail Strategy
June 2012

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Section 1

1.0 Introduction

Wexford County Council has prepared this Draft County Retail Strategy 2013-2019 in accordance with the ‘Retail Planning Guidelines for Planning Authorities’ (hereafter referred to as the RPGs), published by Department of the Environment, Heritage and Local Government (DoECLG) in 2012. Previous retail strategies were prepared for the County in 2005 and 2007. This strategy is placed within a very different economic context, for Wexford County and Ireland as a whole. The aim of the strategy is to ensure a healthy and vibrant retail atmosphere in County Wexford, through retail policies which are framed within the context of national and regional plans, strategies and guidelines. The strategy will also provide information regarding the quantum, scale and types of retail development required within the lifetime of the Wexford County Development Plan 2013-2019, to facilitate a competitive, healthy and accessible retail market.

1.1 Preparation of the Draft Retail Strategy

There have been seven key stages in the preparation of this strategy:

(i) A comprehensive analysis of national and regional policy documents;

(ii) A review and update of data on existing retail floorspace in each of the four main towns of Wexford, New Ross, Gorey and Enniscorthy and the district towns of Courtown and Riverchapel, Kilrane and Rosslare Harbour, Bunclody, Wellingtonbridge and Castlebridge;

(iii) A comprehensive health check appraisal of the four main towns and the five district towns;

(iv) Household and shopper surveys to determine shopping patterns throughout the County;

(v) The identification of opportunity sites for development which could strengthen the retail activity within the four main towns of Wexford;

(vi) A quantitative assessment to determine future requirements for additional retail floorspace for the periods 2013-2019 and until 2022;

(vii) Policies to guide future retail development were prepared for the County.

1.2 Structure of the County Retail Strategy

The structure of the Draft County Retail Strategy 2013-2019 is as follows:

Section 2: provides an overview of the relevant national, regional and local policy relevant to County Wexford and the retail strategy.

Section 3: discusses the main findings of the household and shopper surveys.

Section 4: a health check appraisal of the five district towns and the towns of Wexford, New Ross, Enniscorthy and Gorey.

Section 5: defines the retail hierarchy and the retail core boundaries.

Section 6: provides the quantitative assessment on the retail floorspace requirement.

Section 7: outlines the policies and criteria for assessing future retail development.

Section 8: outlines in conclusion how the strategy adheres to the South Eastern Regional Planning Guidelines 2010-2022 and the RPGs.

Appendix 1: Glossary of terminology.

Section 2 Policy Context

2.0 Introduction

The purpose of this section is to review the policy documents which will have an impact on future retail provision of Wexford. It outlines the relevant policy documents pertinent to the County at national, regional and local level.

2.1 National Level

There are a number of national level plans and guidelines that are relevant to the future development of Wexford. The most important of these are:

- National Spatial Strategy 2002-2020
- National Development Plan 2007-2013
- The National Climate Change Strategy 2007-2012
- Smarter Travel – A Sustainable Transport Future: A New Transport Policy for Ireland 2009-2020
- Retail Planning Guidelines 2012

2.1.1 National Spatial Strategy

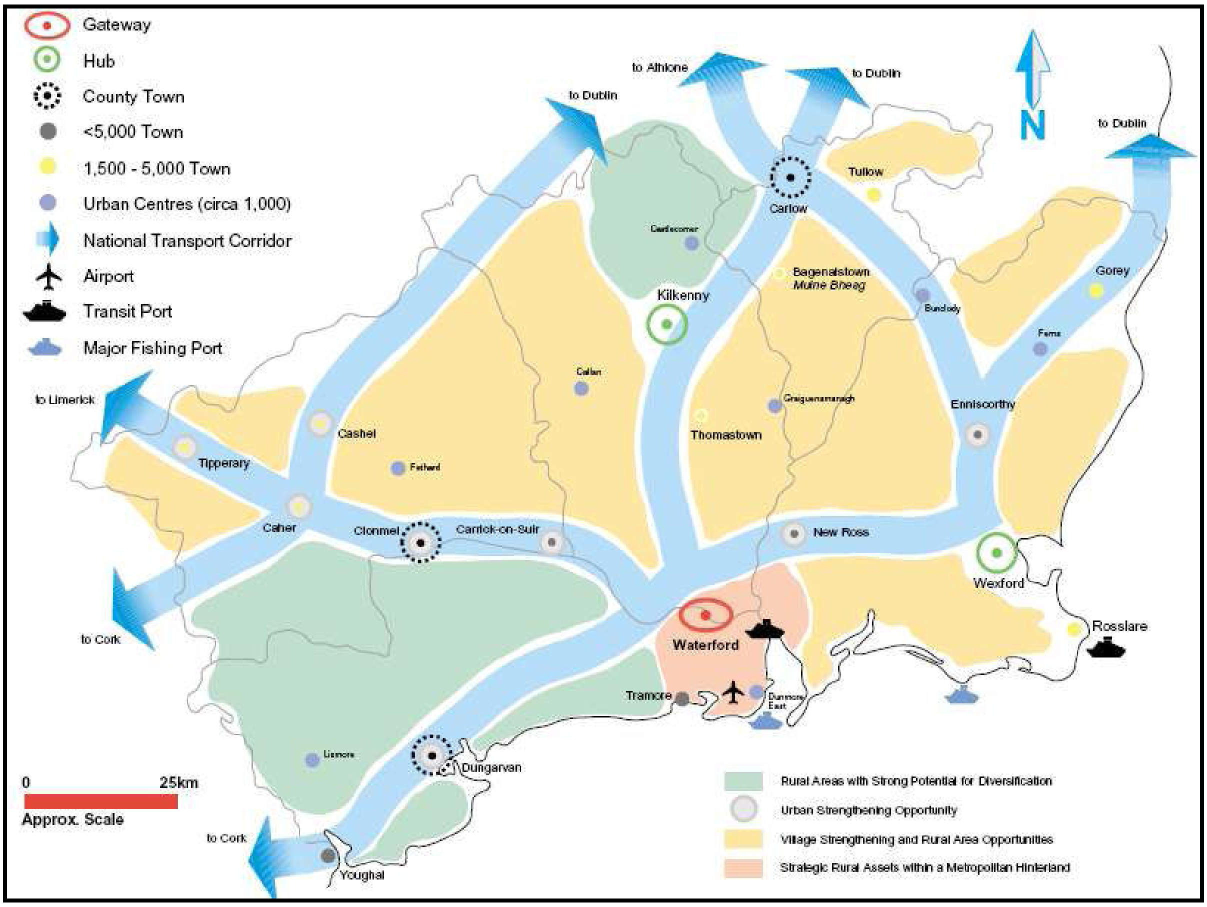
The National Spatial Strategy 2002-2020 – People, Places and Potential (NSS) was published by the Department of the Environment and Local Government (DoELG) in November 2002. It provides the spatial planning framework for Ireland for the period 2002-2020. The main aim of the NSS is to provide more balanced development throughout the State. It identifies broad spatial development patterns for areas and sets down indicative policies in relation to the location of industrial development, residential development, rural development and tourism and heritage. In order to achieve balanced regional development, the NSS has designated a number of strategic centres throughout the country with the potential to be drivers of development both at national level and within their own regions. These centres have been divided into two categories – Gateways and hubs.

Within the NSS it is envisaged that the Gateway of Waterford City, coupled with the strategically located Hubs of Wexford Town and Kilkenny City will act as a ‘growth triangle’ for the South East Region. Critical mass will be achieved through Waterford performing as a gateway, supported by Wexford and Kilkenny as hubs. Waterford, Wexford and Kilkenny will drive regional growth by providing a large and skilled population base, substantial capacity for additional residential and employment related functions and an improving transport network.

New Ross and Enniscorthy are identified within the NSS as an ‘Urban Strengthening Opportunity’ located along a strategic National Transport Corridor linking Dublin to Waterford (See Fig 1 below). According to the NSS these designated towns have the potential to grow and their strengths should be capitalised on through, amongst other things, planning and development promotion activities.

The NSS also stated that the town of Gorey should be capitalised on, through local planning and development promotion activities, with the support of urban renewal and other improvement initiatives, giving smaller towns a distinctive alternative for people attracted to the quality of life such towns can offer.

Figure 1 South-east region



Source: NSS, 2002.

2.1.2 National Development Plan 2007-2013

The National Development Plan 2007-2013 Transforming Ireland - A Better Quality of Life For All (NDP), was published in January 2007. It emphasises the fact that the strategically positioned county towns and other larger towns must be facilitated and allowed to develop; so that they play an important role in ensuring that balanced development takes place within, as well as between, Regions. The further development of these and other similar locations will be encouraged through effective local planning and leveraging wider public and private investment. It is stated, that in order strengthen the hubs, it will be necessary that national investment is partnered with local vision and leadership and the attraction of private investment.

The approach to other smaller towns, villages and rural areas is to invest in improvements to access; via the non-national roads network and rural public transport initiative, water services, rural broadband, community services and housing. This will enable these settlements to attract development and investment.

Towns, villages and rural areas need to be supported in the development of new areas of economic activity such as: local value added enterprise activities; tourism; local enterprise; services; and renewable energy to both complement the surviving elements of a restructured agri-business/natural resource sector and provide new employment opportunities.

2.1.3 The National Climate Change Strategy 2007-2012

The National Climate Change Strategy sets out the measures required to enable Ireland to meet its share of the EU's commitments under the Kyoto Protocol. It recommends a broad mix of measures aimed at achieving a modal shift to public transport, walking and cycling, as well as increased efficiency in both personal and freight transport.

2.1.4 Smarter Travel – A Sustainable Transport Future: A New Transport Policy for Ireland 2009-2020

The aim of the Smarter Travel document is that by 2020:

- Future population and economic growth will have to take place predominantly in sustainable, compact urban and rural areas which discourage dispersed development and long commuting.
- Work-related commuting by car will be reduced.
- Car drivers will be accommodated on other modes such as walking, cycling, public transport and car sharing or through other measures such as e-working.
- The total kilometres travelled by the car fleet in 2020 will not increase significantly from current total car kilometres.
- The road freight sector will become more energy efficient, with a subsequent reduction in emissions.
- Transport will make a meaningful contribution to Ireland's commitment under the proposed EU effort-sharing arrangement in relation to climate change and real reductions on current levels of emissions will be achieved.

2.1.5 Retail Planning Guidelines

The new Retail Planning – Guidelines for Planning Authorities (RPGs) were adopted in April 2012, which supersede the 2005 guidelines. 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 RPGs identify five key national policy objectives which are:

- Ensuring that retail development is plan-led;
- Promoting city/town centre vitality through a sequential approach to development;
- Securing competitiveness in the retail sector by actively enabling good quality development proposals to come forward in suitable locations;

- Facilitating a shift towards increased access to retailing by public transport, cycling and walking in accordance with the Smarter Travel strategy; and
- Delivering quality urban design outcomes.

The RPGs outline that Development Plans must therefore:

1. State the elements of their settlement hierarchy in line with the relevant regional planning guidelines and their core strategy;
2. Outline the level and form of retailing activity appropriate to the various components of the settlement hierarchy in that core strategy; see district centres below;
3. Define, by way of a map, the boundaries of the core shopping areas of city and town centres and also location of any district centres;
4. Include a broad assessment (square metres) of the requirement for additional retail floorspace only for those plans in the areas covered by a joint or multi-authority retail strategy;
5. Set out strategic guidance on the location and scale of retail development to support the settlement hierarchy, including where appropriate identifying opportunity sites which are suitable and available and which match the future retailing needs of the area;
6. Identify sites which can accommodate the needs of modern retail formats in a way that maintains the essential character of the shopping area;
7. Include objectives to support action initiatives in city and town centres; such as

- Mobility management measures-- that both improve accessibility of retail areas while aiming to develop a pedestrian and cyclist friendly urban environment and vibrant street life; and
- Public realm interventions-- aimed at improving the retailing experience through high quality civic design, provision of attractive street furnishing,

lighting and effective street cleaning/business improvement district type initiatives; and

8. Identify relevant development management criteria for the assessment of retail developments in accordance with these guidelines.

The RPGs also identifies locations where joint or multi-authority retail strategies must be prepared. Wexford along with Waterford City and County Councils, Kilkenny and Tipperary County Councils must prepare a joint or multi-authority retail strategy. No strategy has been prepared to date. The data gathered and research carried out for this Strategy will assist in the preparation of the Joint Strategy.

2.2 Regional Context

The most significant regional plan for County Wexford is the Regional Planning Guidelines for the South East Region (SERPGs).

2.2.1 Regional Planning Guidelines for the South East Region 2010-2020

The SERPGs are a long-term strategic planning framework for the development of the South Eastern Region up to 2022. The guidelines have an important role in the implementation of the NSS. The key principle of the Regional Development Strategy is to achieve sufficient critical mass in towns and cities to make them self-sufficient and to compete with urban centres in other regions. The guidelines set out an urban hierarchy with development roles for different types of urban centres in the region.

Wexford Town's designation as a Hub sees it targeted for significant levels of growth as it is an urban centre that supports and is supported by the Gateway. New Ross as a Large Town has been targeted for growth having regard to its strategic location, capacity for growth and potential to deliver on the core objectives of critical mass and balanced regional development. Enniscorthy and Gorey, designated as Large Towns, are described as having experienced high levels of population growth and continue to be attractive locations for new residential development. However, community, social and retail developments need to catch up with recent rapid phases of mainly residential development. Bunclody and Castlebridge are identified as District Towns having well developed services and community facilities and have the capacity to accommodate additional growth (subject to certain physical infrastructural investments). The SERPGs also state that smaller towns and villages play an important role as service/retail/residential centres and need to be developed in a way that respects their existing character while at the same time strengthening their role as local service centres.

The Regional Authority supports the continued growth of the retail sector and development of retail businesses (including retail warehousing) while protecting the retail function of the principal shopping streets. It states that new retail development should satisfy 'Smarter Travel' criteria in terms of its location and accessibility by sustainable modes of travel. The Regional Authority also supports the development of a Joint Retail Strategy for Waterford City/County, Kilkenny, Tipperary and Wexford. The Authority outline criteria that local authorities should seek to include in development plans which are as follows:

- Promote town and city centres as primary locations within the context of a retail hierarchy.

- Identity a range of suitable sites on which the demand for development might best be met, with particular emphasis on improved public transport links.
- Assess the impact of significant proposed expansions of retail floor-space on movement taking into account the impact on road capacity and access to public transport.
- Improve access to town centres by facilitating opportunities for public transport, cycling and walking whilst also ensuring sufficient short-term parking is available to meet the needs of car borne shoppers.

2.3 Local Context

At the County and more local level, there are a number of plans which could have an impact on the Retail Strategy. It is important to know the relevant policies and objectives contained within these plans to prepare the Wexford County Retail Strategy. The relevant plans are:

- Wexford Town and Environs Development Plan 2009-2015
- Enniscorthy Town and Environs Development Plan 2008-2014
- New Ross Town and Environs Development Plan 2011-2017
- Waterford City Development Plan 2008-2014
- Wicklow County Development Plan 2010-2016
- County Carlow Development Plan2009-2015 and Carlow Town Development Plan 2009-2015
- Kilkenny County Development Plan 2008-2014 and Kilkenny City and Environs Development Plan 2008-2014

2.3.1 Wexford Town and Environs Development Plan 2009-2015 and the Enniscorthy Town and Environs Development Plan 2008-2014

The Wexford Town Plan was adopted by the members of Wexford County Council on 9th March 2009. The Enniscorthy Plan was adopted by the members of Wexford County Council on 14th April 2008. Both of these Plans seek to achieve the same objectives in relation to retail and are as follows:

1. To ensure an efficient, equitable and sustainable spatial distribution of retail centres in and around the Towns.
2. To make an important contribution to sustaining and improving the retail profile and competitiveness of County Wexford within the retail economy of the South East Region and beyond.
3. To address leakage of retail expenditure from the Towns and its catchments by facilitating the strengthening of the range and quality of its retail offer.
4. To establish clear principles and guidance on where various forms of new retail floorspace would be acceptable.
5. To ensure that the retail needs of the Wexford/Enniscorthy catchment areas are met as fully as possible to promote social inclusion within the Towns and take due cognisance of the South East Region retail hierarchy.
6. To provide the criteria for the assessment of retail development proposals.

2.3.2 New Ross Town and Environs Development Plan 2011-2017

The New Ross Plan was adopted by the members of Wexford County Council on 14th February 2011. The retail policies contained with the Plan are as follows:

Policy R01: To ensure that the majority of retail development shall be located within the town centre. The areas designated as Primary and Secondary Retail frontages shall be retained as key locations for retail development.

Policy R02: On Primary Shopping Frontages permission will be favourably considered for banks and other professional services, office uses, restaurants, bars, off licenses, takeaways and other entertainment uses provided:

(i) The proposals would not individually or cumulatively cause demonstrable harm to the function, character or appearance of the frontage concerned or to the town centre as a whole.

(ii) There would be no significant loss of residential accommodation at upper floor levels. While residential use is the preferred use upstairs it is accepted that it is not always possible to accommodate appropriate units in these buildings. Therefore other commercial uses will be considered but the Planning Authority will have regard to the amount of residential uses retained in the area to ensure that a balance of residential and commercial uses are maintained in the town centre. The use, taken together with existing or permitted uses would not result in an unacceptable multiplicity of such uses in any one area.

Policy R03: On Primary Shopping Frontages, applications for planning permission which will result in net loss of convenience and comparison shopping floorspace at ground level will be resisted as this would affect the vitality and viability of these streets.

Policy R04: To prioritise the reuse of vacant and derelict buildings in the town centre for uses including retail development.

Policy R05: To encourage the use of ground floors of buildings fronting onto The Quay for retail and related uses. Proposals which result in uses other than retail and related uses at ground floor level will be resisted. New buildings should integrate such uses at ground floor level and provide for active frontages.

Policy R06: To continue the environmental improvement of the town centre in order to enhance its attractiveness, vitality and viability.

Policy R07: To require a Retail Impact Assessment to be carried out for large scale developments or for developments, which the Planning Authority considers may impact on the vitality and viability of the town centre. Such statements shall include, at minimum, the criteria set out in Annex 4 of the Retail Planning Guidelines (DEHLG, 2005).

Policy R08: To provide pedestrian facilities in the prime retail area.

Policy R09: To encourage and facilitate the use of unoccupied retail outlets in the town centre as Retail Incubation Centres.

Policy R10: To ensure that new retail development in the neighbourhood centres shall be for convenience goods with suitable comparison goods open for consideration to provide for the day to day shopping needs of the local community.

2.3.3 Waterford City Development Plan 2008-2014

This Plan incorporates a retail strategy which recognises the role of Waterford City as the primary retail centre in the Region and the focus for comparison retail floorspace. In relation to retail warehousing, the Plan indicates that there will be expansion in expenditure in categories of goods that may not be readily accommodated within the central shopping area. It is stated that unless the range of goods on offer in retail warehousing floorspace is restricted to bulky goods then they can have an undermining effect on the city centre.

Within the Plan specific sites have been identified for the future provision of neighbourhood and district centres to cater for the suburban populations. Reference is made to the Ferrybank area and the developing suburbs of Abbeylands and Rockshire which are located in County Kilkenny and that these areas will cater for the residential population to the north of the River Suir. Given the proximity of these lands to Wexford and more significantly New Ross the development of these lands could have an impact on attracting expenditure away from Wexford.

2.3.4 Wicklow County Development Plan 2010-2016

Given the proximity of County Wexford to the town of Arklow it is considered that the policies relating to Arklow are the most significant. The Wicklow Plan allocates Arklow 7,000-10,000sqm growth in comparison floor space and 2,000-2,500sqm of convenience floorspace. The retail strategy states that since the review of the existing planning permissions , approximately 16,500sqm of new retail space has been constructed or is awaiting commencement / under construction (c. 6,500sqm convenience and 10,000sqm comparison). There is a further application for c. 8,400sqm of retail floorspace currently being considered by An Bord Pleanála (The Alps site). The strategy also highlights that there is limited retail warehousing available in Arklow, mostly confined to hardware and electrical outlets, which is a notable deficiency given the distance from the Metropolitan Area.

The strategy for Arklow is:

1. To promote and encourage consolidation and improvement to retailing and other town centre activities in the core area; however, no further significant retail permission will be granted other than (i) Conversion of non-retail premises in the core area to retail use, (ii) Renovation and expansion of existing retail premises in the core retail area, (iii) Redevelopment of derelict or brownfield sites in the core and (iv) Replacement of existing facilities within the town;

2. Expansion of the retail warehousing sector, either at existing retail warehousing or industrial estate locations, or on new sites to be determined through the town or local area plan process.

2.3.5 County Carlow Development Plan2009-2015 and Carlow Town Development Plan 2009-2015

This Plan contains a retail strategy which has been prepared in conjunction with Carlow Town Council and Carlow County Council. Carlow Town is the primary town in the County and dominates the County in terms of the role and function it provides. Tullow and Muine Bheag (Bagenalstown) provide a support function to Carlow Town. At the next level important retail functions are provided by Hacketstown. Tinnahinch provides limited services however it could, like Carrickduff with respect to Graiguenamagh and Bunclody, assist in the provision of retail services.

From the capacity assessment that was carried out no further capacity for additional floorspace is required in the County. However, the Strategy states that it is evident that additional floorspace needs to be provided in some towns within the retail hierarchy. The broad capacity assessment should be used in combination with the qualitative assessment which addresses each planning application on its merits. The broad capacity assessment will enable the Planning Authority to ensure that a retail development proposal is not out of scale with the existing and future development pattern. It will enable the Planning Authority to ensure that a proposal meets the locational requirement of the Development Plan and the need for a particular type of retail floorspace within a particular town centre. The Plan states that the sequential test will need to be strictly applied to all new retail development proposals and the level and extent of proposals for additional bulky goods floorspace will require careful monitoring. In addition it is noted that the Planning Authority will be cognisant of all existing planning consents for retail development when considering new proposals.

2.3.6 Kilkenny County Development Plan 2008-2014 and Kilkenny City and Environs Development Plan 2008-2014

Kilkenny County Council (the County Council) and Kilkenny Borough Council prepared a retail strategy in tandem with their respective Plans. Within their capacity assessment two scenarios were used to estimate the approximate floorspace required to accommodate the anticipated increase in expenditure were derived (a) one including extant retail warehousing permissions and (b) excluding extant retail warehousing permissions. The removal of retail warehousing from the capacity assessment is necessary as its inclusion results in there being a lack of potential for any new mainstream comparison floorspace in Kilkenny City Centre until post 2014.

The following provides guidance on how the Retail Strategy defines the distribution of strategic and non-strategic retail floorspace within the Retail Hierarchy:

Level 1 (Major Town Centre/County Town Kilkenny City & Environs): Major convenience and comparison

Level 2 (Callan, Thomastown, Castlecomer, Graiguenamanagh): Middle order convenience and tourism related comparison in sub county towns

Level 3: No centres are currently identified at this level in the county retail hierarchy.

Level 4 (Village Centre and Neighbourhood Centre): Predominantly additional convenience but not excluding tourism related comparison.

Retail policies of significance within the Plan

ED23 No further retail warehousing parks will be granted in and around the City and Environs due to constraints on the expenditure capacity for additional comparison floorspace over the period 2008 - 2014.

Exceptions to this policy will only be considered where it can be proven that a proposal unequivocally introduces uniqueness and innovation to the City & County's retail offer which cannot be met in the City Centre or on edge of centre locations.

ED27 That there is an equitable distribution of new retail floorspace and town centre uses between McDonagh Station, the Kmart site and Bateman Quay to ensure that no one site dominates the retail landscape of the City or provides an alternative to the City Centre/Core shopping Area.

2.4 Conclusion

The Retail Strategy of County Wexford is framed within an overarching framework of both national and regional policy. At local level it is recognised that the Retail Strategy should be considered in the context of competing centres outside of the County and the polices of the Town Councils within Wexford which can impact on the fruition of the aims and objectives of this Retail Strategy.

Section 3 Shopping Patterns

3.0 Introduction

This section of the report will examine the shopping patterns of residents and other people who shop within the County of Wexford. Two types of surveys were used to identify shopping patterns. On-street shopper surveys obtain information from respondents who are in a particular town. The main purpose is to discover where people come from and how much they spend. Shopper surveys can give information on people from Wexford and outside. They can identify inflow of expenditure into the County and the main reasons for visiting. Whereas, household surveys capture residents within the study area and illustrate the level of retail leakage. Between August and September 2011, 500 surveys of shoppers in the four main towns and 615 surveys of households within the County were conducted by Wexford County Council.

3.1 Shopper Surveys

Wexford County Council carried out 500 shopper surveys at central locations on the streets of the four main towns within County Wexford; Enniscorthy, New Ross, Wexford and Gorey. The number of surveys carried out in each town was proportionate to the population (Census, 2011) within each of the electoral areas and is shown in Table 1.

Table 1 Survey's per town

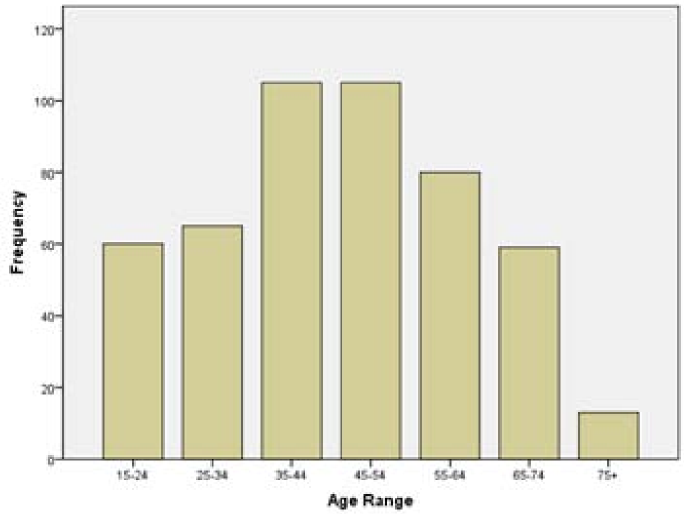
Location	Number	Percent
Gorey	125	25.0
New Ross	100	20.0
Wexford	163	32.6
Enniscorthy	112	22.4

This approach was considered reasonable having regard to the location of the towns within the electoral areas and likelihood of coinciding with catchments. The surveys were carried out over a number of week days in both morning and afternoon. Surveys were also carried out on Saturday the 10th in the four towns. The key objective of the shopper surveys was to investigate the shopping behaviour of people using the four towns. This included spending at the centres by those living outside the County. To obtain a random sample the interviewers were instructed to approach the next person that came along after they had finished the previous survey.

It is important to note when reading the survey findings that the numbers of respondents are the actual numbers responding to each question so the numbers may vary. There are a number of reasons for this such as in some cases the respondent may not have wanted to answer a particular question. Notwithstanding this, it is considered that the results are statistically robust as the response rate was very high.

Of those surveyed 169 were male and 318 female. The age of the respondents was dispersed across the age ranges with the highest proportions being those from the 35-44 and 45-54 age group at 21.6% respectively. The third largest age category was from the 55-64 age group with 16.4%.

Figure 2 Age range of respondents (estimated)



The question with regard to the origin of the shoppers was an important aspect of the surveys as it allows us to establish where people travelled from and also to indicate those who came from outside the County. The results are shown in Table 2. Those on holiday are included in this calculation.

Of those surveyed from outside the county 18 said they shop regularly within the County; this information is displayed in Table 3. Gorey had the highest number of respondents (27) from outside the County, of which 11 stated that they shopped regularly in Gorey. Six of these were from Wicklow; Carnew, Aughrim Arklow was specifically mentioned, one from Kildare and four from Dublin. Eleven of the respondents from outside the County said they were on holidays.

The high number of non-resident respondents in Gorey shows it draws retail spend from outside the County. However its location is a contributing factor and can in this regard only really be compared against New Ross as a town on the periphery of the County. New Ross had 10 respondents from outside the County, of which 6 respondents stated they shopped regularly in New Ross. Four respondents who travelled to New Ross regularly from Glenmore and two were from other parts of County Kilkenny.

Table 2 Respondents who were residents of County Wexford

Location of Survey	Are you resident in County Wexford?					
	Number No	%	Number Yes	%	Number Total	Total %
Gorey	27	22.5%	93	77.5%	120	100.0
New Ross	10	10.5%	85	89.5%	95	100.0
Wexford	15	9.5%	143	90.5%	158	100.0
Enniscorthy	2	1.8%	108	98.2%	110	100.0
Total	54	11.2%	429	88.8%	483	100.0

Table 3 Non-residents connection with the area

Status	Do you live, work or shop regularly or are you on holiday in this area?	
	Number	Percent
Work here	3	6.1
Shop regularly	18	36.7
On holiday	23	46.9
Shop seldom	5	10.2
Total	49	100.0

3.1.1 Purpose of Trip

As part of the shopper survey individuals were asked about their main reason for their visit to the various town centres. Table 4 indicate the responses of all the shoppers. The main weekly grocery shop was the primary reason for the respondents being in the town centres on the day of the surveys.

Table 5 demonstrates the reason non-residents visited the County. The main weekly shop accounted for 24.5% of the respondents from outside the County.

Table 4 Main reason for visiting Town Centre (residents)

What is the main reason for your visit to the Town Centre today?		
Reason	Number	Percent
Main weekly grocery shopping	138	27.9
Other grocery shopping	41	8.3
Clothes - women	35	7.1
Clothes - men	16	3.2
Clothes - children	5	1.0
Footwear	2	.4
Accessories	1	.2
Furnishing/Household	4	.8
DIY/Electrical goods	7	1.4
Hair/Beauty	19	3.8
Toiletries/Chemist	14	2.8
Records/Tapes/CD's etc	1	.2
Bank/Financial services	43	8.7
On business	23	4.6
Eating/Meal out/Snack	12	2.4
Drinking/Visiting a pub	1	.2
Browse	16	3.2
Tourist/Day Trip	4	.8
Nothing in particular	10	2.0
Other	103	20.8
Total	495	100.0

Table 5 Main reason for visiting Town Centre (non-residents)

What is the main reason for your visit to the Town Centre today?		
Reason non-residents	Number	Percent
Main weekly grocery shopping	13	24.5
Other grocery shopping	2	3.8
Clothes - women	5	9.4
Clothes - men	4	7.5
Clothes - children	1	1.9
Hair/Beauty	4	7.5
Toiletries/Chemist	2	3.8
Bank/Financial services	3	5.7
Eating/Meal out/Snack	1	1.9
Browse	4	7.5
Tourist/Day Trip	2	3.8
Nothing in particular	1	1.9
Other	11	20.8
Total	53	100.0

3.1.2 Mode of Transport

Table 6 shows the various modes of transport which were used by the shoppers surveyed to travel to the particular towns. The majority of the respondents had travelled by car, though some had walked especially in New Ross (27.3%). Only 2.6% respondents travelled by public transport in the whole of the County.

Table 6 Mode of transport %

Location of Survey	How did you travel here today?						
	Car	Walk	Bus	Bicycle	Motorbike	Other	Total
Gorey	76.8	15.2	4.0	.0	.0	4.0	100.0
New Ross	68.7	27.3	3.0	.0	.0	1.0	100.0
Wexford	76.1	17.8	3.1	.6	.6	1.8	100.0
Enniscorthy	75.7	21.6	.0	.0	.0	2.7	100.0
Total	74.7	19.9	2.6	.2	.2	2.4	100.0

3.1.3 Journey Time and Frequency of Visits

The majority of respondents had taken less than 10 minutes to the get to the retail centre. This is demonstrated in Figure 3. The length of time taken by the non-residents to travel to the particular retail centre is shown in Figure 4. The drive time of less than 10 minutes is highly represented in non-residents. Also, the journey time of 45 mins is significantly represented in non-residents, which shows that it is not just people in the immediate hinterland visiting the towns.

Figure 3 Journey times for all respondents

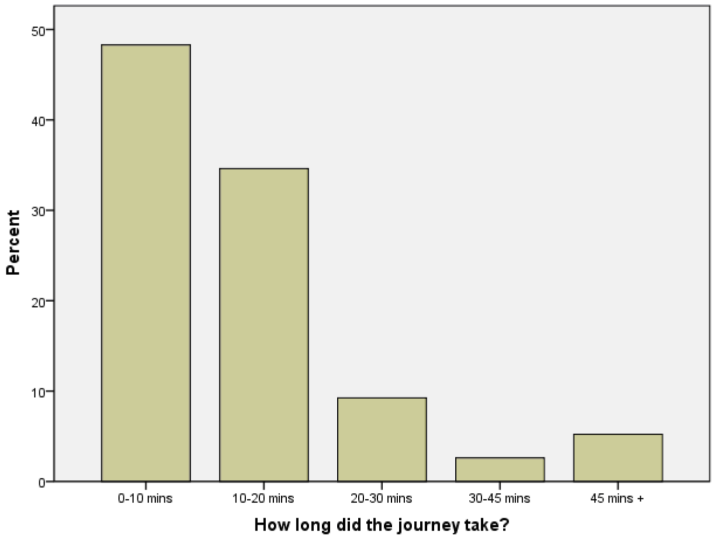
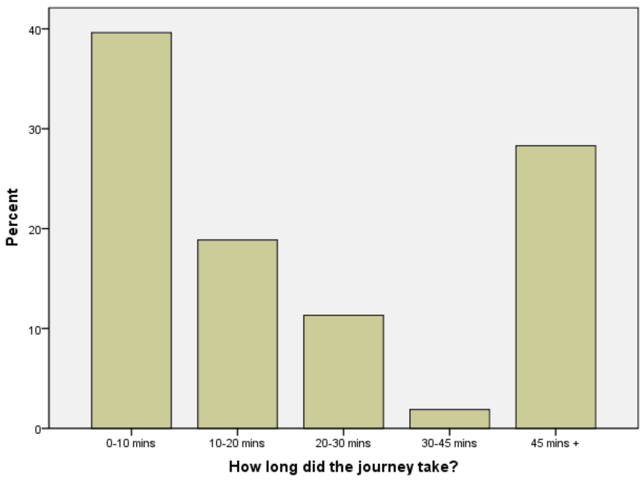


Figure 4 Journey time for non-residents



From the non-residents surveyed 52.9% visit the County at least once a week to shop or just look around. This information is displayed in Table 7. Not surprisingly the residents of Wexford visit the towns more frequently compared to non-residents. Table 8 show the results.

Table 7 Frequency of visits by non-residents

How often do you come to (name town) whether to shop or just look around?		
Frequency of trips for non- residents	Number	Percent
More than 3 times a week	7	13.7
2-3 times a week	8	15.7
Once a week	12	23.5
2-3 times a month	2	3.9
Once a month	6	11.8
Once every 2 months	2	3.9
Less Often	9	17.6
First time	4	7.8
Never	1	2.0
Total	51	100.0

Table 8 Frequency of visits by residents (%)

How often do you come to (name town) whether to shop or just look around?				
Frequency of trips for residents	Gorey	New Ross	Wexford	Enniscorthy
More than 3 times a week	43.0	50.6	34.3	39.8
2-3 times a week	37.6	28.2	29.4	30.6
Once a week	10.8	15.3	23.8	18.5
2-3 times a month	0.0	4.7	4.9	1.9
Once a month	4.3	0.0	4.9	3.7
Once every 2 months	0.0	0.0	2.1	0.0
Less Often	4.3	0.0	0.0	3.7
Never	0.0	0.0	0.0	0.9
Don't Know	0.0	1.2	0.7	0.9
Total	100.0	100.0	100.0	100.00

3.1.4 Shopper Expenditure on Goods and Services

In order to get an estimate on the amount of consumer expenditure, questions were put to the shoppers in relation to their expenditure on convenience and comparison goods and services on the day of the survey. Table 9 shows the average spend on the various types of goods and services by those who stated they purchased the particular type of goods, within each of the four towns.

Table 9 Average shopper expenditure (€)

How much, if anything, did you spend or do you intend to spend?					
Town	Groceries	Clothes/footwear etc	Furniture/Other Bulky Goods	Other including eating out/hairdresser etc	Total
Gorey	70.77	66.97	64.11	36.65	78.48
New Ross	65.33	50.10	.	32.76	61.38
Wexford	57.59	69.42	50.00	31.37	76.08
Enniscorthy	68.49	40.27	23.75	18.50	68.38

The respondents in Gorey had the highest average spend, following by Wexford Town. Those surveyed in Enniscorthy and New Ross had a higher average spend on groceries compared to the other towns. It is to be expected that Wexford, as the hub, would have the highest average spend on comparison goods given it has a higher level of comparison floorspace. Gorey had the highest average spend on bulky goods. However, it should be noted that the surveys were only carried out in town centre locations and not the out of town retail parks where the majority of the bulky goods shops are located especially in New Ross and Wexford town. The household surveys have gathered further information on people’s bulky shopping patterns.

Table 10 compares the average spend by residents and non-residents on the day of the survey.

Table 10 Average expenditure by resident and non-residents

Spend Type	Are you resident in County Wexford?	
	No	Yes
Groceries	67.77	63.14
Clothes/footwear etc	81.00	62.32
Furniture/Other Bulky Goods	30.00	52.80
Other including eating out/hairdresser etc	43.27	29.06
Total	87.91	68.73

Non-residents spent more than the other shoppers especially in terms of comparison shopping. However the spend on groceries is similar to that of residents.

3.1.5 Alternative Retail Centres Visited

The respondents from Wexford were asked which other places they visited most frequently for shopping (outside of the town in which the survey was conducted). A number of respondents said there was no alternative centre. Table 11 shows the results.

Table 11 Alternative locations visited by residents of Wexford

What other places do you visit most frequently for shopping?		
Location Visited	Number	Percent
Wexford town	118	33.1
New Ross	7	2.0
Enniscorthy	23	6.4
Gorey	18	5.0
Carlow	3	0.8
Arklow	24	6.7
Waterford	72	20.2
Kilkenny	3	0.8
Wicklow	1	0.3
DublinCity Centre	50	14
Dundrum Shopping Centre	21	5.9
Other (none of above)	17	4.8
Total	357	100.0

The ‘other’ locations that the respondents referred to comprised of eleven places outside of the County and six within the County such as Campile (1), Wellingtonbridge (1), Taghmon (1), Kilmore Village (1) and Bunclody (2). Of those who used alternative locations, 51.82% stated that they shopped outside the County (Waterford 20.2% and Dublin 19.8%). This data gives a picture of the retail leakage from the County and also shows that the majority of shoppers do not rely on only one location for their shopping needs. Table 12 shows the leakage in respect of the town in which the respondent was interviewed. It is clear that people interviewed in New Ross gravitate towards Waterford and those in Gorey towards Arklow.

Table 12 Alternative locations outside of County visited by residents by origin of survey

Location of Survey	Which other places do you visit most frequently for shopping?								
	Carlow	Arklow	Waterford	Kilkenny	Wicklow	DublinCity Centre	Dundrum Shopping Centre	Other	Total
Gorey	1	22	0	0	0	14	6	5	48
New Ross	0	0	42	1	0	4	0	1	48
Wexford	1	1	28	1	1	29	13	4	78
Enniscorthy	1	1	2	1	0	3	2	1	11
Total	3	24	72	3	1	50	21	11	185

The five shoppers in Gorey who shopped outside the County did so in Bray (3), Liffey Valley (1), Carnew (1). The four destinations outside the County mentioned in the Wexford Town shopper surveys were, Cork (1), Killarney (1), Limerick (1) and Clonmel (1). The 'other' referred to in the Enniscorthy surveys was Newry (1). The 'other' mentioned in the New Ross area was Limerick.

Figure 5 shows the type of shopping that is carried out elsewhere. Comparison shopping for clothes and footwear represents the greatest portion. This shows that the respondents go to other locations primarily for clothing and footwear shopping and therefore the County is experiencing retail leakage for this type of shopping.

Figure 5 Types of shopping carried out in the alternative places

3.1.6 Principle Attractions and Improvements

Shoppers were asked what they thought was the main attraction of the town they were in as a shopping destination. ‘Close to home’ was cited as the principle appeal by the respondents in all of the towns. The following tables show the first response most frequently mentioned by the respondents. Positive reasons were connected with the towns being an attractive shopping environment and choice of clothing and footwear shops. New Ross scored poorly in terms of its attractions.

In your opinion, what are the two main attractions of (name town)?

Table 13 Wexford Attractions

	Number	Percent
Close to home	58	35.6
Good choice of clothing & footwear shops	34	20.9
Other	31	19.0
Attractive shopping environment	13	8.0
Close to work	6	3.7
Good choice of quality/designer shops	5	3.1
Easy to get to by car	3	1.8
Good choice of places to eat and drink	3	1.8
A particular store	3	1.8
Good choice of variety stores	2	1.2
No particular reason/Don't know	2	1.2
Close to hotel	1	.6
Good and extensive parking provision	1	.6
Safe environment/no crime	1	.6
Total	163	100.0

The items noted as attractions in ‘other’ were pedestrainised street/area (3), friendly people (3), the quay was mentioned by four respondents and specifically the quay scenery by two respondents.

Table 14 Enniscorthy Attractions

	Number	Percent
Close to home	46	42.6
Other	33	30.6
A particular store	9	8.3
Good choice of clothing & footwear shops	5	4.6
Attractive shopping environment	5	4.6
Good and extensive parking provision	3	2.8
Close to work	2	1.9
Safe environment/no crime	2	1.9
Good choice of quality/designer shops	1	.9
Good choice of variety stores	1	.9
Good choice of places to eat and drink	1	.9
Total	108	100.0

Four of the respondents referred to Dunnes Stores as the particular store that was their main attraction. Of those who cited ‘other’ five people referred to tourism attractions. Two of which mentioned the castle specifically, and one the 1798 visitor centre. Three of the respondents mentioned Enniscorthy is a nice town and two others specifically referred to the river as being an attraction.

Table 15 New Ross Attractions

	Number	Percent
Close to home	50	52.1
Other	15	15.6
No particular reason/Don't know	12	12.5
A particular store	6	6.3
Attractive shopping environment	4	4.2
Close to work	3	3.1
Good choice of clothing & footwear shops	2	2.1
Good choice of variety stores	2	2.1
Good choice of quality/designer shops	1	1.0
Good choice of places to eat and drink	1	1.0
Total	96	100.0

The ‘particular store’ referred to related to Supervalu (2), Tesco (2), Aldi (1) and the Bank of Ireland (1). With regard to ‘other’ three respondents referred to tourist attractions.

Table 16 Gorey Attractions

	Number	Percent
Close to home	40	32.8
Good choice of variety stores	18	14.8
Attractive shopping environment	15	12.3
Good choice of clothing & footwear shops	14	11.5
Other	8	6.6
Good choice of quality/designer shops	6	4.9
Good choice of places to eat and drink	6	4.9
No particular reason/Don't know	4	3.3
Good choice of cheap/discount shops	3	2.5
Close to work	2	1.6
Easy to get to by car	2	1.6
Good and extensive parking provision	2	1.6
Free parking	1	.8
A particular store	1	.8
Total	122	100.0

There were no common themes among those referred to in ‘other’.

3.1.7 Improvements

The following tables show the improvements that the respondents mentioned that would entice individuals to shop more frequently in the various towns. The tables show the first response most frequently mentioned by the respondents. The main criticisms of the towns generally centre on car parking; cheaper /free parking and more parking provision were common themes among all respondents in all four towns.

In your opinion, what two improvements, if any, to (name town) would encourage you to visit or shop more often than you currently do?

Table 17 Wexford Improvements

	Number	Percent
Better/more frequent bus service	2	1.3
Improve access by car	2	1.3
More parking provision	41	25.8
Cheaper/free parking	29	18.2
More shops	10	6.3
More designer shops/boutiques	4	2.5
Department stores	4	2.5
Covered shopping malls	7	4.4
Fewer empty shops	13	8.2
Improvements to shopping	7	4.4

environment/urban design		
Pedestrianised streets	2	1.3
More bars and/or restaurants	1	.6
More seating areas/benches	1	.6
More cash machines	1	.6
More gyms/health clubs	2	1.3
Nothing/Don't know	3	1.9
Other	30	18.9
Total	159	100.0

The ‘other’ related to a wide range of topics but the recurrent themes were; traffic flow/management (2), cleanliness (4), and shop rents (2).

Table 18 Enniscorthy Improvements

	Number	Percent
Better/more frequent bus service	1	.9
Improve access by car	2	1.9
More parking provision	19	17.6
Cheaper/free parking	16	14.8
More shops	13	12.0
Department stores	1	.9
Covered shopping malls	4	3.7

Fewer empty shops	6	5.6
Improvements to shopping environment/urban design	3	2.8
Pedestrianised streets	9	8.3
More cafes	1	.9
More toilets	1	.9
More seating areas/benches	1	.9
More promotions/events	2	1.9
Nothing/Don't know	3	2.8
Other	26	24.1
Total	108	100.0

The 'other' relate to cleanliness (5), the chain Penneys (2) and two respondents referred to more pedestrian areas.

Table 19 New Ross Improvements

	Number	Percent
Better/more frequent bus service	2	2.0
Improve access by car	1	1.0
More parking provision	27	27.3
Cheaper/free parking	10	10.1
More shops	8	8.1
More designer shops/boutiques	4	4.0
Department stores	5	5.1

Covered shopping malls	2	2.0
Fewer empty shops	4	4.0
Improvements to shopping environment/urban design	3	3.0
Pedestrianised streets	2	2.0
More facilities for children	1	1.0
Nothing/Don't know	4	4.0
Other	26	26.3
Total	99	100.0

Within the category of 'other' three of the respondents referred to derelict buildings, two to the road/tarmac on the quay and two referred to litter/cleanliness.

Table 20 Gorey Improvements

	Number	Percent
Better/more frequent bus service	3	2.4
Improve access by car	3	2.4
More parking provision	18	14.6
Cheaper/free parking	26	21.1
More shops	5	4.1
More designer shops/boutiques	1	.8
Department stores	1	.8
Covered shopping malls	1	.8

Fewer empty shops	3	2.4
Pedestrianised streets	9	7.3
Improved safety/security during day/night	2	1.6
More cafes	1	.8
More bars and/or restaurants	2	1.6
More facilities for children	3	2.4
Nothing/Don't know	11	8.9
Other	34	27.6
Total	123	100.0

The ‘other’ made reference to a wide range of items, the commonest themes related specifically to traffic (5), the junction at Main Street and Esmond Street (2), pedestrian crossings (2) and lack of a children’s shops (2).

3.2 Summary

The shopper surveys have indicated the level of inflow of expenditure from both the tourists and regular shoppers from outside the County. From the respondents surveyed it has been ascertained that Gorey had the highest average spend, with Wexford second. It is also evident that the non -residents had a higher average spend on comparison shopping. The surveys indentified improvements that could be made to the four towns to entice people to shop more frequently. More parking provision and cheaper/free parking was a common theme among the respondents in all four towns. The shopper surveys also showed the level retail leakage from the County to various neighbouring counties. Clothing and footwear shopping accounted for the majority of the shopping carried out outside the County.

3.3 The Household Surveys

Between the months of July and October 2011 household surveys were carried out by Wexford County Council. A total of 615 household surveys were completed. Surveys were also carried out online through mapalerter.com (an online service where local authorities publish service notifications by e-mail and SMS Text Message in their functional areas). Of the 615 surveys carried out 105 were online surveys and 510 were door to door surveys throughout the county in a number of towns and villages.

The key objective of the household surveys was to obtain an insight into the shopping patterns of the resident population of Wexford. The results provide information on the shopping patterns by getting the consumer's perspective of the retail offer currently available, identifying market share of the various retail centres and identifying the amount of retail leakage from the County. The surveys achieve this by obtaining information on where residents carry out their main food shopping, their top-up shopping, shopping for clothing and footwear and bulky household shopping. The surveys also establish the frequency of shopping trips, how much money is spent and the mode of transport employed.

The breakdown of the 510 surveys throughout the County was spread proportionately to the population within the four electoral areas. The Electoral Areas (E.A) are shown in Figure 6 below. Local knowledge and the 2011 preliminary census results were used to determine the number of surveys which should be carried out in each town, village and rural area. The online surveys (105) where completed through mapalerter. People who had signed up to this facility were notified by text and/ or e-mail that there was a survey online. Similarly, there was a notice posted on www.wexford.ie that there was an online household survey available. The following Tables 14-17 and Figures 6-9 demonstrate the breakdown of surveys per electoral area for both types of household surveys.

Figure 6 Study area

Table 21 Survey distribution

Wexford Area	**Total 215**
Wexford	126
Barntown	8
Castlebridge	14
Kilmore	11
Kilrane	10
Murntown	14
Piercestown	6
Rosslare Strand	12
RosslareHarbour	1
Tagoat	5
Taghmon	6
Mayglass	1
Glynn	1

Figure 7 Wexford EA

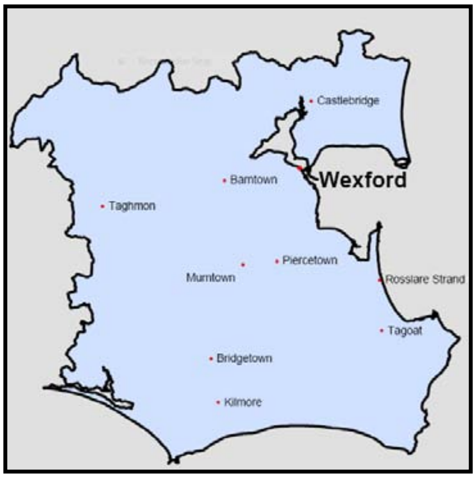


Table 22 Survey distribution

Enniscorthy Area	Total 139
Ballindaggin	3
Ballymurn	6
Bree	10
Bunclody	15
Enniscorthy	79
The Ballagh	7
Glenbrien	3
Oulart	2
Rathnure	5
Marshalstown	6
Edermine	1
Coolgarrow	1
Blackwater	1

Figure 8 Enniscorthy EA

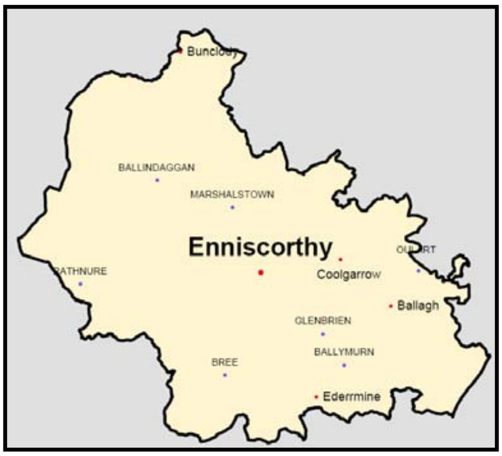


Table 23 Survey distribution

New Ross Area	Total 112
New Ross	55
Ballycullane	11
Campile	6
Carrig on Bannow	7
Clongeen	6

Figure 9 New Ross EA

Clonroche	8
Duncannon	7
Fethard	5
Ramsgrange	3
Wellingtonbridge	3
Foulkesmill	1

Table 24 Survey distribution

Gorey Area	**Total 149**
Courtown	32
Ballycanew	7
Camolin	8
Coolgreany	6
Ferns	10
Gorey	70
Hollyfort	5
Killinerin	6
Monamolin	4
Kilmuckridge	1

Figure 10 Gorey EA

3.3.1 Supermarket Shopping

It is difficult for household surveys to tackle the full range of convenience shopping. Respondents are normally able to give clear information about the supermarket they use regularly but shopping patterns at butchers, bakers, off-licence and other specialist convenience outlets are more variable and can be complex to be dealt with in a brief interview. However, as supermarkets account for most household expenditure on convenience retail items and their location is at the centre of retail planning and policy debate, supermarkets formed the basis of the analysis of convenience shopping.

Table 25 to Table 28 show the breakdown of where people go to shop according to their location. These results show that people are not prepared to travel far for supermarket shopping. The findings show that in the majority of cases people travel to the nearest town to carry out their main grocery shopping. The surveys also show that there is a limited amount of leakage in terms of supermarket shopping outside the County as only 4.8% of the respondents shopped outside the County.

Table 25 Supermarket shopping destinations within Wexford EA.

Which store do you normally visit for your main food and grocery purchases?								
Location of survey	Wexford	Enniscorthy	New Ross	Gore	Rosslare	Taghmon	Other	Total
Barntown	8	0	0	0	0	0	0	8
Castlebridge	14	0	0	0	0	0	0	14
Wexford	116	0	0	0	1	0	0	117

Tagoat	3	0	0	0	2	0	0	5
Taghmon	3	0	0	0	0	2	0	5
Rosslare Strand	10	0	0	0	0	2	0	12
Glynn	1	0	0	0	0	0	0	1
Kilmore	8	0	0	0	0	0	0	8
Murntown	14	0	0	0	0	0	0	14
Mayglass	0	0	0	0	1	0	0	1
Kilrane	8	0	0	0	2	0	0	10
Piercestown	5	0	0	0	0	0	1	6

Table 26 Supermarket shopping destinations within Enniscorthy EA.

Which store do you normally visit for your main food and grocery purchases?								
Location of survey	Wexford	Enniscorthy	New Ross	Gorey	Bunclody	Carlow	Other	Total
Ballindaggin	0	2	0	1	0	0	0	3
Ballymurn	4	2	0	0	0	0	0	6
Blackwater	1	0	0	0	0	0	0	1
Bree	4	4	0	0	0	2	0	10
The Ballagh	3	4	0	0	0	0	0	7
Bunclody	0	2	0	0	6	7	0	15
Enniscorthy	7	57	0	1	0	0	0	68
Glenbrien	1	2	0	0	0	0	0	3

Marshalstown	0	6	0	0	0	0	0	6
Coolgarrow	0	1	0	0	0	0	0	1
Edermine	1	0	0	0	0	0	0	1
Oulart	0	0	0	2	0	0	0	2
Rathnure	0	2	2	0	0	0	1	5

Table 27 Supermarket shopping destinations within New Ross EA.

Which store do you normally visit for your main food and grocery purchases?								
Location of survey	Wexford	Enniscorthy	New Ross	Gorey	Welling ton bridge	Waterford	Other	Total
New Ross	1	1	50	0	0	1	0	53
Carrick	4	0	1	0	2	0	0	7
Ramsgrange	0	0	3	0	0	0	0	3
Wellington bridge	1	0	1	0	0	0	0	2
Fethard	1	0	3	0	0	0	1	5
Duncannon	0	0	5	0	1	0	1	7
Clonroche	1	7	0	0	0	0	0	8
Clongeen	4	0	1	0	1	0	0	5
Campile	0	0	4	0	0	1	1	6
Ballycullane	2	0	3	0	0	5	1	11

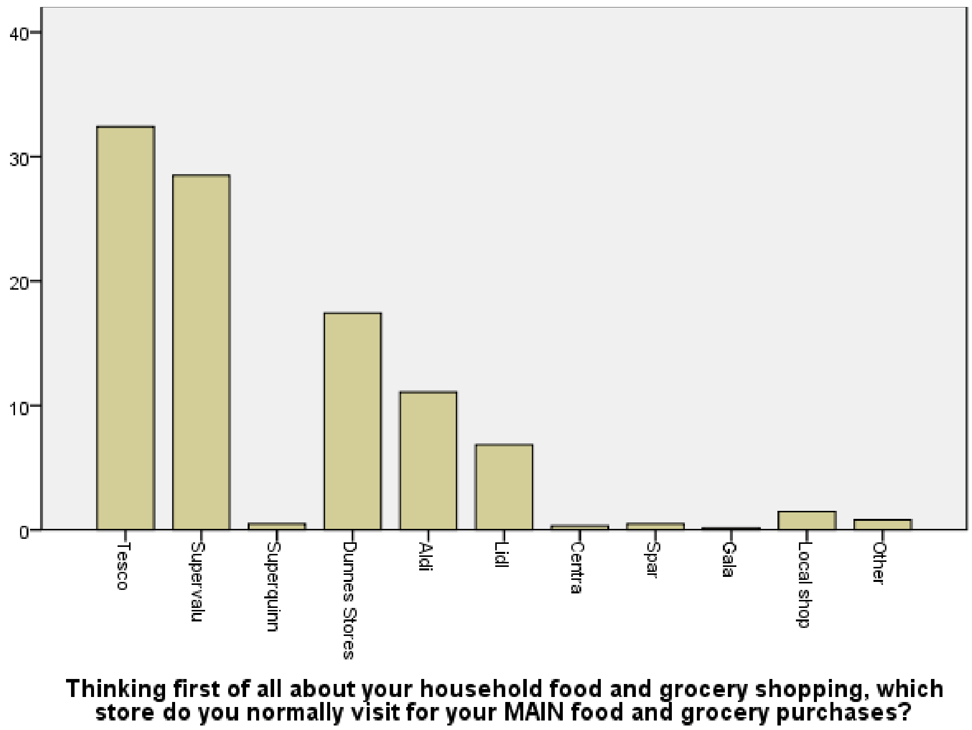
Foulkesmills	1	0	0	0	0	0	0	1

Table 28 Supermarket shopping destinations within Gorey EA.

Which store do you normally visit for your main food and grocery purchases?						
Location of survey	Wexford	Enniscorthy	New Ross	Gorey	Arklow	Total
Courtown	0	0	0	31	1	32
Coolgreany	0	0	0	6	0	6
Ferns	0	4	0	6	0	10
Kilmuckridge	0	0	0	1	0	1
Ballycanew	0	0	0	7	0	7
Gorey	0	0	0	62	4	66
Hollyfort	0	0	0	5	0	5
Killinerin	0	0	0	5	0	5
Monamolin	0	0	0	4	0	4
Camolin	0	0	0	8	0	8

When asked what store people used to carry out their main food shopping Tesco was the most commonly used supermarket by the respondents. Figure 11 displays the results. It should be noted that there is no Superquinn store within the County.

Figure 11 Chosen retailers for main food shop



The survey also questioned people on whether there was another supermarket that people visited to carry out food and grocery shopping and 15% stated that there was not whereas 85% of the respondents stated that they shopped in more than one supermarket. This shows that the majority of people are shopping around for the bargains and do not solely rely on one shop to meet all their needs. Of the 85% of people who shop in more than one supermarket only 1.14% shop outside the County.

Table 29 provides information on expenditure levels of the respondents' last main food shop. The largest portion of individuals (35.3%) spent between €81-€120 and 27.4% fell within the next category with a spend between €41-€80. Table 30 highlights the comparison between the range of expenditure in each of the four towns.

Table 29 Expenditure on main food shopping

Could you tell me how much did you spend on your last shopping trip for your main food and grocery purchases?		
Expenditure Range	Number	Percent
€0-40	47	7.7
€41-80	167	27.4
€81-120	215	35.3
€121-160	104	17.1
€161-200	56	9.2
€201-240	10	1.6
€241-280	6	1.0
€281-320	2	.3
€361-400	1	.2
>€400	1	.2
Total	609	100.0

Table 30 Expenditure on main food shopping per town %

Expenditure Range	Enniscorthy %	Gorey %	New Ross %	Wexford %
€0-40	7.3	5.8	12.7	6.6
€41-80	24.0	25.5	26.8	30.6
€81-120	39.6	34.3	39.4	34.5
€121-160	17.7	19.7	0.0	16.2
€161-200	10.4	14.6	21.1	8.3
€201-240	1.0	0.0	0.0	2.6
€241-280	0.0	0	0.0	0.9
€281-320	0.0	0	0.0	0.0
€361-400	0.0	0	0.0	0.0
>€400	0.0	0	0.0	0.4
Total Percent	100.0	100.00	100.0	100.0

3.3.2 Mode of Transport and Frequency of Main Shopping Trip

The respondents were asked how they travel to carry out their main food shopping and 84.5% of those surveyed stated that they drove themselves in a car. Being a passenger in a car accounted for 6.7% of respondents, while 5.7% said they walked. Only 7 respondents, which accounts for 1.1%, said they used the bus. This data is similar to the shopper surveys where only 2.6% of all respondents travelled by public transport, 74.7% drove and 19.9% said they walked. Figure 12 shows the results for the household surveys.

Figure 12 Mode of transport for main shop

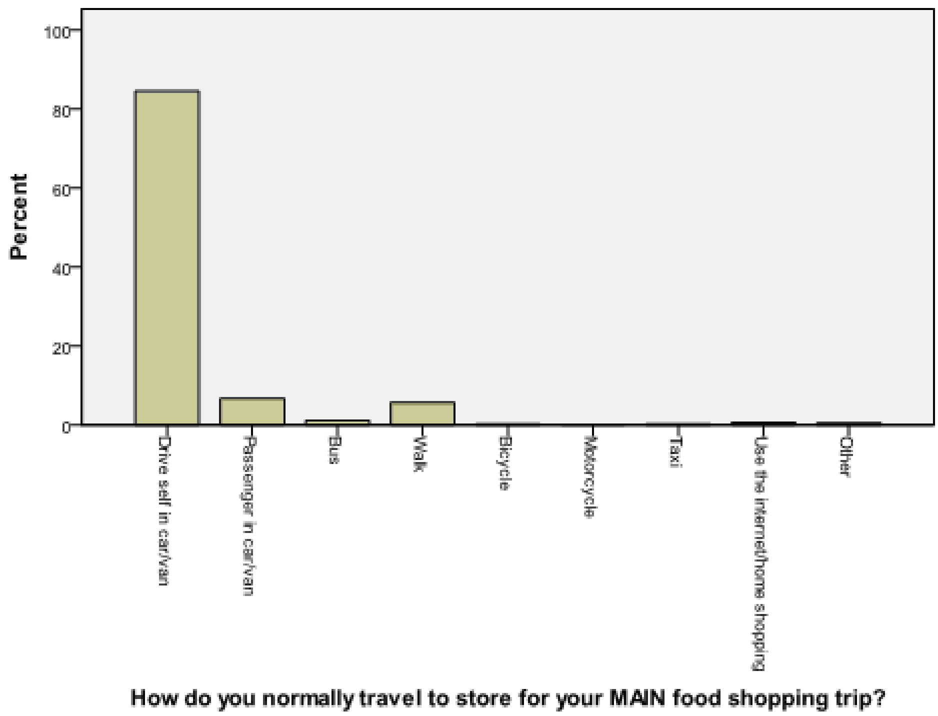
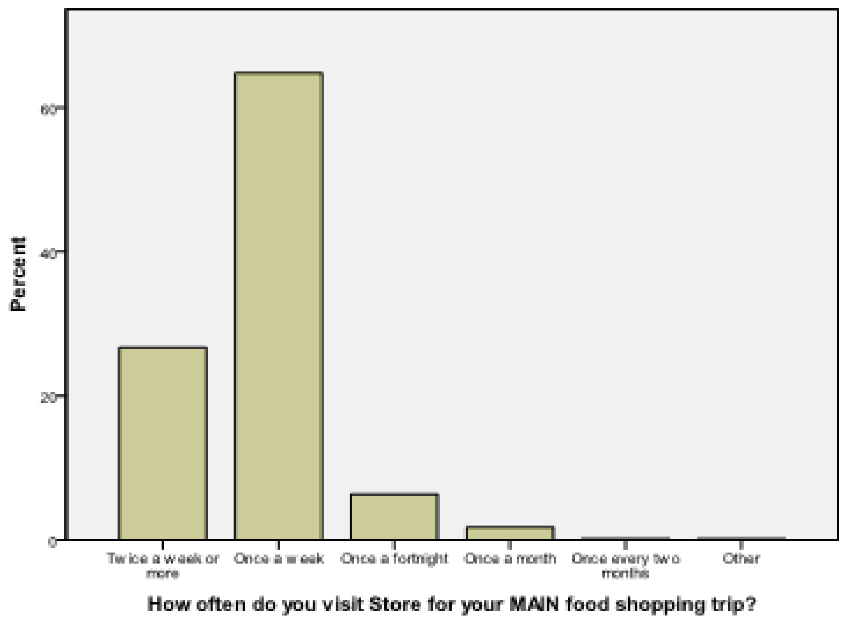


Figure 13 shows how often people carry out their main food shopping. The majority of respondents (64.8%) reported doing a main food shop once a week, 26.7% stated they carry out their main food shopping twice a week or more, 6.4% undertook their primary food purchase once a fortnight and 1.8% said once a month.

Figure 13 Frequency of main food shopping trips



3.3.3 'Top-Up' Shopping

The survey contained questions in relation to 'top-up' shopping. This type of shopping is for routine items like bread and milk. It was found that the majority, at 95.9%, of people do carry out 'top-up' shopping. Of those who carried out 'top-up' shopping the local shop was visited by 39.9% whereas 60.1% of people returned to the supermarket chains such as Tesco, Supervalu, Dunnes Stores, Aldi and Lidl to carry out their 'top-up' shopping. Table 31 shows those respondents who go to a local store compared to one of the main supermarket chains for their 'top-up' shopping (relative to the location of the survey). It should be noted that the supermarket chains Dunnes, Supervalu, Aldi, Lidl, are situated in all four main towns within the County. Tesco is located in Gorey, Wexford and New Ross. Wellingtonbridge, Bunclody and Rosslare Harbour have a Supervalu. It is interesting to note that in Courtown, which has no supermarket chain, 12 of the 29 people who do 'top-up' shopping do so out of the village. Therefore, it can be concluded that 'top-up' shopping is not solely dependent on proximity to the retailer.

Table 31 Where respondents carry out 'top-up' shopping

Thinking about your routine 'top-up' shopping for groceries (e.g. bread, milk, etc.). In which shop/store do you normally shop for grocery purchases?			
Location of Survey	Supermarket Chain	Local Store	Total
New Ross	23	31	54
Ballycullane	2	8	10
Carrig on Bannow	2	5	7
Campile	0	5	5
Clongeen	0	4	4
Clonroche	1	6	7
Duncannon	0	7	7
Fethard	1	4	5
Ramsgrange	0	3	3
Wellingtonbridge	2	1	3
Gorey	55	10	65
Courtown	12	17	29
Hollyfort	1	4	5
Ballycanew	1	5	6
Camolin	2	6	8
Coolgreany	1	5	6

Ferns	3	7	10
Killinerin	0	6	6
Kilmuckridge	0	1	1
Monamolin	0	4	4
Enniscorthy	36	39	74
Bunclody	7	7	14
Ballindaggin	2	1	3
Ballymurn	0	6	6
Blackwater	0	1	1
Bree	0	10	10
Coolgarrow	0	1	1
Edermine	0	1	1
Glenbrien	1	2	3
Marshalstown	3	2	5
Oulart	0	2	2
Rathnure	0	5	5
The Ballagh	1	6	7
Wexford Town	56	68	124
Barntown	2	5	7
Castlebridge	2	12	14
Glynn	1	0	1
Kilmore	2	9	11

Kilrane	7	3	10
Mayglass	0	1	1
Murntown	3	11	14
Piercestown	0	6	6
RosslareHarbour	1	0	1
Rosslare Strand	3	9	12
Taghmon	0	6	6
Tagoat	3	2	5

3.3.4 Clothing and Footwear Shopping

Respondents were asked where they would normally go for clothing and footwear shopping. A quick analysis of where people shop is indicated in Figure 14, however it should be noted that Wexford town had the largest portion of respondents given that it had the highest concentration of population in that area. Tables 32-35 show the shopping destination relative to the location where the survey was conducted. It is evident from these tables that there is considerable leakage outside the County for clothing and footwear shopping as 27.8% of the respondents normally left the County.

The surveys highlighted the high level of leakage in the electoral area of New Ross with 46.7% of those surveyed go to Waterford for clothing and footwear shopping. Wexford attracts 33.6% of respondents from the electoral area and all of the respondents from Clonroche (5.6%) stated they normally travelled to Enniscorthy. Retail leakage to Dublin, Carlow and Arklow accounts for 36.4% of the respondents within the Gorey electoral area. However, a high proportion (54.5%) of the respondents within the electoral area normally carries out their clothing and footwear shopping in Gorey. This demonstrates that the electoral area holds a good proportion of its population spend on comparison shopping. In Wexford electoral area, 86.1% of the respondents normally shop in Wexford Town. Within the Enniscorthy electoral area 36.4% of the respondents shopped in Wexford Town for clothing and footwear, 33.3% normally shopped in Enniscorthy Town and 27.3% of the respondents shopped in Waterford, Carlow and Arklow.

Figure 14 County wide clothing and footwear shopping destinations

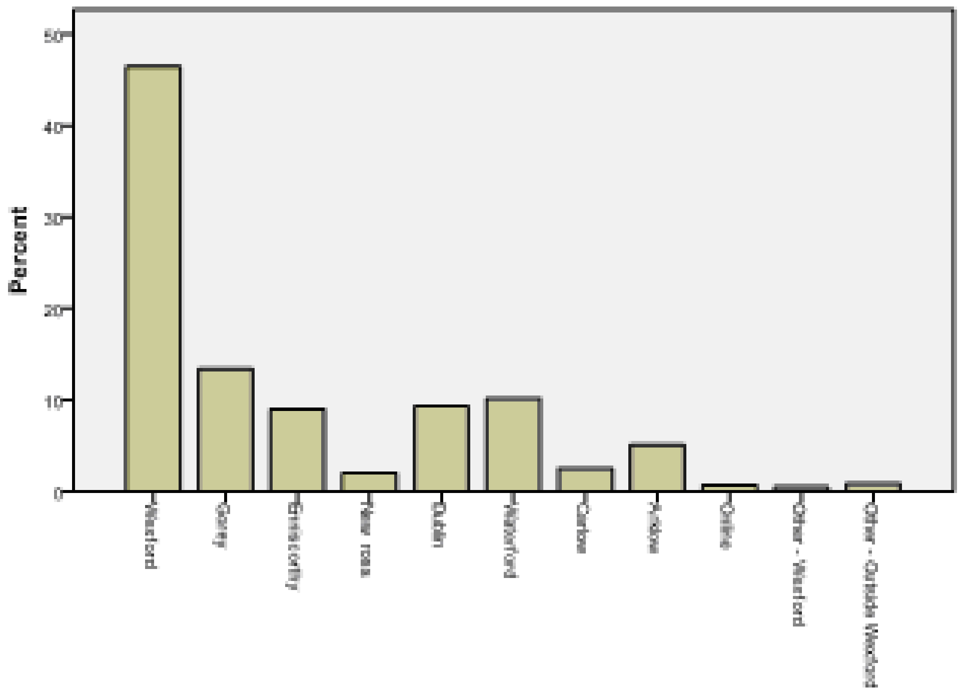


Table 32 Clothing and footwear destinations within Wexford EA

Thinking now about shopping for clothes and shoes, both for yourself and your household, which town, shopping centre or retail location would you normally visit for these purchases?								
Location of Survey	Wexford	Gorey	Dublin	Waterford	Carlow	On-line	Other Wexford	Other Outside Wexford
Barntown	6	0	0	1	0	0	0	0
Castlebridge	13	0	1	0	0	0	0	0
Wexford	104	1	8	3	2	1	1	1
Tagoat	4	0	1	0	0	0	0	0
Taghmon	6	0	0	0	0	0	0	0
Rosslare Strand	9	0	1	0	0	1	0	0
RosslareHarbour	1	0	0	0	0	0	0	0
Glynn	0	0	1	0	0	0	0	0
Kilmore	10	0	0	0	0	0	0	1
Murntown	13	0	0	0	0	1	0	0
Mayglass	1	0	0	0	0	0	0	0
Kilrane	6	0	1	3	0	0	0	0
Piercestown	6	0	0	0	0	0	0	0

Table 33 Clothing and footwear destinations with Enniscorthy EA

Location of Survey	Wexford	Enniscorthy	Dublin	Waterford	Carlow	Arklow	On-line	Other Wexford	Other Outside Wexford
Ballindaggin	1	0	0	0	2	0	0	0	0
Ballymurn	4	0	0	1	0	1	0	0	0
Blackwater	1	0	0	0	0	0	0	0	0
Bree	8	2	0	0	0	0	0	0	0
The Ballagh	4	0	2	1	0	0	0	0	0
Bunclody	0	2	4	0	9	0	0	0	0
Enniscorthy	23	35	9	2	0	0	1	0	2
Glenbrien	3	0	0	0	0	0	0	0	0
Marshalstown	2	2	1	0	1	0	0	0	0
Coolgarrow	0	1	0	0	0	0	0	0	0
Edermine	1	0	0	0	0	0	0	0	0

Oulart	0	0	0	0	0	2	0	0	0
Rathnure	1	2	0	1	0	0	0	1	0

Table 34 Clothing and footwear destinations within New Ross EA

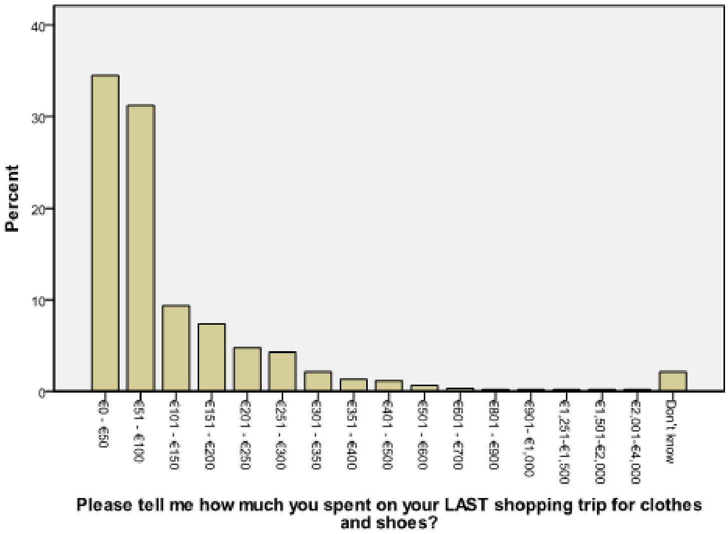
Location of Survey	Wexford	Gorey	Enniscorthy	New Ross	Dublin	Waterford	Other Wexford	Other Outside Wexford
New Ross	4	0	0	11	0	38	0	0
Carrig	4	0	0	1	0	1	0	0
Ramsgrange	2	0	0	0	0	1	0	0
Wellington bridge	3	0	0	0	0	0	0	0
Fethard	4	0	0	0	0	1	0	0
Duncannon	3	0	0	0	0	4	0	0
Clonroche	0	0	6	0	0	0	0	0
Clongeen	4	0	0	1	0	1	0	0
Campile	3	0	0	0	1	2	0	0
Ballycullane	8	0	0	0	1	2	0	0
Foulkesmill	1	0	0	0	0	0	0	0

Table 35 Clothing and footwear destinations within Gorey EA

Location of Survey	Wexford	Gorey	Enniscorthy	Dublin	Carlow	Arklow	Other Wexford	Other Outside Wexford
Courtown	1	20	0	4	0	7	0	0
Coolgreany	0	2	0	0	1	3	0	0
Ferns	1	6	3	0	0	0	0	0
Kilmuckridge	0	0	0	0	0	1	0	0
Ballycanew	0	4	0	1	0	1	0	0
Gorey	4	35	0	14	0	10	1	1
Hollyfort	0	3	0	0	0	2	0	0
Killinerin	0	3	0	2	0	1	0	0
Monamolin	0	4	0	0	0	0	0	0
Camolin	2	1	0	3	0	2	0	0

Figure 15 show how much individuals spent on their last shopping trip for clothing and footwear shopping. The majority of respondents (34.5%) spent less than €50 and 31.2% spent between €51 and €100.

Figure 15 Expenditure on clothing and footwear



3.3.5 Bulky Goods Shopping

Respondents were asked where they last purchased larger bulky household goods. The results below are only for those who had purchased bulky goods as many had not purchased goods (specifically those in rented accommodation). If the period of time since purchasing bulky goods was not recent then the question was ignored. Figure 16 demonstrates visually the breakdown of the locations to which people went. Wexford (44.9%) and Gorey (16.4%) have the largest draw. A similar market share is retained by Enniscorthy at 5.9%, New Ross at 5.7% and Dublin at 6%. The respondents who shopped outside of the County for bulky goods accounted for 18.7% of the sample. Tables 36 to 39 portray exactly where people travel to for bulky goods relative to the location that the survey took place.

Figure 16 Bulky goods shopping destinations

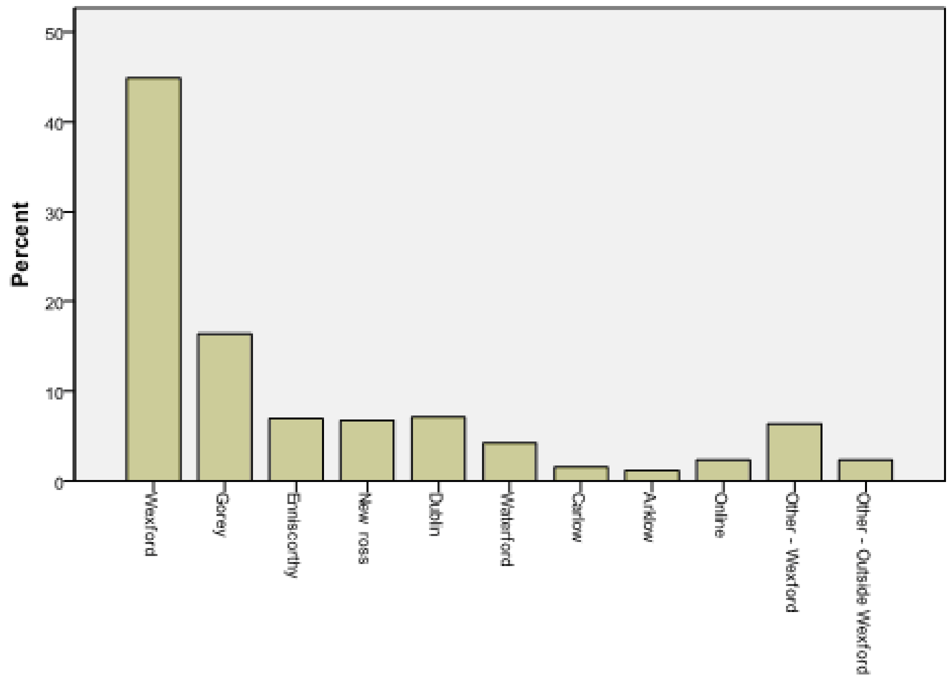


Table 36 Bulky goods shopping locations within Wexford EA

Location	Wexford	Enniscorthy	New Ross	Dublin	Waterford	On-line	Other Wexford	Other Outside Wexford
Barntown	8	0	0	0	0	0	0	0
Castlebridge	10	0	0	1	0	0	0	0
Wexford	87	0	0	7	3	2	4	1
Tagoat	4	0	0	0	0	0	1	0
Taghmon	5	0	0	0	0	0	0	0
Rosslare Strand	9	0	0	0	0	1	0	1
RosslareHarbour	0	0	0	0	0	0	0	0
Glynn	0	0	0	0	0	0	0	1

Kilmore	8	0	0	0	0	0	0	0
Murntown	10	1	0	0	0	0	0	0
Mayglass	1	0	0	0	0	0	0	0
Kilrane	9	0	0	0	0	1	0	0
Piercestown	6	0	0	0	0	0	0	0

Table 37 Bulky goods shopping locations within Enniscorthy EA

Location	Wexford	Gorey	Enniscorthy	New Ross	Dublin	Waterford	Carlow	Arklow	On-line	Other Wexford	Other Outside Wexford
Ballindaggin	2	0	0	0	0	0	0	0	0	0	1
Ballymurn	4	0	0	0	0	1	0	0	0	0	1
Blackwater	1	0	0	0	0	0	0	0	0	0	0
Bree	4	0	2	0	1	0	0	0	2	0	0
The Ballagh	4	0	0	0	2	1	0	0	0	0	0
Bunclody	1	0	0	0	1	0	7	0	0	1	0
Enniscorthy	23	2	22	0	2	1	1	1	2	10	0
Glenbrien	1	0	2	0	0	0	0	0	0	0	0
Marshalstown	2	0	2	0	1	0	0	0	0	0	0
Coolgarrow	0	0	0	0	0	0	0	0	0	0	0
Edermine	1	0	0	0	0	0	0	0	0	0	0
Oulart	0	1	1	0	0	0	0	0	0	0	0
Rathnure	0	0	3	1	0	0	0	0	0	1	0

Table 38 Bulky goods shopping locations within New Ross EA

In which town, shopping centre or retail location did you last purchase larger bulky household goods?								
Location of Survey	**Wexford**	**Enniscorthy**	**New Ross**	**Gorey**	**Waterford**	**On-line**	**Other Wexford**	**Other Outside Wexford**
New Ross	4	0	28	0	9	1	2	1
Carrig	6	0	0	0	0	0	0	0
Ramsgrange	2	0	1	0	0	0	0	0
Wellington bridge	3	0	0	0	0	0	0	0
Fethard	1	0	1	0	2	0	1	0
Duncannon	2	0	0	0	2	0	1	0
Clonroche	1	2	2	0	1	0	1	0
Clongeen	3	0	1	0	0	0	1	0
Campile	2	0	1	0	2	0	1	0
Ballycullane	7	0	0	0	0	0	3	0
Foulkesmill	0	0	0	0	0	0	0	0

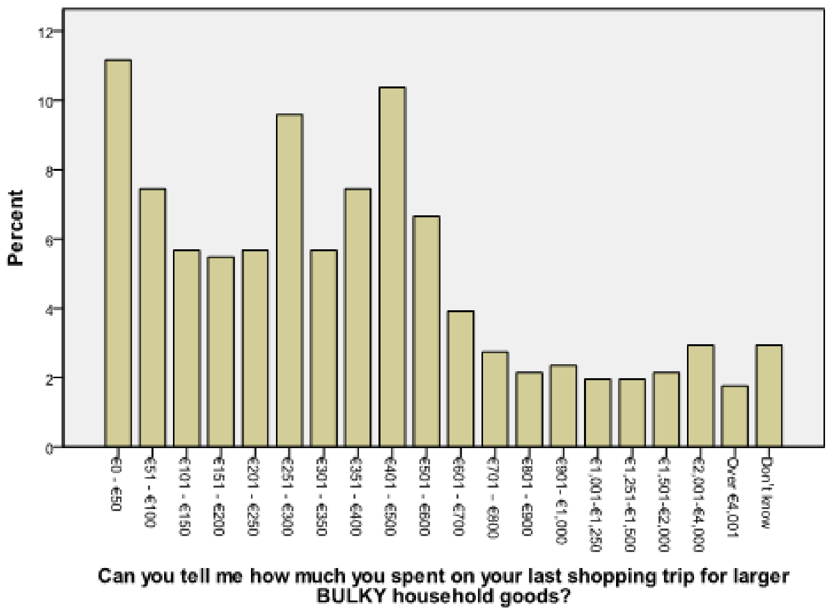
Table 39 Bulky goods shopping locations within Gorey EA

Location of Survey	**Wexford**	**Gorey**	**Enniscorthy**	**Dublin**	**Arklow**	**On-line**	**Other Wexford**	**Other Outside Wexford**
Courtown	0	11	0	10	1	2	1	4
Coolgreany	0	5	0	0	1	0	0	0
Ferns	1	2	1	0	0	0	4	0

Kilmuckridge	0	1	0	0	0	0	0	0
Ballycanew	0	4	0	0	0	0	0	0
Gorey	0	41	0	11	2	1	1	1
Hollyfort	0	5	0	0	0	0	0	0
Killinerin	0	4	0	0	1	0	0	1
Monamolin	0	4	0	0	0	0	0	0
Camolin	1	5	0	1	0	0	0	0

Figure 17 below provides information on the amount spent by the respondents on bulky goods items on their last shopping trip. Given the range of bulky goods available the prices can vary considerably from one item to another e.g. a suite of furniture compared to a a garden tool. The surveys showed that 16.2% of respondents spent less that €50, and 10.4% spent between €401-500. A limited number of people, totalling 1.8%, spent over €4000 on their last bulky goods shop.

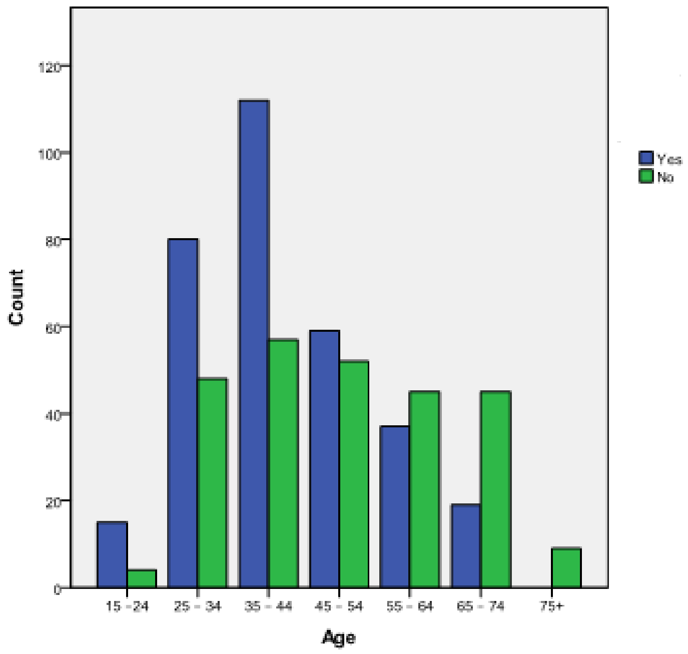
Figure 17 Expenditure on bulky goods



3.3.6 Internet Shopping

The respondents were asked if they had purchased goods over the internet in the last six months. Over half (55%) of the respondents said they had, while 45% said they had not. Figure 18 details the age range of those who internet shop, not surprisingly those who use it the most are those within the 25-34 age bracket and the 35-44 age group.

Figure 18 Breakdown of those who do internet shopping by age



In the last six months, have you used the internet for shopping purchases?

The type of goods purchased by those who carried out internet shopping in the last six months is illustrated in Table 40. The respondents were asked to list multiple answers to this question and hence the frequency of numbers.

Table 40 Purchases made over the internet

Items	Number of Purchases	Percent of Purchases
Books	146	23.7
CDs/Videos	111	18.0
Clothing & footwear	166	26.9
Electrical items	111	18.0
Food & Grocery	41	6.6
Holidays	137	22.2
Sports Goods	53	8.6
Other	48	7.8
Don’t know / Can’t remember	37	6.0

Table 41 details the amount spent by respondents on their last purchase over the internet. Internet expenditure of less than €100 accounts for 58.2% of the overall spend.

Table 41 Expenditure on internet purchases

Spend	Number	Percent
€0-50	128	39.6
€51-100	60	18.6
€101-150	40	12.4
€151-200	22	6.8
€201-250	13	4.0
€251-300	11	3.4
€301-350	6	1.9
€351-400	6	1.9
€401-500	11	3.4
€501-600	8	2.5
€601-700	4	1.2
€701-800	3	.9
€801-900	1	.3
€901-1000	2	.6
€1001-1250	2	.6
€1251-1500	3	.9
€1501-2000	1	.3
€2001-4000	1	.3
Don't Know	1	.3
Total	323	100

3.4 Summary

The household surveys are a good indication of the level of retail leakage the County is experiencing. People do not travel far for grocery purchases and 4.8% of the respondents shopped outside the County for their main food and grocery shop. The supermarkets also hold a significant portion of the 'top-up' shopping market, showing that it is not solely dependent on the proximity to the retailer. The most significant level of retail leakage is for comparison shopping, where 27.8% of the respondents normally shopped outside the County for clothing and footwear. Not surprisingly, there is considerable leakage in the areas on the periphery of the County in the towns of New Ross, Bunclody and Gorey. With regard to bulky goods shopping the level of retail leakage was lower with 18.7% of the respondents shopping outside the County. However, the towns of Wexford and Gorey had the highest draw. The surveys have also indentified that over half of those surveyed have bought something over the internet in the last six months.

Section 4 Health Check Appraisal

4.0 Introduction

'Health Checks' are an important tool in assessing the vitality and viability of town centres and therefore are an integral part of the Retail Strategy. According to the RPGs 'vitality' refers to buoyancy and activity within a town, while 'viability' relates to the commercial well being of a town centre. This section of the report provides an overview of the retail profile and health check assessment of the main urban centres of Wexford Town, New Ross, Enniscorthy and Gorey. It also details to a lesser extent the district towns of Courtown and Riverchapel, Bunclody, Wellingtonbridge, Castlebridge and Rosslare Harbour and Kilrane.

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.

Annex 2 of the RPGs detail a number of priority indicators for health check assessments such as diversity of uses, retailer representation, proportion of vacant street level property, shopping rents, accessibility and environmental quality. However some of the information necessary is not available for centres outside of the main metropolitan areas, for example- shopping rents and the pattern of movement in retail rents within primary shopping areas.

Therefore, in order to determine the vitality and viability of existing town centres in County Wexford the following indicators were used:

- Attractions and environmental quality
- Diversity of uses
- Retail representation
- Vacant retail property
- Accessibility and pedestrian flows
- Actions

Using the above indicators, health check assessments were carried out in Wexford Town, New Ross Town, Enniscorthy Town, and Gorey Town during the summer months of 2011. Appraisals took place in the district towns of Courtown and Riverchapel, Rosslare Harbour and Kilrane, Bunclody, Wellingtonbridge and Castlebridge during February 2012. The shopper surveys discussed in the previous section outline many of the attractions and improvements of the four main towns.

4.1 Wexford Town Health Check Assessment

4.1.1 Attractions and Environmental Quality

Wexford Town is the administrative, retail and business capital of County Wexford. 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 principal attractions to the town centre. The town is an example of a Viking settlement 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 and its only surviving town gate; Westgate.

Wexford Town Centre has a well defined structure. It is focused on a central spine in the form of the Main Street with a series of radial lanes and side streets linking down to the waterfront and upwards to High Street. Main Street itself is divided into North Main Street and South Main Street. The Quays, which traditionally would have acted as the main commercial area of the town, has the potential to cater for a broader scale of retail activity with large serviceable site divisions. The award winning quay boardwalk is an excellent provision of public open space which enhances the attractiveness of the town. There are a number of seating benches provided with landscaping, street furniture and lighting which add to the character of the town.

Wexford has an attractive streetscape. The majority of shop fronts in the town centre are well presented with a mix of both contemporary and traditional style fascias, which complements the streetscape. Modern shop fronts are generally respectful of the traditional idiom. The introduction of uPVC framed windows or similar have had somewhat of a negative impact on the streetscapes. Nonetheless, the town centre has retained much of its original form along Main Street and is attractive to the pedestrian in both scale and use with a series of high quality public spaces such as the Bull Ring, Selskar Square, Redmond Square, the Quayfront and the pedestrainised North and South Main Streets.

Since the last retail strategy improvements have been made to the road paving which has enhanced the town's appearance, in particular; The Quays and the lower end of South Main Street have been resurfaced and works have taken place on extending the pedestrainised area along South Main Street. Extensive works have also taken place on the accessibility of the town in conjunction with the resurfacing works. These improvements to accessibility have made all shops within the town accessible for all.

In light of the economic downturn the main threat to the appearance of the town is vacant buildings. There are a number of buildings throughout the town, even on the principle shopping streets, which have been vacant for a considerable time. However, an example of an initiative undertaken by Wexford Borough Council on the vacant Dunnes Stores site, which occupies a prime retail location, is the use of the windows as a community display area. This initiative was carried out in cooperation with Dunnes Stores. It removes the vacant appearance from the building and thereby enhancing the streetscape. Litter bins are provided throughout the town and there was no problem with litter on the day of the survey.

4.1.2 Diversity of Uses

Wexford Town Centre accommodates a diverse range of uses which enhances its role as the commercial centre of the County. The town centre supports a wide range of retail and service outlets in a linear development along North and South Main Street and the historic harbour area. It is apparent from the land use survey carried out the rough approximate split between retail and services within the town is 60:40 to retail units.

Within Wexford Town, the variety of shops, pubs, restaurants and cafes are located along Main Street and the Quay. There is a mix of independent retailers and national multiples which contribute to the diversity of the retail offer. The independent stores play a key role in contributing to the town’s unique retail sector. Bulky comparison retailers are provided for in the retail and business parks at Drinagh, Clonard and Ardcavan. There are a number of forecourt retailing offers on the main arterial routes, through the town such as Newtown Road, Rosslare Road and the R741 coastal approach road. There are also a number of high quality hotels within the town providing conferencing and leisure facilities, such as Whites Hotel, Talbot Hotel, Maldron Hotel and the Riverbank Hotel. The range of business and commercial uses within the town centre include local and national professional businesses and financial institutions. Industrial development is primarily located in Ardcavan, Whitemill Industrial Estate, Kerlougue Business Park and Sinnotstown Lane. The presence and development of the Wexford campus of Carlow Institute of Technology has provided local access to further educational opportunities, which can attract inward investment with the increased number of skill-sets within the area. Important civic buildings within the town include the Wexford Opera House, the Wexford Arts Centre, public library, public swimming pool, the Wexford Borough Council, County Council, Department of Environment, Community and Local Government offices. Other key services located within the town are Wexford Regional Hospital, Ely Hospital, many medical centres and dentist surgeries.

4.1.3 Retail Representation

An audit of existing retail floorspace was carried out by Wexford County Council to identify the existing quantum of retail floorspace within the County's four main towns. The following table represents the existing retail floorspace in Wexford Town in July 2011 (vacancies are discussed in greater detail under section 4.1.4).

Table 42 Existing retail floorspace Wexford Town

	Convenience Floorspace (sq m)	Comparison Floorspace (sq m)	Bulky Comparison Floorspace (sq m)	Vacant Retail Floorspace (sq m)	Total retail Floorspace (sq m)
Wexford	13945	33160	18348	19248	84701
Percent of floorspace	16.5%	39.1%	21.7%	22.7%	100.0%

The retail profile of the town is characterised by a variety of independent retail outlets which are complemented by national and international. Traditionally, Wexford has been occupied by a range of independent retailers but more recent developments have seen a number of national/international retailers establish themselves within the town; such as Fat Face, New Look, Pamela Scott, A-wear and Jack & Jones. The introduction of these well known brands instil confidence in Wexford Town as a shopping destination.

In terms of convenience shopping, Wexford has a broad range of national/international supermarkets, including; Tesco, two Aldi stores, a Lidl, two Supervalu supermarkets and a Dunnes Stores. The development of the Tesco food store on Distillery Road and an Aldi Discount food store on Trinity Street, have collectively extended the traditional retail core southwards. Bulky goods comparison shopping has a number of independent retailers such as Colman Doyle and Lowneys Furniture. The national chains such as Halfords, DID Electric, Right Price Tiles, Cost Plus Sofa and Woodies are also represented within the retail park located at Clonard.

4.1.4 Vacant Retail Property

The retail floorspace audit for Wexford Town revealed that 22.74% of the existing retail floorspace in the town was vacant. Out-of-town retail parks accounted for 30% of the vacant floorspace and 39.5% accounted for the town centre vacant units. The vacant floorspace includes a number of vacant units of significant size such as those previously occupied by Dunnes Stores and Tesco alongside a new build convenience supermarket located in Clonard Village.

4.1.5 Accessibility and Pedestrian Flows

Wexford is accessible from a number of primary routes such as the N30 from Enniscorthy, the N25 from Waterford, the R733 serving New Ross via Wellingtonbridge and the R741 from Gorey. Over the last ten years the overall accessibility of Wexford Town has benefited from the works carried out by the Borough Council's Traffic Management Plan. The works included; the introduction of new traffic lights, pedestrian crossings, one-way systems and roundabouts throughout the town. The proposed Enniscorthy bypass along with the proposed Oylegate to Rosslare Harbour road project will remove the need for motorists using the R741 to travel through the town centre. Parts of North and South Main Streets have benefited from a programme of works undertaken by Wexford Borough Council to develop the street as a pedestrian zone.

The railway station is well located in the centre of the town on Redmond Square. The station has been recently upgraded with the provision of an accessible pedestrian crossing and improvements to the overall accessibility of the station for rail and bus users. The rail service provides links to Dublin and Rosslare. Bus Éireann also provides frequent services from Rosslare Harbour via Wexford to Dublin and services also run to Cork, Limerick and Waterford via New Ross. Ardcavan coaches operate routes to Maynooth, Dublin and Limerick. Wexford Bus also operates a route from the town to Dublin City and Dublin airport serving many local towns en-route. They also operate a Wexford Town Service which picks up at a number of points throughout the town such as the Crescent Quay, Redmond Square, Newtown Road, Belvedere Grove, Clonard Road, Corish Park, Bishopswater, Distillery Road and The Faythe. They also run services from Castlebridge to Wexford, Wexford Town to Rosslare Strand via Piercestown and Wexford to Kilmore Quay via; Johnstown Castle, Murrintown, Bridgetown and Kilmore village. Wexford also has a number of taxi ranks and operators in existence.

Wexford is relatively well served by car parking facilities although parking in the town centre is predominantly surface car parking. There are multi-storey car parks located at Paul's Quay and at Whites Hotel on Abbey Street. There is a large surface car park located along the quays, to the rear of McCauleys at Redmond Square, adjacent to the old cinema, Dunnes Stores on Redmond Road and at Bride Street. The recent connection between Bride St and Stonebridge car park at Paul's Quay has improved permeability in the area. Allen Street comprises poor quality surface car parking, located in a backland area.

4.1.6 Actions

An 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 to accommodate larger retailing formats and this can place pressure on the fine urban grain of traditional town centres. However, the integration of these units has been successfully catered for in areas such as the Main Street with the introduction of Fat Face, New Look, Pamela Scott, A-wear and Jack & Jones. There are a number of sites in the traditional town centre which have the capacity to provide appropriate opportunities for delivering modern retailing formats, such as the old Dunnes Stores and Tesco site and the site of the old cinema (these will be discussed in further detail in section 7). It is important that retailing is retained within the town centre to maintain the importance and viability of the retail core. Therefore town centre available sites should be considered in the first instance. Then when these sites are not a viable option, the issue could be addressed by the development of larger retail units at the edge of the traditional town centre, such as the Trinity Wharf site and the GPS HomeValue Hardware and Livingston site. The provision of large-scale modern shopping facilities in the vicinity of the traditional town centre will serve to benefit both large scale and independent retailing due to the increase of linked trips.

The economic downturn is manifested in the streetscape through vacant properties. Management of these units is essential in order to maintain a positive image of a town. Monitoring and a proactive approach are required to reduce this threat. Another initiative in the pipeline by Wexford Borough Council in partnership with the Wexford Campus of I.T. Carlow is the leasing of an unoccupied shop on South Main Street for the display of artwork from the arts department of the college. This is a good pilot for future community initiatives for improving the appearance of vacant units in the town.

The traditional town centre would also benefit from better and more integrated pedestrian linkages with the extended town centre area, which would enhance the character and accessibility of the town. In particular it would be beneficial to strengthen pedestrian links between the Quays and Main Street to avoid severance of these core areas. Access to the town will also be improved by alleviating pressure on Hill Street by the construction of the proposed link road from Carricklawn to Carcur, creating an important route within the town.

4.1.7 Wexford Health Check Conclusion

Wexford as the county town is considered vibrant, with a range of independent, national and international operators. The town has a good 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. The town centre has much potential to build upon the areas traditional charm and create an attractive area for craft, gift and other specialists and independent shops, including restaurants.

4.2 New Ross Health Check Assessment

4.2.1 Attractions and Environmental Quality

New Ross is situated at a strategic location in the south west of County Wexford on the banks of the River Barrow, approximately 36km to the west of Wexford Town and 23km to the north east of Waterford City. It is located at the intersection of the N25 National Primary Road linking Rosslare Europort to Waterford City and the N30 National Primary Road connecting New Ross to Enniscorthy.

The town of New Ross developed due to its strategic location along the River Barrow. It is sited approximately 32km upstream on the River Barrow, which provides employment for the town and immediate area.

Traditionally the town developed in a linear format, constrained by geographical features; the River Barrow to the west and the steeply increasing topography to the east. New Ross is an attractive market town with a colourful array of traditional styled shop fronts dotted along the interlinking narrow streets.

The streetscape generally comprises of three and four storey buildings overlooking tidy and well maintained footpaths. The town centre is interspersed with vibrant flowerboxes and at the time of the survey little or no litter was evident along the streets. Although street furniture is largely absent in the town centre, there are some seating areas scattered along the Quays and adjacent to O'Hanrahan's Bridge. The overall quality of public realm and streetscape is generally good, however on the periphery of the town centre particularly along Mary Street and John Street, shop units were showing signs of neglect and lack of maintenance which detracts from the aesthetics of the town.

The built heritage in the town centre has remained largely intact over the years with a number of impressive period buildings and structures adding to the visual appeal of the town centre, albeit some of the structures in recent times, have become derelict and dilapidated in appearance.

In recent years the tourism potential of the waterfront has been developed with the completion of a marina for mooring of pleasure boats, the permanent docking of the Dunbrody replica famine ship and the redevelopment of the Dunbrody Irish

Emigration History Centre along the Quays which has become a key tourist attraction within the South East Region.

The waterfront along the Quays provides eye-catching views of the River Barrow and the surrounding area. Currently the waterfront area is utilised predominantly as a car park with limited seating or street furniture. The presence of a number of vacant retail and commercial units, coupled with some cleared infill sites (presently used for private car-parking) gives the waterfront a slightly neglected appearance. Given the attractive views along the waterfront and its proximity to the town centre, there is a significant opportunity to develop the potential of this area. The Council are currently involved in the resurfacing of the quays which will enhance the overall appearance and the redevelopment of the quayfront is imminent.

4.2.2 Diversity of Uses

New Ross offers a range of uses as would be expected in a large county town. Retail uses dominate the ground floors of the buildings within the town centre while the upper floors consist of a mixture of office and residential accommodation. It is apparent from the land use survey carried out the approximate split between retail and services within the town is 60:40 to retail units.

Business and commerce are provided for by; AIB, Bank of Ireland, Permanent TSB and a credit union as well as a range of solicitors, accountants and auctioneers/estate agents' offices. Other key services located within the town include; a public library, a medical centre, dentist surgeries and a community enterprise centre which serve the local need. There are also a number of;

restaurants, pharmacies, florists, ladies boutiques, music stores, health food shops, jewellers and gift shops in the town centre.

Industry is located at New Ross Port to the west of the town centre (across the River Barrow); to the south west of the town at Marshmeadows and at the Butlersland IDA Industrial Park off the N25 and the Woodbine Industrial Estate along the N30 to the south east of the town centre.

New Ross has a relatively high level of leisure and recreational facilities including; a public park, a swimming pool, a marina, a children's adventure centre, St. Michael's Theatre, a boat club, an 18 hole golf course and a range of outdoor sports pitches. Visitor accommodation is provided in a small range of B&Bs and two hotels with the larger Brandon House Hotel and Solas Croi Eco Spa located on the outskirts of the town.

4.2.3 Retail Representation

The following table represents the breakdown of the existing retail floorspace within New Ross (vacancies are discussed in greater detail under section 4.2.4).

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Table 43 Existing retail floorspace in New Ross

	Convenience Floorspace (sq m)	Comparison Floorspace (sq m)	Bulky Comparison Floorspace (sq m)	Vacant Retail Floorspace (sq m)	Total retail Floorspace (sq m)
New Ross	9669	5012	14586	7378	36645
Percent of Floorspace	26.4%	13.7%	39.8%	20.1%	100.0%

The retail representation consists mainly of independent retailers providing a range of goods and services. In relation to convenience retailing, New Ross has a number of different formats which include; a mix of local independent shops, a number of symbol group stores such as Supervalu, and a small number of specialist ethnic shops. The international discount multiples of Lidl and Aldi are also represented. Tesco operate a large store in the New Ross Retail Park which is situated to the south east of the town centre, on the outskirts of the town.

The primary retail area of the town (where the main concentration of retail activity is undertaken) is centred on the streets of South Street, North Street, Charles Street and Quay Street. The secondary retail area (which at present contains a significant level of vacant retail units) is focused on the periphery streets of Mary Street, John Street, the Quays and a small shopping area to the rear of South Street.

Comparison shopping (excluding bulky goods) in New Ross is relatively limited and is provided predominately by small independent retailers. International/UK comparison multiples are poorly represented. There are a select number of indigenous multiples and symbol groups such as; Sam McCauley, Sportsavers and Vodafone.

Bulky goods shopping is primarily located at the New Ross Retail Park and the Woodbine Business Park situated to the south east of the town along the N30 National Primary Road. The New Ross Retail Park consists of a number of large retail units with a significant level of surface car parking to the front. Retail units are occupied by Tesco, and the bulky goods provided by Michael Murphy EZ Living and Joyce's Homecentre. There were units vacant at the time of the health check. Woodbine Business Park, also contains a number of bulky good retailers including; McManus Furniture, Cedarwood - 'Kitchens, Bedrooms and Home

Interiors' and Michael Murphy's Furniture. At the time of the survey there were also a number of units vacant.

Across the River Barrow to the north west of the town centre at Rosbercon, a small number of mixed use developments have been constructed. A convenience store and ethnic food store, alongside a number of local level services serve this immediate community. The ground floor units of a number of the mixed use developments are currently vacant. Neighbourhood centres are also located on the town periphery at Castlemoyle and Irishtown.

4.2.4 Vacant Retail Property

The floorspace audit revealed that 20.1% of the existing floorspace is vacant. Bulky comparison retail floorspace located in the retail parks accounted for 32.4% of the vacant units. The remainders of the vacant units are located within the town centre.

4.2.5 Accessibility and Pedestrian Flows

Pedestrian activity is quite limited with the majority of pedestrian flows concentrated along South Street, Charles Street and along the Quays. There are five pedestrian type crossings to assist movement along the Quays and one designated pedestrian crossing on South Street.

Although the majority of the traffic volumes in the town are directed along the Quays, there was considerable traffic congestion along South Street and Charles Street throughout the day of the health check. This is exacerbated by on-street parking which tends to restrict vehicular movement. It was also noticed that Bridge Street and the North Quays become congested later in the afternoon.

Similarly, the access road from Waterford has a problem with long tail backs at peak hours on a regular basis.

In terms of public transport New Ross is served by Bus Éireann - Expressway service linking Rosslare and Dublin to Waterford via Wexford and New Ross. Bus Éireann also provide a local bus service serving Waterford – New Ross – Duncannon - Wellingtonbridge – Wexford Town. Kilbride Coaches run a regular service between Kilkenny and New Ross via Inistioge. The Rural Bus Company has a number of local routes linking New Ross with many of the surrounding townlands and Waterford and Wexford Town on a weekly and daily basis. The town is also served by some local private bus operators. The New Ross Town Council is also in the process of organising a town bus service operating a loop throughout the town serving a number of existing housing estates. There are also a limited number of taxi and hackney firms operating in and around the town.

4.2.6 Actions

In order for the town to continue to retain its standing within the County it needs to improve the quality of its retail offer in comparison shopping. There are a number of key opportunity sites close to the quay and town centre which have the capacity to absorb future retail development and to provide the size and quality of floor space required by major national and international retailers. These opportunity sites are brownfield or derelict sites that have the potential to deliver medium-large mixed use developments that will not only expand the choice of shopping available for New Ross and its catchment area but also enhance the physical attractiveness, environmental quality, public realm and vitality and viability of the town centre by improving environmental quality.

The overall appearance of the town will be improved by the resurfacing of the quay, which had just commenced at the time of writing. The Quays are the main access route through the town and contribute to people's first impression on the town. Contracts have also been signed for the redevelopment and visual improvement of the quay to include the provision of a boardwalk and a new civic space. A detailed Public Realm Plan has been prepared and when implemented will enhance the environmental quality of the town. Some of the actions included in the public realm plan include; an open spaces, sports and recreation study, accessibility audit, waterfront upgrading works, improvements to the quay, Rosbercon open spaces and links with the town centre, improvements to the Tholsel, partial pedestrianisation of Quay Street and laneway improvements. The Council is also actively involved in a shop front improvement scheme, where grants are provided for painting and decorating, repair and renewal of facia, soffit and guttering, repair and renewal of windows, doors and traditional shop fronts.

4.2.7 New Ross Health Check Conclusion

New Ross has a distinct character marked by its built heritage with traditional styled shop fronts and its location along the waterfront. However, the health check analysis conducted outlines that whilst New Ross has a limited range of comparison shopping it has in recent times had significant development in bulky comparison floorspace. Opportunity sites exist within the town centre for development that would enhance the vibrancy of the town and its retail offer.

4.3 Enniscorthy Health Check Assessment

4.3.1 Attractions and Environmental Quality

Enniscorthy is an old Norman settlement situated on the banks of the River Slaney. The River Slaney is the town's most valuable resource in terms of natural amenity. Residential development lies to the east and west of the town. The single largest attraction in the town is the Enniscorthy Castle which includes a tourist information point. Other major attractions include St Aidan’s Cathedral and Vinegar Hill.

Enniscorthy Town is bisected by the River Slaney which runs through the centre of the town dividing it in half. The town’s mediaeval origin is evident in its strategic location in an elevated location immediately west of and overlooking the River Slaney. The town centre follows a historic street layout, which rises steeply from the river.

Enniscorthy has a high quality physical and natural environment. The town’s location on the hillsides of the Slaney Valley has provided amenities for passive recreation. Many of its views are protected by the 2008 Enniscorthy and Environs Development Plan 2008-2014. The town centre has a high quality public realm. Its unique topography gives Enniscorthy a rather picturesque quality. The Market Square is the focal point of the town with many routes leading to its centre such as Cathedral Street, Irish Street, Rafter Street, Weafer Street and Castle Street. The buildings in the town centre are in good condition. Rafter Street has recently been pedestrainised, which strengthens the core of the town centre.

Shop fronts are well presented and the town centre 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 modern forms of PVC window frames in historic properties. Many of the shops have hanging flower baskets and there are attractive features and street furniture which enhance the aesthetic setting of the town. There is a park located in the

Duffry which has recently been renovated with landscaping, seating and a playground. The promenade running along the river also provides an aesthetic attribute to the town.

Litter bins are provided throughout the town. There did not appear to be a problem with litter at the time of the survey, with the exception of the area to the east of the river. The quality of paving and paths throughout the town are generally good. On the eastern side of the town, a number of the buildings are poorly maintained and the level of vacancies was more evident. The overall quality of the public realm of lands to the east of the river is less than that of the western end of the town centre.

4.3.2 Diversity of Uses

Enniscorthy Town Centre accommodates a wide range of functions. It is apparent from the land use survey carried out the approximate split between retail and services within the town is 50:50. Comparison shopping is the dominant use on Rafter Street, Slaney Street, and Cathedral Street. It is provided by a number of independent retailers – Modern Fashions, Murt Walsh, and Eric Barron. Convenience supermarket shopping is provided by two Supervalu stores, Dunnes Stores, Aldi and Lidl. A new addition to the town is Mr. Price a national branded retailer providing both convenience and comparison shopping on the eastern side of town.

There is a range of commercial and business uses in the town. Financial institutions are represented by AIB, Bank of Ireland, Permanent TSB, Ulster Bank and Enniscorthy Credit Union. A number of professional services provide a range of services; such as accountants, insurance brokers, estate agents/auctioneers, solicitors, opticians and pharmacies. Other key services are the Garda Station, Fire Station, FAS Office, Public Library, HSE Rehabilitation and Nursing Home.

A number of pubs, two nightclubs, restaurants and coffee shops are evident in the town centre. There are two hotels, Treacys Hotel and the Riverside Park Hotel and Leisure Club, which provide visitor accommodation. The ‘Waterfront’ public swimming pool is located on the eastern side of town.

4.3.3 Retail Representation

The following table represents the breakdown of the existing retail floorspace in Enniscorthy (vacancies are discussed in greater detail under section 4.3.4).

Table 44 Existing Retail Floorspace Enniscorthy

	Convenience Floorspace (sq m)	Comparison Floorspace (sq m)	Bulky Comparison Floorspace (sq m)	Vacant Retail Floorspace (sq m)	Total retail Floorspace (sq m)
Enniscorthy	7767	9555	3909	2315	23546
Percent of floorspace	33.0	40.6	16.6	9.8	100.0

The retail representation consists mainly of independent retailers providing a range of goods and services. The national/international retailers comprise of Aldi, Lidl, Supervalu and Dunnes Stores. Brand name comparison shops currently in the town are Vodafone, Carphone Warehouse, O'Brien's Sandwich Bar, Xtra Vision and Sportsavers.

There are two main shopping centres within the town both anchored by supermarkets. The Abbey Square Shopping Centre is located to the south east of the town centre adjacent to the River Slaney. The anchor of the shopping centre is Supervalu and it also contains a number of smaller retail and service units such as a newsagent kiosk, pharmacy and cafe. The shopping centre is served by a large surface level car park in Abbey Square. There are some bulky warehouse units with large floor plates adjoining the shopping centre. This area of the town represents a key opportunity for redevelopment.

On Irish Street, to the west of the River Slaney, there is a large Dunnes Stores with a number of adjacent retail units, on the former Minch Norton site. The development has aided in diversifying the retail sector in the town centre and has enhanced the existing linkages between the Minch Norton site and the traditional town centre. It has also resulted in the effective reuse of the traditional stone grain stores.

Overall, Enniscorthy has a lack of larger comparison national and international multiples. Bulky comparison shopping in Enniscorthy is relatively limited with a small number of units located within the town centre. It is considered that limited floor space sizes in the core retail area of the town may have restricted national/international traders entering the town centre. However, since the opening of the new Dunnes Stores in late 2006 the old Dunnes site with a gross floor area of 950sqm in the town centre with convenient car parking has been vacant.

4.3.4 Vacant Retail Property

The floorspace audit revealed that Enniscorthy had 2315 sqm of vacant retail floorspace within the town centre. This accounted for 9.8% of the existing retail floorspace. The majority of the vacant units were small, with a net retail floorspace of less than 50sq.m. The highest levels of vacant units were located on Slaney Street. The highest proportion of vacancies (59%) were located in the town centre on Castle Street, Weafer Street, Rafter Street, Irish Street and Slaney Street.

4.3.5 Accessibility and Pedestrian Flows

Enniscorthy is centrally located in County Wexford on the N11 and N30 National Primary Routes. The town is currently bisected by the N11 and suffers from traffic congestion especially at peak hours, often resulting in long delays. Added to this, the geography of the area impedes the accessibility of vehicular and pedestrian traffic in the town centre. For instance, traffic can be heavily congested on the R744 on the eastern side of the river. When the proposed bypass is constructed around the town, traffic congestion in the town will be substantially reduced. On-street parking, which is available along many of the town’s key retail streets impacts on travel congestion. Overall, the impeded traffic flow through the town can act as a deterrent on visiting the town.

There are three main surface car parks within the town: Abbey Square, The Duffry Gate and what is known locally as the Old Dunnes car park located to the rear of Rafter Street. Dunnes Stores provides the only multi storey car park in the town.

Pedestrians are well provided for throughout the town with adequate footpaths on all roads and a number of pedestrainised streets such as, Slaney Street and Rafter Street. There are three pedestrian crossings within Market Square. On the day of the survey there was a high level of pedestrian activity on Rafter Street.

Enniscorthy Town enjoys good levels of accessibility by public transport. Bus Éireann provide a frequent service from Templeshannon Quay in the town centre to Dublin, Wexford town, Waterford and Rosslare Harbour. The town is also on Wexford Bus's and Ardcavan Coaches routes to Dublin. Enniscorthy is also located on the Dublin to Wexford (Rosslare) rail line. There are a number of taxi companies operating within the town.

4.3.6 Actions

In order for Enniscorthy to continue to retain and enhance its standing within the County and national retail hierarchy, the retail offer needs to be improved and enhanced to make it more competitive with the other towns. There is a need to preserve the vitality and viability of the town centre and its retail facilities. In many cases, shop formats or floorplates are perceived as not meeting the needs of the larger retailers. However, the redevelopment of the Minch Norton site has provided the opportunity for a large multiple retailer (Dunnes Stores) to develop, while linking well with the core retail area of the town. This development has set the precedent for the expansion of the core retail area of the town centre to include derelict sites along Island Road, Irish Street and Barrack Street. There are a number of opportunity sites in the town centre such as the site of the former Murphys Flood's Hotel, the quays at Abbey Square and the site located at Nos. 10 and 11 Market Square. These sites form a prominent part of the townscape of

Enniscorthy and their redevelopment would enhance the overall vitality and facilitate the consolidation of the town centre.

A public realm plan titled Enniscorthy 1500+ details possible enhancements and improvements of different parts of the town centre area, extending across the bridge to Templeshannon, The report, specially commissioned by the Town Council, has been prepared by Phillip Geoghegan of iCon Architecture and Urban Design company outlines improvements such as the pedestrianisation of Rafter Street (which has been implemented) shop front conservation, the refreshment of pavements on Slaney Street, making Spout Lane a visually clear pedestrian route, widening of the pavements on Shannon Quay and restoring the lettering on the boundary wall to Donohoe's Depot.

There is still an imbalance in the provision of neighbourhood centre facilities between the eastern and western environs of the town even with the development of Mr Price on the neighbourhood site at Clonhasten. The development of Phase 3 of the main drainage scheme for Enniscorthy will open up lands for residential development on the eastern side of the river in the next few years and these lands should be adequately served by neighbourhood centre facilities.

The Council 's have just finished works on Court Street and Irish Street in Town Centre which included new granite footpaths, road resurfacing and changes to street layouts. The Council's upcoming projects include the footpath refurbishment of Church Street including new lighting, road surfacing, traffic calming and accessibility works and improvements to Vinegar Hill and the 1798 Centre. Works are also ongoing to improve accessibility throughout the town.

4.3.7 Enniscorthy Health Check Conclusion

Overall, Enniscorthy is an attractive town with retail activity clustering around the Market Square. The town has a pleasant shopping environment with good shop fronts, paving and a high quality public realm. The key issue facing Enniscorthy is the congestion in the town which should be addressed by the construction of the N11/N30 town bypass. One of the key conclusions of the health check is that the town has not attracted many of the national/international retailers throughout the years. There are however a number of key sites available which could have the opportunity to enhance the retail provision within the town centre, these sites will be discussed in great detail in section 7.

There is a clear imbalance in the overall environmental quality between the east and west side of the River Slaney. There is a higher rate of derelict and vacant buildings to the east of the river and the overall quality of the public realm is significantly less than that of the western end of the town centre. The eastern bank of the river would benefit from significant investment and redevelopment.

4.4 Gorey Health Check Assessment

4.4.1 Attractions and Environmental Quality

Gorey is the main town in north of the County. It is approximately 52 kilometres north of Wexford Town, via Enniscorthy on the N11/M11. The town is located 100 kilometres from Dublin and has developed a significant role as a residential base for commuters to Dublin. The town developed to the west of the River Banoge (running north-south) in a low lying area of land. The surrounding landscape is undulating with hills rising around the town - north-east at Clonattin and more significantly in the south-west at Gorey Hill. Noticeably, the landscape to the west of the town rises more significantly in the area known as Creagh.

Gorey has an attractive town centre, consisting of one wide, straight arterial main street with minor streets feeding onto it in a grid-like fashion. A series of streets run north-west and south-east of Main Street, including Rafter Street, John

Street, and Thomas Street. The existing primary retail provision in Gorey is centred at Gorey Shopping Centre and Main Street, with secondary shopping frontage on Esmonde Street and The Avenue.

Main Street still retains a number of older and attractive shop fronts and the streetscape is generally colourful and vibrant. The majority of the buildings along the main arterial routes are in good condition. However, the secondary side streets in the town are relatively vacant and subject to some dereliction and decay. The traditional fabric of the streetscape is interspersed with many new builds throughout the years.

A public urban park is situated adjacent to the new Civic Offices. It provides street furniture and adult exercise equipment. There is also a number of seating benches located on Main Street and Esmonde Street. The overall quality of the public realm and streetscape is generally good. On the days of the survey it was noted that littering and graffiti were not a noticeable issue in the town.

4.4.2 Diversity of Uses

Gorey town incorporates a mixed pattern of uses. It is apparent the land use survey carried out the approximate split between retail and services within the town is 56:44 to retail units. Retail is the main activity on Main Street, Esmonde Street, The Avenue, Gorey Shopping Centre and Knockmullen Retail Park. Esmond Street is associated with independent ladies fashion boutiques.

There are a range of business and commercial uses within the town centre. Financial Institutions represented in the town are AIB, Bank of Ireland, EBS, Permanent TSB, Ulster Bank and Gorey Credit Union. The local professional businesses represented are auctioneers/estate agents, insurance brokers, solicitors, opticians and accountants. Other key services located within the town centre are Gorey Public Library, the Civic Offices, Gorey Garda Station, the Courthouse, and Gorey Medical Centre. Industry is located in Gorey Business Park to the southwest of town and the IDA Industrial Estate on the Courtown Road to the northeast of the town.

Visitor accommodation is provided by two hotels the Amber Springs Hotel and the Ashdown Park hotel. Both offer conferencing and leisure facilities. The town is well catered for in terms of cafes, small restaurants and pubs.

4.4.3 Retail Representation

The following table represents the breakdown of the Gorey retail floorspace as of October 2011(vacancies are discussed in greater detail under section 4.4.4).

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Table 45 Existing Retail Floorspace Gorey

Settlement	Convenience Floorspace (sq m)	Comparison Floorspace (sq m)	Bulky Comparison Floorspace (sq m)	Vacant Retail Floorspace (sq m)	Total retail Floorspace (sq m)
Gorey	9807	14008	9318	5868	39001
Percent of floorspace	25.1%	35.9%	23.9%	15.0%	100.0%

The retail representation consists mainly of independent retailers providing a range of goods and services. In recent times some national and international retailers have established themselves within the town, such as the brand name comparison shops of Paco, E-mobile, Elverys Sport, Carphone Warehouse, and Boots.

In relation to convenience retailing, Gorey Town Centre has a number of different formats which include a traditional grocer, a mix of independent local shops and a number of franchise stores such as Centra, Gala, and Spar. Gorey's cultural diversity is manifested in the streetscape with the introduction of specialty stores such Eurostore and the Polski Store. Gorey also has a number of the larger national/international supermarket chains. Tesco, Dunnes Stores, Supervalu, Aldi and Lidl are all within or adjacent to the Town Centre.

Bulky comparison shopping in Gorey is primarily focused on electrical, hardware and furniture/textiles with stores such as Heiton Buckleys, Dominic Smith Electrical, Homevalue Hardware, Brennans Hardware, Halpin Furniture Ltd., Redmond Electric, J Bolands Carpet, Gorey Floors and Kitchens, Dwyer Furniture and Hughie Doyle Furniture and Tiles.

4.4.4 Vacant Retail Property

The floorspace audit revealed that Gorey had 5,868 sq.m. of vacant retail floorspace within the town. This accounted for 15% of the existing retail floorspace within Gorey. At the time of the audit there were no vacant units on the Main Street. The vacancies were predominantly on Esmonde Street and St. Michael's Road where new developments have been constructed but are not occupied. Vacancies in the Knockmullen Retail Park account for 4% of the vacancies.

4.4.5 Accessibility and Pedestrian Flows

Gorey is very accessible from a variety of locations. Dublin and many of Wicklow's towns, such as Arklow are easily accessible via the M11. The N11 connects Gorey to Rosslare, Wexford Town and Enniscorthy. The R741 also connects Wexford Town to Gorey via a number of smaller settlements such as Ballycanew, Ballyedmond and Monamolin. The Courtown and Riverchapel area are connected via the R742.

On the day of the health check a high level of pedestrian activity was evident on Main Street, Edmonde Street, John Street, and Rafter Street. There was limited pedestrian activity between Gorey Shopping Street and Main Street via The Avenue. There are three pedestrian crossings in town, two located on the Main Street and one at the eastern end of Esmonde Street. However, on the day of the health check it was noted that a considerable level of indiscriminate crossing takes place at various points along the street. Also, the lack of a pedestrian crossing at the junction of the Arklow Road, Esmonde Street and the Main Street was quite notably a cause for concern for pedestrian safety. This is currently been reviewed by the Council and a number of options are being considered.

Although the Gorey by-pass has alleviated considerably the traffic congestion within the town, on the day of the health check there were traffic delays evident at the junction of Main Street and The Avenue.

Car parking provision within the town is provided predominantly by on-street parking. There is a small surface car park located to the east of Esmonde Street. Underground car parking is provided in Gorey Shopping Centre. Surface car parking is provided at the Knockmullen and WFC Retail Parks and adjacent to larger convenience retailers such as Aldi, Lidl, Tesco and SuperValu. The on-street parking on the Main Street often leads to congested and slow moving traffic.

In terms of public transport, Gorey is served by a frequent bus service provided by Bus Éireann and Wexford Bus, stopping en-route from Rosslare Harbour to Dublin Airport. Gorey also benefits from a rail service from Rosslare to Dublin. The station is located in close proximity to The Avenue. Gorey currently has two taxi ranks situated at either end of the town.

4.4.6 Actions

There is a significant area of greenfield land which 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 Gorey Shopping Centre. Planning permission has been granted for a new Tesco store in this location and there remain further development opportunities at this land. It will be essential to maintain a sense of connect between the land and the Gorey Main Street and Esmonde Street area.

Retail development should be maintained in the ground floor of buildings on Main Street. The development of the new Tesco store will free up the existing Tesco site. This site which is located close to the Gorey retail core, offer a significant opportunity for re-development.

A detailed Public Realm Plan has been prepared and when implemented will enhance the environmental quality of the town. Some of the actions included in the public realm plan include; the refurbishment of the Market House, increased public space in front of Market House creating a ‘new place under the clock’, new uses and improvements to Market Square and a crossing point on The Avenue at the urban park and improvements to the junction at Main Street and Esmonde Street. The Council is currently actively involved in a feasibility study for the junction of Main Street and Esmonde Street and works are imminent for upgrading of footpaths and a crossing point on The Avenue.

4.4.7 Gorey Health Check Conclusion

The health check assessment indicates that Gorey is a thriving, vibrant and vital town centre. The overall environmental quality and amenity of the town is generally good with an attractive streetscape. Vacancy levels are low considering the current economic climate and are located away from the prime pitch areas. Recent developments in the town centre have seen an influx of national and international multiples, which have collectively demonstrated investment confidence in Gorey.

4.5 Bunclody Health Check Assessment

The Town possesses a very unique streetscape pattern, defined by the Market Square and The Mall which runs perpendicular to Irish Street and Church Street. The River Slaney, with its associated floodplain is one of the most significant environmental and landscape features of the town.

The town performs important civic and service functions with a concentration of civic amenities including churches and schools. These provide services not only for the resident population but also for a much wider rural population. The town provides a relatively high concentration of urban dwellings in a compact area.

Services such as a bank, post office, pubs and a number of small independent retailers are provided within the town. There are also a number of industrial, commercial uses and bulky goods stores in a linear form exiting onto Ryland Road. The most notable introduction to the retail offer recently at this location is the national retailer Mr. Price. Construction has also commenced on the Aldi store on the Ryland Road.

Part of the settlement, Carrigduff is located in County Carlow. It contains the main supermarket in the area, Supervalu. The N80 national primary route is the main arterial route that runs through the town linking Enniscorthy with Carlow. Enniscorthy is located just seven miles from the town. Car parking occupies a proportion of the Mall outside the commercial buildings. The wide and straight street with a central mall divides into two traffic lanes on either side. Footpaths are located along the Main Street, Irish Street and in parts on Ryland Road. There was a consistent stream of pedestrian activity on the morning of the survey.

The following table represents the breakdown of the Bunclody retail floorspace as of February 2012.

Table 46 Existing Retail Floorspace Bunclody

Settlement	Convenience Floorspace (sq m)	Comparison Floorspace (sq m)	Bulky Comparison Floorspace (sq m)	Vacant Retail Floorspace (sq m)	Total retail Floorspace (sq m)
Bunclody	1372.6	1905.3	0	894.98	4172.88
Percent of floorspace	32.9%	45.7%	0.0%	21.4%	100.0%

There are a number of significant opportunity sites in the town which would benefit from infill developments, such as opposite the school on Irish Street, the site adjoining Meadowlands Nightclub north of fire station and some of the backlands off the Main Street.

4.6 Castlebridge Health Check Assessm ent

The village of Castlebridge has a unique character, which arose in the eighteenth century as the result of the mills. The milling operations were established to use the waters from the Garrylough River, which flows through the village. The milling activity that developed during this time was explicitly to service the barley trade (malting, brewing and animal feed). The remains of this prosperous period are clearly evident in the buildings that make up the village centre today.

The village is located approx 5km from the hub of Wexford Town. It is located on the Regional Road from Gorey to Wexford Town, the R741. There a number of housing estates located within the village. The village centre is located at the junction of the county road and regional roadway. It contains a number of uses such as a pharmacy, public houses, restaurant, furniture stores, pottery workshop, insurance brokers office, petrol station and shop. Pedestrian access to the village centre is facilitated by fragmented and narrow footpaths. The provision of improved footpaths is hindered by the location of the existing mill and warehouses flank walls.

At the time of the survey there were no vacant units within the village. The following table represents the breakdown of the Castlebridge retail floorspace as of February 2012.

Table 47 Existing Retail Floorspace Castlebridge

Settlement	Convenience Floorspace (sq m)	Comparison Floorspace (sq m)	Bulky Comparison Floorspace (sq m)	Vacant Retail Floorspace (sq m)	Total retail Floorspace (sq m)
Castlebridge	439	254.2	1648.4	0	2341.6
Percent of floorspace	18.7%	10.9%	70.4%	0%	100.0%

There is significant land with development potential within the village. In recent times permission has been granted for a village centre with a number of retail units on the lands to the east on entering the village. Any development of the village should respect the scale and character that currently exists and should not take from Wexford Town as the primary shopping destination.

4.7 Courtown Harbour and Riverchapel Health Check Assessment

Courtown is situated in the North East of County Wexford, on the wide sweep of Courtown Bay. The area is renowned for its natural amenity areas particularly the coastline. It is predominantly a tourist destination and often associated with holiday makers from Dublin. The Regional Road (R742) links the area to Gorey town and Wexford Town. Parking provision is predominantly on street parking.

The existing commercial and retail development is located at the Courtown Harbour area and the Riverchapel villages. These two centres are somewhat fragmented. The survey took place in February 2012 and a significant number of the retail units were closed, however no for sale or let signs existed so it is considered that the units are opened seasonally. The types of uses consisted mainly of convenience shops associated with a coastal town such as ice cream parlour and sweets shops. There are also a number of fast food premises. The following table gives a breakdown of the existing retail floorspace in Courtown and Riverchapel area.

Table 48 Existing Retail Floorspace Courtown/Riverchapel

Settlement	Convenience Floorspace (sq m)	Comparison Floorspace (sq m)	Bulky Comparison Floorspace (sq m)	Vacant Retail Floorspace (sq m)	Total retail Floorspace (sq m)
Courtown/ Riverchapel	327.7	0	0	1482.3	1810
Percent of floorspace	18.1%	0.0%	0.0%	81.9%	100.0%

The Council's aim is to focus on the Courtown area as a prime, quality tourist destination. While the beaches and natural environment are and will remain the principal tourism resources, there is a need to extend the range of facilities, to tackle the problem of seasonality.

4.8 Kilrane and Rosslare Harbour Health Check Assessment

Rosslare Harbour developed as a result of the harbour and the railway. Rosslare Europort is the main commercial attraction in the area and its importance for the economic development of the county cannot be understated. The area around the Harbour has developed into a small town with a range of shops, service industries, residential developments and community facilities. The new town centre has developed recently to the southwest of the Europort. It is defined by a small number of mixed use developments arranged around a staggered crossroads on the N25. The town centre currently incorporates a shopping centre, Church and bank. A mixed use development has also recently been granted planning permission on a corner site to the northeast of this crossroads. A commercial/ logistics area is located to the southwest of the Europort, which includes a large area of undeveloped land.

Kilrane village was established long before the development of Rosslare Harbour. It is predominantly residential area with local services including a school, church, community centre, shop and pubs. A small industrial area is located to the southwest of the village. It includes a Waste Transfer Station and a logistics centre.

The following table shows the existing retail floorspace as of February 2012.

Table 49 Existing Retail Floorspace Kilrane/Rosslare

Settlement	Convenience Floorspace (sq m)	Comparison Floorspace (sq m)	Bulky Comparison Floorspace (sq m)	Vacant Retail Floorspace (sq m)	Total retail Floorspace (sq m)
Kilrane/Rosslare Harbour	1444.5	144	519.7	823.8	2932
Percent of floorspace	49.3%	4.9%	17.7%	28.1%	100.0%

4.9 Wellingtonbridge Health Check Assessment

Wellingtonbridge enjoys a central location in southern Wexford. It is situated at the intersection of the R733 and the R736. The R733 links Wellingtonbridge to Wexford Town. The R736 links a number of villages in south Wexford with Wellingtonbridge and the N25 near Rosslare Harbour. The village is approximately 15 minutes drive from both Wexford Town and New Ross. It provides a range of services to the surrounding hinterland such as a SuperValu supermarket, a large hardware store, department store, hair salon, pharmacy, opticians, restaurant, veterinary clinic, petrol station and shop.

Wellingtonbridge railway station served the town of Wellingtonbridge and surrounding area. It was one of the main stops on the Rosslare Harbour to Waterford railway line. This line closed in September 2010.

At the time of the health check there were no vacant units within the village.

Table 50 Existing Retail Floorspace Wellingtonbridge

Settlement	Convenience Floorspace (sq m)	Comparison Floorspace (sq m)	Bulky Comparison Floorspace (sq m)	Vacant Retail Floorspace (sq m)	Total retail Floorspace (sq m)
Welling Ton bridge	1056.8	546	4633.87	0	6236.67
Percent of floorspace	16.9%	8.8%	74.3%	0.0%	100.0%

It is important that the existing services and retail provision in the town are maintained, as they play an important role for the large surrounding rural hinterland. Development which is in keeping with the scale and character of the town will be supported.

5.0 Health Check Conclusion

In conclusion, the appraisal of the four main towns shows that Wexford maintains its position as the hub, in terms of the retail provision available, whilst the three remaining towns play a supportive role. Gorey is vibrant town, with a good environmental standard. New Ross and Enniscorthy are somewhat lacking behind with regard retail provision and will need to increase and enhance their provision in order to compete and to retain residents within their catchment areas. There are a number of opportunity sites within the four main towns which would improve and enhance the retail provision.

Vacancy levels account for 9.9% of the total retail floorspace within the main and district towns. Wexford Town has 22.7% of its floorspace vacant, New Ross 20.1% of its overall floorspace, Enniscorthy has 9.8% vacancies levels and Gorey has 15% of its total floorspace vacant. Retail vacancies were not a concern under previous health check appraisals carried out for the County. It is imperative that vacant units do not become derelict. The use of windows for display and appropriate advertising can improve the environmental quality of areas.

The District Towns provide a range of services to their surrounding areas. The development of these towns should not have a negative impact on the primacy of the main towns and should be in keeping with the existing scale and character of the town.

Section 5 Retail Hierarchy and Identification of Core Retail Areas

5.0 Introduction

The current Retail Planning Guidelines (RPGs) require that retail development and activity must follow the settlement hierarchy of the State. It states that retail functions tend to reflect broad tiers of urban development including Metropolitan, Regional, Sub-Regional (including District Centres within larger urban areas) as well as Small Towns and Rural Areas as well. The RPGs set out a national settlement hierarchy and the SERPGs set out an urban hierarchy with development roles for different types of urban centres in the region. These documents form the background for the preparation of the Settlement Strategy in the County Development Plan and consequently the retail hierarchy for County Wexford. It is important that development plans indicate a range of retail centres showing where investment in new retail and other development will be promoted, and existing provision enhanced.

5.1 National Settlement Hierarchy

The RPGs identifies six general tiers of shopping provision, acknowledging overlaps between them which make up the national hierarchy.

Metropolitan Dublin City supplies retail functions of a specialist nature not found elsewhere in the State, as well as providing the broadest range of comparison goods shopping. The other large cities of Cork, Limerick/Shannon, Galway and Waterford provide a range of high-order comparison shopping which is largely unmatched in smaller cities and towns.

Regional Beyond Ireland’s five main cities, a tier of other Gateway, Hub Towns and other towns perform important regional retailing functions including

- The Midlands Gateway towns of Athlone, Tullamore and Mullingar;
- The Border Region Gateways of Sligo, Dundalk and Letterkenny; --
- The Hub towns of Ballina/Castlebar, Cavan, Ennis, Kilkenny, Mallow, Monaghan,Tralee/Killarney, Tuam and Wexford; and
- Other large towns such as Clonmel, Drogheda, Naas/Newbridge and Portlaoise.

Sub-Regional Beyond the Dublin and regional retailing destinations, other important towns such as Arklow, Athy, Carlow, Dungarvan, **Enniscorthy,** Longford, Midleton, Navan, Nenagh, New **Ross**, Swords and Thurles perform important sub-regional retailing functions including the major national retailing chains.

In the Wexford context, although Gorey is not specifically referred to it is considered that it would fall within this tier as a result of its recent population growth and continuing retail expansion in the town.

District Centres

The core strategies of development plans within the larger urban centres above, including Dublin City, other Gateway cities and towns, hub towns as well as other large towns, (generally in excess of 10,000 population), will provide details of the relevant city and town centre areas as well as any locations designated for significant growth within the environs of the city or town in question.

Small Towns and Rural Areas

The fourth tier of the hierarchy comprises a large number of small towns in the 1,500 to 5,000 population category. There are about 75 in all, most of which provide basic convenience shopping, either in small supermarkets or convenience shops and in some cases, also provide comparison shopping e.g. small-scale hardware, retail pharmacies and clothes shops.

Local Shopping
Shopping at the most local level is provided by a mixture of neighbourhood shops in suburban areas and village stores/post-offices in rural areas. In addition, another sector in the Irish retail market is the casual trading sector, including 'farmers' markets'.

5.2 Wexford County Settlement Hierarchy

The Core Strategy of a development plan is required to set out a Settlement Hierarchy for the County and allocate population growth to these settlements. In the Wexford context, the Settlement Hierarchy is focused on developing the role of Wexford Town as the Hub; supported by the County's other three large towns of New Ross, Enniscorthy and Gorey. The next level is the District Towns, which will play an important role in supporting the larger towns. The network of strategic growth areas and smaller villages will have a more limited role. These areas provide important services for local communities and their rural hinterlands. The settlement hierarchy of Wexford is detailed in Figure 19.

Figure 19 County Wexford settlement hierarchy

Settlement Type	Settlement
Hub	Wexford Town

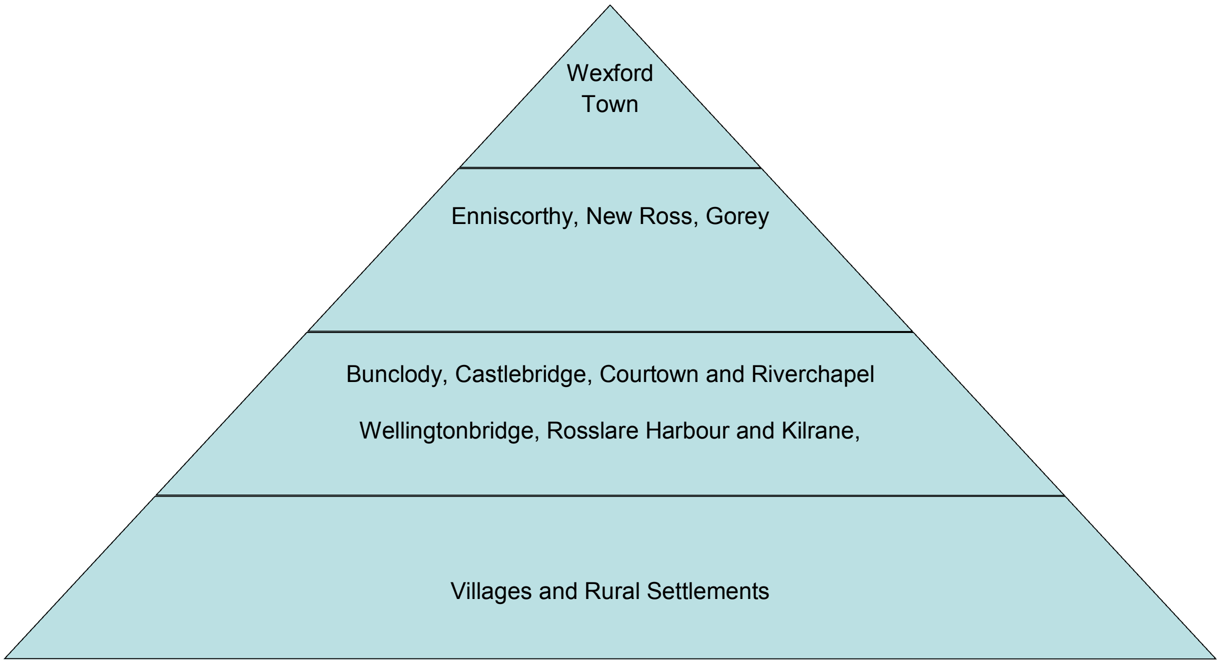
Larger Towns	Enniscorthy New Ross Gorey
District Towns	Bunclody Rosslare Harbour and Kilrane Castlebridge Courtown and Riverchapel Wellingtonbridge
Strong Villages	Kiltealy Taghmon Bridgetown Ferns Campile Clonroche
Smaller Villages	*Two tiers (villages will not be named)* >400 and <1500 population <400 population
Open Countryside	All open countryside outside of the designated settlements.

5.3 Wexford retail hierarchy

The purpose of the retail hierarchy is to indicate the level and form of retailing activity appropriate to the various urban centres of the County in order to enable the Council to protect each centre's overall vitality and viability whilst allowing each centre to perform its overall function within the County's settlement hierarchy. It is the core concept of the retail hierarchy that the urban areas of the hub, supported by the larger towns and to a lesser extent the district towns, are the main retail centres in the County. As such this retail strategy focuses primarily on the upper levels of the hierarchy. It is important to note that this is not to deter or discourage smaller scale retail development and investment in the smaller villages. Rather it is important to set a clear hierarchy which identifies where the distribution of new retail floorspace should be delivered and which is appropriate in scale and character to the hierarchical role of the centre.

In the context of the County's settlement strategy, Wexford's Retail Hierarchy is as follows:

Figure 20 County Wexford retail hierarchy



Wexford Town is the primary retail centre in the County. From the floorspace audit (carried out in the summer months of 2011) the town had 84,701 sqm of net retail floorspace. This accounts for 46% of the overall floorspace in the four main towns, thereby confirming its position as the main town in the County. Wexford Town has a diverse range and quantum of both comparison and convenience goods not equaled elsewhere within the County.

The towns of New Ross, Gorey and Enniscorthy play an equal part in the retail hierarchy. Gorey is not specifically referred to in the hierarchy, however, it has seen considerable growth in both population and retail expansion. Gorey accounts for 21% of the net retail floorspace of the four towns, with 39,001sqm. It provides a range of national supermarket retailers and general comparison goods shopping.

New Ross is referred to as a Sub-Regional Tier settlement in the national retail hierarchy. It has 20% of the overall retail floorspace within the four main towns which accounts for 36,645 sqm. The town contains a wide range of convenience shopping with a high representation of the large national supermarket retailers. It has also experienced considerable growth in bulky comparison goods. However, improvement of the comparison offer is critical to retaining its status in the national retail hierarchy.

Enniscorthy is also referred to as a Sub-Regional tier settlement a in the national retail hierarchy. It has 13% of the net retail floorspace of the four towns with a net retail floorspace of 23,547 sqm. It has seen the least growth in contrast to the other Tier 3 towns especially in terms of bulky comparison goods.

The towns of Bunclody, Courtown and Riverchapel, Rosslare Harbour and Kilrane, Wellingtonbridge and Castlebridge within the settlement hierarchy have earned their position as they have populations in excess of 1500 persons. Each of the towns has a small supermarket, alongside a level of comparison shopping. They all play a crucial role in serving the surrounding areas.

Villages and rural settlements are the final tier in the retail hierarchy. Their main function is to serve localised residential areas. They include small shops usually associated with petrol filling stations and post offices. They play an important role in local communities particularly in the more rural and remote parts of the County.

Scale and Type of Retailing Appropriate

The following provides guidance on how the Retail Strategy defines the distribution of retail floorspace.

Level 1 (Wexford Town): Major convenience and comparison.

Level 2 (New Ross, Enniscorthy and Gorey): Major convenience and comparison

Level 3 (Bunclody, Courtown and Riverchapel, Rosslare Harbour and Kilrane, Wellingtonbridge and Castlebridge): Middle order convenience, middle order comparison and tourism related comparison.

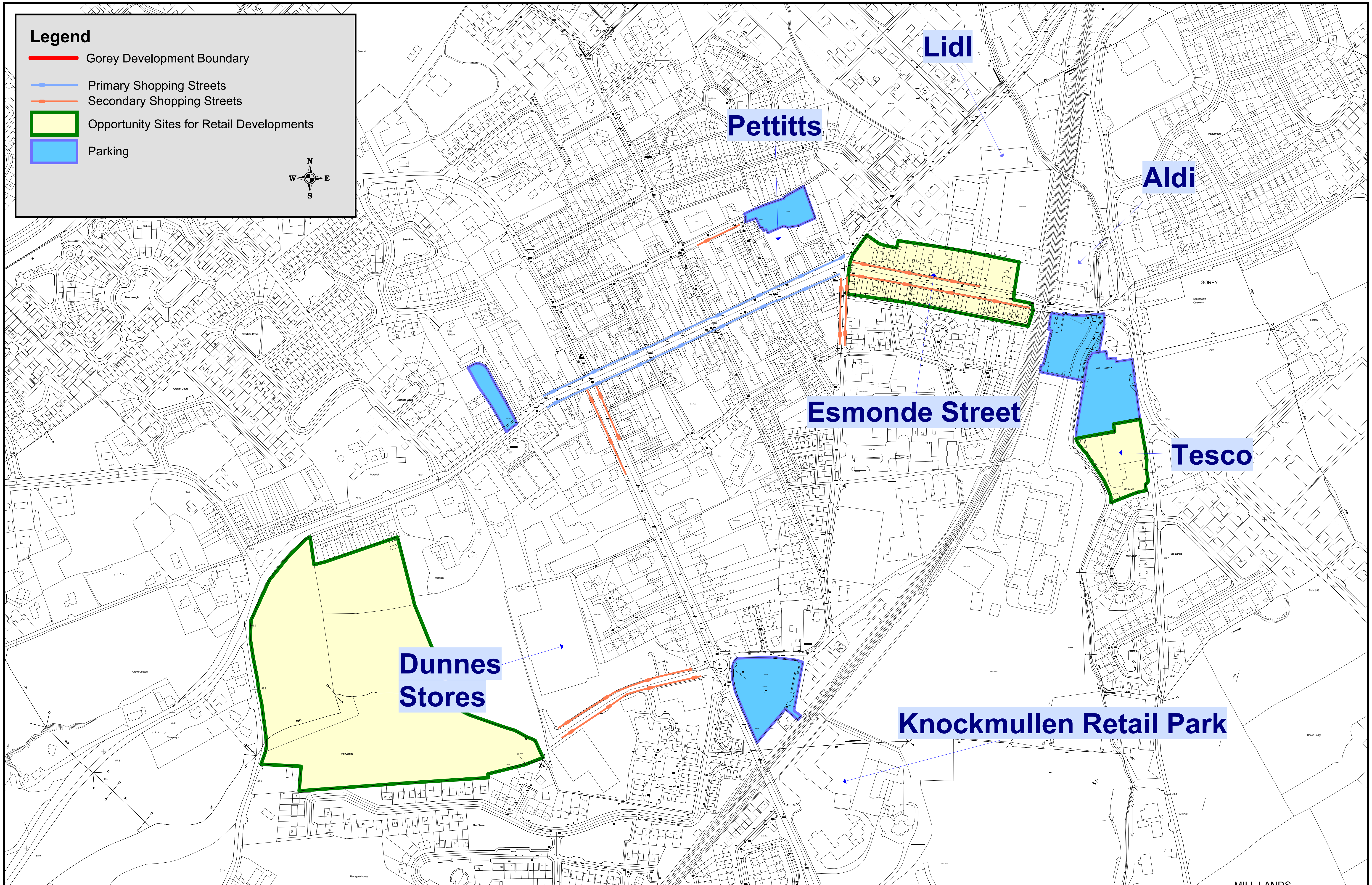
Level 4: No centres are currently identified at this level. Predominantly additional convenience but not excluding tourism related comparison.

5.4 Identification of Core Retail Areas

Core retail areas can be divided into both primary and secondary shopping streets. Within this retail strategy the ‘primary retail street’ of a centre is being defined as the area where the main concentration of retail activity takes places. It is characterised by a mix of factors including prime retail units, low vacancies, highest demand from retailers/operators/developers/investors and has the highest footfall of shoppers. Outside of this area, there may be other important retail areas or freestanding shopping centres. The mix of uses normally would include commercial leisure, service related or residential and these areas are known as the ‘secondary retail streets’.

The Core Retail areas will form the main focus and preferred location for new retail development. The primary shopping streets in particular should be retained as the key locations for retail development. Development should be appropriate to the scale and function of each centre. Consideration of any new retail development outside of the core retail areas will be guided by the provisions of the RPGs. In all these centres it is important to develop and maintain a compact core where retail and commercial uses are close enough to each other to benefit from each other's pedestrian flows. Larger defined core areas can diffuse retail floorspace, and result in the weakening of the core retail areas.

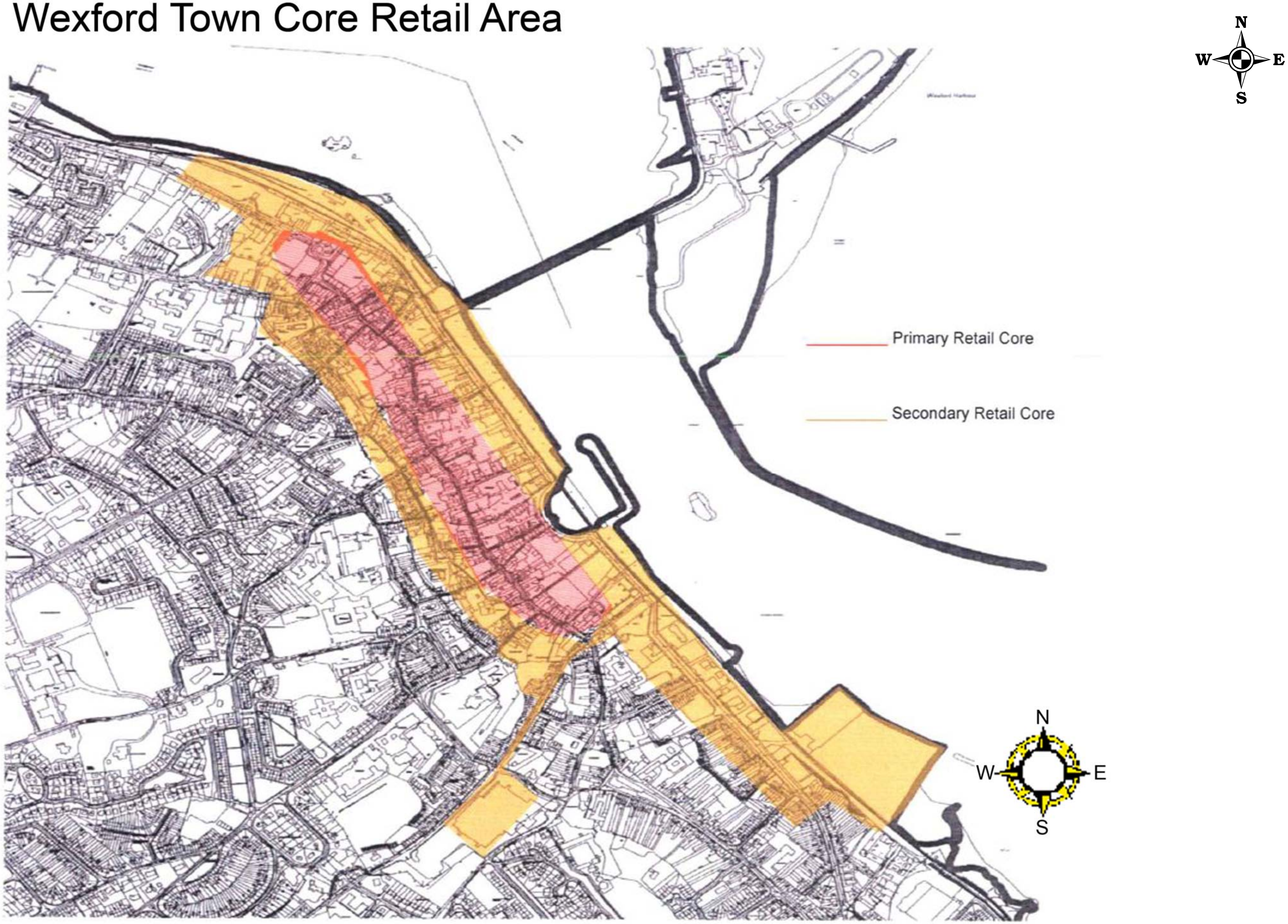
The town centre of Gorey has been mapped (Maps 1), to identify the core retail area. The primary and secondary shopping streets have been highlighted. As the town councils of Wexford Town, New Ross and Enniscorthy have their own development plans the Core Retail areas were identified under their respective retail strategies and which have been reproduced as Maps 2-4. Wexford Town, New Ross and Enniscorthy are bound by their respective development plans. The core shopping areas have not been defined for the District Towns as they are considered too small a scale to warrant such an approach. It is considered that the approach for the development of these towns should be in keeping with the scale and character of existing development and guided by the provisions of the RPGs.



Draft Wexford County Development Plan 2013 - 2019
Retail Strategy

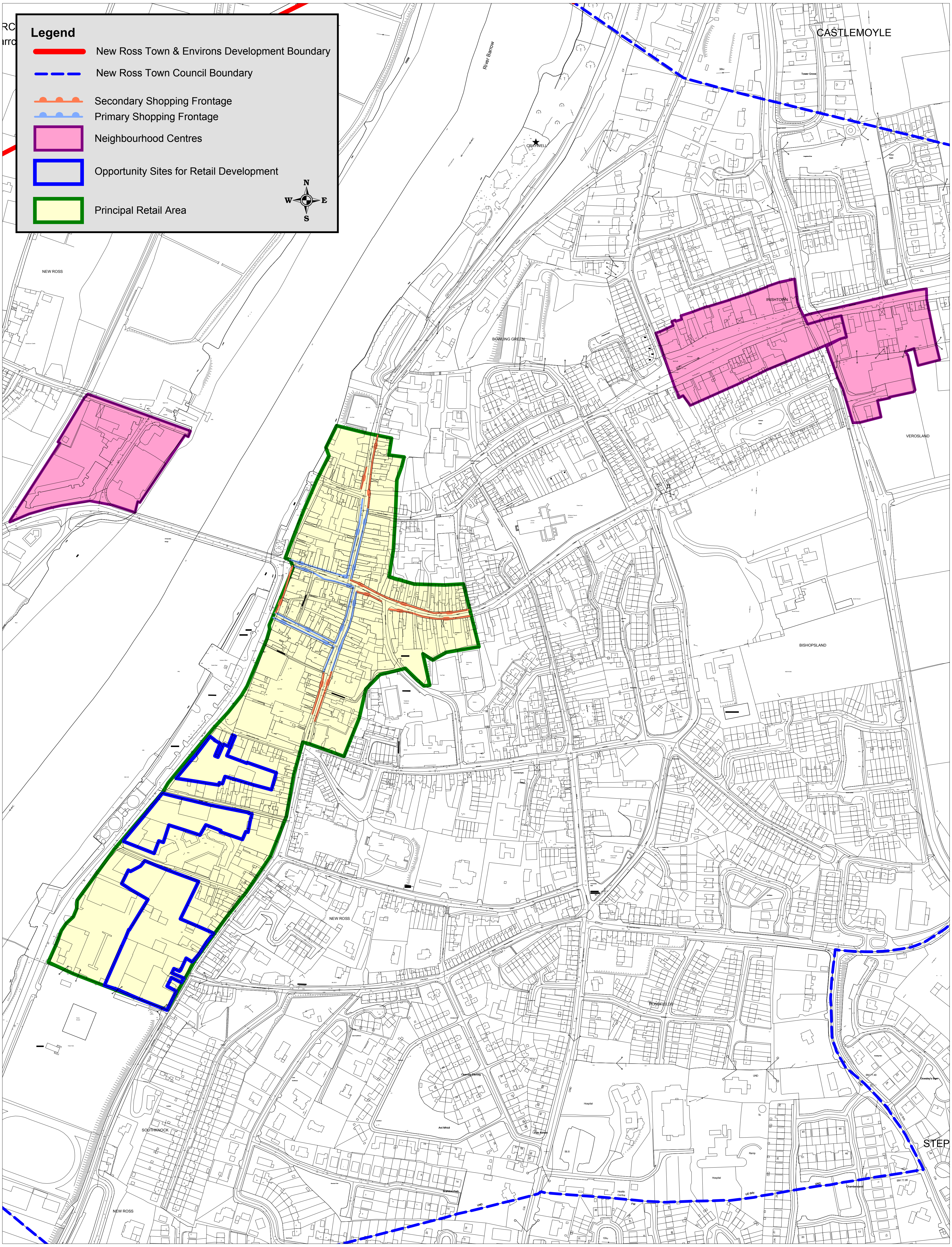
Title: Gorey	
Drawn by: NK	Checked by: NC
Date: 21.05.2012	Map No: 1

Wexford Town Core Retail Area



This map has been reproduced from the Wexford Town Retail Strategy 2008-2014

Draft Wexford County Development Plan 2013 - 2019 **Retail Strategy**	**Title: Wexford**	
	Drawn by: NK	Checked by: NC
	Date: 21.05.2012	Map No: 2



This map has been reproduced from the New Ross Town Retail Strategy 2011-2017

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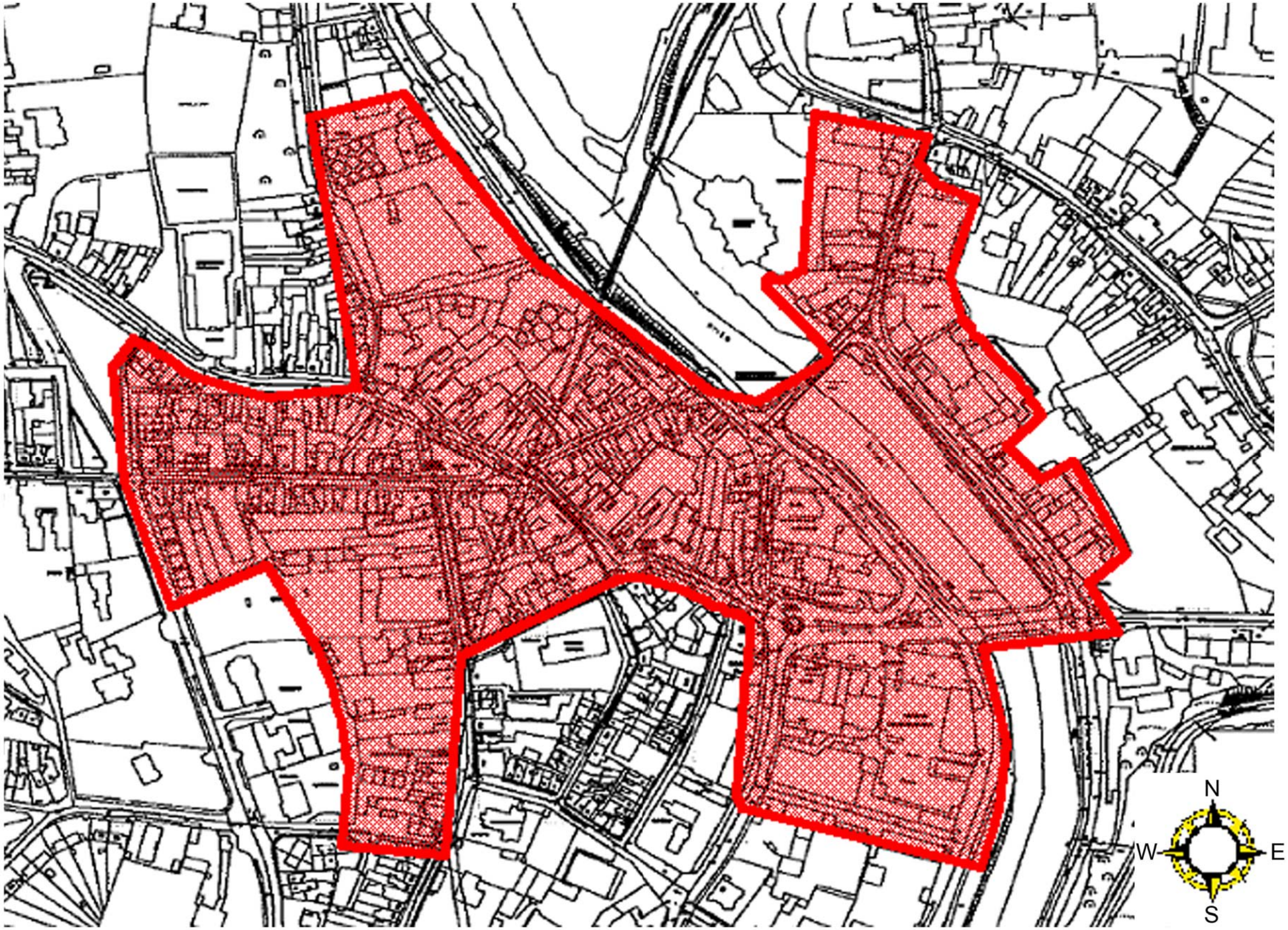
Retail Strategy

Title: New Ross	
Drawn by: NK	Checked by: NC
Date: 21.05.2012	Map No: 3

Enniscorthy Town Core Retail Area



This map has been reproduced from the Enniscorthy Town Retail Strategy 2009-2015

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Retail Strategy

Title: Enniscorthy	
Drawn by: NK	Checked by: NC
Date: 21.05.2012	Map No: 4

Section 6 Capacity Assessment

6.0 Introduction

This section of the Retail Strategy has been carried out by RPS Planning & Environment who were commissioned by Wexford County Council to undertake the capacity assessment for the County Retail Strategy. The assessment is set out under the following sections; baseline information and methodology, broad capacity assessment and conclusion.

6.1 Baseline Information and Methodology

As part of the review of the 2005 Retail Strategy and 2007 review (herein referred to as previous Retail Strategy) and preparation of the 2013 Draft Retail Strategy, the following baseline information was examined:-

- Existing population and population growth trends as provided;
- Existing and emerging retail floorspace as provided; and
- Statistical sources used to inform the future retail capacity within the County.

6.1.1 Existing Population and Population Growth Trends

Since the previous Retail Strategy was prepared, more up-to-date statistics have become available. These include:

- Preliminary results of the 2011 Census.
- National and Regional Population Targets.

The population growth allocations included within the Retail Strategy were prepared by the Planning Department.

6.1.2 Existing and Emerging Retail Floorspace

In order to establish the quantum of existing and emerging floorspace with planning consent in the County, a review of existing retail applications was undertaken by the Planning Department. Floorspace data has been compiled through an extensive survey carried out by the Planning Department at the end of 2011/beginning of 2012. **All floorspace indicated in the capacity assessment is net retail floorspace unless otherwise stated.**

6.1.3 Statistical Sources Used to Inform Existing and Future Retail Capacity within the County

The following statistical sources were used to provide a broad capacity assessment of the requirement for additional convenience and comparison retail floorspace:

- Annual Services Inquiry 2009, (September 2011);
- County Incomes and Regional GDP 2009, (February 2012);
- Medium Term Fiscal Statement, (November 2011); and
- ESRI Mid-Term Review 2008 - 2015, (May 2008).

These sources have been examined and inform the broad capacity assessment for retail floorspace. This capacity assessment provides an overview of the floorspace capacity in the County based on population and expenditure growth estimates, turnover ratio estimates, gross additional expenditure and future sources of retail sales.

The key inputs and outputs to the capacity assessment are a derivation of the following:

Step 1: Population and Expenditure Estimates;

Step 2: Turnover Estimates;

Step 3: Turnover Ratios;

Step 4: Gross Additional Expenditure Potential;

Step 5: Future Sources of Retail Sales; and

Step 6: Capacity Potential.

6.2 Broad Capacity Assessment

As set out in the current RPG a key matter which should be included in development plans is a broad assessment of the additional retail floorspace required over their lifetime. This section of the Retail Strategy for the County will provide a broad floorspace capacity assessment which will assist the Council in making the necessary provision to facilitate new retail floorspace.

This assessment is based on the population at 2011 and population forecasts for 2013, 2019 (end of the development plan period), and 2022, (end of the SERPG horizon). This assessment takes account of updated retail floorspace information and retail planning consents which have not been delivered. The capacity assessment enables a quantification of the type and amount of additional retail floorspace that will be required in order to accommodate expenditure growth within the County. This assessment illustrates the total potential amount spent by residents in the County on retail goods. However, how much of that spend is retained within the County is dictated by factors such as scale of the existing retail floorspace, quality of goods sold, nature of sales, turnover efficiency, distribution of the population, travel times, accessibility and location of similar competing developments or centres.

The purpose of the capacity assessment is to indicate the quantum of additional floorspace that can be absorbed by the projected additional expenditure available within the County.

Capacity assessments take into consideration existing retail floorspace, granted retail schemes which are due to be developed and increases in turnover efficiency. Steps necessary to undertake the assessment include determining the population and expenditure estimates of the County, turnover estimates of existing and new floorspace, gross additional expenditure and sources of future retail sales.

Table 51 shows the existing floorspace (excluding vacant) in Wexford County at the end of 2011. Convenience floorspace equates to 28.1% of the overall retail floorspace, comparison floorspace comprises 39.6% of the floorspace, while retail warehousing (bulky goods) make up 32.3% of the total.

Table 51 Existing Floorspace County Wexford

	Convenience Existing	Comparison Existing	Bulky Existing	Overall Existing
Wexford Town	13,945	33,160	18,348	65,453
Gorey	9,807	14,008	9,318	33,133
New Ross	9,669	5,012	14,586	29,267
Enniscorthy	8,010	9,920	3,909	21,839
Bunclody	1,373	1,905	0	3,278
Castlebridge	439	254	1,648	2,342
Courtown	328	0	0	328
Kilrane/Rosslare	1,445	144	520	2,108

Wellington Bridge	1,057	546	4,634	6,237
County Wexford Total 2011	46,073	64,949	52,963	163,985

6.2.1 Population and Expenditure Estimates

The first step is to calculate the total amount of expenditure on convenience and comparison goods by the resident population of the County for 2013, 2019 and 2022. It is important to note that since the 2007 Wexford Retail Strategy was prepared there has been a significant downturn in the Irish economy which requires to be taken into account in the capacity assessment. The assessment, therefore, incorporates latest economic forecasts which reflect/respond to the very changed economic conditions that prevailed at the beginning of 2012.

To derive the overall retail spend for the County, the estimated per capita levels of expenditure are multiplied by the County population targets. The per capita expenditure estimates for comparison and convenience goods are derived from the CSO's 2009 Annual Services Inquiry (ASI), the latest year for which information is available (released September 2011). Per capita expenditure estimates for convenience and comparison goods are projected forward based on recent personal consumption growth estimates from the Medium Term Fiscal Status (November 2011) and the ESRI Medium Term Review 2008-2015.

The analysis of retail expenditure is only concerned with expenditure that occurs within retail outlets: i.e. expenditure related to retail floorspace only. As a result, the per capita expenditure figures exclude expenditure that does not occur in retail outlets e.g. via the internet as well as markets and stalls.

Both convenience and comparison expenditure per capita ratios are derived based on a 2009 price year. The per capita expenditure ratios for comparison goods for 2013, 2019 and 2022 are presented in Table 52 below. The per capita expenditure figures are calculated using projected annual growth rates for per capita convenience and comparison expenditure between 2013 and 2022. The expenditure by the resident population of Wexford is outlined in Table 52.

Table 52 Expenditure by the Resident Population of Wexford (2009 prices, €m)

	Per Capita Expenditure			Total Expenditure	
Year	**Convenience**	**Comparison**	**Population**	**Convenience**	**Comparison**
2011	€3,429	€3,325	145,273	498.2	483.1
2013	€3,464	€3,358	147,431	510.7	495.1
2019	€3,795	€3,782	161,074	611.3	609.2
2022	€4,027	€4,097	166,083	668.8	680.4
Sources: derived from CSO Annual Services Inquiry 2009, and County Incomes and Regional GDP 2009. Population figures Wexford Co. Co. Planning Department					

It is estimated that convenience and comparison expenditure will remain flat for 2012, rising slightly by 1% for 2013 and then rising modestly by 1.6% for convenience spending, and a slightly higher 2.0% for comparison expenditure to 2019 as the economy improves.

The ASI figures for 2008 and 2009 show that comparison expenditure fell faster than convenience expenditure, which has had a greater impact on the per capita expenditure for comparison goods. This is not unexpected as comparison expenditure is more discretionary (clothes, footwear etc.)

compared to convenience expenditure which relates mainly to weekly food and beverage shopping. Indeed the overall proportion of comparison expenditure fell from 52.9% of the total retail expenditure in 2008 to 49.2% in 2009, while convenience expenditure increased from 47.1% of total retail expenditure in 2008 to 50.8% in 2009. It is also worth noting that the Indices of Disposable Income Per Person show that Wexford's per capita expenditure has fallen to 92.8% (in 2009) of the overall average for the state compared to 96.7% of the overall average for the state in 2008.

6.2.2 Turnover Estimates

The current turnover of retail outlets in the County can be estimated by using the expenditure potential of the County's population and information on inflows and outflows of expenditure from the County area. Retail expenditure is not limited by county boundaries and more often than not no county will retain all the available expenditure as shoppers will use different centres outside the county at different times and for different purposes. This is particularly so with Wexford and its close proximity to centres such as Waterford, Kilkenny, Carlow Arklow, the M50 and Dublin.

Current inflows and outflows of convenience and comparison expenditure are informed through consumer surveys by face to face (household shopper surveys) and on-street (shopper street surveys). Household shopper surveys enable an estimate of the amount of expenditure retained within an area. This estimate is commonly referred to as an area's market share. Shopper street surveys enable an estimate to be made on the amount of expenditure which originates from outside an area. This is normally referred to as an area's trade draw.

Market Share is the proportion of retail expenditure by persons living in an area that is spent and retained in the area. It is normally assumed to be higher for convenience goods than for comparison shopping.

Trade Draw is the proportion of retail expenditure to an area that is derived from residents from outside of the area. Higher trade draw is typically a characteristic of centres that are higher in the retail hierarchy.

The household and shopper surveys, presented in Section 3, enable the estimation of the extent of expenditure on goods in retail outlets in the County. They allow an estimate of the total amount of turnover for retail outlets in the County or, put another way, the total amount of expenditure on goods sold by retailers in the County to be derived.

According to the household surveys an estimated 95.2% of convenience expenditure (market share) by the resident population is spent in retail outlets located in the County. Of the residents doing their main food shopping outside the County, the majority of this expenditure leakage was to Waterford City and Arklow.

The comparison market share of resident's expenditure is 72.2%. It is evident that the majority of the leakage was accounted by Waterford City, Arklow and Dublin (including Dundrum Town Centre).

According to the shopper surveys an average of 11.2% of respondents were from outside the County, of whom 36.7% shopped regularly within the county. Of the non County respondents approximately half were in the County for either convenience or comparison shopping purposes. Taking these figures and adding them to estimated tourist spending figures results in a trade draw of 9.3% for convenience turnover and 8.3% of comparison turnover in 2011.

It is estimated that the overall market share and trade draw will alter over the period of the study as market forces shape retailing and new and improved retail formats come on stream to meet rising consumer expectations.

6.2.3 Projected Turnover of Retail Outlets

The derived market share and trade draw assumptions from the 2011 household and shopper surveys have been incorporated in Table 53 which provides the estimation of turnover in retail floorspace in the County over the period to 2022.

To calculate turnover, the amount spent by Wexford residents in retail outlets located outside the area (leakage) is subtracted from the total amount of potential retail expenditure by these residents. To this is added the additional expenditure which is due to people living outside the County. The combination of these deductions and additions provides the derived total turnover of retail outlets located in the County. This is the process used in calculating the turnover figures presented for 2011, 2013, 2016 and 2022 in Table 53 for both convenience and comparison floorspace.

It is anticipated that tourism spending will increase, in line with Fáilte Ireland forecasts, which will increase spending from this sector. It is also assumed that over time it will become less attractive for shoppers to travel long distances due to increases in the costs of travel.

Table 53 Projected Turnover from Retail Outlets Located in County Wexford (2009 prices, €m)

2011	Convenience		Comparison	
Resident Expenditure		498.2		483.1
Less Expenditure Outflow	4.8%	23.9	27.8%	134.3
Spend by Resident on Outlets in County		474.3		348.8
Add Imported Expenditure	9.3%	48.6	8.3%	40.1
Spend in Retail Outlets in Catchment		**522.9**		**380.3**

2013				
Resident Expenditure		510.7		495.1
Less Expenditure Outflow	4.8%	24.5	27.8%	137.7
Spend by Resident on Outlets in County		486.2		357.5
Add Imported Expenditure	9.6%	51.6	8.6%	42.6
Spend in Retail Outlets in Catchment		**537.8**		**391.1**
Growth between 2011 and 2013		**14.9**		**10.8**
2019				
Resident Expenditure		**611.3**		**609.2**
Less Expenditure Outflow	2.4%	14.7	25.5%	155.3
Spend by Resident on Outlets in County		596.6		453.9
Add Imported Expenditure	10.2%	62.3	8.9%	54.2
Spend in Retail Outlets in Catchment		**664.3**		**498.2**
Growth between 2013 and 2019		**126.6**		**107.1**
2022				
Resident Expenditure		**668.8**		**680.4**
Less Expenditure Outflow	2.4%	16.1	22.5%	153.1
Spend by Resident on Outlets in County		652.8		527.3
Add Imported Expenditure	10.5%	70.2	9.2%	62.6
Spend in Retail Outlets in Catchment		**729.4**		**580.8**

Growth between 2019 and 2022		**65.0**		**82.6**

6.2.4 Turnover Ratios

The turnover figures for 2011 set out in Table 53 are an estimate of the amount of expenditure that will be sustained by the estimated amount of floorspace in the County at the beginning of the Retail Strategy period. For example, in 2011, the County has approximately 46,072 sq m of convenience floorspace that was generating turnover of €522.9m and approximately 117,912 sq m of comparison (including bulky goods) floorspace that was generating turnover of €380.3m Looking at the indicative turnover ratios (turnover divided by floorspace) this would imply convenience sector turnover of €11,350 per sq m while average comparison turnover ratios are calculated to be approximately €3,225 per sq m.

With regards to the convenience turnover ratio, with a mixture of both older and modern formats, a figure of €11,500 per sq m has been used. From this the convenience floorspace is under trading slightly.

The comparison floorspace comprises some 64,950 sq m of 'mainstream' comparison floorspace and 52,963 sq m of retail warehousing (bulky goods) floorspace. In the past a split of 80:20 between 'mainstream' comparison and bulky goods has been used. Over the past 10 years the proportion of bulky goods spending has been increasing with the development of retail warehousing parks as well as the inclusion of 'mainstream' comparison goods within some retail warehouse parks. In addition the overall proportion of bulky goods floorspace as a percentage of the comparison floorspace has been increasing. Therefore it is considered appropriate to assume a 75:25 mainstream comparison: bulky goods split which would result in a turnover ratio for mainstream comparison floorspace of €4,392 per sq m and €1,795 per sq m for bulky goods floorspace. Industry standards suggest that a figure of €4,500 turnover ratio for mainstream comparison floorspace and a figure of €2,500 for bulky goods floorspace would be appropriate (Cork Retail Strategy). From these assumptions, it would appear that the 'mainstream' comparison floorspace is trading at near equilibrium, while bulky goods floorspace is undertrading by a significant degree; indicating an oversupply of retail warehousing floorspace at a county level.

6.2.5 Gross Additional Expenditure Potential

Using the derived turnover estimates, it is possible to estimate the growth in spare expenditure capacity that will occur in the County between 2011-2013 and 2013-2019, with 2022 provided to give a longer term picture. This is illustrated in Tables 54 and 55.

Table 54 Gross Spare Expenditure Capacity in County (2009 prices, €m)

	Convenience €m	Comparison €m
Growth between 2011 and 2013	14.9	10.8
Growth between 2013 and 2019	126.6	107.1
Growth between 2019 and 2022	65.0	82.6
Growth between 2011 and 2022	206.4	200.4

Source: Table 53

Table 55 Gross Spare Expenditure Capacity in County (sq m)

	Convenience Sq m	Comparison Sq m	Comparison (Bulky) Sq m
Growth between 2011 and 2013	1,266	1,763	1,058
Growth between 2013 and 2019	10,164	16,480	9,888
Growth between 2019 and 2022	5,068	12,333	7,400
Growth between 2011 and 2022	16,498	30,575	18,345

Source: Table 54 and Turnover ratios

6.2.6 Future Sources of Retail Sales

The Gross Spare Expenditure figures that have been estimated for the County are gross estimates and need to be adjusted to take account of vacant retail floorspace and expenditure that may occur via new retail developments (extant planning permissions) that are due to come on stream post 2013, and through increases in turnover efficiency of existing and future floorspace. All of these future sources of spend have been factored into the derivation of the net expenditure that is available for additional retail floorspace. Turnover efficiency of existing floorspace needs to be taken into account as well.

Vacant Floorspace

The amount of vacant floorspace in Wexford is set out in Table 56. Overall there was some 34,348 sq m of vacant retail floorspace comprising 5,434 sq m of convenience floorspace (15.8% of vacant retail floorspace), 18,035 sq m of comparison floorspace (52.5% of vacant retail floorspace), and 10,880 sq m of retail warehousing floorspace (31.7% of vacant retail floorspace).

The convenience floorspace vacancy rate was 10.5%, while the comparison floorspace vacancy rate was 27.7%. The retail warehousing vacancy rate was 17.0%. The four major towns of the County accounted for the vast majority of the vacant retail floorspace at 94.7%. Wexford Town accounted for some 56% of all vacant retail floorspace, followed by New Ross (19.9%), Gorey (12.1%), and Enniscorthy (6.7%).

Table 56 Vacant Retail Floorspace

	Convenience Vacant	Comparison Vacant	Retail Warehousing Vacant	Overall Floorspace Vacant
Wexford Town	3,383	8,854	7,012	19,249
Gorey	88	3,820	235	4,143
New Ross	318	4,100	2,405	6,823
Enniscorthy	636	1,226	454	2,316
Bunclody	87	34	774	895
Castlebridge	0	0	0	0
Courtown/Riverchapel	98	0	0	98
Kilrane/Rosslare	824	0	0	824
Wellington Bridge	0		0	0
County Wexford Total	5,434	18,035	10,880	34,348

Source: Wexford County Council Retail Floorspace Survey 2011

It is important that vacant retail floorspace located in the core retail areas of towns is included in the assessment of new proposals as well as extension of time applications.

Extant Planning Permissions

The freeze date for extant planning permissions incorporated in the capacity assessment is the end of 2011. There was planning consent for an additional **86,765 sq m** of net retail floorspace comprising in the order of 18.9% of convenience, 54.8% comparison and 26.2% retail warehousing (bulky) goods floorspace. The vast majority of extant permissions (89%) are accounted for within the four major towns as follows. Wexford Town accounted for 43.1%, Gorey 33.1%, New Ross 8.8%, and Enniscorthy 4.0%. It is worth noting that 30% of the overall extant floorspace of the County is accounted for by the proposed Trinity Wharf development in Wexford Town. Overall 13 no. significant extant applications (over 1,000 sq m net comparison 500 sq m net convenience) comprise 75,216 sq m or 86.7% of the total extant floorspace. It is important that extension of time applications are assessed using a rigorous application of the sequential test, updated zoning objectives since they were permitted and also to account for the Retail Planning Guidelines 2012.

Table 57 Extant Permissions County Wexford

	Convenience Extant	Mainstream Comparison Extant	Retail Warehousing Extant	Overall
Wexford Town	4,636	28,097	4,637	37,370
Gorey	6,397	4,245	18,107	28,749
New Ross	3,220	4,393	0	7,613

Enniscorthy	202	3,280	0	3,482
Bunclody	990	272	0	1,262
Castlebridge	0	2,849	0	2,849
Courtown/Riverchapel	0	1,914	0	1,914
Kilrane/Rosslare	0	526	0	526
Wellington Bridge	1,000	2,000		3,000
County Wexford Total	16,445	47,576	22,744	86,765

Source: Wexford County Council Retail Survey 2011

It is also important to consider whether retail developments proposed during the period are reflective of the current economic and retail climate. There has been little progress on the outstanding granted permissions that were not already under construction, which is a direct consequence of the effects of the current economic recession. It is not a trend that is unique to the County of Wexford but one which prevails across the Country. Over the period to 2019, it is unlikely that all of the grants will be developed out and trading and a number are likely to re-emerge but reduced in scale to reflect the current economic climate. For the purposes of the capacity assessment, it has been assumed that 50% of the extant floorspace could be fully trading and capturing expenditure potential at 2019. This assumption has been incorporated in the broad assessment of the requirement for additional retail floorspace.

Turnover Efficiency

Over time, the efficiency of comparison and convenience floorspace is assumed to increase by 1% per annum. It is anticipated that the existing floorspace will account for capacity equating to some 4,933 sq m of convenience floorspace, 6,311sq m of comparison floorspace, and 5,671 sq m of retail warehousing (bulky goods) floorspace.

6.3 Capacity Potential

From the estimates of gross additional expenditure potential in Table 55, the expenditure accounted for by the extant planning permissions and turnover efficiency growth is subtracted to give the net capacity for the County. Given the high levels of vacant floorspace (10.5% for convenience floorspace, 21.7% comparison floorspace and 17% bulky goods floorspace), it is considered appropriate that this is taken into account as well. In this regard a vacancy rate of between 5% is considered reasonable to enable choice and competition in the retail market.

The Council will have regard to the findings of the capacity assessment in assessing planning applications, however when considering any individual planning proposal in any town the applicant will be required to demonstrate in the RIA that the floorspace is appropriate having regard to the quantum of floorspace required in that town. The RIA shall take account of the particular catchment, extant permissions and their likelihood of being implemented and vacancies in the individual towns. The quantitative need for the quantum of floorspace will not be the only deciding factor, the Council will also consider whether any given planning application will be better located sequentially than permitted developments or whether it would be required for qualitative reasons such as strengthening the County's retail profile.

The final part of the capacity assessment is to determine the amount of floorspace that is required to accommodate this anticipated increase in expenditure over the timescale of the Retail Strategy and forward to 2022. This is achieved by applying 2009 Price Year turnover ratios to the expenditure figures. For the convenience and comparison floorspace, turnover ratios for 2013, 2019 and 2022 have been used. Applying these turnover ratios to the net expenditure capacity growth provides the estimates of the net floorspace potential available in the County. Given the levels of vacant and extant floorspace available, it is considered appropriate to provide a two stage approach to the net spare capacity. Table 58 shows the net spare expenditure capacity **when turnover efficiency growth only** is subtracted from gross expenditure potential in Table 58 while Table 59 shows the final net space expenditure capacity when all factors are included.

Table 58 Net Spare Expenditure Capacity in County Turnover Efficiency (sq m)

	Convenience Sq m	Mainstream Comparison Sq m	Comparison Bulky Sq m
2011 and 2013	358	483	14
2013 and 2019	7,494	12,716	6,818
2019 and 2022	3,713	11,065	5,842
2011 and 2022	11,565	24,264	12,675

Note: Vacant and extant permissions not subtracted from Table 55

As noted above vacancy rates and extant permissions also need to be taken into account. Reducing vacancy rates to a more sustainable rate (5%) would result in a capacity requirement of the order of 8,435 sq m convenience floorspace, 9,477 sq m in comparison floorspace, and 4,443 sq m for bulky goods floorspace up to 2022 for the entire County.

Table 59 Net Spare Expenditure Capacity in County to 2022 (sq m)

	Convenience Sq m	Mainstream Comparison Sq m	Comparison Bulky Sq m
2011 and 2019	2,176	-6,089	-2,969
2019 and 2022	-1,963	-8,222	-3,960
2011 and 2022	213	-14,311	-6,929

Note: Gross capacity minus turnover efficiency, vacancy rates and extant permissions.

Table 59 assumes that the vacant floorspace uptake and extant permissions will absorb further the net capacity outlined in Table 58 on a 50:50 basis between the periods 2011-2019 and 2019 and 2022, (to accord with the Development Plan period). It is noted that the proportions may alter with prevailing market conditions.

The issue of extant permissions (and the granting of extension of time applications) to significant retail developments needs to be carefully considered against updates to national Retail Planning Guidance, and also changes to Development Plan (particularly zoning) policy. As highlighted above, a relatively small number of extant permissions (13 in total) account for the vast majority (86.7%) of the overall extant floorspace of 86,765 sq m. This is noted in tandem with an understandable current reluctance in the market to implement significant permissions on key sites.

At the same time, it is not the purpose of the Retail Strategy to limit competition, and therefore there is an obligation to consider robust quantitative and qualitative arguments for renewal and investment in new floorspace where it can be demonstrated that there would not be a material negative impact on existing floorspace (less than 5% trade diversion from existing floorspace).

6.4 Conclusions

Since the preparation of the 2005 Retail Strategy and the 2007 Review, the County has witnessed a considerable improvement in the competitiveness of its retail offer. The downturn in the economy since 2008 has resulted in a reservoir of vacant retail floorspace throughout the county. In the interests of sustainability, it is considered appropriate that potential floorspace capacity over the period of this strategy is used to reduce the levels of vacant floorspace. It was also found that some extant permissions have a role in the residual capacity for additional retail floorspace.

The figures presented in the capacity assessment provide a broad assessment of the requirement for additional new floorspace. They should thus be taken as indicative and as guidance on the quantum that will be required and are in no way intended to be prescriptive. It is not the purpose of the capacity assessment to place a cap on the scope for future retail developments in the County. In developing the Retail Strategy's objectives the capacity assessment is viewed in the context of the following factors and issues:

- The strengths and weaknesses of the County's retail profile and how these are best harnessed and addressed respectively;
- The actions required to sustain and grow retail activity particularly in the light of the increasing attraction of Dublin for residents in the north

of the County;

- How to address the issue of vacant retail floorspace;
- Qualitative improvements to the four main town centres; and
- How extant permissions are managed in light of new zoning designations and application of sequential test.

The issue of extant permissions (and the granting of extension of time applications) to significant retail developments needs to be carefully considered against updates to national Retail Planning Guidance, and also changes to Development Plan (particularly zoning) policy.

Section 7 Opportunity Sites

7.0 Introduction

This section of the Retail Strategy indentifies key opportunity sites which are considered appropriate for future retail development. The 2005 and 2007 County Retail Strategies contained many recommendations on the location of further retail development. This strategy will review the previous recommendations and identify alternative sites if necessary. The sites identified are close to the town centres. In some instances planning permission has already been granted on the sites however to date they have not been implemented. The sites have the capacity to absorb future retail development and to provide the size and quality of floor space required by major national and international retailers. Many of the sites are brownfield that have the potential to deliver medium-large mixed use developments that that will not only expand the choice of shopping available within the towns and their catchment area but also enhance the physical attractiveness, environmental quality, public realm and vitality and viability of the town centres by improving environmental quality.

Sites have not been selected in the District Towns as they are more apparent due to the small size of the settlements.

7.1 Wexford

Wexford has a well-established retail core and is the most important retail centre in the County. Wexford's key Opportunity Sites are as follows:

- The old Tesco store site – this site is located with access onto the South Main Street and the Crescent Quay. It contains the supermarket, car parking and a number of warehouses.
- Old cinema site and former FBD offices– this site is located off Redmond Road. This is a high profile site on the approach road to Wexford adjacent to existing surface car parking.

- Trinity Wharf site – a large scale mixed use development was previously granted on this site (expires February 2017) which comprising a substantial retail mall. Any development at this site should site should not impact on the adjacent Natura 2000 sites.

- GPS HomeValue Hardware and Livingston site – this site is in close proximity to Redmond Square and is located on Redmond Road. Opposite the site there is significant surface car-parking which serves this area of town.

- Train station lands - the train station is adjoined by a substantial amounts of derelict lands which could be used for retail purposes, subject to not interfering with the adjacent Natura 2000 sites or the railway.

- ESB site – this site is a vacant site located at Commercial Quay.

- Colman Doyle Site – this store occupies a prominent location at the end of the South Main Street.

7.2 New Ross

New Ross has a number of sites in close proximity to the quayside that could be developed for retail purposes. The key opportunity sites are:

- Bond Store car park – this site occupies a prime site located along the Quay opposite the Dunbrody Ship and Visitor Centre.
- Site of Billy Foley's Yard and The former Campus Garage – this site is bound to the north by Marsh Lane, to the south by Priory Lane and also fronts onto the Quay. Planning permission exists for a mixed use development on the site.
- The site of the Old Malthouse and lands currently occupied by Steele and Company – this site is bound to the north by Priory Lane, the west by Lidl. Planning permission has been granted for a mixed use development on the site.

7.3 Enniscorthy

There are a number of areas close to the town centre which have the capacity to absorb future retail development. Enniscorthy's key opportunity sites are:

- Abbey Quay – this area is currently occupied by a number of units with large floor plates such as Abbey Square Shopping Centre, The Carpet Centre, Murphy's Cash and Carry and the Purple and Gold Garden Centre. It occupies a prominent site adjacent to the river, near the approach roads from the N11 and N30 and has significant surface car parking.

- Chivers site at Abbey Quay – this site fronts onto the promenade along the River Slaney. It is in close proximity to the Abbey Square Shopping Centre and can be accessed via Mill Yard Lane or from the Promenade.

- No. 10 and 11 Market Square - this site occupies a prominent position in the centre of the town centre. Planning permission was previously granted for a mixed use development.

- Murphy Flood Site – this site is located off the Main Street and is currently a temporary car park. It occupies a site at the heart of the town's retail core. It is bounded to the west by Irish Street one of accessways linking the redeveloped Minch Norton site (Dunnes Stores) to the Market Square.

- Old Dunnes Stores – this site is located off the recently pedestrianised Rafter Street and benefits from primary retail frontage. To the rear of the site is substantial surface car parking.

7.4 Gorey

Gorey is an important retail centre in the north of the County. Gorey's key opportunity sites are:

- Greenfield lands to the west of the town centre – in recent times Niralcy Ltd (Tesco). have been granted a single storey food store at this location which has at present not commenced. There is further opportunity for development of the land adjacent to the proposed food store.

- Esmonde Street – development potential exists for change of use and redevelopment of the residential properties.

- Tesco – in light of the planning permission granted for the new Tesco, the existing store is located off the Courtown Road close to Esmonde Street.

7.5 Conclusion

The Council have endeavoured to identify sites throughout the County which have the potential to be developed for retail. These sites will further enhance and maintain the vitality and viability of the main retail centres of the County, subject to complying with the criteria for assessing future retail developments and retail policies discussed in the following section 8. These sites should also be considered when the sequential approach is being applied when they are located in the town centre or edge of centre locations. It is not suggested that all the sites identified in this strategy should be developed. Development should be at a scale and character of the town centres and which reflects the additional floorspace requirement outlined in the capacity assessment.

Section 8 Objectives and Criteria for Assessing Future Retail Development

8.0 Introduction

This section of the strategy contains key retail objectives to encourage and accommodate future retail development in the County[1]. It also outlines criteria for assessing future retail development and particular types of retail development Proposals for retail developments shall be assessed against the objectives in the Development Plan and the requirements of the Retail Planning Guidelines (DoECLG), April 2012.

8.1 Retail Objectives

The objectives reflect the Strategy's overriding requirement that the retail development should be directed to the town centres of Wexford Town, New Ross, Enniscorthy and Gorey. They have been formulated to ensure;

I. County Wexford possesses a clear policy framework which will help guarantee that its strategic and local retailing needs are achieved;
II. The competitiveness of the County's main centres are protected and enhanced;
III. The regeneration of areas with scope for improvement are encouraged;
IV. The environmental attractiveness of the town centres is increased;
V. The leakage of retail expenditure out of the County is minimised.

Objective 1: The Council shall ensure that all retail development permitted is in accordance with the Guidelines for Planning Authorities Retail Planning (DECLG, 2012) and the Wexford County Retail Strategy.

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[1] Wexford Town, Enniscorthy and New Ross have their own development plans and they are bound by the objectives of their respective development plans.

Objective 2: The Council will permit retail development of a scale which is appropriate to the level of the town/area within the retail hierarchy and the population of the catchment.

Objective 3: The Council will prohibit new retail developments if they would either by themselves or cumulatively with other recent developments and proposals seriously damage the vitality and viability of existing town centres.

Objective 4: The planning authority will have regard to the findings of the capacity assessment contained in the County Retail Strategy in assessing planning applications. However when considering any individual planning proposal in any town the applicant will be required to demonstrate in the Retail Impact Assessment that the floorspace is appropriate having regard to the quantum of floorspace required in that town. The Retail Impact Assessment shall take account of the particular catchment, extant permissions and their likelihood of being implemented and vacancies in the individual towns. Information with regard to extant permissions can be provided by the Council. The quantitative need for the quantum of floorspace will not be the only deciding factor; the Council will also consider whether any given planning application will be better located sequentially than permitted developments or whether it would be required for qualitative reasons such as strengthening the County's retail profile profile.

Objective 5: The Council shall promote and protect the designated Primary and Secondary Retail streets as the key locations for retail development.

Objective 6: The Council shall resist applications for planning permission which would result in net loss of convenience and comparison shopping floorspace at ground level on Primary Shopping Streets where this would affect the vitality and viability of these streets.

Objective 7: On Primary Shopping Streets permission will be favourably considered for banks and other professional services, office uses, restaurants, bars, off licenses, takeaways and other cultural uses provided:

i) The proposals would not individually or cumulatively cause demonstrable harm to the function, character or appearance of the street concerned or to the town centre as a whole.

ii) There would be no significant loss of residential accommodation at upper floor levels. While residential use is the preferred use upstairs it is accepted that it is not always possible to accommodate appropriate units in these buildings. Therefore other commercial uses will be considered but the Planning Authority will have regard to the amount of residential uses retained in the area to ensure that a balance of residential and commercial uses are maintained in the town centre. The use, taken together with existing or permitted uses would not result in an unacceptable multiplicity of such uses in any one area.

Objective 8: It is an objective of the Council that proposals for large scale retail development will be favourably considered where they:

- provide safe and easy access for pedestrians, cyclists and disabled persons;
- are accessible by public and private transport;
- are of a high design standard and satisfactorily integrate with the surrounding built environment;
- do not negatively impact on the flow of vehicular traffic either in the immediate vicinity or the wider area of the development.
- are of a scale appropriate to its location.

Objective 9: The Council will generally require a Retail Impact Assessment (RIA) to be carried out for proposals for development[2];

(a) greater than 1000 sqm of net floorspace for both convenience and comparison type developments in the four main towns,

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[2] Wexford Town, Enniscorthy and New Ross have their own development plans and they are bound by the objectives of their respective development plans.

(b) greater than 500 sq.m. of net retail floorspace for both convenience and comparison type developments in district towns and other settlements,

(c) or where the Planning Authority considers the development may impact on the vitality and viability of a town centre.

The Planning Authority retains the right to waive the requirement of the Retail Impact Assessment on a case to case basis. The Retail Impact Assessment shall include, at minimum, the criteria set out in the Retail Planning Guidelines (2012) or as amended.

Objective 10: Retail developments on edge of centre sites or out of town centre sites will be considered when it has been clearly demonstrated that all viable, available and suitable sites in the town centre have been fully investigated and considered in accordance with the Retail Planning Guidelines and in particular the Sequential Test.

A special financial contribution will be applied to retail developments on edge of centre or out of town centre sites. This contribution will be used by the Council to carry out town centre improvements and/or to enhance access arrangements from the town centre to the subject site. Provisions in this regard will be set out in the respective Development Contribution Schemes.

Objective 11: The Council will prioritise the reuse of vacant and derelict buildings in the town centre for uses including retail development.

Objective 12: The Council will encourage ‘living over the shop’ whereby the upper storeys of buildings have a residential function with the ground floor used for commercial or retail purposes.

Objective 13: The Council will consider tourism related retail developments in towns and villages or at existing established tourist attractions. The retail facility shall be suitably designed, sited and of a scale that does not detract from the tourism feature and shall be subject to normal planning and environmental criteria and the development management standards contained in Chapter 18.

Objective 14: It is the objective of the Council to continue to make environmental improvements to the town centres through high quality civic design, provision of attractive street furnishing, lighting and effective street cleaning/business improvement district type initiatives.

Objective 15: It is an objective of the Council to improve accessibility of town centres by developing a pedestrian and cyclist friendly urban environment and promoting vibrant street life.

Objective 16: It is the objective of the Council to ensure that all proposed projects relating to retail development (including retail warehouses, factory outlets, shopping centres, convenience shops etc) and any associated improvement works or associated infrastructure (i.e. parking facilities), individually or in combination with other plans or projects, are subject to Appropriate Assessment to ensure there are no likely significant effects on the integrity (defined by the structure and function) of any Natura 2000 site(s) and that the requirements of Article 6(3) and 6(4) of the EU Habitats Directive are fully satisfied.

8.2 Criteria for Assessing Future Retail Development

All applications for significant retail development should be assessed against a range of criteria.

8.2.1 The Sequential Test

The Retail Planning Guidelines state *that the order of priority for the sequential approach is to locate retail development in the city/town centre (and district centre if appropriate), and only to allow retail development in* *edge-of-centre or out-of-centre locations where all other options have been exhausted.*

*Where retail development in an edge-of-centre site is being proposed, only where the applicant can demonstrate **and** the planning authority is satisfied that there are no sites or potential sites including vacant units within a city or town centre or within a designated district centre that are (a) **suitable** (b) **available** and (c) **viable**, can that edge-of-centre site be considered.*

*Where retail development on an out-of-centre site is being proposed, only in exceptional circumstances where the applicant can demonstrate **and** the planning authority is satisfied that there are no sites or potential sites either within the centre of a city, town or designated district centre or on the edge of the city/town/district centre that are (a) **suitable** (b) **available** and (c) **viable,** can that out-of-centre site be considered.*

All applications for retail developments at edge-of-centre or out-of-centre will be subject to the sequential test. Where an application for a retail development edge of centre and out of town centre is lodged to the planning authority, the applicant shall demonstrate that all town centre options including but not limited to Opportunity Sites have been assessed and evaluated and that flexibility has been adopted by the retailer in regard to the retail format.

8.2.2 Retail Impact Assessments

New developments can have adverse impacts on the vitality and viability of established centres. As a result of the limited retail floorspace identified as required in the Capacity Assessment detailed in Section 6 for additional retail floorspace the threshold for an RIA has been adjusted accordingly. Wexford County Council generally requires that a retail impact assessment should accompany development proposals:

- greater than 1000 sqm of net floorspace for both convenience and comparison type developments in the four main towns,
- greater than 500 sq.m. of net retail floorspace for both convenience and comparison type developments in district towns and other settlements,
- or where the Planning Authority considers the development may impact on the vitality and viability of a town centre.

RIAs shall be prepared in accordance with the current Retail Planning Guidelines and its associated Annex. The Guidelines require an applicant to address the following criteria and demonstrate whether or not the proposal would:

- 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 an adverse impact on one or more town centres, either singly or cumulatively with recent developments 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 an 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 and 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.

- In relation to large-scale out of town retail developments, a transport assessment showing how trips to and from the proposed development might affect the road network and public transport links.

Other criteria that should be considered in the RIA for significant applications include:

- That there is a need for the scale of the development (it is not appropriate for applications for out-of-centre sites to be pursued where there are significant vacant units within the town centre),
- That there is the potential to increase employments opportunities and promote economic regeneration;
- That there is the potential to increase competition within the area;
- Responding to consumer demand for its retail offering and not diminish the range of activities and services that an urban centre can support; and
- Compliance with development plan objectives.

8.2.3 Traffic and Transport Assessments

Retail developments have the potential to impact negatively on traffic and transport within area. Therefore a Traffic and Transport Assessment (TTA) may be required for retail developments over a particular threshold (1000 square metres for retail / leisure) as set out in the Traffic Management Guidelines 2003, and the Traffic and Transport Assessment Guidelines 2007. The Planning Guidelines on Spatial Planning and National Roads set out additional advice and requirements in relation to transport matters. Such an assessment must examine the transport impacts of a proposed development, showing how trips to and from the proposed development might affect the road network and public transport links. Incorporating any subsequent measures necessary to ensure roads and junctions and other transport infrastructure in the vicinity of the development are fit for purpose and encourage a shift towards sustainable travel modes. The TTA should also address urban design impacts of proposed public and private transport proposals and also deal with delivery and monitoring regimes for various aspects.

8.3 Criteria for Assessing Specific Categories of Retail Development

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

8.3.1 Large Convenience Goods Stores

Large convenience stores comprising of supermarkets, superstores and hypermarkets are now an accepted element of retailing in cities and large towns. They provide primarily for the weekly convenience goods shopping of households. They should be located in city or town centres or in district centres or on the edge of these centres and be of a size which accords with the general floorspace requirements set out in the development plan/retail strategy to support and add variety and vitality to existing shopping areas and also to facilitate access by public transport for shoppers.

In certain limited circumstances however, it may not be possible to bring forward suitable sites in or on the edge of a city or town centre because of the site requirements of large convenience goods stores, heritage constraints in historic towns, or because the road network does not have the capacity to accommodate additional traffic and service vehicles. In these cases, the sequential approach should be used to find the most preferable sites.

Where a proposal for large convenience goods stores development involves the sale of a significant amount of comparison goods (as is common now in many supermarkets, superstores and hypermarkets), the planning application drawings should clearly delineate the floorspace to be devoted primarily for the sale of convenience goods. The balance between the convenience and comparison element of the proposed store drawings is a critical element in the assessment of the suitability of the development proposal. Where a significant element of the store is indicated to be for comparison goods the potential impact of that element of the store on existing comparison goods stores within the catchment must be included in the assessment of the application.

8.3.5 Retail Parks and Retail Warehouses

A retail park comprises an agglomeration of retail warehouses grouped around a common car park selling mainly bulky household goods, requiring extensive areas of showroom space, often with minimal storage requirements. There is an expectation that most of the goods purchased can be transported off-site by the
customer. Home delivery services may also be available.

There are benefits to be gained in grouping retail warehouses in retail parks so that the number of trips by car are minimised. The parks are generally located at out-of-centre locations to facilitate access by car. These locations may also provide relief to congested city or town centres.

However, because the number of retail parks has grown substantially over the past decade, reaching saturation point in some areas, leading to vacancy in some cases, and also because of the blurring of the definition of the goods permitted to be sold in these parks, it is appropriate to reassess the impact of such developments. Due to the fact that the range of goods being sold from retail warehouse parks often includes non-bulky durables, there is potential for a detrimental impact on city/town centres as indicated by the increasing numbers of vacant units in urban centres where retail parks exist on the periphery. It also needs to be recognised that many bulky goods stores such as furniture retailers can and are accommodated in city and town centres. For these reasons there should, in general, be a **presumption against further development of out-of-town retail parks** as per the RPGs.

The criteria for assessing a retail warehouse application include scale and design of the development, appropriate vehicular access and the quantative need for such development. The Retail Planning Guidelines state that individual retail units should not be less than 700sq.m and not more than 6,000sq.m 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 as those defined within the RPGs such as household appliances, furniture and furnishings. The proportion of non bulky goods should be limited to 20% of the not truly ‘bulky’ goods and should be clearly delineated on the planning application drawings.

8.3.6 Factory Shops

Such units, usually located as part of or adjacent to the production facility, should be restricted by way of conditions to the sale of factory products (unless located within the core shopping area). Proposals for individual factory shops may be appropriate, provided the scale of the shop is appropriate to its location and raises no issues in relation to the viability of nearby urban centres or raise significant traffic and transport issues.

8.3.7 Outlet Centres

The Retail Planning Guidelines state that the success of these centres depends on drawing customers and visitors from a wide catchment area, including tourists. There may be implications for existing tourist centres and established town centres, even those some distance from the proposals. Nonetheless, outlet centres within or immediately adjacent to a city or town centre can generate commercial synergies with the established retail outlets, thereby raising the profile of the centre and enhancing aggregate turnover on retail goods and leisure activities.

The most appropriate location for outlet centres is where commercial synergy can be achieved between an outlet centre and an urban centre which would lead to economic benefits for the overall area. Outlet centres should not be permitted in more remote out-of-town locations. Applicants must demonstrate, that the products sold will not be in competition with those currently on sale in typical city/town centre locations.

8.3.9 Retailing in Smaller Towns and Villages

District Towns play an important role within the County's retail hierarchy. They provide convenience shopping, alongside a level of comparison shopping serving the population of the immediate catchment of the town and surrounding areas. Local shops within the County's villages play a vital role in providing for daily top-up shopping needs. The development of such local shops should be encouraged to a scale appropriate to the County's settlement strategy. There should be a clear presumption in favour of central or edge of centre locations for new developments.

8.3.10 Local Retail Units

Local retail units located in local centres or neighbourhood centres perform an important function in urban area. They play a vital role in catering for the daily of causal needs of nearby residents or of those passing by. They are often easily accessible to the elderly and disabled. The development of such local shops should be encouraged in growing residential areas. Such developments should be easily accessible to all sections of society.

8.3.11 Retailing in Rural Areas

Retailing should generally be directed to existing settlements: development for this purpose in the countryside will generally not be permitted. It is recognised, however, that there may be exceptional circumstances where the development of certain types of retail units in rural areas could be acceptable. The retail units in question could be:

- a retail unit which is ancillary to activities arising from farm diversification,
- a retail unit designed to serve tourist or recreational facilities, and secondary to the main use,
- a small scale retail unit attached to an existing or approved craft workshop retailing the product direct to the public, or
- a small scale retail unit designed to serve a dispersed • rural community.

8.3.12 Retailing and Motor Fuel Stations

Local shops attached to petrol filling stations are a growing sector of the retail market. However, the size of the shop associated with any petrol filling station should take account of the fact that large shops can attract additional custom, large numbers of cars can cause disruption and the preferred location for retailing is in town centres. The Retail Planning Guidelines state that when the size of such retail units exceed 100sq.m. the sequential approach should apply.

8.3.13 Casual Trading

Casual trading is provided for under the Casual Trading Act 1995 and includes trading markets and the increasingly popular farmers markets. If properly regulated such casual trading can make a significant contribution to the local economy. Casual trading should be promoted where it can create an ambiance which can contribute to the vitaltiy and viabilty of retail centres.

8.3.14 Garden centres/nurseries

Garden centres shall only be considered outside settlements where it can be shown that the principle activity is the cultivation and or sale of plants and the retail activity is purely ancillary to the main use. The expansion of the existing garden centres to incorporate a retail element for gardening products shall be ancillary to the main use.

Section 9 Conclusion

9.0 Conclusion

This Retail Strategy has been prepared in accordance with the current Retail Planning Guidelines, published in April 2012, DoECLG. The strategy confirms the Retail Hierarchy with Wexford Town as the principal town, supported by New Ross, Enniscorthy and Gorey. This is in line with the objectives of National Spatial Strategy 2002 and Regional Planning Guidelines 2010 to attain a critical mass within the hub and larger towns. The District Towns also play an important role in the County's retail hierarchy as important service providers to their surrounding hinterland. The core shopping areas have been defined to ensure that the retail floorspace is maintained within a compact core, in order to maintain the vitality and viability of the main retail centres.

In order to calculate the additional floorspace that is required under the next development plan period, and in line with the population targets set by the Regional Planning Guidelines 2010, a Capacity Assessment was prepared by the planning consultants RPS Planning and Environment. This identified the floorspace required in line with the population targets set for the various settlements.

In order to facilitate the additional floorspace, opportunity sites have been identified in the larger towns. These sites are easily accessible and located within the town or edge-of-centre. Guidance and policies have also been provided in relation to the locations and assessment of the various types of retail development.

The council will endeavour during the life of the Wexford County Development Plan 2013-2019, update the baseline information, through monitoring of planning consents for both new retail floorspace and change of use. This will be incorporated into the development management procedure and will be available at such a time for the preparation of the regional retail strategy. The household and shopper survey data will be updated again at the next review.

The Council is committed to protecting retail functions of towns and improving town centres as places to live, work and shop.

Appendix 1 Glossary

Bulky Goods – goods generally sold from retail warehouses where DIY goods or goods such as flatpack furniture are of such size that they would normally be taken away by car and not be portable by customers travelling by foot, cycle or bus, or that large floor areas would be required to display them e.g. repair and maintenance materials; furniture and furnishings, carpets and other floor coverings; household appliances; tools and equipment for the house and garden, audio-visual, photographic and information processing equipment, other major durables for recreation and leisure.

City and town centres – They provide a broad range of facilities and services and fulfil a function as a focus for both the community and public transport. The term excludes district centres, retail parks and local centres.

Comparison goods - clothing and footwear furniture, furnishings and household equipment (excluding non-durable household goods,) medical and pharmaceutical products, therapeutic appliances and equipment, educational and recreation equipment and accessories, books, newspapers and magazines, goods for personal care, goods not elsewhere classified and bulky goods.

Convenience shopping – food, alcoholic and non-alcoholic beverages, tobacco and non-durable household goods.

Edge-of-centre – A location within easy walking distance of the primary retail area of a city or town centre, and providing parking facilities that serve the centre as well as the new development thus enabling one trip to serve several purposes. Apart from proximity to the city / town centre other factors to be considered are the character of the site itself as well as the existence of either links or barriers to that centre.

Expenditure Leakage – loss of retail revenue from a study area due to persons living in that area doing their shopping outside of the study area.

Factory Shop – A shop located as part of or adjacent to the production facility and specialising in the sale of manufacturers' products direct to the public.

Forecourt Retailing –mini-supermarket linked to Petrol Filling Stations.

Gross retail area – this is the total floorspace, as measured from inside the shop walls, which includes sales space, plus storage space, offices, toilets, canteen and circulation space.

Hypermarket – Self service stores on single or more levels selling both food and a range of comparison goods, with net sales area in excess of 5,000 sq m with dedicated surface level car parking.

Independent retailer – Privately owned retail outlet not affiliated to any multiple operator. Usually small family run shops.

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

Net retail area – The area within the shop or store which is visible to the public and to which the public has access including fitting rooms, checkouts, the area in front of checkouts, serving counters and the area behind used by serving staff, areas occupied by retail concessionaires, customer service areas, and internal lobbies in which goods are displayed, but excluding cafes and customer toilets.

Outlet Centres - Groups of retail units in particular focusing on fashion and accessories which are generally associated with designer groups. They specialise in selling surplus stock and end-of-line goods at discounted prices.

Out-of-centre – A location that is clearly separate from a town centre but within the town development boundary, as indicated in a development plan or local area plan.

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

Primary shopping streets – The part of the retail area/shopping core which performs the primary retail function. Primary streets would have a high proportion of retail uses compared to other streets in which food/drink, financial and other services may also contribute.

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

Retail area/shopping core – That part of a town centre which is primarily devoted to shopping.

Retail inflow – Turnover that is due to persons coming from outside a particular study area/catchment area to purchases retail goods.

Retail leakage/outflow – Potential turnover that is lost due to persons living within a study area/catchment area using the internet or driving outside of the study area/catchment area, to conduct their shopping and purchase retail goods.

Retail Parks – A single development of a least three retail warehouses with associated car parking.

Retail Warehouse – A large single-level store specialising in the sale of bulky household goods such as carpets, furniture and electrical goods, and bulky DIY items, catering mainly for car-borne customers.

Shopping centre – Either a traditional or purpose built group of shops (e.g. district centres) separate from the city or town centre, and either located within the built-up urban area or in a suburban location on the edge of an urban area, usually containing at least one food supermarket or superstore.

They may provide both convenience and comparison shopping depending on size and will also include non-retail services, such as banks, building societies and restaurants.

Secondary shopping streets – The part of the retail/shopping core which performs a secondary retail function. Secondary streets would have a lower proportion of retail uses compared to primary frontages in which food/drink, financial and other services and functions will also have a significant role.

Supermarket – Single level, self service store selling mainly food, with a net sales area of less than 2,500 sq m.