Appendix 2: Retail Strategy

2008 - 14

ENNISCORTHY

Enniscorthy Town Retail Strategy


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2008 - 14

Retail Strategy

Enniscorthy Town and Environs Development Plan 2008 - 2014

Enniscorthy is an attractive market town, with a central triangular market square which still forms the hub of the retail core within the town. The main shopping streets radiate out from the Market square. Enniscorthy is classified as a third tier centre in the retail hierarchy of the Retail Planning Guidelines. It is a busy town centre serving a wide rural catchment area. It has a unique retail offer which is defined by a large number of specialised comparison operators.

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Introduction

1.1 Introduction

1.1.1 The Retail Planning Guidelines (RPGs) for Planning Authorities, issued by the Department of the Environment and Local Government (DoELG) in January 2001, require Local Authorities to prepare retail strategies and policies for their areas and to incorporate these where appropriate into their development plan. The retail strategy for Enniscorthy is therefore prepared in tandem with the preparation of the new Town Development Plan.

1.1.2 John Spain Associates were commissioned to prepare a retail strategy for Enniscorthy to provide advice regarding the quantum, scale and type of retail development required within the town. Detailed consideration of the above issues was given in the preparation of the strategy document and in the formulation of policies and actions regarding future retail developments in Enniscorthy.

1.2 Introduction to Study Area

1.2.1 Enniscorthy is classified as a third tier centre in the Retail Planning Guidelines for Planning Authorities 2005 and is the second largest settlement in County Wexford. The town is centrally located in County Wexford on the N11 and N30 National Primary Routes.

1.2.2 Enniscorthy has a high quality physical and natural environment. It is located on the hillsides of the Slaney Valley, which has provided amenities for passive recreation. The town centre has a high quality public realm. Its unique topography gives Enniscorthy a rather picturesque quality.

1.2.3 Enniscorthy is an attractive and vibrant town with retailing clustering around the Market Square. The principle shopping streets include Main Street, Rafter Street, Weaver Street and Castle Street. It has a unique retail offer which is defined by a large number of specialised comparison operators. However, the town has relatively few national/ international comparison shopping facilities.

1.3 The Purpose of the Retail Stategy

1.3.1 The purpose of the retail strategy is to implement the objectives of the Retail Planning Guidelines. Wexford County Council have requested that the strategy considers in particular the following:

1. Consideration of new retail trends, best land use planning practice and changes in national policy and market shifts.

2. Profile of recent retail development.

3. Enniscorthy Town Health Check

4. Development Opportunities -

   (A) Review the existing retail hierarchy in the town and identify areas which are not served by retail facilities and propose areas which could benefit from neighbourhood shopping developments.

   (B) Identification of sites which could provide opportunities to strengthen the existing retail core within the Town Centre having regard for the need to protect the town's historical core and cultural importance.

5. Identification and classification of retail types.

6. Population baseline projections.

7. Capacity Assessment.

1.4 Approach

1.4.1 The approach taken in the formation of the retail strategy included the undertaking of baseline survey and research. This comprised the following components:

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

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

Economic Context: Retail expenditure is influenced by the economic performance of the town. The economic context for Enniscorthy is therefore established.

Qualitative Survey: A qualitative health check survey was carried out in order to assess the current level of vitality and viability of the town. Opportunity sites for retail development and expansion were also indentified.

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

1.5 Preparation of Retail Strategy

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

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

1.5.2 The final component of the study was to determine the retail strategy for Enniscorthy. The factors influencing this included:

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

1.6 Structure of the Report

1.6.1 The remainder of the report is structured as follows:

Section 2 - Policy Analysis and Economic Context: This section considers national and local policy and provides a review of relevant economic policy in the context of the retail strategy.

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

Section 4 - Health Check Qualitative Assessment: This section includes a health check analysis of Enniscorthy town centre. The profile of recent and proposed developments is also assessed.

Section 5 - Retail Hierarchy and Identification of Core Retail Areas: The structure and context of the town was analysed to determine the hierarchical retail structure of the town and the core retail areas. Potential development opportunities are identified in this section of the report.

Section 6 - Quantitative Analysis and Capacity Assessment: This section provides a broad assessment of the requirement for additional retail floor space for Enniscorthy.

Section 7 - Policies and Actions: This section includes recommendations to encourage the improvement of Enniscorthy town centre.

Section 8 - Criteria for Assessing Future Retail Development: This section includes recommendations and policies regarding the assessment of future planning applications for retail development.

Planning Policy and Economic Context

2.1 Introduction

2.1.1 In setting out this retail strategy, it is important to review some of the wider factors which will influence the development of Enniscorthy. The planning policy context in place at national, regional and local level has implications for the role of the town in the county settlement strategy, role in retail provision and the future scale of retail provision to be encouraged in the town. This chapter will review the relevant spatial and sectoral planning policy documents which pertain to Enniscorthy.

2.1.2 It is also important to assess the economic context at a national, regional and local level as current and projected economic growth can have a significant effect on factors such as expenditure change and thus on the nature and quantum of retail development that occurs. This section of the retail strategy will therefore outline the national, regional and local economic context.

2.2 National Level

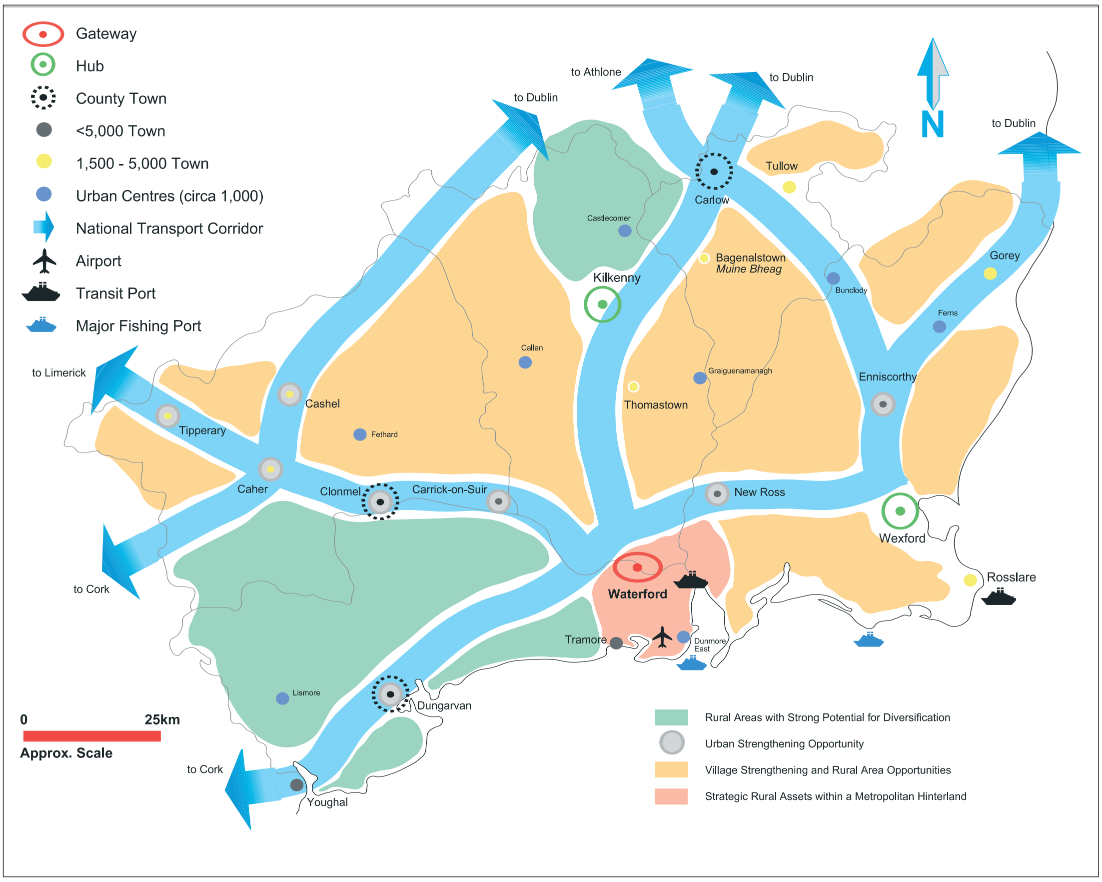
National Spatial Strategy

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

2.2.2 The Strategy predicts that the population of the state will increase to between 4,391,000 persons and 5,013,000 persons in 2020 depending on economic growth. Within the South East Region there will be an increase in population from 424,000 (2002 figures) to between 440,000 and 480,000 persons. The 2006 Census preliminary results however show that population growth is already occurring at a greater rate than was envisaged in the National Spatial Strategy. The population of the State was recorded at 4,239,848 persons, an increase of 8.2% over the 2002 population. The population of the south east region was recorded at 460,474 persons in the preliminary results of the 2006 Census, an increase of 8.7% over the 2002 figure. The population of the south east is therefore likely to exceed the projected 2020 population figure well in advance of that date.

2.2.3 The NSS sets out the future spatial structure of Ireland. Within the South East Region, the spatial structure is concentrated on the gateway city of Waterford with the twin hubs of Kilkenny and Wexford (see Figure 2.1). These centres together form a nationally strategic ‘growth triangle’. The N11 is identified as a strategic radial corridor along the east of the country, linking Wexford to Dublin and on to Belfast via the M1. Wexford has been designated as a hub due to its strategic location in the Southeast, close to Rosslare Port and on the national road and rail networks. It is also noted that the town has substantial capacity for development and has a variety of employment, retailing, services and administrative functions. The town can contribute to creating a 'triangle of strength' with Waterford and Kilkenny. It is envisaged that this will significantly strengthen and energise the Southeast region.

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



2.2.4 Enniscorthy is also located along a strategic radial transport corridor (N11) identified in the NSS. Enniscorthy, in addition to New Ross, is designated as towns with an 'Urban Strengthening Opportunity'. In relation to these, the NSS states that:

"These towns, located on important economic and transport corridors or in important locations and with a capacity to grow, must become a focus for the settlement policies of local authorities as incorporated in county development plans."

2.2.5 The NSS therefore envisages significant growth for towns such as Enniscorthy. Within Wexford, the NSS also recognises towns of 1,500-5,000 population (Gorey and Rosslare) and towns of <5,000 population (Ferns and Bunclody)

2.2.6 In accordance with the NSS, Wexford remains the principal settlement in the County. However, the NSS also recognises the potential of Enniscorthy to absorb a considered level of additional development. This would require expansion of the existing services, including retail, in the town to cater for the additional population. While Wexford, as a hub settlement, would provide the widest range of retail services in the County, Enniscorthy be able to meet the daily convenience and comparison requirements of residents in its catchment area.

The National Development Plan

2.2.7 The new National Development Plan 2007-2013 was released on 23rd January 2007. The Plan proposes investment of approximately €184 billion into five investment priorities (see Table 2 below) with the aim of creating a strong and vibrant economy geared to meet the challenges of the future and which will deliver increased quality of life for all.

Table 2.1: Spending Allocations of National Development Plan 2007-2013

	Billion (Current Prices)
Economic Infrastructure	54.7
Enterprise, Science and Innovation	20.0
Human Capital	25.8
Social Infrastructure	33.6
Social Inclusion	49.6
Total	**183.7**

2.2.8 The key elements of the plan include:

- Overcome structural infrastructure deficits.
- Enhance enterprise development, Science, Technology and Innovation, Training and Skills provision.
- Integrate regional development within the National Spatial Strategy framework.
- Invest in long-term environmental sustainability.
- Develop a program for social inclusion.

2.2.9 The NDP contains future actions for the Gateway and Hub centres. However, the Plan also notes that:

"there are other strategically positioned county towns and other large towns whose continued development must be facilitated in national investment so that they may continue to play an importance role in ensuring that balanced development takes place not only between regions but within them as well. The future development of these and other similar locations will be encouraged through effective local planning and leveraging wider public and private investment."

2.2.10 The NDP therefore recognises the role that towns such as Enniscorthy play in regional development and that further investment and strong planning policies can safeguard this role.

2.2.11 With regards to national economic infrastructure, the key actions of the NDP include facilitating the road network and upgrading the public transport system in line with the Transport 21 programme. There will be some benefits to Enniscorthy in this regard as outlined below in the section on 'Transport 21'.

Transport 21

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

The principal objectives of the Programme include:

- to create a high quality, efficient national road and rail network consistent with the objectives of the National Spatial Strategy;
- to strengthen national, regional and local public transport services;
- The programme contains a number of elements influencing the transportation network in Wexford which include:
- **Intercity Rolling Stock:** Since 2002, Iarnród Éireann has ordered new intercity railcars and carriages for the national rail service. In late 2005, an order was placed for 30 railcars to facilitate the expansion and extension of improvements in Intercity rail services on the Rosslare and Sligo lines. By the end of 2008, it is envisaged that the existing service on the Dublin-Rosslare line will be supplemented by additional commuter services from Gorey and Arklow. Enniscorthy is also located on this rail line.
- **N11 National Route:** The Gorey bypass has been completed and it is estimated to have removed 10,000 vehicles from the town centre every day.
- **N30 Enniscorthy/Clonroache:** This scheme involved the construction of approximately 5.3 km of standard 2-lane carriageway, and improves the access between Enniscorthy and New Ross. The scheme was opened in April 2006.
- **N11/N30: Enniscorthy By-Pass:** This proposes a bypass of the town to the east and west. The eastern route commences at the in the existing N11 and N80 junction in Clavass and terminates at a proposed roundabout with the N11 in Scurlocksbush. The western route commences with a proposed roundabout in the vicinity of the existing N11, 250 metres south of the N11/N80 junction and terminates at the realigned N30 south of Dunsinane at a proposed roundabout.

2.2.13 The proposals under Transport 21 will serve to increase the accessibility of Enniscorthy. The proposed by-pass will be particularly beneficial, removing traffic from the town centre.

Sustainable Development: A Strategy for Ireland

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

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

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

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

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

Retail Planning Guidelines

2.2.18 The Retail Planning Guidelines provide national level policy guidance in relation to retailing. The guidelines provide clear objectives for retail policy, set out guidance in relation to specific retail formats and issue advice in relation to the location of new retail development. The guidelines represent a plan led approach to retail development at a national level, which is then followed on by the use of county retail strategies to guide development at a localised level.

2.2.19 There are five principle objectives in the Guidelines:

1. To ensure that all development plans include policies and proposals for retail development.
2. To facilitate a healthy and competitive retail environment.
3. To promote development which is easily accessible, especially by public transport, in locations which encourage multi-purpose journeys.
4. To support the role of town and district centres.
5. A presumption against large retail centres located close to existing or planned national roads/motorways, with limited exceptions where the development would be situated in an Integrated Area Plan area in a Gateway where there is capacity in the road network to cater for such development.

2.2.20 The support of town and district centres leads to the implementation of the sequential test when planning and assessing retail developments. This essentially promotes town centre sites as the first choice for new retail development. Where there are no development sites available in the town centre, the next preferable location is edge of town centre sites (i.e. approximately 300-400 metres from the boundary of the town centre area). Only where there are no sites, or potential sites, within a town centre or on the edge of a town centre or where satisfactory transport accessibility cannot be ensured within a reasonable period of time, should out of centre sites be considered acceptable.

2.2.21 The Retail Planning Guidelines also provide a definition of District Centres and Local Centres/Neighbourhood Centres. The Guidelines state that District Centres are:

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

2.2.22 District Centres generally comprise of approximately 10,000 sq.m. adjacent to large towns, extending up to 20,000 sq.m. in some parts of Dublin. The provision of district centres is to be based on major growth in population or a clear proven level of existing under provision.

2.2.23 Local Centres are defined as:

“Small groups of shops typically comprising a newsagent, small supermarket/general grocery store, sub post office and other small shops of a local nature serving a small, localised catchment population”

2.2.24 According to the Retail Guidelines,

"Local shops located in local centres or neighbourhood centres perform an important function in urban areas. They can provide a valued service, catering particularly for the daily casual needs of nearby residents or of those passing by. Local shops encompassing both foodstores and important non-food outlets such as pharmacies have significant social and economic functions; they offer a particularly important service for those who are less mobile, especially elderly and disabled people, families with small children, and those without access to a car. For example in peripheral housing estates they may provide the only readily accessible shopping facilities. Where a planning authority can substantiate clearly the local importance of such shops in defined local centres, they should safeguard them in development plans, through appropriate land use zoning."

2.2.25 Enniscorthy has experienced population growth in recent years, and it is considered that provision should need to be made for designated neighbourhood centres. However, given the overall population in the town, it is unlikely that a purpose built district centre would be appropriate in Enniscorthy.

2.2.26 The Retail Planning Guidelines were first published in 1999. These guidelines were subsequently amended, with the revised Guidelines issued in January 2005.
The policies of the Guidelines have essentially remained the same, with the revision affecting policy in relation to the cap on the floorspace of retail warehouses. The 2000 Guidelines had placed a cap of 6,000 sq.m. on the floorspace of single retail warehouse units. The revised Guidelines state that this cap will not apply in areas which are the subject of Integrated Area Plans, under the Urban Renewal Act, 1998, in the Gateway centres designated in the National Spatial Strategy. As Wexford has no designated gateway in the National Spatial Strategy, the cap of 6,000 sq.m. will continue to apply to retail warehouse units in the County.

2.3 Regional Level

Regional Planning Guidelines

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

2.3.2 The settlement strategy for the region is based on a hierarchy of urban centres which include the Gateway, Hubs, County Towns, Large Towns and District Towns (see Figure 2.2).

Figure 2.2: Spatial Structure for South East Region

2.3.3 The role of the various urban centres in the region is outlined in Table 2.2 below. The Guidelines reiterate the supporting role of the hubs as outlined in National Spatial Strategy. However, it is also noted that they are strategic urban centres which reach out to wider rural areas of the region. They would therefore be required to have a high level of service provision, including retail.

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

2.3.5 The policies of the Regional Planning Guidelines serve to channel population growth and development into a hierarchy of settlements. However, they also emphasise that these centres should also provide the necessary services to cater for this growth.

In terms of retail planning, it will therefore be necessary to ensure that the appropriate level of retail development is provided which will match the role of towns and villages in the settlement hierarchy.

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

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

2.4 Local Level

Wexford County Development Plan

2.4.1 The Retail Strategy for County Wexford was prepared in the context of the Wexford County Development Plan 2007-2013 adopted on the 30th of April 2007.

2.4.2 The 2007-2013 Wexford County Development Plan notes that the county has experienced substantial population growth in recent years, with the population increasing by 12.9% from 2002 to 2006. The increase in population largely occurred through in-migration to the county. This growth was principally concentrated in eastern and south-eastern areas, of the county, along the national road network, in coastal areas and in proximity to the main towns, particularly Wexford, Gorey, Enniscorthy and New Ross. The trends in population growth indicate that overspill has occurred from Dublin to Wexford.

2.4.3 The retail policies for Enniscorthy will need to have due regard to the functional role of the town as outlined in the proposed settlement structure for the county and ensure that the provision of retail development in line with its role as a Secondary Growth Area is provided.

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

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

2.4.5 The document is organised around the themes of economy, society and culture. With regards to economic development, the strategy aims to develop a vibrant local economy with employment opportunities for all sectors of the community. It is also a specific goal to promote Wexford as a gateway for development.

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

2.4.7 The cultural goals of the strategy emphasise sustainable development, the need to maintain a high quality environment and socially inclusive society. More specifically, it is a goal to develop the county as a centre of arts and culture and increase sports participation. It is noted in the strategy that access to services is a difficulty for those living in rural areas and it is a strategic objective to support rural villages. This is significant given the relatively large proportion of the population living in rural areas, which amounted to 67.5% of the population in 2002.

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

2.5 National Economic Context

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

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

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

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

2.5.4 The growth in the economic performance of the country has resulted in a rapid increase in private consumption. This has primarily been a result of the higher real disposable incomes and, more recently, lower interest rates which have supported consumer confidence. This has resulted in an increase in retail expenditure particularly on comparison and bulky household goods and is reflected within the Retail Sales Index. These figures outline how *"the volume of retail sales increased by 6.8% in February 2007 compared to February 2006"*.

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

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

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

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

2.6 Regional Economic Context

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

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

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

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

"The county level data while highlighting the underperformance of particular counties and providing a basis for initiatives and strategies at the county level, mask the fact that the South-East continues to underperform all of the other NUTS III regions comprising the NUTS II Region and is much more similar, in terms of economic performance, to regions within the Border Midland and West NUTS II Region than to other regions within the more prosperous Southern and Eastern Region"

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

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

2.6.5 Among the major strengths of the region are:

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

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

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

2.7 Economic Context in County Wexford

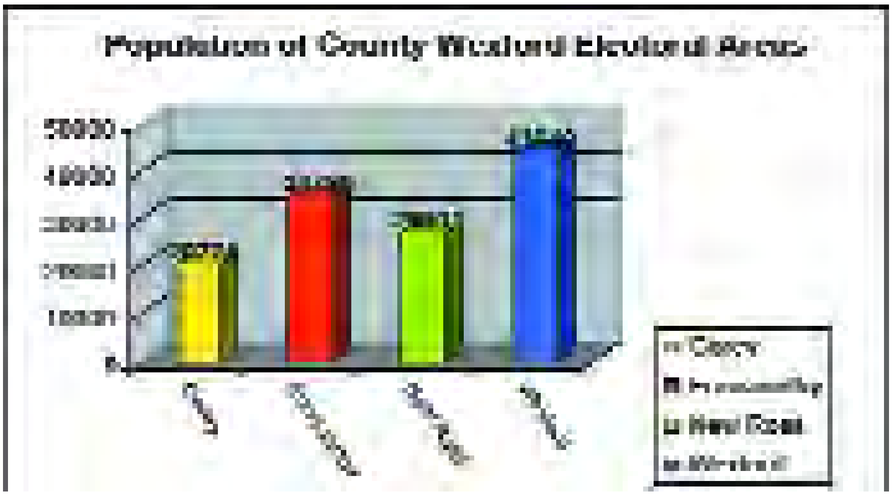
2.7.1 The Wexford County Development Board's document "Remodelling the Model County" is a ten year strategy for the Economic, Social and Cultural development of Wexford (2002-2012). The Strategy outlines how traditionally Wexford has been economically successful and prosperous. This prosperity was built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

2.7.2 Notwithstanding the above, County Wexford is outlined as having the highest growth rate within the South East Region. Preliminary 2006 Census data issued by the Central Statistics Offices outlines how the population of the County is currently 131,615. This represents a population increase of 12.9% in the four year intercensal period since 2002.

2.7.3 Population growth in Wexford has been largely attributed to a major influx of people into the county. In this context 71% of the increase in the county's population is due to inward migration.

2.7.4 However, growth in population has not been evenly spread within the County. As with the remainder of the State, recent population changes reflect increasing urbanisation and growth in towns / villages close to the main urban centres. Figure 2.3 highlights the Population of Electoral areas within the County. The Wexford Electoral Area remains the largest Electoral area with a population of 43,640 accounting for 38% of the county's population. This has contributed to the towns overall vibrancy and made it more attractive for inward investment. Enniscorthy is the second largest electoral area at 31,790, followed by Gorey and New Ross with 29,274 and 26,911 respectively.

Figure 2.3: Population of Electoral Areas



2.8 Conclusion

2.8.1 The planning policy context for Enniscorthy envisages a growth in the population and services in the town. Further retail provision should be developed in line with this to ensure that the retail facilities are sufficient in quantity and are well located to meet the future requirements.

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

Chapter 3

Current Trends in Retailing

3.1 Introduction

3.1.1 The rapid expansion in the retail market in Ireland has been associated with the emergence of a number of distinct trends in retailing.

3.1.2 In the past number of years some of these trends have become increasingly evident, e.g. concentration of ownership, discount retailers, international multiples and the requirement for larger floorspace.

3.1.3 The purpose of this chapter is to examine the principal trends which are likely to have an impact in the development of the retail sector in Enniscorthy.

3.2 General Trends in Retailing

Increase in Expenditure

3.2.1 One of the most notable trends has been a marked increase in expenditure on comparison goods, with forecasts indicating that this will continue in the future. Figures published in the most recent Retail Sales Index outline how “the volume of retail sales increased by 6.8% in February 2007 compared to February 2006. If motor trades are excluded the annual increase was 6.9%.”

Leisure Use Integration and Extended Opening Hours

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

3.2.3 The inclusion of additional leisure activities to shopping centres does have the benefit of increasing activity in shopping areas, bringing vitality and vibrancy. There is also an increase in 24 hour store opening, although this is concentrated in the convenience section. However, the ability of centres and individual stores to extend opening hours is biased towards larger retailers, with smaller retailers at a disadvantage in terms of relative costs involved and smaller trade volumes. As longer opening hours become more common, this could put smaller retailers at a competitive disadvantage and could lead to a reduction in their market share.

Home Shopping

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

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

3.2.6 However, websites such as eBay have considerably extended the range and profile of internet shopping. In some instances, the internet has been used by traditional mail order service providers as a means of extending their range of customer service and providing a second means of shopping. Online convenience retailing has also increased in popularity in recent years with food retailers such as Tesco providing this facility to consumers.

3.2.7 Online shopping is beneficial to the consumer in so far as the consumer can readily see the prices of the products they wish to purchase prior to making the purchase. Internet shopping offers choice to consumers and enables them to have their groceries delivered to their door.

3.2.8 The Centre for Retail Studies UCD estimates that 30% of the population have already made one purchase on the internet. APACS (Association for Payment Clearings Services) (2006) found that in 2005 over half of all adults in the UK (25 million people) made an online purchase. This equated to 74% of internet users and represented an increase of 11% of internet users over 2004. Furthermore, the average number of purchases made online also increased from 13.6% in 2004 to 18.5% in 2005.

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

3.3 Convenience Retailing

Increase in Retail Unit Size

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

Removal of the Groceries Order

3.3.2 The Restrictive Practices (Groceries) Order, introduced in 1987 prevented the sale of specified grocery goods at a price (after the deduction of any discount or benefit received by the retailer) which was less than the invoice price of the goods.

Where charges relating to delivery, insurance or other costs not included in the invoice had to be paid to the retailer, these charges had to be added to the invoice price.

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

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

Competition from Discounters

3.3.5 In recent years, there has been the distinct emergence of discount retailers, such as Aldi and Lidl. These retailers now have a 6% share of the retail market (see Figure 3.1 below), and can no longer be considered as niche retailers. Discount retailers have significantly increased the number of stores, and there are no current signs of this programme of expansion slowing down. There are currently two discount foodstores in Enniscorthy, an Aldi Store located on the Kiltealy Road and a Lidl Store on the Bellfield Road.

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

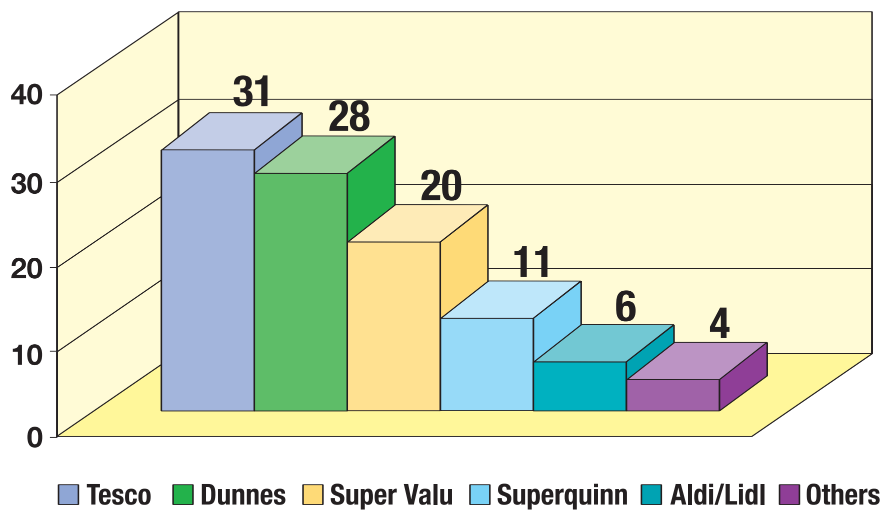


Figure 3.1: Market Share in Convenience Sector
Source: Joint Committee on Enterprise and Small Business Third Report (2005)

Concentration of Market Share

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

3.3.8 It is also noticeable that many of these major retailers have recently introduced new formats to compete in the local convenience markets which provide top-up shopping as opposed to a weekly shopping (e.g. Tesco Local & Tesco Express, Superquinn Select, Marks and Spencer Simply Food).

3.3.9 There has also been a noticeable development of convenience outlets attached to petrol service stations.

Out of Centre Convenience Shopping

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

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

3.3.12 It is anticipated that the next major trend is going to be fashion parks which are scaled-down versions of the large shopping centres in Ireland at present. The idea is to create the equivalent of a town high street on the edge of or outside a town, benefiting from the extra space for carparking in addition to reduced traffic congestion experienced in the town centre. One such Fashion Park is planned for Northside Shopping Centre, Coolock, Dublin.

Farmers Markets

3.3.13 One new form of convenience retailing that is emerging is the concept of farmers markets. These normally operate on a weekly basis and provide the opportunity for independent traders to sell a variety of fresh products such as fruit and vegetables, cheese, speciality breads, and sundry items such as olives, jams, chocolates, wine etc. At present a farmers market operates in Enniscorthy every Saturday 9.30 to 2pm.

Ethnic Markets

3.3.14 Another emerging trend is the increase in ethnic markets and stores specialising in ethnic products such a food, fashion and hair products.

3.4 Comparison Retailing

Larger Sized Units

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

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

International Multiples

3.4.3 There is now a far greater presence of European and International multiples in the Irish retail market. Even within the last few years, the retail sector has seen the introduction of new brands into the country, e.g. H & M, New Look, Zara, Starbucks, Gap and Diesel. There are also a number of new entrants seeking to enter the market such as Old Navy, Banana Republic and Naf Naf. The introduction of these international multiples also indicates the demand for higher-order comparison goods in Ireland e.g. House of Fraser & Harvey Nichols. The current thriving economy has made Ireland an attractive location for expansion, and continued economic growth would see the continuance of this. International retailers require larger size units such as the Gap store at Arnotts on Henry Street which has a gross floor area of 700 sq. m. However, a side effect of this is a degree of homogenisation of town centres, with a potential risk of eroding the inherent character of towns.

3.4.4 BCSC (British Council for Shopping Centres) (2004) note that this trend of homogenisation is of particular concern to smaller city and town centres as they lack the strength of the comparison offer of the large centres and thus cannot successfully compete with them on the basis of the same mix of goods and brands.

Polarisation of Retail Development

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

3.5 Retail Warehousing

3.5.1 The pattern of retail warehousing is now well established in Ireland, with a growing trend for a concentration of warehouse units in a retail parks. This form of retailing tends to be more reliant on private transport given the predominantly bulky nature of goods sold. It is frequently not suited to town centre sites owing to the need for a large site area to contain both the unit and the associated car parking.

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

3.5.3 It is noted that there is a recent trend towards broadening the range of goods sold in these parks, including convenience goods and large scale comparison shopping (e.g. discount foodstores, Heaton's, Next, Argos). This could represent a potential threat to town centres as retail parks may be viewed as a more attractive location for new development, providing larger units and substantial car parking more easily than some town centre sites. The range and choice of goods may also be seen as a positive in the market particularly in the light of the trend in some sectors towards bulky items such as larger toys (e.g. trampolines), flat pack furniture, DIY etc.

3.6 Conclusion

3.6.1 The rapid growth in the Irish retail market has been associated with emergence of a number of general trends in retailing including an increase in available expenditure, extended opening hours of retailers and the rise of online shopping.

3.6.2 Ireland has experienced unprecedented rates of economic growth since the early 1990s. This growth has manifested itself in the retail sector through increased floor space and increased volume rates of growth, emerging in new forms of retailing.

3.6.3 In the convenience sector key trends in retailing include an increase in the size of the retail units, the consequences of the removal of the Groceries Order and the emergence of discount retailers. It is clear from an analysis of convenience retailing that the market is dominated by a limited number of retailers with Tesco, Dunnes Stores and Super Valu controlling 79 percent of the market share

3.6.4 The trend for larger sized retail units is replicated in the comparison sector. Also, there is a far greater presence of European and International multiples in the Irish retail market in recent years with the recent addition of new entrants such as Gap and Diesel. The phenomenon of retail warehousing has continued to develop substantially in Ireland with the range of goods sold increasing which may represent a potential threat to town centres unless more strictly controlled.

Health Check Assessment

4.1 Introduction

4.1.1 This section of the retail strategy provides an overview of the retail profile and health check assessment of Enniscorthy. In particular this section assesses new major retail developments which have been permitted in the town and discusses the implications of these developments for the future retail role and function of Enniscorthy.

4.2 Health Check Assessment

4.2.1 Annex 2 of the Retail Planning Guidelines sets out the matters that should be taken into account when determining the vitality and viability of town centres. A health check assessment of Enniscorthy is an integral part of the retail strategy. This assessment was carried out for the principle town centre. 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.

4.2.2 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 centres.

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.

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

4.2.4 In order to determine the vitality and viability of Enniscorthy town centre the following indicators were utilised:

- Attractions
- Accessibility
- Environmental quality/amenity
- Diversity of Uses
- Multiple Representation
- Mall Developments
- Other Retailers
- Suitability of existing floorspace
- Recent and Proposed Developments
- Future development potential

4.3 Enniscorthy Town Centre Health Check Assessment

Attractions

4.3.1 Enniscorthy is an old Norman settlement situated on the banks of the River Slaney. The town centre is framed by open space to the north and south with residential development to the east and west. The river Slaney is the town's most valuable resource in terms of natural amenity. The single largest attraction in the town has been the Castle Museum which includes a tourist information centre. Other major attractions include St Aidan's Cathedral and Vinegar Hill.

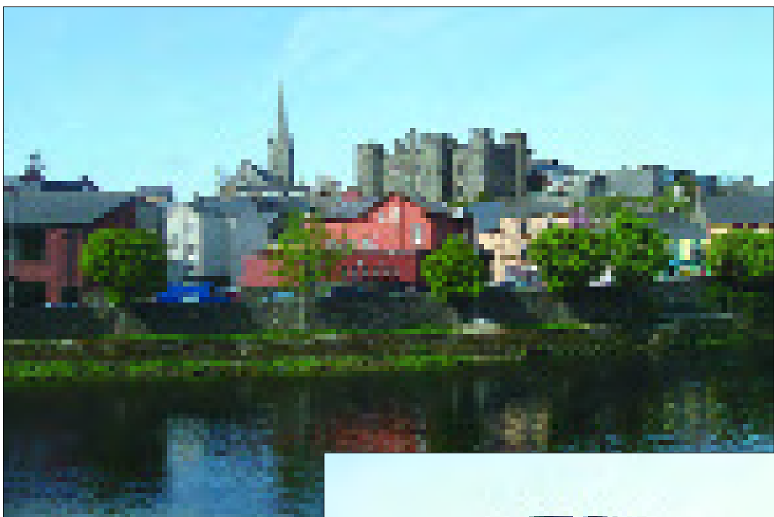


Photo 4.1: View of Enniscorthy from the River Slaney

Photo 4.2: Enniscorthy Castle

4.3.2 Enniscorthy town is dissected by the River Slaney which runs through the centre of the town dividing it in half. The town dates from Norman times, and this mediaeval origin is evident in its strategic location in an elevated location immediately west of and overlooking the River Slaney. The historic pattern of streets and narrow burgage plots also reflect its origins. The town centre follows a historic street layout, which rises steeply from the river.

4.3.3 The town centre predominately comprises independent retailers, although there is a large Dunnes Stores supermarket along Rafter Street and a Super-Valu in the Abbey Square Shopping Centre located on Mill Park Road. A new Dunnes Stores outlet has recently developed at Barrack Street on the former Minch Norton Site. The independent stores contribute to the town's unique retail sector. Other facilities in the town include the Slaney Plaza Cinema, Riverside Park Hotel and the Railway Station.

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

Photo 4.3: Market Square

Accessibility

4.3.5 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 the effects of increased traffic flows. Added to this, the topography of the area impedes the accessibility of vehicular and pedestrian traffic in the town centre. When the proposed bypass is constructed around the town the traffic congestion within the town will be substantially reduced. Through traffic in the town, which has no destination in the town, is currently a major contributor to congestion. Main Street, which is the main route into the town centre, suffers congestion during business hours.

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

Photo 4.4: Main Street Congestion

4.3.7 Enniscorthy town enjoys good levels of accessibility by both public and private modes of transport. Bus services are operated by both public and private operators from the town. Bus Éireann provide a frequent service from Templeshannon Quay in the town centre to Dublin, Wexford town, Waterford and Rosslare Harbour. Enniscorthy is located on the Dublin to Wexford (Rosslare) rail line. At present there is no local bus service serving the town.

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

Environmental Quality/Amenity

4.3.9 Enniscorthy has a high quality physical and natural environment. The town is located on the hillsides of the Slaney Valley, which has provided amenities for passive recreation. The town centre has a high quality public realm. Its unique topography gives Enniscorthy a rather picturesque quality. Many of the shops have hanging baskets and there are attractive features and street furniture which enhance the aesthetic setting of the town. Modern shop fronts are generally respectful of the traditional streetscape.

4.3.10 While there are no specific areas within the town which suffer from high vacancy rates, there is a clear imbalance between the east and west side of the river with higher concentrations of derelict and vacant buildings to the east of the River. The overall quality of the public realm of lands to the east of the river is significantly less than that of the western end of the town centre.

4.3.11 The majority of shop fronts are well presented and the town core maintains much of its traditional streetscape. Most of the original development consists of buildings of stone construction or tall terraces of buildings with strong vertical emphasis. As with most Irish Towns, the streetscapes have suffered to some extent by the intensive development of modern forms PVC window frames to historic properties.

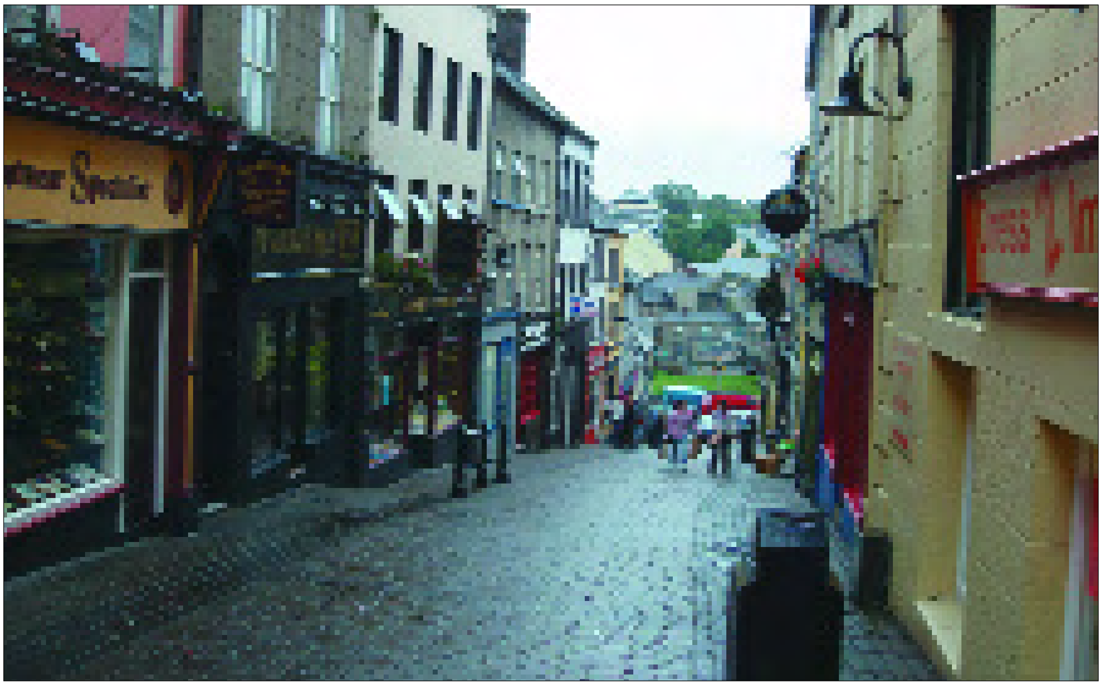


Photo 4.5: Slaney Street

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

Diversity of Uses

4.3.13 Enniscorthy town centre accommodates a wide range of functions. A number of pubs, restaurants and night clubs are evident in the town centre. Other facilities in the town include the Slaney Plaza Cinema and the Railway Station. The Riverside Park Hotel and Leisure Club is a three star Bórd Fáilte approved accommodation located on the River Slaney. The town predominantly comprises independent retailers such as Eric Barron, Billy Doyle and Burke O'Leary although national retailers are also represented. National retailers include Super Valu and Dunnes Stores. Both Aldi and Lidl have recently developed discount foodstores on the Kiltealy Road.

Multiple Representations

4.3.14 There are a range of national and multiple convenience retailers located in Enniscorthy including Dunnes Stores, Super Valu, Aldi and Lidl. However, the comparison sector in Enniscorthy is dominated by specialised retailers and there is an overall lack of larger comparison national and international multiples. Limited floor plate sizes along the core retail area of the town have restricted national/international traders entering the town centre.

4.3.15 The 2001 Enniscorthy Town Development Plan outlined that in many cases shops in Enniscorthy are perceived as not meeting the needs of the next generation. In this context there is a clear need to enhance the existing comparison profile of the town in order to accommodate the requirements of national and international comparison retailers. However, Enniscorthy's ability to do so is restricted by the national trend to centralise high order comparison retailing in a limited number of regional centres.

Mall Developments

4.3.16 The Abbey Square Shopping Centre is located to the south east of the town core adjacent to the River Slaney. The anchor of the shopping centre is Super-Valu and it also contains a number of smaller retail and service units such as a newsagent, pharmacy and hair salon. The shopping centre is served by a large surface level car park in Abbey Square and is adjoined by a series of bulky warehouse units with large floorplates which are centred on the car park. This area of the town represents a key opportunity for redevelopment.

4.3.17 On Island Street, to the west of the River Slaney, a shopping centre anchored by Dunnes Stores has recently been developed on the former Minch Norton site. The development comprises a gross floor area of approximately 4,970 sq.m. which includes a Dunnes Stores of approx. 4,471 sq.m. set out over two levels with a number of individual lock up units. The development has aided in diversifying the retail sector in the town centre and has provided enhanced the existing linkages between the Minch Norton site and the traditional town centre.

4.3.18 The western environs of the town are also well served by retail facilities. Pettitts Super Valu store and a number of retail and service units are located to the west of the town centre at Duffry Gate.

Other Retailers

Neighbourhood Centres

4.3.19 There are a number of convenience retail units located in the western environs of Enniscorthy along the Kiltealy Road. These include two discount foodstores Aldi and Lidl (total gross retail floorspace of 4,200 sq.m.). Permission was also granted for the development of additional neighbourhood centre facilities in conjunction with the Aldi store, which have yet to be constructed. These include a crèche, medical centre and 3 no. retail units and will enhance the overall neighbourhood facilities provided in the western environs of the town.

4.3.20 The eastern environs of the town has a more limited neighbourhood centre offer. The Gala Neighbourhood Centre is located to the east of the town centre and consists of a Gala supermarket with on-street parking provided in a residential area. Gahon's petrol station and neighbourhood centre is also located in Drumgold and is currently occupied by a petrol station, takeaway and hair salon.

Suitability of Existing Floorspace

4.3.21 The 2001 Enniscorthy Town Development Plan outlines how the town has suffered from the centralisation of shopping facilities into Wexford. In many cases shops in Enniscorthy are perceived as not meeting the needs of the next generation. The failure to modernise is reflected in some cases in poor shop-front presentation. There is a need to preserve the vitality and viability of the town centre and its retail facilities. The 2001 Enniscorthy Town Development Plan outlines that this can be aided by the enticement of large multiples to the town centre to counteract the loss of trade to large surrounding towns.

4.3.22 Limited floor plate sizes along the core retail area of the town have restricted national/international traders entering the town centre. Units that are available to let in the town centre do not suit the size requirements of these operators. Larger units are unlikely to become available within the finer urban grain of Enniscorthy Town's traditional streets. However, the development of the Minch Norton site has provided the opportunity for a large multiple retailers (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.

4.3.23 There is also an imbalance in the provision of neighbourhood centre facilities between the eastern and western environs of the town. It is considered that in order to facilitate the residential expansion of the eastern environs of the town enhanced neighbourhood centre facilities should be provided in this area. 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.

4.4 Recent and Proposed Development

4.4.1 Recent developments in Enniscorthy have demonstrated investment confidence in the town. An outline of recent and proposed developments in the town is provided below.

Minch Norton Lands:

4.4.2 The most significant retail development in recent years has been the redevelopment of the Minch Norton lands. The redevelopment of these lands has aided in diversifying the retail sector of the town centre and provided the level of floorplates required by modern retailing formats.

4.4.3 The Minch Norton lands are accessed by Island Road, Irish Street and Barrack St. The development represents a mix of modern architecture with old industrial buildings in the heart of Enniscorthy town. The overall scheme, when complete, will comprise 36 no apartments, 2,100 sq.m. of office space, 5,500 sq.m. of retail space including a Dunnes Store anchor unit and 7 no. retail units, 300 car spaces and includes the repaving of large areas of the streets surrounding the development. The Dunnes Stores anchor unit has recently opened.

4.4.4 The development has achieved a key objective of the Town Plan, namely the development of a retail unit on the Minch Norton site which will attract a large anchor tenant. The development has expanded the choice of shopping for the residents of Enniscorthy Town and will result in the enhancement of the environmental quality of the area. The redevelopment of these lands to accommodate retail use also enhances existing linkages between Barrack Street and the traditional town centre.

Photo 4.6: Minch Norton Lands

Bulky Retail Warehouse Development:

4.4.5 A significant amount of bulky retail warehousing has also been developed in the environs of Enniscorthy recently. This includes the development of a retail warehouse scheme off the Kiltealy Road (Reg. Ref 20051382) with a gross floor area of 3,929 sq.m. to include a garden centre.

Proposed Developments:

Nos. 10 and 11 Market Square (Ref TP 1680)

4.4.6 An application for the redevelopment of no's. 10 and 11 Market Square is currently subject to a further information request issued by Enniscorthy Town Council. The proposed development comprises of the demolition of no.11 Market Square and the construction of a new pedestrian street linking Island Street to Market Square to include the construction of a pedestrian bridge from Island Street and a public square. The development includes the construction of a mixed use development comprising of retail units over 3 levels, 12 apartments on level's 1 and 2, 2 office units on level 2 and refurbishment works to no. 10 Market Square.

4.4.7 The site occupies a prominent position in the historic townscape of Enniscorthy town. The site is bounded by Market Square to the west, Barrack Street to the north, Island Road to the south and Slaney Street and Mary Street to the south. It forms a prominent part of the townscape of Enniscorthy and its redevelopment for retail use will enhance the overall vitality and facilitate the consolidation of the town centre. The development of this site has the potential to make a significant positive addition to the townscape.

Murphy Floods Site:

4.4.8 We are advised that proposals to develop a large comparison retailer in the former Murphy Floods site are currently at pre planning stage at Wexford County Council.

4.5 Future Delevopment Potential

4.5.1 There area a number of areas close to the town centre which have capacity to absorb future retail development. The redevelopment of the Minch Norton site to accommodate a large comparison retailer has set a precedent for the expansion of the core retail area to the include areas such as Barrack Street and Irish Street. Abbey Quay also has potential to accommodate larger comparison retailers along the river Slaney. These are examined in more detail in Chapter 5 of the retail strategy.

4.6 Conclusion

4.6.1 Overall, Enniscorthy is considered as a healthy town centre. It is an attractive and vibrant town with retailing clustering around the Market Square. The principle shopping streets include Main Street, Rafter Street, Weaver Street and Castle Street. There is only a small percentage of dereliction in secondary retail locations. The town has a pleasant shopping environment with good shop fronts, paving and relatively high quality public realm.

4.6.2 However, the town is somewhat imbalanced in terms of the concentration of retailing activities. Enniscorthy has a number of specialised comparison operators, but has relatively few national/international comparison shopping facilities. One of the key conclusions of the study is that much of the floorspace available in the town centre does not provide the size and quality of floorspace demanded by major national and international retailers. It will not be possible to significantly increase the importance of the town as a retailing location without providing this floorspace. Potential development sites are examined in more detail in Chapter 5 of the retail strategy.

4.6.3 Added to this 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. Retail uses concentrated in this area of the town are primarily service related and lack the provision of anchor and multinational representations. The eastern bank of the river would benefit from significant investment and redevelopment.

4.6.4 On an overall basis it is considered that Enniscorthy town centre has a high quality public realm. However, the town centre would benefit from continuing works. The continuation of the “living over the shop” scheme should be encouraged. It is also considered that the refurbishment/upgrading of a number of laneways and associated archways would enhance the vitality and attractiveness of the town’s retail core by improving the shopping environment and encouraging greater pedestrian permeability.

4.6.5 The key issue facing Enniscorthy is the congestion in the town which should be addressed by the construction of the N11/N30 town bypass. The recent development of the Minch Norton Site and the retail proposal on the Kiltealy road will add significantly to the town’s retail attraction and will enhance its vitality and future viability. There are a number of development opportunities within the town for retailers, in particular the Murphy Floods Hotel site and the Abbey Quays area offer significant development potential for retail use. These are examined in more detail in Chapter 5 of the retail strategy.