

Chapter

5

Retail Hierarchy and Identification of Core Retail Areas

5.1 Introduction

- 5.1.1 The principle of a hierarchy of retail centres informs the consideration of zoning for retail developments in development plans and is an essential component of a retail strategy.
- 5.1.2 The national retail hierarchy is set out in the Retail Planning Guidelines. It reflects both the settlement structure of the State and low residential densities in rural areas.
- 5.1.3 The guidelines identify four tiers of shopping provision within the national hierarchy. They also recognise that the four classifications are indicative and the functions provided by each tier overlap in some respects. Below Dublin, there are no clearly defined cut-off points between levels of the hierarchy.

The First Tier

- 5.1.4 Metropolitan Dublin, which contains a little over a quarter of the total population, accounts for 41 per cent of all comparison turnover and 31 per cent of convenience turnover. As well as providing the broadest range of comparison goods shopping, it supplies retail functions of a specialist nature not found elsewhere in State.

The Second Tier

- 5.1.5 Cork, Limerick, Galway and Waterford account between them for a further 19 per cent of comparison turnover and 15 per cent of convenience turnover. These centres provide a range of high-order comparison shopping which is largely unmatched elsewhere.

The Third Tier

- 5.1.6 A third tier of towns cannot be precisely defined but include Athlone, Carlow, Castlebar, Clonmel, Drogheda, Dundalk, Ennis, Kilkenny, Letterkenny, Monaghan, Mullingar, Newbridge, Portlaoise, Sligo, Tralee, Tullamore and Wexford. These centres are now attaining functions previously found only in higher order centres.
- 5.1.7 The Retail Planning Guidelines outline that there is a further group of towns which may also be regarded as third tier shopping locations, albeit to a more limited extent. These contain convenience goods outlets on a par with settlements listed above. Most have national supermarket chain representation. Enniscorthy is classified under this level of the national retail hierarchy. Other towns include Naas, Navan, Nenagh, New Ross, Sligo and Swords.
- 5.1.8 The density of third tier centres is related to overall population density. It is highest in the east and south-east and falls off towards the west and north. The last named centres are of particular importance in less densely populated areas of the State, where they provide urban anchors for a rural economy which is undergoing rapid change.

The Fourth Tier

- 5.1.9 The fourth tier of the hierarchy comprises a large number of towns in the 1,500 to 5,000 population category. These towns provide basic convenience shopping either in small supermarkets or convenience shops and in some cases, lower order comparison shopping such as hardware, pharmaceutical products and clothes.
- 5.1.10 Beyond these tiers, shopping at the local level is provided by corner shops in suburban areas and village stores, post-offices and shops attached to petrol filling stations.
- 5.1.11 The hierarchy defined in the guidelines essentially reflects the current situation across the country. The degree of complexity required to formulate retail strategies in the various areas of the State varies considerably.

5.2 The Role of the Development Plan in Defining the Retail Hierarchy

- 5.2.1 It is an objective of the Retail Planning Guidelines not to inhibit growth and competition. The retail strategy should ensure that policies and proposals are consistent with the Retail Planning Guidelines but it should also be forward looking in assessing the town within the national hierarchy both now and in the future. Note: it is important to state that the guidelines are for floor areas to sustain the viability of a Town or County and they are not to be interpreted so as to limit competition or to prevent the provision of new or modern shop spaces.
- 5.2.2 Development Plans should set out the hierarchy of centres and a strategy for the location of retail developments. In particular, the guidelines state that development plans should indicate a range of centres, from city centre through to town centre, district centre to local centres and village centre where investment in new retail and other development will be promoted, and existing provision enhanced.

5.3 The Existing Retail Hierarchy of Enniscorthy

- 5.3.1 Enniscorthy is classified as a third tier centre in the Retail Planning Guidelines for Planning Authorities 2005 and is the second largest settlement in Wexford County. A key part of the Retail Strategy is to confirm the retail hierarchy and the role of the main town centre. In determining the hierarchy for the town the following principles were considered:
 - The need to protect and enhance the vitality and viability of the core retail area of Enniscorthy.
 - The distribution of future retail floor space relates to the identified existing and future retail hierarchy in the town and should be appropriate to the scale and character of the centre.
 - The distribution of future retail floor space should be linked to the future distribution of population growth.
 - The principles of sustainability should be adhered to and future retailing should be concentrated as far as practicable in centres that are served by public transport.
 - The need to facilitate competitiveness and innovation in the retail industry.

5.3.2 The retail hierarchy for Enniscorthy is respectively:

- Town Centre
- Neighbourhood Centres
- Village/Local Shop

Town Centre

5.3.3 The Retail Planning Guidelines define a 'Town Centre' as follows:

"Town Centre: the term town centre is used to cover city, town and district centres which fulfill a function as a focus for both the community and public transport. It excludes retail parks, local centres and small parades of shops of purely local significance."

5.3.4 Enniscorthy has a concentrated retail core on the western bank of the river with little retail provision to the east. Linkages between the various parts of the retail core are weak particularly between Abbey Centre Mall and the main shopping area.

5.3.5 The main focus of the development strategy for the town is the refurbishment/upgrade of the existing stock to make better use of available space. It is also important that linkages to the town centre are fully exploited.

Neighbourhood Centres

5.3.6 Neighbourhood Centres are identified in the Retail Planning Guidelines as:

"Small groups of shops, typically comprising a newsagents, small supermarket/general store, sub-post office and other small shops of a local nature serving a small, localised catchment population."

5.3.7 Presently there are a number of neighbourhood centres adjacent to Enniscorthy town centre. The Gala Neighbourhood Centre is located to the east of the town centre and consists of a Gala supermarket with on-street parking provided in a residential area. The second neighbourhood centre is located to the west of Enniscorthy town centre, it consists of a Super Valu store and a number of small retail and service units. There are also a number of convenience retail units located further along the Kiltalea Road. These include Aldi and Lidl discount foodstores at Bellefield Road Industrial Estate (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 units include a crèche, medical centre and 3 no. retail units and will enhance the overall neighbourhood centre provision in the western environs of the town when complete.

5.3.8 It is envisaged that as the population of Enniscorthy grows, the town may experience an increasing demand for additional neighbourhood centre facilities. To achieve this and to be consistent with the Retail Planning Guidelines (as amended), there is a need to provide new neighbourhood centres within existing and emerging major residential areas.

5.3.9 For the purposes of this Plan, neighbourhood centres shall comprise small groups of shops, typically to include a newsagent, small supermarket/general grocery store/discount foodstore, sub-post office and other small shops of a local nature serving a small, localised catchment population. In parallel, the emphasis for the town centre will be to meet the middle and higher order comparison needs of the town and its catchment area.

Local Shops

5.3.10 This level of the retail hierarchy includes small local shops serving residential estates, shops attached to petrol filling stations, post offices and small villages which serve a local catchment area. There are numerous small retail outlets outside of the town centre which serve this retail function.

5.4 Definition of the Core Retail Areas

5.4.1 The core retail area of Enniscorthy is identified in Map 5.1. In determining the core areas, the following was considered:

- The definition and policies of the development plan.
- The objectives of the retail strategy to maintain and enhance the vitality and viability of town centres.

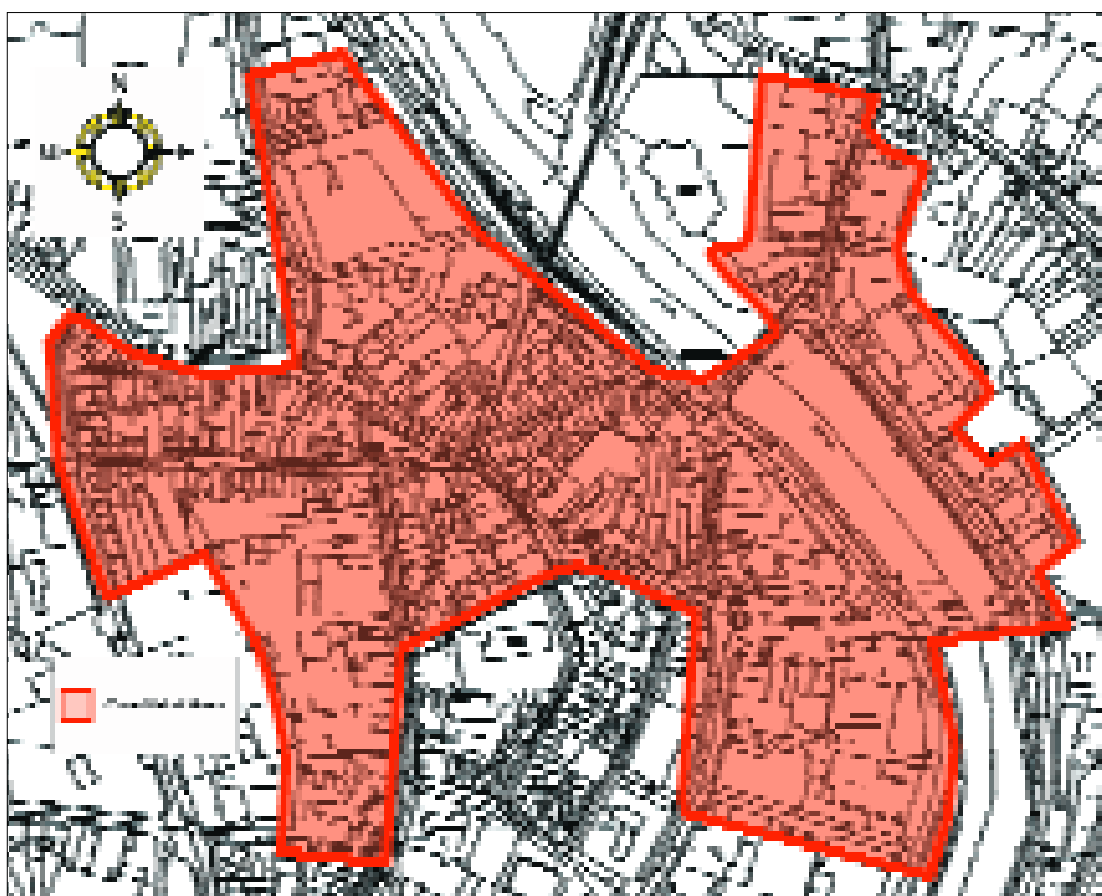


Figure 5.1: Enniscorthy Core Retail Area

5.4.2 Figure 5.1 outlines the primary and secondary retail core of the town centre and areas where policies for the protection of the retail function should be applied. The core retail area of the town is centered on Market Square and extends to the South to include Rafter Street and to the north to include the Minch Norton lands. This area of the town exhibits a number of higher order retail, service and specialist functions. It has a good range of convenience shopping as well as entertainment facilities, restaurants and pubs.

5.4.3 Core shopping areas are normally characterised by a mix of factors including prime retail units, low vacancies, and predominance of multiples and well established family run stores, few non retail uses and high pedestrian foot flow. It is recognised that such core areas may expand to the immediately adjacent areas over the life time of this Strategy. Retail development should be directed into the town centre in order to:

- ensure a vital and viable town centre,
- encourage regeneration of areas with scope for improvement
- increase the environmental attractiveness of the town centre
- achieve the quantum and quality of retailers necessary to minimise spending outflow
- meet the criteria for sustainable development

5.4.4 Figure 5.1 also defines the secondary retailing area of the town. These include a series of radial streets which adjoin the core retail area including Church Street, the upper end of Main Street, Slaney Street etc and extend to include Shannon Quay to the east of the river and Abbey Square Shopping Centre. The secondary shopping frontages identified in Figure 5.1 are currently occupied by a wide range of functions such as professional services, retail, restaurants, bars, offices etc.

5.5 Town Centre Development Opportunities

5.5.1 There are 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 include areas such as Barrack Street and Irish Street. Abbey Quay also has potential to accommodate larger comparison retailers along the river Slaney. The location of these areas are outlined in Figure 5.2.

Abbey Quay

- 5.5.2 The Health Check Assessment of the retail strategy outlines that there is limited provision of national/multinational comparison retail outlets in Enniscorthy. The confined nature of the historical core of the town centre precludes the integration of these units into this area.
- 5.5.3 The river front area adjoining Abbey Square Shopping Centre represents significant development potential. The River Slaney acts as the town's most valuable resource in terms of amenity but to date its potential has not been realised. The area is currently occupied by a series of bulky retail units with large floor plates such as Slaney Fireplaces, Murphy's Cash and Carry and private car parking. These units provide dead frontages onto the river front and could be redeveloped to accommodate modern retail formats.
- 5.5.4 The area has strong pedestrian and vehicular linkages which could be improved in order to enhance the overall vitality and viability of the river front. The Quays area is a relatively uncongested area of the town and if retailers were to locate here this could reduce traffic pressure on the main town centre.

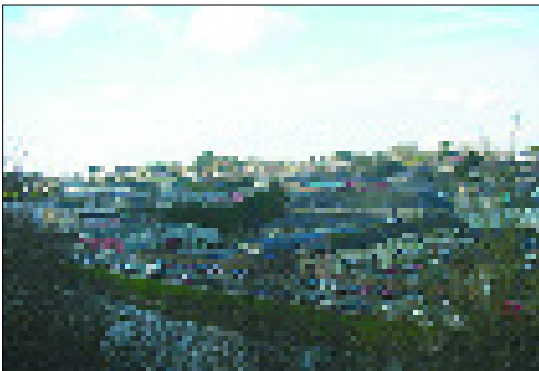




Figure 5.2: Potential Development Sites



Murphy Floods Site

5.5.5 The 2006 Draft Wexford County Retail Strategy outlines how there are a number of sites in the town which could be re-developed for retail use. The former Murphy's Floods Hotel site located on the Main Street is a derelict site at present and would be a suitable location for a large retailer. The redevelopment of the site for retail uses would enhance the overall vitality and facilitate the expansion of the primary retail core of the town centre while improving linkages and pedestrian flows between Main Street and the Dunnes Stores development on Barrack Street.



Backlands Area

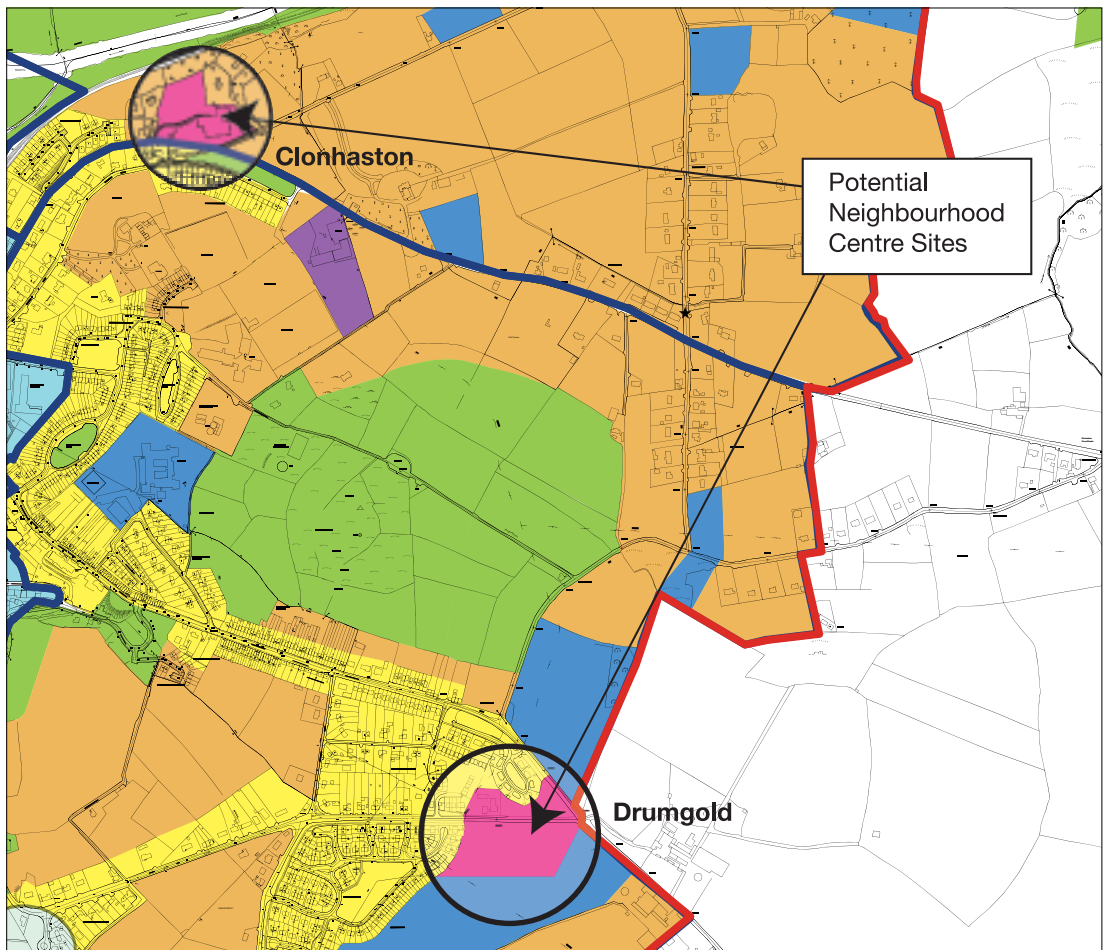
5.5.6 There is also significant backlands development potential in Enniscorthy. The traditional town centre benefits from a number of laneways which provide access via archways to backland areas. The upgrading of these archways and associated laneways would greatly enhance the character and accessibility of the town's retail core by enhancing greater pedestrian permeability. The upgrading of these laneways would facilitate the redevelopment of backlands site in the town centre including the car parking area to the rear of Parnell Road which is connected to Rafter Street via a laneway. This area is currently occupied by a series of Bulky warehouse units which front onto a surface level car park.



5.6 Neighbourhood Centre Development Opportunities

- 5.6.1 The western environs of the town is well served by neighbourhood centre facilities. Pettitts neighbourhood centre is anchored by a Super Valu store and a number of retail and service units. There are also a number of convenience retail units located further along the Kiltalea Road including two discount foodstores at Bellefield Road Industrial Estate (gross retail floorspace of 4,200 sq.m.). The eastern environs of the town has a more limited neighbourhood centre retail 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.
- 5.6.2 It is envisaged that as the population of Enniscorthy grows, the town may experience an increasing demand for additional neighbourhood centre facilities. To achieve this and to be consistent with the Retail Planning Guidelines (as amended), there is a need to provide new neighbourhood centres within existing and emerging major residential areas.
- 5.6.3 The Council has indicated that the majority of residentially zoned lands will be located to the east of the River Slaney in conjunction with the delivery of phase 3 of the main drainage scheme for Enniscorthy. Given the lack of retail facilities currently serving this side of the river it is considered that there is a need to develop neighbourhood centre facilities in conjunction with future residential development. The County Council has identified potential sites to accommodate future neighbourhood centre facilities including O'Donoghues former car sales showroom and the expansion of existing neighbourhood centre facilities at Drumgold. These areas are outlined in Figure 5.3 below.

Figure 5.3: Potential Neighbourhood Centre Sites



Chapter

6

Quantitative Assessment

6.1 Introduction

- 6.1.1 In this section we carry out an assessment of the likely capacity in quantitative terms for additional retail floor space in Enniscorthy for the study period.
- 6.1.2 In the Enniscorthy Town Retail Strategy, to be consistent with the new County Development Plan, the County Retail Strategy and the 2006 Census figures, we cover the period from 2006-2011 and 2011-2016. In respect of looking beyond 2011, this enables a longer term look at retail planning and potential in the town to be taken, which is consistent with the Wexford County Retail Strategy and the South Eastern Regional Planning Guidelines.
- 6.1.3 Future floorspace requirements for the Enniscorthy area are calculated as a portion of the overall floorspace requirements for the County. The quantitative assessment contained in the Wexford County Retail Strategy is therefore repeated below and portion of the floorspace requirements in the County Strategy is allocated to Enniscorthy. The quantum of floorspace allocated to the town is based on population projections and the size of the retail catchment area.
- 6.1.4 The base year for the purposes of this capacity assessment is 2004, the latest year for which comprehensive floorspace data is available.
- 6.1.5 It should be noted that a quantitative retail impact appraisal of this nature can only provide a broad brush indication of the likely floorspace quantum's that need to be achieved in the town. It involves making forecasts for the future population expenditure, turnover and other factors. A number of inputs have to be estimated. As the study is based on a number of assumptions, it can only provide a broad indication of anticipated capacity.
- 6.1.6 Nonetheless, the quantitative study can give a useful overview of the position. Furthermore, it should be noted that the figures set out in this section are not intended to be prescriptive thresholds. Rather they are the minimum floorspace targets that need to be achieved in order to ensure the retail role and function of Enniscorthy continues to be reinforced and strengthened. They should not be treated as upper limits. There should be no upper limit provided retail development accords with the requirements of the retail strategy.

6.2 Wexford County Quantitative Assessment

6.2.1 The Approach

- 6.2.1.1 The approach taken is a step by step capacity assessment including the following steps:
1. Estimate the population at base year and design year;
 2. Estimate of expenditure per capita on convenience, comparison and bulky household goods at the base year and design year;

- 3. Estimate of total available expenditure in the base year and design year for residents of Wexford with adjustments to allow for inflows and outflows based on the household survey and business survey;
- 4. Estimate the likely increase in expenditure available for provision of additional floorspace, making allowances for existing planning permissions, increased efficiency of existing retail floorspace and changes in the proportion of expenditure on other forms of retailing such as internet or mail order;
- 5. Estimate the likely average turnover of new floor space in convenience, comparison and bulky household goods;
- 6. Estimate the capacity for additional floorspace in the county.

6.2.2 Population

- 6.2.2.1 The 2002 Census of Population carried out by the Central Statistics Office states that the population of County Wexford was 116,596 persons. Preliminary 2006 Census figures outlines how the population has grown to 131,615. This represents an increase of 12.9% in the 4 year intercensal period. 71% of this increase is outlined as being due to inward migration.
- 6.2.2.2 In order to be consistent with the Wexford County Development Plan, Wexford County Council have provided us with population projections for the County up to 2016. These projections are based on both a high and low growth scenario. Scenario 1, the high growth scenario, envisages a continuation of the current level of inward migration into the county while Scenario 2, the low growth scenario, assumes 50% of the current migration levels. The following population forecasts are given for the county for the high and low growth scenarios.

Table 6.1: Scenario 1 High Growth Population Projections for Co. Wexford

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

Source: Wexford County Council

Table 6.2: Scenario 2 Low Growth Population Projections for Co. Wexford

2004	2006	2011	2016
124,106	131,615	146,410	162,240

Source: Wexford County Council

6.2.3 Expenditure Per Capita

- 6.2.3.1 The Retail Planning Guidelines Study examines three principal sources of data on retail planning expenditure in Ireland. These are the Annual Services Inquiry, the National Income and Expenditure Accounts and the Household Budget Survey. The survey concludes that the most reliable data source for established baseline expenditure is the Annual Services Inquiry. The most recent Annual Service Inquiry was published in 2003. This source is therefore used for the purposes of this capacity assessment. However, in order to be consistent with the base year, the figures for 2003 have been adjusted to 2004 using the Consumer Price Index.
- 6.2.3.2 Some adjustments to the data set out in Table 1 of the Services Inquiry are also necessary in order to ensure that goods are correctly categorised between comparison and convenience.

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

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

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

6.2.4 Expenditure Estimates

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

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

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

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

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

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

- 6.2.4.7 Expenditure growth on comparison goods has been substantially higher than expenditure growth on convenience goods. This is because most household's requirements in respect of convenience products have been largely satisfied and most additional expenditure has gone into products such as clothing, footwear, household goods, electrical goods, carpets, furniture and so on. Exceptionally high levels of growth in comparison goods sales were experienced in the late 1990's up to 2001. Growth figures have also been strong in the most recent years. Based on the Retail Sales Index we have estimated that expenditure on these categories of goods increased at a rate of 8% per annum for the period 1997 to 2002.
- 6.2.4.8 It is clear that expenditure growth is now somewhat lower than in the recent past. We have therefore used a more conservative long term average for projecting forward and we have assumed a high scenario growth rate of 7% per annum per capita and a low growth rate scenario of 5% per annum per capita for comparison goods.
- 6.2.4.9 Based on the high growth rate of 7% per annum we estimate that the expenditure per capita in comparison goods will reach €4,019 in 2011 and €5,637 by 2016 (all 2004 prices).
- 6.2.4.10 Based on the low growth rate scenario of 5% per annum per capita by 2011 the expenditure on comparison goods per capita will be €3,522 rising to €4,495 by 2016 (2004 prices).

Table 6.3: Expenditure per Capita

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

Source: Price Year 2004

6.2.5 Total Available Expenditure

- 6.2.5.1 The total available expenditure is set out in Table 6.4. This is calculated by multiplying the population by the expenditure per capita for each category for each year.
- 6.2.5.2 In 2006 we estimate the total available for convenience expenditure is between €409m and €417m assuming the high growth scenario for convenience goods and between €363m and €377m for comparison goods. By 2011 comparison expenditure will exceed convenience under the high growth scenario by a significant margin. We estimate there will be between €539m and €615m of comparison expenditure in the county compared to between €500m and €535m convenience expenditure.
- 6.2.5.3 This trend is reflected under Scenario 2, the low growth Scenario. By 2011 it is estimated that expenditure on convenience goods will be between €455m and €512m, and between €516m and €588m on comparison goods.
- 6.2.5.4 The projections for 2016 are somewhat conjectural. However, having regard to the assumptions set out above we estimate that by 2016 convenience expenditure will be between €608m and €684m and comparison expenditure in 2016 will be between €796m and €998m under the high growth scenario. Under the low growth Scenario it is

estimated that convenience expenditure will be between €557m to €627m and comparison expenditure will be between €729m and €915m.

Table 6.4: Scenario 1: Total Available Expenditure

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

Source: Tables 6.1 and 6.3. 2004 prices

Table 6.5: Scenario 2: Total Available Expenditure

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

Source: Source Tables 6.2 and 6.3. 2004 prices

- 6.2.4.5 It is necessary to adjust total available expenditure to allow for inflows and outflows for the county. In other words, to allow for people living outside Wexford County who shop in Wexford Town or Gorey or elsewhere in the county and to allow for the expenditure generated by the population of the county which goes to centres outside Wexford.
- 6.2.5.6 A figure of 10% is used to accommodate for inflow of expenditure into the county for comparison goods expenditure and 10% for convenience goods expenditure. This figure is to take into account tourist expenditure and holiday home owners.
- 6.2.5.7 The 2005 Wexford County Retail Strategy highlighted that the findings of the shopping survey commissioned as part of the Strategy outlined that there is approximately 2% leakage of convenience expenditure and 10% leakage of comparison expenditure. These leakage figures are assumed for the purposes of this capacity assessment. The relevant figures are outlined on Tables 6.6 and 6.7 below and the overall increase in expenditure is summarised in Tables 6.8 and 6.9.

Table 6.6: Scenario 1: Total Available Expenditure Allowing for Inflow and Outflows and Adjusted for Increase in Turnover of Existing Floor Space

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

2004 prices

Table 6.7: Scenario 2: Total Available Expenditure Allowing for Inflow and Outflows and Adjusted for Increase in Turnover of Existing Floor Space

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

2004 prices

Table 6.8: Scenario 1: Increase in Expenditure

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

2004 prices

Table 6.9: Scenario 2: Increase in Expenditure

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

2004 prices

6.2.6 Turnover and Floor Space Capacity

- 6.2.6.1 It is possible to derive the existing average turnover rate per sq metre of existing floor space by dividing the total available expenditure in 2006 by the floor space in each category. However, complications arise in respect of the comparison category as very different levels of turnover will apply to town centre comparison goods such as clothing and footwear and smaller household durables than would apply to bulky household goods sold in retail warehouses. Having regard to the Household Budget Survey and experience elsewhere in this respect it is estimated that approximately 20% of expenditure will be accounted for by bulky household goods in retail warehouse type premises.
- 6.2.6.2 We have applied an average turnover per sq.m. for all floorspace in County Wexford for 2006 for convenience goods of €10,000 per sq.m., €4,500 for comparison goods and €2,400 for bulky goods at 2004 prices. These figures have been adjusted to grow at a rate of 1% per annum to allow for efficiency gains by retailers. The figures are based on published retail industry data and have regard to the average turnover per sq.m. calculations established in the Retail Planning Guidelines Study 1999 (Tym and Blackwell). They reflect the average turnover levels retailers will require to sustain a healthy level of activity. They do not count in the high levels of overtrading that have existed in many areas in recent years.
- 6.2.6.3 These figures show the average turnover per sq metre of existing floor space overall in the county. They disguise significant differences in turnover for different shops.

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

Table 6.10: Floorspace Requirements Scenario 1

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

Table 6.11: Floorspace Requirements Scenario 2

Year	Convenience sq.m.	Comparison sq.m.	Bulky sq.m.	Total sq.m.
2011 Low	46,662	86,342	40,473	173,477
2011 High	52,543	98,534	46,188	197,265
2016 Low	54,344	103,276	48,411	206,031
2016 High	61,164	129,519	60,712	251,395

6.2.6.4 In order to calculate the quantity of future retail floorspace required for the county, the existing provision of retail floorspace should be subtracted from the totals outlined in Tables 6.10 and 6.11 above. The 2005 Wexford County Retail Strategy outline that in 2004 the existing convenience floorspace was 43,319 sq.m. and comparison floorspace was 84,184 sq.m. We assume that this comparison figure includes Clonard Retail Park which includes 4,995 net sq.m. of bulky retail floorspace. Based on the 2004 floorspace figures, table 6.12 and 6.13 below outline the additional floorspace capacity for convenience, comparison and bulky floorspace in the county.

Table 6.12: Scenario 1: Additional Floorspace Capacity in County Wexford

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

Table 6.13: Scenario 2: Additional Floorspace Capacity in County Wexford

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

6.2.6.5 It can be seen from Scenario 1 Table 6.12 that the capacity for additional convenience floor space by 2011 ranges from approximately 7,690 sq.m. to 11,622 sq.m. and for comparison goods between 11,093 sq.m. and 23,841 sq.m. For bulky comparison goods in the form of retail warehousing, there is scope for between 37,325 sq.m and 43,300 sq.m. of additional floor space.

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

6.2.6.7 The low growth scenario outlined in Table 6.13 highlights how the capacity for additional convenience floor space by 2011 ranges from approximately 3,343 sq.m. to 9,224 sq.m. The equivalent demand for comparison floorspace is between 7,153 and 19,354. For bulky comparison goods in the form of retail warehousing, there is scope for between 35,478 sq.m and 41,193 sq.m of additional floor space.

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

6.3 Future Retail Floorspace Requirements for Enniscorthy

6.3.1 The future floorspace requirements for Enniscorthy are obtained by dividing the floorspace figures for the entire County by the population of the retail catchment area of Enniscorthy. The 2006 Preliminary Census Results outlined an overall population of 131,615 for County Wexford. Wexford County Council have provided a breakdown of the county population between the four main urban centres in County Wexford (Gorey, Enniscorthy, Wexford Town, New Ross). This breakdown indicated a population of 31,790 for the Enniscorthy catchment area. This represents 24% of the overall population of County Wexford. The floorspace figures provided in Tables 6.12 and 6.13 above are therefore divided by 24% in order to obtain the future floorspace requirements for Enniscorthy. The results are outlined in Tables 6.14 and 6.15 below.

Table 6.14: Scenario 1: Additional Floorspace Requirements Enniscorthy

Year	Convenience sq. m.	Comparison sq. m.	Bulky sq.m.	Total sq. m.
2011	1,910-2,789	2,130-4,577	532-1,144	4,573-8,511
2016	3,841-5,627	9,147-15,334	2,287-3,834	15,274-24,795

Table 6.15: Scenario 2: Additional Floorspace Requirements Enniscorthy

Year	Convenience sq. m.	Comparison sq. m.	Bulky sq. m.	Total sq. m.
2011	802-2,214	1,373-3,714	343-929	2,519-6,857
2016	2,646-4,283	4,625-9,663	1,156-2,416	8,427-16,362

6.3.2 However, it is necessary to make adjustments to the floorspace figures outlined in Tables 6.14 and 6.15 above in order to take into account outflows of expenditure from Enniscorthy to Wexford town. This is particularly true of comparison expenditure given the current paucity of larger comparison national and international multiples within the town. In this context, it is considered that there is an outflow of comparison expenditure of approximately 40% to Wexford Town. The figures in Tables 6.14 and 6.15 above have therefore been adjusted in order to take into consideration this outflow of expenditure. The results of this adjustment are outlined in Tables 6.16 and 6.17 below.

Table 6.16: Scenario 1: Floorspace Requirements for Enniscorthy, including adjustments to comparison expenditure

Year	Convenience sq. m.	Comparison sq. m.	Bulky sq.m.	Total sq. m.
2011	1,910-2,789	1,278-2,746	532-1,144	3,508-6,222
2016	3,841-5,627	5,488-9,200	2,287-3,834	10,701-17,128

****Assumption: 40% outflow of comparison expenditure to Wexford Town

Table 6.17: Scenario 2: Floorspace Requirements for Enniscorthy, including adjustments to comparison expenditure

Year	Convenience sq. m.	Comparison sq. m.	Bulky sq. m.	Total sq. m.
2011	802-2,214	824-2,229	343-929	1,832-5,000
2016	2,646-4,283	2,775-5,798	1,156-2,416	6,115-11,530

****Assumption: 40% outflow of comparison expenditure to Wexford Town

6.3.3 The floorspace capacity figures outlined in Tables 6.16 and 6.17 above should not be considered as upper limits, merely as indicative of the scale of new floorspace required to meet the needs of existing and future population and expenditure in the town. Additional new floorspace may be proposed and this could replace some existing outdated or poorly located retail floorspace. These figures should be seen as minimum rather than maximums. The key consideration is the location of new floorspace. The quantum only becomes a critical consideration where new convenience and comparison floorspace is proposed outside of the defined retail core of the town and the issue of likely impact on the town centre as a whole arises.

Policies and Actions

7.1 Introduction and Key Principles

- 7.1.1 The location and scale of new retail development must have regard to the planning context for the County and in particular the Retail Planning Guidelines, the County Development Plan and the Town Development Plan.
- 7.1.2 A key principle in the provision of future retail floorspace is the need to reinforce the existing retail hierarchy of the County, and in particular existing town and village centres. It is particularly important that the principle urban centre of Enniscorthy town centre continues to develop its retail function to meet the shopping needs of its residents and to ensure a healthy and competitive retail environment. It is equally important that the secondary retail areas of the town retain and reinforce their retailing role and that the existing provision of retail development in these centres is maintained and enhanced in the interests of sustainability.
- 7.1.3 In terms of future zoning, the principal location for future retail development will be concentrated in town centre locations. Consideration to the potential impact of large scale retail development outside of the town centre and its impact on the traditional town centre should be taken cognisance of.

7.2 Distribution of Floorspace Requirements

- 7.2.1 A capacity assessment has been undertaken in the previous section of this study. This is based on a number of forecasts and assumptions which may be subject to change.
- 7.2.2 It is estimated that there is a need for between 1,910 sq. metres and 2,789 sq. metres of additional convenience floorspace and between 1,278 sq. metres and 2,746 sq. metres of comparison floorspace by 2011. Figures for 2016 outline how there is capacity for between 3,841 sq. metres to 5,627 sq. metres for convenience expenditure and 5,488 sq. metres and 9,200 sq. metres for comparison expenditure.
- 7.2.3 It is assumed that additional convenience and comparison retail floorspace should be provided where possible within the existing town centre of Enniscorthy. A number of potential opportunity sites suitable for town centre development have been identified for the principal town centre in Chapter 5.
- 7.2.4 Provision is also made for the development of limited convenience floorspace which may be appropriate in neighbourhood centres to serve existing and planned areas of residential expansion. Additional bulky household goods floorspace should be met either in town centres or in purpose built retail warehouse parks situated on the edge of town centres where possible. Conditions should be imposed in such developments clearly restricting the sale of goods to bulky household items.

7.3 Specific Objectives for Town Centre and Village Improvements

- 7.3.1 This section will summarise the general appropriate policies and actions to encourage the improvement of Enniscorthy town centre.

General Measures to Promote Town Centre and Village Improvements

- 7.3.2 Detailed below are a number of general policies and objectives that should be implemented to encourage and foster retail development in Enniscorthy. Whilst it is acknowledged that the development of retail facilities is largely dependant on market demand and retailer requirements, it is envisaged that the following general policies will help promote the town centre as a vibrant and attractive area thus encouraging its continued growth and development for retail, retail service, professional service and other complementary land uses.
- 7.3.3 Overall, Enniscorthy is considered as a healthy town centre with significant opportunities for retail expansion. The town centre follows a historic street layout, which rises steeply from the river. It is an attractive and vibrant town with retailing clustering around the Market Square. Notwithstanding this the town would benefit from the following environmental enhancements and upgrading.

Design and Shop Front Guidelines

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

Town Centre Development

- The tight urban grain and small retail units in Enniscorthy town centre provide limited opportunities for large retail traders to enter the traditional retail core of the town. However, there are a number of sites in the town centre area which have the capacity to provide appropriate opportunities for accommodating large retail developments. Sites such as the former Murphy Floods Hotel, Abbey Quay and other sites adjacent to the Minch Norton Area should be encouraged for town centre development.

Living Over the Shop Initiative

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

Pedestrian Facilities

- The refurbishment/upgrading of a number of laneways and associated archways would greatly enhance the vitality and attractiveness of the town’s retail core by improving the shopping environment and encouraging greater pedestrian permeability. Pedestrian facilities and connections should be enhanced to encourage greater pedestrian movement within the town’s retail core.

Business Improvements District Schemes

- A feasibility study regarding the development of town centre management initiatives for the town in association with the Chambers of Commerce should be considered. This may include the setting up of a town centre management committee and one or more ‘BIDS’ or Business Improvement Districts.
- BID schemes originated in Canada in 1971 and are now in operation in many cities and towns throughout the world. It is estimated that there are now more than 400 BID type schemes in operation in Canada and USA. European countries are also

becoming involved in these schemes, including Austria, Belgium, Denmark, France, Holland and Portugal. Most recently a legislative framework has been put in place in the United Kingdom for the operation of these schemes.

- Research on the operation of such schemes in the US identified that they have significant positive impacts on the economic vitality and viability of cities and towns. BIDS provide a whole new impetus for businesses to work with their respective local authorities and local residents, allowing for innovation and acumen to benefit everyone in an area.
- The Local Governments Act 2006 provides a statutory basis for the establishment of Business Improvement District Schemes within the functional areas of Local Authorities. In a Business Improvements District Scheme, a group of businesses are empowered, where a majority of those businesses agree, to raise a special contribution from all the businesses in the defined area to pay for the carrying out of complementary local services and improvements, within that defined area. The boundary of, and the range of local improvements to be carried out in the defined area of, a Business Improvements District Scheme are set out in a detailed business plan which is developed by the business community in association with the local authority.
- It is anticipated that it will be entirely a matter for the business community to develop a BID Plan and to decide on the level and type of works, services or projects that are desirable and the type of financial investment they will make. However, once the business community has determined that it wants a BIDS and achieves a positive plebiscite of all businesses in an area, the BID will be mandatory on all businesses in the BID. The ethos of BIDS is that it would provide services in an area that would add to, and not substitute for, those services already provided by the local authority.
- The BIDs approach will provide the opportunity to lever in private sector funding for the improvements and their subsequent management in addition to sources of local authority funding.

Special Contribution Scheme

- Section 48 and 49 of the Planning and Development Act 2000 deal specifically with the issue of Development Contribution Schemes. The planning authority must set out a contribution scheme in which the basis for the determination of contributions is set out. Section 48 (20 (c)) allows for special development contributions. It is stated:

"A planning authority may, in addition to the terms of a scheme, require the payment of a special contribution in respect of a particular development where specific exceptional costs not covered by a scheme are incurred by any local authority in respect of public infrastructure and facilities which benefit the proposed development"

- Investigations should be carried out regarding the possibility of developing such a supplementary scheme for specific works which enable town centre management and environmental improvements which specifically enhance the vitality and quality of the town centre.

Chapter

8

Criteria for Assessing Future Retail Development

8.1 Introduction

- 8.1.1 The principal aim of this chapter is to provide policy recommendations regarding the assessment of future planning applications for retail development.

8.2 Criteria for Assessing Future Retail Development

- 8.2.1 All applications for significant retail development should be assessed against a range of criteria. These criteria are set out below. It should be noted that it is not appropriate to assess all applications for new retail development against all the criteria, particularly developments which are clearly in accordance with the strategy set out in Section 7 and small scale developments (less than 1,000 sq. metres - net area.)
- 8.2.2 It is recommended that retail impact statements should not necessarily be required for developments less than 1,000 sq. metres - net area, unless it is considered that they would have a material impact on the vitality and viability of an existing retail centre. Nor should retail impact statements be required for retail developments that are located within identified retail centres in a development plan including town centres, district centres and neighbourhood centres.

The Sequential Test

- 8.2.3 It is stated in the Retail Planning Guidelines:

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

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

- 8.2.4 All applications for large retail developments (in excess of 1,000 sq. metres - net area) should be subject to the sequential test. Where an application for a large retail development (in excess of 1,000 sq. metres - net area) outside of the town centre is lodged to the planning authority, the applicant should demonstrate that all town centre options have been assessed and evaluated and that flexibility has been adopted by the retailer in regard to the retail format. The exception to the approach is retail warehouse development that are restricted to the sale of bulky household goods as it is identified in the Retail Planning Guidelines that such developments are better suited to peripheral locations on the edge of a town centre.

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

- Support the long term strategy for town centres as established in the development plan and not materially diminish the prospect of attracting private sector investment into one or more town centres.
- Should not cause an adverse impact on one of more town centres, either singularly or cumulatively with recent development or other outstanding planning permissions, sufficient to undermine the quality of the centre or its role in the economic and social life of the community.
- Should not diminish the range of activities and services that a town centre can support.
- Should not 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, 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.

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

- That there is a quantitative and qualitative need for the development. Need however should not be a consideration for town centre located development.
- The contribution of the development towards the improvement of the town centre in terms of urban design.
- The contribution of the development towards site or area regeneration.
- The role of the development in improving the competitiveness of the town against other competing centres.
- Compliance with development plan policies and objectives.
- The development is easily accessed by the elderly and disabled/mobility impaired.

8.3 Criteria for Assessing Particular Types of Development

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

Convenience Food Shopping

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

Discount Food Stores

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

Planning Guidelines and thus it is appropriate to permit such development within neighbourhood centres. Such developments are also often suited to brownfield industrial sites located in proximity to residential areas.

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

District Centres

- 8.3.5 It is likely that as Enniscorthy continues to grow in population terms, that there may be demand for the development of district centres to cater for newly developing residential estates. District Shopping Centres can play an important role in the County retail offer, especially in the convenience provision within the county. The development of such centres should only be developed in areas where large scale residential expansion is envisaged/proposed.

Retail Warehouse Parks

- 8.3.6 It is recognised in the Retail Planning Guidelines that in general retail warehouses do not fit easily into town centres given their size requirements and the need for good car parking facilities. It is therefore appropriate to group these facilities into planned retail parks on the edge of the town centre if such sites are available or in an out of centre site, if the applicant can demonstrate that there are no suitable edge of centre sites available. Criteria for assessing retail warehouse applications include scale and design of the development, appropriate vehicular access and the quantitative need for such development.
- 8.3.7 As stated in the Retail Planning Guidelines, individual retail units should not be less than 700 sq metres and not more than 6,000 sq metres in size. These figures are gross floor area, including storage and garden centres. In respect of retail warehouse developments outside town centres, it is essential that the range of goods sold is restricted by planning condition to bulky household items such as DIY products, carpets, furniture, and electrical goods. Failure to do so may have a negative impact on the vitality and viability of the town centre area.

Factory Outlet Centres

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

Retail Warehouse Clubs

- 8.3.9 Retail Warehouse Clubs as stated in the Retail Planning Guidelines share many of the characteristics of large retail outlets and therefore should be treated as any other large retail development. Such development should therefore be located within or on the edge of existing town centres and there should be a demonstrable need for its development both qualitatively and quantitatively. Particular consideration should be given to the design of such developments as often they have a retail warehouse type

format and thus may be inappropriate within the traditional town centre. As such facilities are geared towards bulky shopping such facilities must also be served by adequate car parking.

Local Shops and Petrol Filling Stations

- 8.3.10 Local shops play an important role in providing for daily top up shopping. They are also often easily accessible to the elderly and disabled. The development of such local shops should be encouraged in the smaller towns and villages in the counties and also in residential areas in the suburbs of the larger estates in the principal county towns. Such developments should be easily accessible to all sections of society.
- 8.3.11 Local shops attached to petrol filling stations are a growing sector of the retail market. Such facilities do play an important role, particularly in serving some of the more isolated rural communities. However, care should be given to the development of such facilities on the edge of town centres as they may have a negative impact on established convenience outlets within the town centre. As stated in the Retail Planning Guidelines, the size of such retail units should not exceed 100 sq metres.

