New Ross Town and Environs Development Plan 2011-2017

Appendix I

Retail Strategy

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Section 1 Introduction

1.1 Introduction

This retail strategy has been prepared in accordance with the Retail Planning Guidelines for Planning Authorities (DoEHLG, January 2005). The strategy and its associated retail policies will be incorporated into the New Ross Town and Environs Development Plan 2011-2017. The retail strategy will provide information regarding the quantum, scale and types of retail development required within the lifetime of the development plan and provide policies and actions regarding future retail developments in New Ross town.

1.2 Introduction to New Ross Town

The Retail Planning Guidelines classifies New Ross town as a third tier shopping location. New Ross is the third largest town in County Wexford and it is strategically located on the N25 and N30 national primary roads.

New Ross town has a high quality physical setting and natural environment. The topography of steep hills together with its riverside location has helped to shape the physical characteristics of the town. The town centre is characterised by a medieval street pattern with pedestrian laneways, historic buildings and a rich archaeological heritage dispersed throughout it. The main streets are enclosed by three and four storey buildings traditional in form and plot widths.

In terms of retail floor space and activity New Ross town is significantly less vibrant that the county's other third tier towns Wexford and Enniscorthy. This can be largely attributed to its proximity and accessibility to higher order centres of Waterford City, Kilkenny City and Wexford Town.

The principal shopping streets in the town are South Street, North Street, Quay Street and Charles Street with secondary activity along the lanes and side streets radiating off these and also along The Quay.

The town centre predominantly comprises independent retailers with the exception of Super Valu on the Quay. Comparison shopping is provided by specialised retailers. However, there is an obvious lack of large comparison national and international multiples.

Unfortunately the town centre has suffered significant amounts of dereliction and has a high rate of vacant buildings. This can be contributed in the main part to declining levels of activity, in particular retail, in the town centre. However, the town centre has outstanding character and enormous potential.

1.3 Aim of the Retail Strategy

The aim of this retail strategy is to implement the objectives of the Retail Planning Guidelines and to devise a strategy that will sustain and enhance New Ross town's role as a third tier retail centre within the context of the Retail Planning Guidelines. It will aim to enhance the vitality, viability and vibrancy of the town centre and ensure that new retail development is appropriately located, is accessible to all sections of society and is of a scale which allows the town centre to prosper. It will encourage and facilitate the diversification of the town's retail profile.

1.4 Methodology

The formulation of the retail strategy included the undertaking of baseline survey and research in the form of:

(i) An analysis of national and local policy documents that relate to retail planning in New Ross town,

(ii) An analysis of retail trends in New Ross town and its catchment area. Detailed household and shopper surveys were carried out to determine shopping patterns in the area,

(iii) Qualitative assessment including a health check of New Ross town and the identification of sites which could provide opportunities to strengthen retail activity within the town centre's main retail areas.

(i) Quantitative assessment to determine future requirements for additional retail floor space.

(ii) Policies and objectives to guide future retail development in the town.

1.5 Preparation of the Retail Strategy

The quantitative analysis/capacity assessment as outlined above is fundamental in determining the requirement for future convenience and comparison floor space. This assessment comprised of the following:

(i) Identification of the catchment area

(ii) Population projections

(iii) Establishing convenience and comparison expenditure

(iv) Establishing the extent of existing and permitted floor space and its turnover,

(v) Estimate future available expenditure to support additional retail floor space to 2019.

Section 2 Policy Context

2.1 Introduction

The purpose of this section is to review the policy documents which will have an impact on the future retail provision within New Ross Town. The following section will outline the relevant policy documents pertinent to New Ross at national, regional and local level.

2.2 National Level

There are a number of national level plans, strategies and guidelines that are of particular relevance to the future development of New Ross Town and the direction it will take. These are:

- National Development Plan 2007-2013
- National Spatial Strategy 2002-2020
- Sustainable Development: A Strategy for Ireland
- Transport 21
- Retail Planning Guidelines.

2.2.1 National Development Plan 2007-2013

The current National Development Plan (NDP) 'Transforming Ireland — A Better Quality of Life for All' was published in January 2007 and sets out the Government's medium-term capital expenditure programme over a 7 year period, focussing on the areas of economic and social infrastructure, employment and human resources and the productive sector. Over €184 billion, part-funded by the European Structural Fund but mainly through the Irish exchequer, has been set aside for projects under the NDP.

The primary objectives of the Plan include:

I. Decisively tackle structural infrastructure deficits;
II. Greatly enhance enterprise development, Science, Technology and Innovation, working age training and skills provision;
III. Integrate regional development within the National Spatial Strategy framework;
IV. Invest in long-term environmental sustainability;
V. Realise the opportunities of strengthened all-island collaboration in areas of mutual interest;
VI. Deliver a multi-faceted programme for Social Inclusion; and
VII. Provide Value for Taxpayers' Money. (pg. 17-18, NDP, 2007)

The NDP states that strategically positioned county towns and other larger towns must be facilitated and allowed to development so that they play an important role in ensuring that balanced development takes place. Given the strategic location of New Ross in close proximity to the 'Gateway' of Waterford and its importance within the County Wexford settlement hierarchy, it envisaged that the town of New Ross will have directly assist in the regional development of the South East.

2.2.2 National Spatial Strategy 2002-2020

The National Spatial Strategy (NSS) was published by the Department of the Environment and Local Government (DoELG) in November 2002. It provides the spatial planning framework for Ireland for the period 2002-2020. The main aim of the NSS is to provide more balanced development throughout the State.

The NSS identifies broad spatial development patterns for areas and sets down indicative policies in relation to the location of industrial development, residential development, rural development and tourism and heritage.

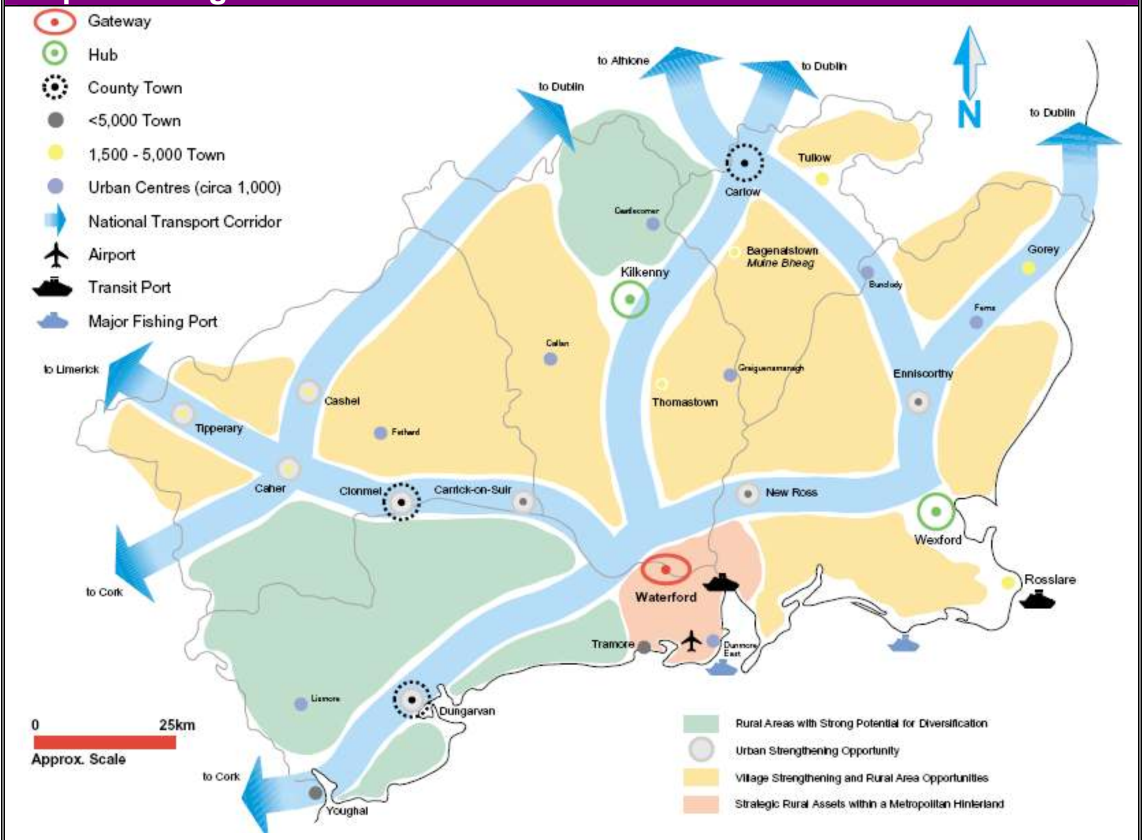
In order to achieve balanced regional development, the NSS has designated a number of strategic centres throughout the country with the potential to be drivers of development both at national level and within their own regions. These centres have been divided into two categories – Gateways and Hubs.

Within the NSS it is envisaged that the Gateway of Waterford City, coupled with the strategically located Hubs of Kilkenny City and Wexford Town will act as a 'growth triangle' for the South East Region. This growth triangle is to provide the 'critical mass' in the Region, with Kilkenny and Wexford providing a large and skilled population base, substantial capacity for additional residential and employment related functions and an improving transport network.

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

The port facilities of New Ross are also recognised in the NSS as having an important role in the development of the region, providing additional opportunities to bolster growth within the South East Region.

Map 1 Strategic Location of New Ross within the NSS



Source: NSS, 2002.

2.2.3 Sustainable Development: A Strategy for Ireland

The Sustainable Development: A Strategy for Ireland was published by the Government in 1997. Although the strategy does not consider retailing as a specific issue as such, it has important implications for the formulation of retail and other land use policy.

The strategy calls on Planning Authorities to incorporate the principles of sustainability into their development plans and to ensure that planning policies support its achievement which is a mandatory requirement under the 2000 Act.

Attention is drawn to the need for integrated land use and transportation policies to help to minimise the growth in private transport demand and to increase the use and efficiency of public transport rather than facilitate the private car. These are important criteria when considering new sites and locations for retail development.

2.2.4 Transport 21

Transport 21 is a capital investment framework detailing programmes and projects in the national transportation system over the period 2006 to 2015. It is made up of two separate investment programmes; a national programme and a programme for the Greater Dublin Area. The key aims of the national programme are:

- to create a high quality, efficient national road and rail network consistent with the objectives of the National Spatial Strategy;
- to provide for a significant increase in public transport use in provincial cities;
- to strengthen national, regional and local public transport services; and
- to enhance safety and security facilities at the regional airports.(www.transport21.ie)

Under Transport 21 as part of the N25 Rosslare to Waterford Scheme linking the Port of Rosslare to Waterford, it is proposed for the construction of a N25 by-pass to the west of New Ross Town with the creation of new crossing over the River Barrow. The proposal is currently at the preliminary design phase. The proposed by-pass will significantly reduce the traffic congestion currently experienced within from the town centre and in addition improve its accessibility to the surrounding area.

2.2.5 Retail Planning Guidelines

The Retail Planning Guidelines for Planning Authorities (RPG) were published in 2000 by the DoELG (subsequently titled the Department of Environment, Heritage and Local Government – DoEHLG) and revised in January 2005. They were prepared in response to the increasing pressure for retail development in the last decade. The guidelines sought to provide a framework to enable the future retail development that is projected to be accommodated in a way that is '*efficient, equitable and sustainable*'.

The background of the RPG and the pressure for retail development is set out in the context of the exceptional growth of the Irish economy that occurred in the 1990s. The challenge for the development plan system is to establish the optimum location for new retail development that is accessible to all sections of society and is of a scale that allows the continued prosperity of traditional town centres and existing retail centres.

The RPG sets out the matters that are to be included in all future development plans of Planning Authorities as:

I. Confirmation of the retail hierarchy, the role of centres and the size of the main town centres.
II. Definition in the development plan of the boundaries of the core shopping area of town centres.
III. A broad assessment of the requirement for additional retail floor space.
IV. Strategic guidance on the location and scale of retail development.
V. Preparation of policies and action initiatives to encourage the improvement of town centres.
VI. Identification of criteria for the assessment of retail developments. (para.36, pg.12, RPG, 2005)

The RPGs advise that development plans should provide an indication of the general scale and form of retail development that is required in the future and that this will constitute the context for making decisions on planning applications. The general principle is that, as far as possible, development is to be sited within town centres with a presumption against development elsewhere except where district and neighbourhood centres are being provided to meet neighbourhood needs. The guidelines advocate that a full appraisal of the retail development potential of sites both within the town centre and edge of town centres should be undertaken.

Planning Authorities are encouraged within the RPG to adopt a pro-active role in enhancing the vitality and viability of their town centres in order to achieve their full potential and to allow for their continuous improvement as retail destinations. A key component in this process involves health check assessments of key retail centres. A health check comprises an evaluation of the strengths and weaknesses of retail centres, and as described within the RPG's should both inform and be undertaken within the framework provided by the development plan.

New Ross is classified in the RPG as a Tier 3, Level 2 centre in the 'National Retail Hierarchy' and has a similar designation to that of; Arklow, Athy, Dungarvan, and Enniscorthy. This level is below that of the Tier 3, Level 1 county towns of; Athlone, Carlow, Kilkenny Tullamore and Wexford. Not withstanding this Tier 3, Level 2 centres are described as being of particular importance in realising the role of providing an urban anchor for the surrounding community undergoing rapid change. (para. 11, pg. 4, RPG, 2005)

2.3 Regional Level

This section provides a review of the regional level planning and policy documents with respect to New Ross. These framework documents include;

- Regional Planning Guidelines for the South East Region 2010-2022
- Waterford Planning Land Use and Transportation Study 2001

2.3.1 Regional Planning Guidelines for the South-East Region 2010-2022

The Regional Planning Guidelines (RPGs) are a long-term strategic planning framework for the development of the South Eastern Region up to 2022. The guidelines have an important role in the implementation of the NSS. The key principle of the Regional Development Strategy is to achieve sufficient critical mass in towns and cities to make them self-sufficient and to compete with urban centres in other regions. The guidelines set out an urban hierarchy with development roles for different types of urban centres in the region. New Ross is identified as a Large Town which should continue to be an attractive location for new development.

The RPGs identify Urban Consolidation Priorities for Large Towns which includes the following:

1) Identify under-utilised, derelict or undeveloped lands within the built-up area through the development plan process.
2) Realise opportunities using, for example, the derelict sites act and acquisition of key sites.
3) Where sufficient development opportunities within the urban area are not available, consider appropriate extension options having regard to infrastructural constraints and the availability of community services.

2.3.2 Waterford Planning Land Use and Transportation Study 2001

The Waterford Planning Land Use and Transportation Study (PLUTS) was commissioned by Waterford City Council in 2001. It was undertaken in response to the need for an integrated framework of plans and solutions to address the needs of the City in both land use and transportation terms up to 2020. The PLUTS is consistent with main objectives of the NSS and therefore aims to foster a balanced spatial development at a local, city and regional level.

Map 2 Strategic Location of New Ross within PLUTS

Source: PLUTS, 2001.

New Ross is defined as a satellite town of Waterford City within the Study and it is envisaged that it will have significant role to play the future expansion of the South East Region. PLUTS states a strategic aim of Waterford is to amalgamate with the ports of New Ross and Rosslare in order to efficiencies and strengthen the Region's position as a viable alternative to Dublin Port. (pg.46, PLUTS, 2001)

An existing rail link between Waterford and New Ross (currently not longer in use) is highlighted in PLUTS as having considerable potential for the transportation of passengers/freight and if re-opened could be of significant benefit to the South East Region.

> *"The possibility of reopening and improving rail services to the nearby regional towns of New Ross and Carrick on Suir must be maintained and it is strongly recommended that existing track bed be protected on the New Ross line. This represents a very valuable asset that may be called upon to accommodate future travel demand beyond the plan period." (pg. 52, PLUTS, 2001)*

2.4 Local Level

This section provides an overview of the local level planning and policy documents which will have an influence on the future development of the New Ross. These are;

- Wexford County Development Plan 2007-2013
- Remodelling the Model County': A Strategy for the Economic, Social and Cultural Development of County Wexford 2002 – 2012
- New Ross Town and Environs Traffic Management Study Final Report October 2003
- The Environs of New Ross Local Area Plan 2005

2.4.1 Wexford County Development Plan 2007-2013

Wexford County Development Plan 2007-2013 (WCDP) relates to the administrative area of Wexford County Council and provides the framework for the future development within the county over a six year period. The core aim of the plan is to balance the demand for development while at the same time protecting the physical environment.

New Ross, along with the towns of Enniscorthy and Gorey are classified as a 'Secondary Growth Areas' under the County Wexford Settlement Strategy. The Plan states that these secondary growth areas are key urban resources and it predicts;

> *"a high level of employment activity, high order shopping and a full range of social and educational facilities so that these towns can become self sufficient and not develop into dormer towns for Wexford Town". (Section 2.3.2, WCDP, 2007)*

In relation to retailing, the County Retail Strategy (CRS) contained within the WCDP, notes that New Ross Town serves as a retail and service centre for the south-west of County Wexford and the south-east of County Kilkenny.

New Ross however is described within the CRS, as being 'significantly less vibrant' than the other main centres of Enniscorthy and Gorey with high vacancy rates along the secondary retail area on the periphery of the town centre.

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

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

The document is organised around the themes of economy, society and culture. With regards to economic development, the strategy aims to develop a vibrant local economy with employment opportunities for all sectors of the community.

The strategy recognises that the importance of New Ross Port in the development and expansion of the County. The document therefore includes as one of its strategic objectives (15 b) - the development of the port of New Ross.

The promotion of industrial sites and buildings within the centres of New Ross, Wexford, Enniscorthy and Gorey, are also identified as strategic objectives within the strategy, in order to attract Foreign Direct Investment and encourage economic activity in the County.

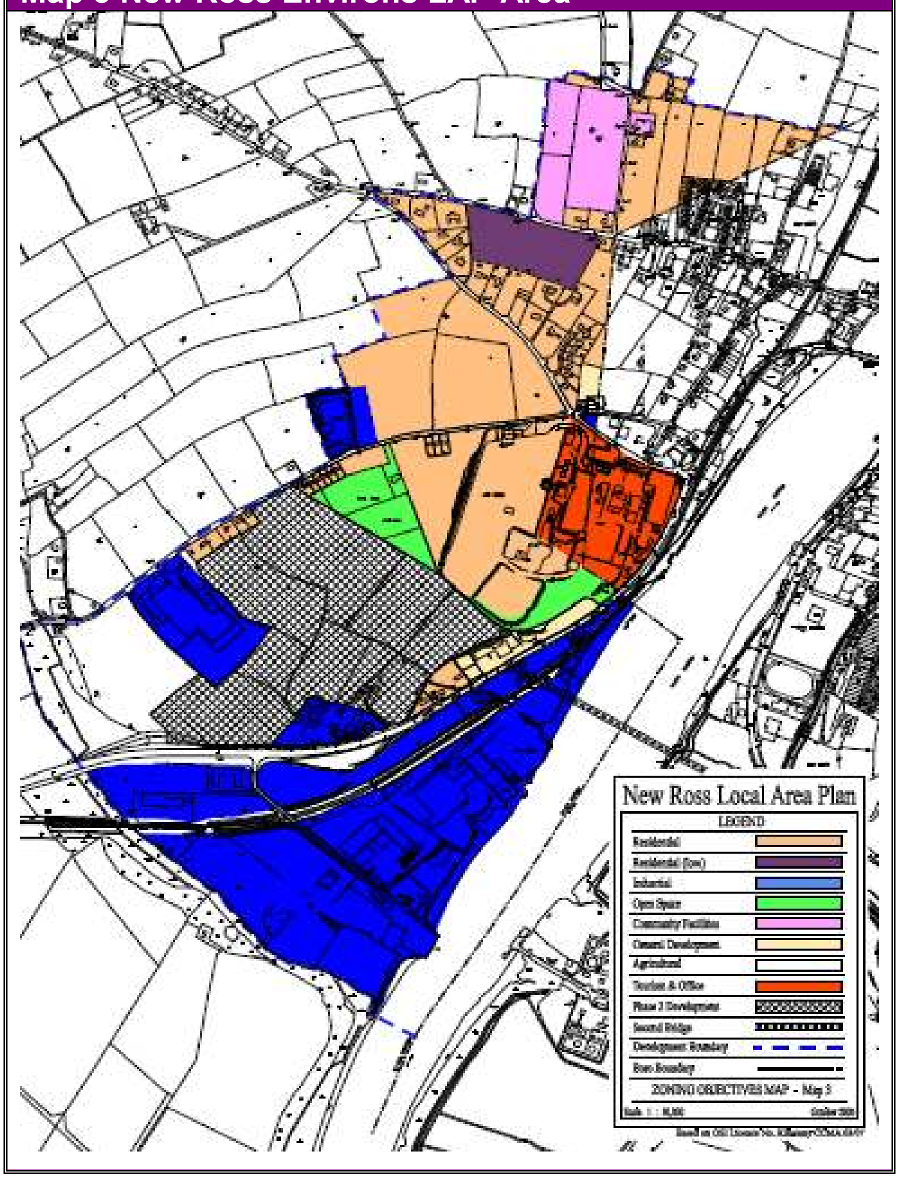
2.4.3 The Environs of New Ross Local Area Plan 2005

The New Ross Environs Local Area Plan (NRELAP) was adopted by Kilkenny County Council in 2005. The Plan sets out to provide guidance for the future development for a relatively small portion of land located across the River Barrow, to the west of New Ross Town Centre. This land borders the Urban

District Boundary of New Ross Town but is within the administrative area of Kilkenny County Council.

In respect of retailing, the LAP recognises the role of New Ross Town Centre as the location for the majority of convenience shopping. The Plan states that there is no significant retail provision proposed within the LAP area with the exception of a small neighbour centre to service the local community, which is expected will increase over the lifetime of the Plan as a result of the proposed zoning of additional residential land. (pg. 20-21, NRELAP, 2005)

Map 3 New Ross Environs LAP Area



Section 3 Healthcheck of New Ross

3.1 Introduction

Healthchecks are an important tool in assessing the vitality and viability of town centres. According to the RPG; 'vitality' refers to the buoyancy and activity within a town, while 'viability' relates to the commercial well being of a centre.

A health check comprises an evaluation of the strengths and weaknesses of retail centres and as detailed in Annex 2 Paragraph 3 of the RPG should include indicators such as; the diversity of uses and quality of activities in a centre, the retail representation within a centre, recent retailing developments, accessibility for people living and working in the area, and an assessment of the physical environment within town centres. Consequently the following headings were included in the health check assessment contained in this section:

- Character,
- Diversity of Uses,
- Retail Representation,
- Accessibility and Pedestrian Flows,
- Physical Structure, and
- Recent Developments

3.1.1 Character

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

Waterford City - via Wexford Town and N30 National Primary Road connecting New Ross to Enniscorthy.

The town of New Ross developed given its strategic location along the River Barrow and possesses Ireland’s only inland port which is sited approximately 32km upstream on the River Barrow. The port is important resource providing employment for the town and immediate area. In recent years the tourism potential of the waterfront has been recognised with the completion of a small marina for mooring of pleasure boats and the permanent docking of the Dunbrody replica famine ship along the Quays which has become is a key tourist attraction within the South East Region.

The waterfront along the Quays provides eye-catching views of the River Barrow and the surrounding area. Currently the waterfront area adjacent to the Quays is utilised predominantly as a car park with limited seating or street furniture. The presence of a number of vacant retail and commercial units, coupled with some cleared infill sites (presently used for private car-parking) along the Quays gives the waterfront a slightly neglected appearance. Given the attractive views along the waterfront and its proximity from the town centre, this is a significant opportunity to develop the potential of this nature resource.

3.1.2 Diversity of Uses

There is an assortment of uses as would be expected in a large county town. Retail dominates the ground floors of the buildings within the town centre while the upper floors consist of a mixture of office and residential accommodation. Business and commerce are provided for by; AIB, Bank of Ireland, Permanent TSB and a credit union as well as a range of solicitors, accountants and auctioneers/estate agents’ offices. Other key services located within the town include; a public library, a medical centre, dentist’s surgery, an advice centre and a community enterprise centre which serve the local need. There are also a number of; restaurants, pharmacies, florists, ladies boutiques, music stores, health food shops, jewellers and gift shops situated in the town centre.

Industry within the town is located; at New Ross Port to the west of the town centre across the River Barrow; to the south west of the town at Marshmeadows, at the IDA Industrial Park and Woodbine Industrial Estate along the N30 National Primary Road to the south east of the town centre.

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

The Quays - New Ross

3.1.3 Retail Representation

New Ross is classified under the RPG as a third tier shopping location. The retail representation consists mainly of independent retailers providing a range of goods and services. In recent years some national multiples and international retailers have established themselves within the town.

In relation to convenience retailing, New Ross has a number of different formats which include; a mix of local independent shops – Kavanagh's, Molloy's Mini Market and Nugent's etc, a number of symbol group stores – SuperValu, Spar, Gala, Centra and Costcutters, a small number of specialist ethnic stores – Lituanica, Polish Shop Krakow and Polskie Sklepy Galicja, and the international discount multiples of Lidl and Aldi. Tesco have a large store on outskirts of the town contained within the New Ross Retail Park which is situated to the south east of the town centre.

Comparison and bulky floor space in New Ross is relatively limited and is provided predominately by small independent retailers, with the exception of a select number of indigenous multiples and symbol groups such as; Sam McCauley, Sportsavers, Michael Murphy and Joyces. International/UK comparsion multiples are poorly represented with the exception of Vodafone who have recently opened small mobile phone store within the town centre.

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

Across the River Barrow to the north west of the town centre at Rosbercon, a small number of mixed use developments have been constructed. A convenience store and limited number of local level services serve this immediate community. The ground floor units of a number of the mixed use developments are currently vacant with some unfinished to date. Neighbour centres are also located on the town periphery at; Castlemoyle, Irishtown and the Three Bulletgate.

As mentioned previously the New Ross Retail Park is situated to the south east of the town along the N30 National Primary Road and consists of a number of large retail units with a significant level of surface car parking to the front. The retail units are occupied by Tesco, Michael Murphy and Joyce's Homecentre with two of the units vacant at the time of the healthcheck.

Woodbine Business Park which is located (in close proximity to New Ross Retail Park) near the intersection of the N30 and N25 National Primary Roads also contains a number of bulky good retailers including; McManus Furniture, Cedarwood - 'Kitchens, Bedrooms and Home Interiors' and Dermot Kehoe - 'Supply and DIY'.

3.1.4 Accessibility and Pedestrian Flows

Pedestrian activity was quite limited with the majority of pedestrian flows concentrated along South Street, Charles Street and along the Quays. There were little or no pedestrians observed along North Street and John Street on the day of the healthcheck. There are 2 no. pedestrian type crossings to assist movement along the Quays, with one designated pedestrian crossing present on South Street.

Although the majority of the traffic volumes in the town are directed along the Quays, there was considerable traffic congestion along South Street and Charles Street throughout the day of the healthcheck. This is exacerbated by a proliferation of on-street parking which tends to restrict vehicular movement and reduces both driver and pedestrian visibility.

In terms of public transport New Ross is served by Bus Éireann - Expressway and Local Bus services. The town is also served by some local private bus operators. In addition there are a limited number of taxi and hackney firms operating in and around the town.

3.1.5 Physical Structure

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

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

New Ross Streetscape

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

3.1.6 Recent Retail Developments

New Ross has experienced little retail development in recent years. The exceptions to this have been the arrival of the discount retailers of Lidl and Aldi to the town. Aldi have also been granted planning permission (Planning Ref; 20082528 for an additional 275sq.m of retail floor space. This extension has not commenced to date.

Tesco have recently completed an extension (Planning Ref; 20073112) to their existing store which comprises of approximately 950 sq.m of additional net convenience and comparison retail floor space.

The refurbishment of the old storage warehouses along the Quays adjacent to Hanrahans Bridge includes approximately 180sq.m of retail floor space at ground floor level.

Recent Retail Developments in New Ross

3.2 Opportunity Sites

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

- Bond Store Car Park, The Quay
- Site of Billy Foley's Yard and The former Campus Garage, The Quay
- The site of the Old Malthouse and lands currently occupied by Steele and Company (bound to the north by Priory Lane, the west by Lidl).

Section 4 Household and Shopper Surveys

4.1 Introduction

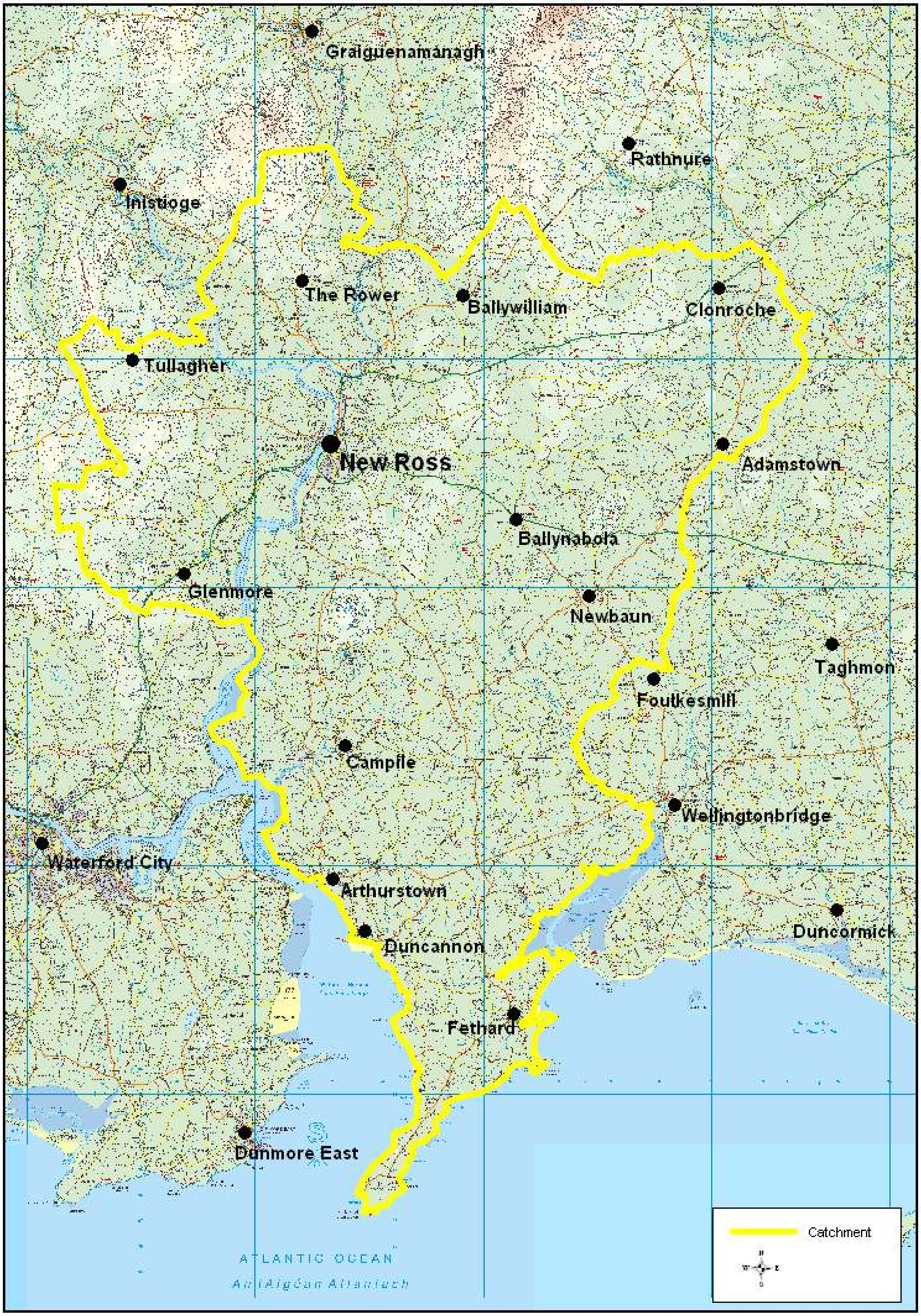
The overall objective of the household and shopper surveys is to provide an insight into consumers' perspective of the retail offer currently available in New Ross. This understanding is based on the information collated within household and shoppers surveys that were conducted as part of this retail strategy.

The household survey comprised a total of 104 face to face interviews conducted on the doorsteps of randomly selected households in the catchment area identified on Figure 4.1.

The shopper survey involved 103 on-street interviews at various locations dotted throughout New Ross Town Centre. The respondents were asked a range of questions relating to their last shopping trips for different types of shopping.

The definition of the catchment area for the purposes of these surveys was based on local knowledge of the town and surrounding hinterland informed by the Planning Department of Wexford County Council and New Ross Borough Council, and on factors such as the distribution of population, the road network, travel times, the location of competing centres and the health check appraisals of these centres provided in Section 3.

Figure 4.1
New Ross Catchment Area



The results of the surveys play an important role in the assessment of the potential for additional retail floor space as they provide important information on:

- Market share (the proportion of retail expenditure by persons living in catchment area spent and retained in the catchment area)
- Trade draw (the proportion of turnover in retail outlets in the catchment area attributable to persons living outside the catchment area).

In addition, the surveys provide an indication of:

I. Where people shop;
II. Where people come from to shop in New Ross;
III. Travel preferences; and
IV. Other factors that may influence shopping patterns

The remainder of this Section provides an overview of the findings contained within the household and shopper surveys.

4.2 Household Survey

The key objective of the household survey is to provide an insight into the shopping patterns of the resident population within the study area illustrated in Figure 4.1.

In October 2009, 104 face to face interviews conducted on the doorsteps of randomly selected households at 10 no. densely populated locations dispersed throughout the catchment area listed in Table 1 below. Taking into account the population distribution and density within the catchment area, the largest proportion of surveys were conducted in New Ross, totalling almost 20%, with the other surveys distributed throughout the remaining locations. Doorsteps surveys were favoured instead of telephone surveys as they would be more effective in terms of achieving a sufficient number of sample respondents.

Table 1 Location of Households Surveyed		
Location	**Respondents**	**Proportion (%)**
New Ross	20	19.2
Clonroche	11	10.6
Adamstown	10	9.6
Campile	10	9.6
Fethard	10	9.6
Duncannon	10	9.6
Ballycullane	9	8.7
Newbaun	9	8.7
Ballywilliam	8	7.7
Glenmore	6	5.8
The Rower	1	1.0
Total	**104**	**100.0**
Source: WCC Data, 2009.		

Table 2 & 3 provide classification details of the respondents surveyed in terms of gender and age range. Women accounted for 71% of the individuals surveyed while the remaining 29% of respondents were men. In terms of the age range, the majority of the individuals surveyed (27.9%) fell within the 25 to 34 age bracket, while some 8.7% of the respondents were aged over 75.

Table 2 Gender of Respondents Surveyed		
Gender	**Respondents**	**Proportion (%)**
Female	74	71.2
Male	30	28.8
Source: WCC Data, 2009.		

Table 3 Age Range of Respondents Surveyed		
Age Range	**Respondents**	**Proportion (%)**
15-24	0	0.0
25-34	29	27.9
35-44	25	24.0
45-54	23	22.1
55-64	15	14.4
75+	9	8.7
Total	**104**	**100.0**
Source: WCC Data, 2009.		

The key findings from this survey are summarised in the paragraphs below under the following headings:

- Main Food Shopping
- Top-up Shopping
- Bulky Goods Shopping
- Clothing and Footwear Shopping
- Shopping in New Ross
- Internet Shopping
- Principle Attractions and Improvements that might be made to New Ross

4.2.1 Main Food Shopping

Respondents were asked to indicate where they travelled to for their main food shopping and the retailer from which they purchased their food items. Tables 4 & 5 illustrate the findings. Almost three-quarters of the shoppers surveyed remained within the catchment area for their main food shopping travelling to New Ross Town. This gives a clear indication of the quality of convenience offer available within the catchment area and specifically in New Ross. For those respondents journeying outside the catchment area Wexford Town accounted for approximately 11% of the shoppers surveyed and this was closely followed by Enniscorthy with a further 9% and to a lesser degree Waterford City with 1.9% of the shoppers stating that it was their primary location for grocery items.

Table 4 **Main Food Shopping Destinations**		
Location	**Respondents**	**Proportion (%)**
New Ross	76	73.1
Wexford	11	10.6
Enniscorthy	9	8.7
Waterford City	2	1.9
Ramsgrange	2	1.9
Ballywilliam	1	1.0
Campile	1	1.0
Clonroche	1	1.0
Fethard	1	1.0
Total	**104**	**100.0**
Source: WCC Data, 2009.		

In terms of the retailer where the shoppers conducted their main food shopping, it was Tesco which ranked highest totalling nearly two-thirds of the individuals surveyed. Dunnes Stores and SuperValu accounted for 8.7% and 7.7% respectively, while the retailers - Lidl, Centra and Aldi, totalled 16% of the shoppers between them.

Table 5 Main Food Shopping – Retailer		
Store	**Respondents**	**Proportion (%)**
Tesco	66	63.5
Dunnes Stores	9	8.7
SuperValu	8	7.7
Lidl	7	6.7
Centra	6	5.8
Aldi	4	3.8
Other	2	1.9
Londis	1	1.0
Local shop	1	1.0
Total	**104**	**100.0**
Source: WCC Data, 2009.		

As detailed in Table 6 the vast majority, 94%, of respondents travelled by car when undertaking the main food shopping trip with 89% driving themselves and only 6% travelling as a passenger. Less than 4% walked and only 1% used the bus as a mode of travel while undertaking main food shopping.

Table 6 Mode of Transport for Main Food Shopping		
Mode	**Respondents**	**Proportion (%)**
Drive self in car/van	92	88.5
Passenger in car/van	6	5.8
Walk	4	3.8
Bus	1	1.0
Use the internet/home shopping	1	1.0
Total	**104**	**100.0**
Source: WCC Data, 2009.		

Approximately 60% of respondents reported doing a main food shop once a week and one-third (33%) of respondents carry out their main food shopping twice a week or more. 9% of shoppers stated that they undertook their primary food purchase once a fortnight.

Table 7 **Frequency of Main Food Shopping**		
Frequency	**Respondents**	**Proportion (%)**
Once a week	61	58.7
Twice a week or more	34	32.7
Once a fortnight	9	8.7
Total	**104**	**100.0**
Source: WCC Data, 2009.		

Table 8 below details the range of expenditure on the main food shopping provided by respondents. The largest proportion of individuals (31%) spent between €81 and €120 on their main food purchase. Over one-fifth of those surveyed fell within the next spend bracket ranging from €121 to €160. Approximately 9% of shoppers spent in excess of €201 on their main grocery shopping, while nearly 8% stated they spent less than €40.

Table 8 **Expenditure on Main Food Shopping**		
Expenditure Range	**Respondents**	**Proportion (%)**
€0 - €40	8	7.7
€41 - €80	21	20.2
€81 - €120	32	30.8
€121 - €160	22	21.2
€161 - €200	12	11.5
€201 - €240	4	3.8
€241 - €280	5	4.8
Total	**104**	**100.0**
Source: WCC Data, 2009.		

4.2.2 Top-up Shopping

The primary destination for top up shopping within the catchment area was New Ross Town which attracted one quarter of respondents for top-up shopping. A further 12% of householders surveyed undertook their top-up shopping in Ramsgrange with approximately 11% conducting top up shopping in Clonroche. Given the general dispersion of top-up shopping within the selected locations in catchment area, it appears that the individuals surveyed purchase their top shopping at a more local level and that the proximity to the retailer is a key element in regard to top-up shopping

Table 9
Top-up Shopping Destinations

Location	**Respondents**	**Proportion (%)**
New Ross	26	25.0
Ramsgrange	12	11.5
Clonroche	11	10.6
Campile	10	9.6
Adamstown	9	8.7
Fethard	8	7.7
Ballywilliam	7	6.7
Newbaun	7	6.7
Wellingtonbridge	5	4.8
Duncannon	3	2.9
Glenmore	3	2.9
Ballycullane	2	1.9
The Rower	1	1.0
Total	**104**	**100.0**

Table 10 below illustrates the expenditure range with respect to top-up shopping. The highest proportion of respondents, 88% spent between less than €40 on top-up shopping and a further 12% spending between €41 and €80. This lower level of expenditure is in line with what would be expected given that top-up shopping is generally conducted more frequently compared to main food shopping.

Table 10 **Expenditure on Top-up Shopping**		
Expenditure Range	**Respondents**	**Proportion (%)**
€0 - €40	91	87.5
€41 - €80	12	11.5
€81 - €120	1	1.0
Total	**104**	**100.0**
Source: WCC Data, 2009.		

4.2.3 Bulky Goods Shopping

New Ross was the most popular destination for bulky goods shopping commanding 46% of all bulky goods shopping trips within the catchment area. The remaining 56% of households however, travelled to a destination outside the catchment area for their bulky goods shopping with 23% going to Wexford Town, 21% to Waterford City and a further 6% going to Enniscorthy. Dublin, Carlow and Wellingtonbridge together accounted for the remaining 5% of responses. These findings are summarised in Table 11.

Table 11 **Bulky Goods Shopping Destinations**		
Location	**Respondents**	**Proportion (%)**
New Ross	46	45.5
Wexford	23	22.8
Waterford City	21	20.8
Enniscorthy	6	5.9
Dublin	3	3.0
Wellingtonbridge	1	1.0
Carlow	1	1.0
Source: WCC Data, 2009. *Figures exclude missing responses		

Table 12 below provides information on expenditure levels of the respondents in relation to bulky goods purchases. The wide range of expenditure classes indicates that in generally bulky goods tend to command higher prices. Expenditure on bulky goods shopping was spread across a number of levels with 6% of respondents spending between €0 and €50, 8% spent €151 - €200 and 11% spent between €251 and €300. Almost 80% of the respondents however spent less than €500 on their bulky goods shopping. A limited number of individuals, totaling 7%, spent in excess of €1,000 while on their last bulky goods shopping trip.

Table 12
Expenditure on Main Food Shopping

Expenditure Range	Respondents	Proportion (%)
€0 - €50	6	5.9
€51 - €100	13	12.9
€101 - €150	5	5.0
€151 - €200	8	7.9
€201 - €250	13	12.9
€251 - €300	11	10.9
€301 - €350	5	5.0
€351 - €400	4	4.0
€401 - €500	13	12.9
€501 - €600	4	4.0
€601 - €700	3	3.0
€701 - €800	1	1.0
€801 - €900	0	0.0
€901 - €1,000	5	5.0
€1,001 - €1,250	0	0.0
€1,251 - €1,500	5	5.0
€1,501 - €2,000	0	0.0
€2,001 - €4,000	1	1.0
Over €4,001	1	1.0
Don't Know	3	3.0

Source: WCC Data, 2009.
*Figures exclude missing responses

4.2.4 Clothing and Footwear Shopping

Analysis of the clothing and footwear destinations contained in Table 13 reveals that the vast majority (94%) of the respondents travelled outside the catchment area for their clothing and footwear shopping. This highlights that there is considerable leakage of clothing and footwear expenditure from the catchment area and into the competing centres. Wexford Town and Waterford City were both ranked as the primary destinations for clothing and footwear shopping among the respondents, each accounting for 43%. New Ross came in third place with 5.8% while Enniscorthy was close behind with 4.9% of the individuals stating that it was their main clothing and footwear shopping location.

Table 13
Clothing and Footwear Shopping Destinations

Location	**Respondents**	**Proportion (%)**
Wexford	44	42.7
Waterford City	44	42.7
New Ross	6	5.8
Enniscorthy	5	4.9
Dublin	2	1.9
Wellingtonbridge	1	1.0
Kilkenny	1	1.0

Source: WCC Data, 2009.
*Figures exclude missing responses

Table 14 displays the expenditure levels on clothing and footwear shopping. Nearly half the respondents (49%) spent between €51 and €100 on their clothing and footwear, while 16% spent €0 - €50 when last shopping for fashion goods. The bulk of the households within the survey (87%) spent less than €200 while shopping for clothing and footwear items.

Table 14 **Expenditure on Clothing and Footwear**		
Expenditure Range	**Respondents**	**Proportion (%)**
€0 - €50	16	15.7
€51 - €100	50	49.0
€101 - €150	15	14.7
€151 - €200	8	7.8
€201 - €250	3	2.9
€251 - €300	1	1.0
€301 - €350	1	1.0
€351 - €400	4	3.9
€401 - €500	1	1.0
€501 - €600	2	2.0
Over €600	1	1.0
Source: WCC Data, 2009. *Figures exclude missing responses		

4.2.5 Shopping in New Ross

As Table 15 indicates more than a third of households surveyed had visited New Ross for shopping purposes at least once a week, over the last six months. Almost 15% stated that they travelled to New Ross to shop once a month. Of the individuals who took part in the survey approximately 13% answered they never visit New Ross for shopping purposes.

Table 15 Frequency of shopping trips to New Ross		
Frequency	**Respondents**	**Proportion**
Once a week or more/4+ times a month	36	35.0
Once a month	15	14.6
Never visit New Ross for shopping	13	12.6
Once every two weeks/2 times a month	10	9.7
Once every 6 months	9	8.7
Once every 2 months	7	6.8
3 times a month	6	5.8
Not visited in last 6 months	5	4.9
Once every 3 months	1	1.0
Once every 5 months	1	1.0
Source: WCC Data, 2009. *Figures exclude missing responses		

4.2.6 Internet Shopping

The respondents were asked if they had purchased goods on the internet over the six months. As illustrated in Table 16, over two-thirds of the households (68%) stated that they had not used the internet for shopping purposes. Among the remaining individuals who have purchased goods on the internet, approximately 32%, the most popular items purchased included clothing/footwear (42%), CD's/DVD's (36%) and holidays (36%).

Table 16 Internet Shopping		
Yes/No	**Respondents**	**Proportion (%)**
No	71	68.3
Yes	33	31.7
Total	**104**	**100.0**
Source: WCC Data, 2009.		

As detailed in Table 17, the level of expenditure on internet purchases is relatively low with some 36% of respondents spending between €51 and €100 on their internet shopping and 71% spending less than €150. Not withstanding this it noted that 10% of internet purchases by households were in excess of €501. While internet shopping appears to be on the increase, it remains a relatively small part of overall shopping patterns within the catchment area.

Table 17 **Expenditure on Internet shopping**		
Expenditure Range	**Respondents**	**Proportion (%)**
€0 - €50	6	19.4
€51 - €100	11	35.6
€101 - €150	5	16.0
€151 - €200	2	6.5
€201 - €400	3	9.7
€401 - €500	1	3.2
Over €501	3	9.7
Source: WCC Data, 2009. *Figures exclude missing responses		

4.2.7 Principle attractions and improvements to New Ross

Table 18 below outlines the principle attractions of New Ross stated by the respondents. 38% of households surveyed within the catchment area stated that the good choice of shops was the primary attraction of the town.

Table 18 Principle Attractions of New Ross		
Attractions	**Respondents**	**Proportion (%)**
Good choice of shops	39	37.5
Close to home	20	19.2
Easy to get to by car	13	12.5
Choice of larger stores	6	5.8
Easy to find parking space	5	4.8
High quality of shops	4	3.8
Covered shopping centres	4	3.8
Other	3	2.9
Close to work	2	1.9
Don't know	2	1.9
One particular retailer	2	1.9
Easy to get to by bus	1	1.0
Pedestrianised streets	1	1.0
Easy to park near shops	1	1.0
Nice shopping environment	1	1.0
Total	**104**	**100.0**
Source: WCC Data, 2009.		

The proximity of New Ross to home (19%) and ease of accessibility by (13%) were also key attractions highlighted by respondents. A nice shopping environment (1%) pedestrianised streets (1%), access by bus (1%) and the ease of parking in relation to shops (1%) were ranked lowest on the list of attractions mentioned by the respondents.

Table 19 provides the survey responses of improvements that households indicated they would like to see undertaken in New Ross. Car parking improvements featured prominently with nearly one-quarter (23%) stated that they would like more parking provision within the town, 12% citing free parking as a key improvement required and 9% affirmed that cheaper parking would encourage them to shop in New Ross more often. 22% of respondents stated that department stores or larger stores would improve the attractiveness of New

Ross as a shopping location, while 13% of the responses mentioned that more clothing and fashion shops were needed.

Table 19 **Principle Improvements to New Ross**		
Improvements	**Respondents**	**Proportion (%)**
More parking provision	24	23.1
Department stores/larger stores	23	22.1
More clothes & fashion shops	13	12.5
Free parking	12	11.5
Cheaper parking	9	8.7
Covered shopping centres/malls	9	8.7
Other	5	4.8
Better access by car	4	3.8
Better/more frequent bus service	2	1.9
More quality/designer shop	1	1.0
More facilities for disabled	1	1.0
One particular retailer	1	1.0
Total	**104**	**100.0**
Source: WCC Data, 2009.		

4.3 Shopper Survey

The shopper surveys provide an invaluable estimation as to the amount of the consumer expenditure being attracted to New Ross Town from the surrounding areas.

The shopper survey involved 103 no. on-street interviews at various locations dotted throughout New Ross Town Centre, in September 2009. The locations and number of people surveyed are detailed in the Table 20 below. The respondents were asked a range of questions relating to their shopping trips for different types of shopping.

Table 20 Location of Shopper Surveys in New Ross		
Location	**Respondents**	**Proportion (%)**
South Street	43	41.7
North Street	19	18.4
Quay Street	13	12.6
The Quays	28	27.2
Total	**103**	**100.0**
Source: WCC Data, 2009.		

Table 21 & 23 respectively display the gender and age range of the respondents who took part in the shopper survey. Over 61% of the individuals were female with males shopper accounted for 39% of the survey. The age of the respondents was dispersed across the age ranges with the highest proportion of shoppers aged between 55 and 64 years of age (24%). The second largest category of the individuals surveyed (22.3%) fell within the 35 to 44 age bracket while almost 5% of the respondents were aged over 75.

Table 21 Gender of Respondents Surveyed		
Gender	**Respondents**	**Proportion (%)**
Female	63	61.2
Male	40	38.8
Total	**103**	**100.0**
Source: WCC Data, 2009.		

Table 22 Age Range of Respondents Surveyed		
Age Range	**Respondents**	**Proportion (%)**
15–24	2	1.9
25–34	17	16.5
35–44	23	22.3
45–54	18	17.5
55–64	25	24.3
65–74	13	12.6
75+	5	4.9
Total	**103**	**100.0**
Source: WCC Data, 2009.		

The key findings from this survey are summarised in the paragraphs below under the following headings:

- Origin of Shoppers
- Mode of Transport
- Frequency of Visits to New Ross
- Purpose of Trip
- Main Streets/Shopping Areas Visited
- Shopper Expenditure on Goods and Services
- Principle Attractions and Improvements to New Ross

4.3.1 Origin of Shoppers

The majority of respondents in the shopper survey originated from within the catchment area. This is illustrated in Table 21 below which shows that the almost 75% of the people surveyed were living in the catchment area, with approximately 25% of the respondents travelling from outside the catchment to New Ross Town.

Table 21
Origin of Respondents to the Shopper Survey

Origin	Respondents	Proportion (%)
Within Catchment Area	77	74.8
OutsideCatchment Area	26	25.2
Total	**103**	**100.0**

Source: WCC Data, 2009.

A further breakdown of the origin of respondents is provided in Table 22 with details the town/area that the respondents lived in or nearby. The largest proportion of respondents (46.6%) lived in or nearby New Ross Town. Campile accounted for almost 9% of individuals surveyed, while Wexford Town and Waterford City both accounted for 4.9% of the respondents. 26% of the shoppers survey stated ‘Other’ as a response. The bulk of these ‘Other’ shoppers lived in or in close proximity to; Wellingtonbridge (2.9%), Glenmore (2.9%), Enniscorthy (1.9%) and Foulkesmills (1.9%).

Table 22 Town/Area Respondents lived in or nearby		
Town	**Respondents**	**Proportion (%)**
New Ross	48	46.6
Ballywilliam	2	1.9
Campile	9	8.7
Clonroche	2	1.9
Fethard	4	3.9
Taghmon	1	1.0
Wexford	5	4.9
Waterford	5	4.9
Other	27	26.2
Total	**103**	**100.0**
Source: WCC Data, 2009.		

4.3.2 Mode of Transport

Table 23 illustrates the various modes of transport by which the shoppers surveyed travelled to New Ross. The majority, 79%, of respondents in the survey travelled to New Ross by car while a further 17% walked, with 2% taking the bus to their destination. The remaining 2% stated 'Other' as a response, travelling to New Ross by taxi. Cycling or the use of a motorbike was not identified as a means of transport by any respondents.

Table 23 Mode of Transport		
Mode of Transport	**Respondents**	**Proportion (%)**
Car	82	79.6
Walk	17	16.5
Bus	2	1.9
Bicycle	0	0.0
Motorbike	0	0.0
Other	2	1.9
Total	**103**	**100.0**
Source: WCC Data, 2009.		

4.3.3 Frequency of Visits

Almost 81% of respondents came to New Ross at least once a week. Some 46% visited the town more than 3 times a week either to shop or look around, while 18% travel to the town once a week. Approximately 7% of the shoppers journeyed to New Ross less often than every 2 months. 2% of those surveyed stated that it was their first time to visit the town. Table 24 below provides a breakdown of the frequency of visits given by the respondents.

Table 24
Frequency of Visits to New Ross

Frequency of visits	**Respondents**	**Proportion (%)**
More than 3 times a week	47	45.6
2-3 times a week	17	16.5
Once a week	19	18.4
2-3 times a month	3	2.9
Once a month	3	2.9
Once every 2 months	2	1.9
Less often	7	6.8
First time	2	1.9
Never	3	2.9
Total	103	100.0

Source: WCC Data, 2009.

4.3.4 Purpose of Trip

As part of the shopper survey individuals were asked about was their main reasons for visiting New Ross. Table 25 indicates the responses of the shoppers. Grocery shopping was the primary reason stated by respondents for coming to New Ross with 36% journeying to the town for main food shopping and approximately 14% for other grocery shopping.

‘Other’ was the response given by 17% of respondents and within this category the majority of the responses (totalling almost 9%) stated that work was the main reason for travelling to the town. Banking and financial services ranked high among the shoppers survey with 14% stating that this was the main reason for their trip to New Ross on the day of the survey.

Interestingly less than 6% of the respondents had travelled to New Ross for their clothing and footwear purchases. Only 2.9% of the shoppers had come to New Ross for women’s clothing and 1% stated that children’s clothing was their primary reason for visiting the town. Less than 2% of individuals indicated that footwear was the main reason and surprisingly none of the shoppers sampled had coming to New Ross primarily to purchase men’s clothing. Tourism and day trips accounted for 2.9% of the responses mentioned.

Table 25
Main Reasons for Visiting New Ross

Reasons	**Respondents**	**Proportion (%)**
Main weekly grocery shopping	37	35.9
Other grocery shopping	14	13.6
Clothes - women	3	2.9
Clothes - children	1	1.0
Clothes - men	0	0.0
Footwear	2	1.9
Toiletries/chemist	2	1.9
Bank/financial services	14	13.6
On business	3	2.9
Eating/meal out/snack	4	3.9
Browse	3	2.9
Tourist/Day Trip	3	2.9
Other	17	16.5
Total	**103**	**100.0**

Source: WCC Data, 2009.

4.3.5 Main Streets/Shopping Areas Visited

Shoppers were asked to indicate the primary streets and shopping areas they visited or intend to visit in New Ross. Table 26 indicates that over half, 54%, of respondents travelled or intended to travel to South Street. The Quays was the next most popular destination as indicated by almost one-quarter, 23%, of respondents.

Table 26
Main Streets/Shopping Areas

Reasons	Respondents	Proportion (%)
South Street	56	54.4
The Quays	24	23.3
North Street	12	11.7
Quay Street	5	4.9
Bridge Street	1	1.0
John Street	1	1.0
New Ross Retail Park	1	1.0
Woodbine Business Park	1	1.0

Source: WCC Data, 2009.

Respondents were asked if they intended to visit the New Ross Park located on the outskirts of the town during the course of their visit to New Ross. Almost 30% of shoppers surveyed confirmed that they intended to travel to the retail park, with the remaining 70% of respondents stating they would not visit the retail park. Table 27 provides a breakdown of the retail stores that the individuals stated they planned to visit.

Table 27 Selected Stores within New Ross Retail Park		
Store	**Respondents**	**Proportion (%)**
Tesco	20	83.3
Joyces	3	12.5
Dermot Kehoe	1	4.2
Source: WCC Data, 2009. *It is noted that Dermot Kehoe is located within the Woodbine Business Park. *Figures exclude unspecified stores		

4.3.6 Shopper Expenditure on Goods and Services

In order to get an estimate on the amount of consumer expenditure on goods and services, questions were put to the shoppers in relation to their expenditure on convenience and comparison goods and on services. Tables 28 and 29 below, detail the level of spending both in actual and percentage terms respectively by the sample shoppers.

Table 28 Level of Expenditure (€)				
Origin	**Convenience (Main Food)**	**Comparison (Clothing/ Household)**	**Other (Cinema/ Hairdresser etc.)**	**Total**
Within catchment	5,777	1,933	706	8,416
Outside catchment	670	140	265	1,075
Total	6,447	2,073	971	9,491
Source: WCC Data, 2009.				

Table 29 Level of Expenditure (%)				
Origin	**Convenience (Main Food)**	**Comparison (Clothing/ Household)**	**Other (Cinema/ Hairdresser etc.)**	**Total**
Within catchment	90	93	73	88
Outside catchment	10	7	27	12
Total	100	100	100	100
Source: WCC Data, 2009.				

Table 29 illustrates the percentage expenditure of the respondents based on whether they lived within or outside the catchment area. The vast majority of expenditure on convenience goods (90%) was conducted by shoppers located within the catchment area, with only 10% accounted for by respondents from outside the catchment area. A similar pattern appears in relation to comparison goods with 93% of the expenditure accounted for by residents within the catchment area. Expenditure on services reveals a slightly different story with some 27% of shopper spending on such items conducted by individuals located outside the study area. The percentage expenditure levels indicate that the bulk of the retail spending is conducted by residents of the catchment area with little spending being attracted into New Ross from individuals living outside the catchment area. This minimal trade draw would indicate that the current retail offer in New Ross is not sufficient to entice shoppers to travel to the Town in order to conduct their convenience or comparison shopping.

4.3.7 Principle Attractions and Improvements

Table 30 below summarises the key attractions of New Ross as indicated by the surveyed shoppers. The respondents provided a wide range of reasons for travelling to New Ross; however it was close to home which accounted for over half the responses received (54.4%). Proximity to work was the second most common attraction mentioned by shoppers (15%). Approximately 10% of respondents stated 'other' as their principle attraction which included responses such as; better opening hours, a family tradition of shopping in New Ross and the compact nature of the town centre. 6% of the shoppers stated that the accessibility by car was a positive element while 2.9% of respondents claimed that New Ross has an attractive shopping environment.

Table 30 Principle Attractions of New Ross		
Attractions	**Respondents**	**Proportion**
Close to home	56	54.4
Close to work	15	14.6
Other	10	9.7
Easy to get to by car	6	5.8
Attractive shopping environment	3	2.9
Good choice of cheap/discount shops	3	2.9
Close to hotel	2	1.9
No particular reason/Don't know	2	1.9
Good choice of variety stores	2	1.9
Good choices of places to eat & drink	2	1.9
Good choice of quality/designer shops	1	1.0
A particular store	1	1.0
Total	**103**	**100.0**
Source: WCC Data, 2009.		

In terms of improvements that would entice individuals to shop in New Ross (Table 31) over one-quarter of respondents stated the more car parking provision was required. Cheaper/free parking and more shops accounted for 17% and 16% of the principle improvements respectively. The arrival of a department store also featured prominently as a key improvement that would encourage individuals to travel to New Ross for shopping purposes (10%).

Table 31
Principle Improvements to New Ross

Improvements	Respondents	Proportion (%)
More parking provision	26	25.2
Cheaper/free parking	17	16.5
More shops	16	15.5
Department Stores	10	9.7
Improve access by car	7	6.8
Pedestrianised streets	5	4.9
Improvements to shopping environment /urban design	4	3.9
Other	4	3.9
Better/more frequent bus service	3	2.9
More bars and/or restaurants	3	2.9
More designer shops/boutiques	1	1.0
Covered shopping malls	1	1.0
Fewer empty shops	1	1.0
Improved safety/security during day/night	1	1.0
More cafes	1	1.0
More toilets	1	1.0
More gyms/health club	1	1.0
Nothing/don't know	1	1.0
Total	**103**	**100.0**

Source: WCC Data, 2009.

Section 5 Retail Hierarchy and Identification of Key Retail Areas

5.1 Introduction

The Retail Planning Guidelines recognise that retail functions reflect four broad tiers of urban development. The first three tiers, which include Wexford Town, Waterford and Kilkenny account for 78% of the comparison turnover and two thirds of the convenience turnover.

The guidelines identify a further group of towns which may also be regarded as third tier shopping locations, albeit to a more limited extent. This group includes New Ross and Enniscorthy. These contain convenience goods outlets on a par with the other tiers. Most have national supermarket chain representation.

The fourth tier of the hierarchy comprises a large number of small towns which provide basic convenience shopping and in some cases lower order comparison shopping.

Beyond these tiers, shopping at the most local level is provided by corner shops in suburban areas and village stores and post-offices.

5.2 The role of the Development Plan in defining the Retail Hierarchy

The Retail Planning Guidelines require a development plan and its retail strategy to assess a town in the context of its position in the national retail hierarchy. The plan should indicate the range of retail centres relevant to the town where investment in retail and other development will be promoted and existing provision enhanced. In the case of New Ross this translates to the town centre and neighbourhood centres and to a lesser extent local shops.

5.3 The Existing Retail Hierarchy in New Ross Town

5.3.1 New Ross is classified as a third tier centre in the Retail Planning Guidelines and is the third largest town in County Wexford. The process of determining the retail hierarchy for the town considered the following:

- The need to protect and enhance the vitality and viability of the town centre,
- The principles of sustainability in that retailing should be concentrated as far as practicable in centres that are served by public transport.

5.3.2 The retail hierarchy for New Ross is:

- Town Centre
- Neighbourhood Centre
- Local Shop

5.3.3 Town Centre

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

"The term town centre is used to cover city, town and district centres which fulfil 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".

New Ross town centre is attractive with a colourful array of traditional styled shop fronts dotted along the interlinking narrow streets. The primary shopping frontages in the town centre are concentrated on South Street, North Street, Quay Street and Charles Street with secondary retail frontages onto John Street, Mary Street, the area on South Street between AIB Bank and St. Michael's Theatre and the Quayside.

The streetscape generally comprises of three and four storey buildings overlooking tidy and well maintained footpaths. While street furniture is largely absent for the town centre, some seating areas are scattered along the Quays and adjacent to O'Hanrahan's Bridge. The overall quality of public realm and streetscape in the town centre is generally good, however on the periphery of the town centre particularly along Mary Street and John Street, shop units and building are showing signs of neglect and lack of maintenance which detracts from the aesthetics of the town.

While the town centre has good pedestrian linkages in the form of narrow streets and laneways, many of these are steep in nature with limited passive supervision and as a result are underutilised and ineffective. A key objective of this plan is to make the town centre more pedestrian friendly. In particular the pedestrianisation of South Street would encourage more activity in this area. Redevelopment of brownfield sites will be required to deliver pedestrian linkages as a key feature of design proposals.

The development plan aims to revitalise the town centre through regeneration, in particular the promoting the re-use of existing derelict and vacant buildings and the redevelopment of under-utilised and brownfield sites

5.3.4 Neighbourhood Centres

The Retail Planning Guidelines define neighbourhood centres 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".

There are two neighbourhood centres in New Ross town. The Irishtown neighbourhood centre is located to the east of the town centre. The second neighbourhood centre is located at Rosbercon. Given the limited population of the town, development within these neighbourhood centres needs to be restricted so that is does not impact on the vitality and viability of the town centre.

It is considered that these two existing neighbourhood centres are sufficient to serve the local shopping needs of the residential and working population in these areas. Taking cognisance of the projected population in the town and its environs, it is not considered necessary to develop additional neighbourhood centres.

5.3.5 Local Shops

This level of the hierarchy includes small local shops serving residential areas, shops attached to petrol filling stations and post offices. There are numbers small retail outlets outside of the town centre which serve this retail function.

3.4 Identification of the main retail areas in the town centre

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

Map 4 identifies location of the primary and secondary shopping frontages within this area. The primary shopping streets in particular should be retained as the key locations for retail development.

Retail development should be directed to the town centre in order to:

- Ensure a vital and viable town centre,
- Encourage the reuse of derelict and vacant building stock
- Encourage regeneration of the town centre
- Increase the environmental attractiveness of the town centre,

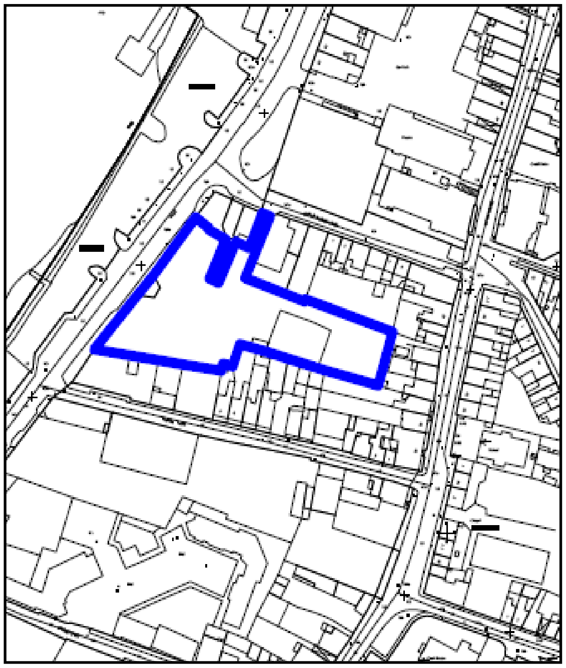
- Achieve the quantum and quality of retailers necessary to minimise spending outflow/leakage,
- Meet the criteria for sustainable development.

5.5 Key Opportunity Sites for Retail Development

A number of key opportunity sites close to the town centre have been identified. These sites have the capacity to absorb future retail development and to provide the size and quality of floor space required by major national and international retailers. These opportunity sites are brownfield or derelict sites that have the potential to deliver medium-large mixed use developments that that will not only expand the choice of shopping available for New Ross and its catchment area but also enhance the physical attractiveness, environmental quality, public realm and vitality and viability of the town centre by improving environmental quality.

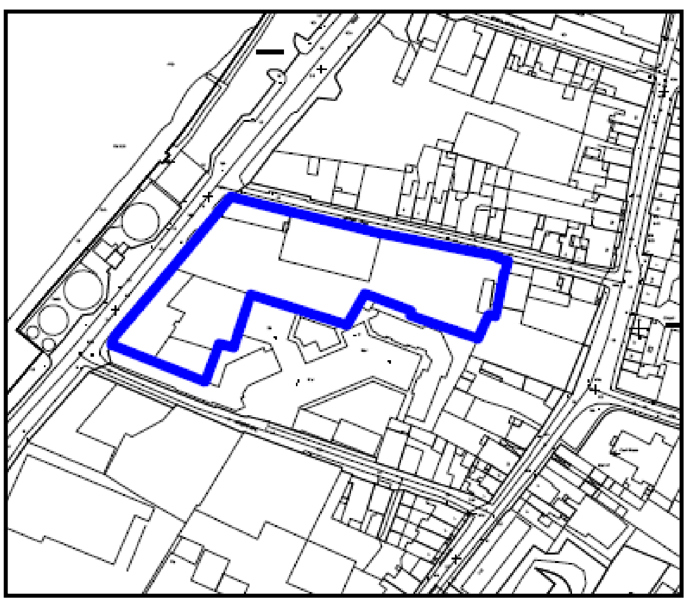
These key opportunity sites are:

- Bond Store Car Park, The Quay
- Site of Billy Foley's Yard and The former Campus Garage, The Quay
- The site of the Old Malthouse and lands currently occupied by Steele and Company (bound to the north by Priory Lane, the west by Lidl).



5.5.1 Lands bound to the north by Sugarhouse Lane and to the south by Marsh Lane (across the Quay from the Dunbrody Ship and Visitor Centre).

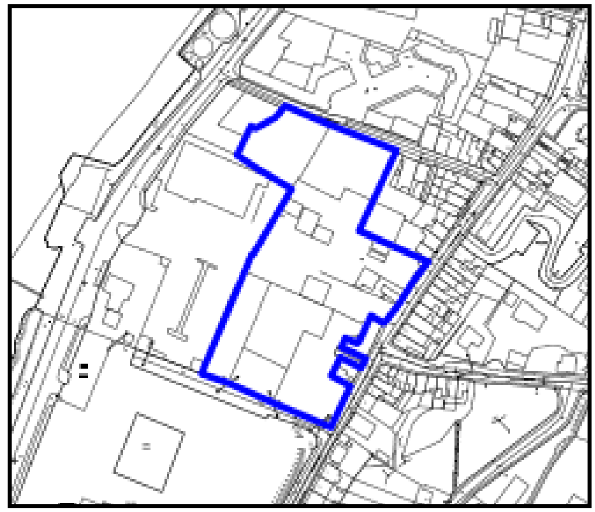
This quayside brownfield land is currently used as a car park and offers potential for a mixed use development The site is opposite the Dunbrody ship and could also be used to develop tourism related services such a cafes, restaurants, art gallery and exhibition areas. The development of pedestrian linkages onto Sugarhouse Lane will provide an important connection to the primary shopping area at South Street



5.5.2 The site of the 'Campus' garage and 'Billy Foley's' yard. These lands are bound to the north by Marsh Lane, to the south by Priory Lane and front onto the Quay to the west.

This is brownfield quayside site. It has permission for a mixed use development. This site offers the opportunity to deliver a contemporary mixed use development.

5.5.3 The site of the Old Malthouse and lands currently occupied by Steele and Company (bound to the north by Priory Lane, the west by Lidl).



There is planning permission on this site for a mixed use development. The site offers an opportunity to deliver a contemporary mixed use development with linkages to the main commercial core, the Quayside, marina and the town park.

Section 6 Quantative Assessment

6.1 Introduction

This section provides a quantitative assessment of the future requirements for retail floor space in New Ross for the duration of the plan period. The following methodology was applied in the assessment:

(a) Identify the catchment area
(b) Estimate the existing and future population of the catchment area
(c) Estimate the expenditure per capita on convenience, comparison and bulky household goods in the catchment area.
(d) Estimate the turnover of existing retail floor space in the town and the potential turnover of permitted but not developed retail floor space
(e) Estimate future available expenditure in the catchment area.
(f) Based on the above assess the requirements (if any) for additional retail floor space in the town.

6.2 Quantitative Assessment

6.2.1 Identification of Catchment Area

Based on drive times of 15, 30 and 45 minutes three catchments were identified for New Ross town. Kilkenny City, Carlow Town, Wexford Town and Waterford City are all located within the 45 minute drive time catchment. These are all superior destination centres for comparison shopping and it is therefore unrealistic to assume that New Ross could compete with these centres with regards to comparison shopping. In addition, it is unrealistic to assume that New Ross would serve the 45 minute catchment for the purpose of convenience shopping with one notable exception of Hook Head. As such this strategy focuses on the 15 and 30 minutes drive time catchments only.

6.2.2 Population of Catchment Area

Census information provided details of the population of the two catchment areas.

Table 32 Population of Catchment Area

	Year				
Drivetime	1986	1991	1996	2002	2006
15	20,372	19,876	20,534	21,047	23,088
30	130,985	130,963	135,022	144,071	154,464

6.2.2.1 Adjustments to Population Figures

While Waterford will have an influence on the 15 minute catchment it is assumed for the purpose of both expenditure and turnover assessments that 100% of the 15 minute catchment is relevant. With regards to the 30 minute catchment, it is noted that Waterford City and Environs, Enniscorthy Town and Environs and Wexford Town and Environs are all located within the catchment in addition to the southern environs of Carlow and Kilkenny. In the interest of achieving a realistic assessment of the extent to which future retail floor space is required to serve the New Ross catchment only, the population of these urban areas have been removed from the 30 minute catchment.

Table 33: Adjustments to Population Figures

Catchment	Population
30 min catchment	154,464
Wexford, Waterford, Enniscorthy, Kilkenny/Carlow (southern environs)	81,057
15 min catchment	23,088
Total	**50,319**

In addition, the population of the 15 minute catchment has also been removed. This allows for a detailed assessment of two catchment areas namely, Catchment A (within 15 minutes drivetime) and Catchment B (greater than 15 minutes but less than 30 minutes drivetime).

Table 34 Populations of Catchment A and Catchment B

Catchment	Population
A - 15 minute drivetime	**23,088**
B - More than 15 less than 30 minute drive time	**50,319**

6.2.2.2 Population Projections

For the purpose of projecting the future population of the catchment area it is assumed that Wexford, Kilkenny, Carlow and Waterford City and Environs have an equal influence on the 30 min drive time catchment area for New Ross. Carlow has no significant influence on the 15 min drivetime while Waterford city and Environs, Kilkenny and Wexford have an equal influence on the 15 min catchment.

Table 35 Predicted Percentage Change for Catchment A (15 min)

Settlement	2002-06	2006-10	2010-16	2016-22
Waterford City and Environs	1.3	1.2	1.2	1.7
Kilkenny	1.7	2.0	2.3	2.0
Wexford	1.3	2.4	2.7	2.75
Average% Increase	1.4	1.8	2.1	2.15

Source: RPG targets

Table 36 Predicted Percentage Change for Catchment B (30 min)

Settlement	2002-06	2006-10	2010-16	2016-22
Waterford City and Environs	1.3	1.2	1.2	1.7
Kilkenny	1.7	2.0	2.3	2.0
Wexford	1.3	2.4	2.7	2.75
Carlow	3.0	1.6	2.25	2.3
Average% increase	1.8	1.8	2.11	2.18

Source: RPG targets

6.2.2.3 Population Growth Scenarios

In accordance with the demographic assessment of the plan three growth scenarios of high, medium and low, based on 150%, 100% and 50% growth respectfully have been applied to the population predictions as follows:

Table 37 Percentage change per annum (High, Medium, Low)

	2006-10			2010-16			2016-22		
Catchment	***H***	***M***	***L***	***H***	***M***	***L***	***H***	***M***	***L***
A	2.7%	1.8 %	0.9%	3.15%	2.1%	1.05%	3.22 %	2.15%	1.07%
B	2.7%	1.8 %	0.9%	3.16%	2.11 %	1.055%	3.27 %	2.18%	1.09%

Table 38 Scenario 1 High Population Growth

Catchment	2006	2009	2011	2016	2019
A	23,088	24,958	26,387	30,416	33,354
B	50,319	54,394	55,756	64,575	70,909

Table 39 Scenario 2 Medium Population Growth

Catchment	2006	2009	2011	2016	2019
A	23,088	24,334	25,270	27,868	29,665
B	50,319	53,036	55,129	60,825	64,803

Table 40 Scenario 3 Low Population Growth

Catchment	2006	2009	2011	2016	2019
A	23,088	23,711	24,170	25,426	26,242
B	50,319	51,677	52,679	55,429	57,241

6.3 Expenditure Assessments

6.3.1 Goods Based Retail Classification System

Annex 1 of the Retail Planning Guidelines promotes the use of a 'goods based retail classification system'. Retail goods categories are defined by reference to the National Income and Expenditure Accounts and can be divided into convenience goods and comparison goods as follows:

Convenience	Food Alcoholic and non-alcoholic Beverages Tobacco Non-durable household goods
Comparison	Clothing and footwear Furniture, furnishings and household equipment (excluding non-durable household goods) Medical and pharmaceutical products, therapeutic appliances and equipment Educational and recreation equipment and accessories Books, newspapers and magazines goods for personal care and goods not elsewhere classified
Bulky goods	Goods generally sold from retail warehouses where DIY goods or goods such as flatpack furniture are of such a size that they would normally be taken away by car and not be manageable by customers travelling by foot, cycle or bus, or that large floor areas would be required to display them e.g. furniture in room sets, or not large individually, but part of a collective purchase which would be bulky e.g. wallpaper, paint.

For the purpose of assessing existing and future expenditure the above goods retail classifications have been employed in accordance with Annex 1 of the Retail Planning Guidelines.

6.3.2 Total Available Expenditure

Figures for the estimated annual household expenditure, specific to the defined catchment areas were provided by GAMMA as follows:

- Household expenditure is based on the 2004/2005 CSO Household Budget Survey updated using the Consumer Price Index (Jan 2010).
- Household expenditure is calculated using household counts and social class data from the 2006 census.

Table 41: Expenditure on Convenience and Comparison goods

Catchment	Convenience(€)	Comparison(€)
A	**87,208,070**	**81,247,175**
B	**555,227,141**	**523,103,302**

6.3.2.1 Total Available Expenditure per Capita

The available expenditure per capita specific to the catchment areas is achieved by dividing the population of the catchment into the total available expenditure.

The expenditure estimates from GAMMA are based on 2010 assumptions and accordingly population projections for 2010 were used. In particular the high growth scenario was used as this is more reflective of the extent of population growth for the catchment experienced over the period 2006-2010. For the purposes of the calculating Total Available Expenditure the following population projections for the entire catchment area were used:

Table 42: 2010 Population projections

Catchment	2010		
A	**H** **25,581**	**M** **24,750**	**L** **23,919**
B	**H** **171,155**	**M** **165,585**	**L** **160,024**

Spends in convenience averaged across both catchments are in the region of €3,326 per capita, while comparison accounts for €3,116 per capita. This is consistent with the findings of the Wexford County Retail Strategy.[1]

Table 43: Available Expenditure Per Capita (€)

Catchment	Convenience	Comparison
A	3,409	3,176
B	3,244	3,056
Average	**3,326**	**3,116**

6.3.3 Turnover of Retail Floor Space

6.3.3.1 Turnover of Existing Retail Floor Space

As part of the retail strategy, a survey of existing retail provision within New Ross was undertaken. The results are as follows:

[1] Wexford County Retail Strategy, Appendix of Wexford County Development Plan 2007-2013.

Table 44: Existing Retail Floor space (sq.m) in New Ross town

Retail Class	Floor area (sq.m)
Convenience	5,705
Comparison	15,841
Bulky	10,999
Vacant	8,802

Notably, the amount of vacant retail space is in excess of the total convenience provision for the town.

The County Retail Strategy provides estimates with regards to turnover per square metre as follows:

Table 45: Turnover per sq.m (€)

Turnover per sq.m (€)	
Convenience	10,000
Comparison	4,400
Bulky	2,400

The turnover per square metre figures provided by the County Retail Strategy has been applied to the existing retail figures in order to estimate the turnover of existing retail.

Table 46: Turnover of Existing Retail Floor Space (€)

Convenience	57,050,000
Comparison	69,700,400
Bulky	26,397,600

6.3.3.2 Potential Turnover of Retail Developments granted Planning Permission but not yet Developed

In addition to existing turnover, it is necessary to consider the potential turnover of developments which have been granted planning permission but have not yet been constructed. This will achieve a realistic assessment of future floor space requirements. However, it should be noted that the realisation of such developments is subject to market demand.

Table 47: **Permitted retail developments but not yet constructed (sq.m.)**

Convenience	275
Comparison	8,044
Bulky	965

Table 48: **Potential turnover of permitted but not yet constructed (€)**

Convenience	2,750,000
Comparison	35,393,600
Bulky	2,316,000
Total	**40,459,600**

6.3.4 Future Available Expenditure

An estimate with regards to future available expenditure is achieved by multiplying population estimates by average spends per capita minus existing and permitted retail turnover. Bulky Goods turnover is assumed at 20% of comparison spend in accordance with the County Retail Strategy. All figures are calculated on the basis of 2010 spends.

Table 49: Scenario 1 Future Available Expenditure (High Growth)

Catchment		2009	2011	2016	2019
A	***Convenience***	25,281,822	30,153,283	43,888,144	53,903,786
	Comparison	-41,680,713	-38,049,910	-27,813,027	-20,348,156
	Bulky	-12,860,278	-11,509,276	-9,393,356	-7,527,139
B	***Convenience***	116,654,136	121,072,464	149,681,300	170,228,796
	Comparison	27,844,936	31,173,664	52,727,300	68,207,596
	Bulky	4,532,012	5,364,467	10,754,640	14,625,980

Table 50: Scenario 2 Future Available Expenditure (Medium Growth)

Catchment		2009	2011	2016	2019
A	***Convenience***	23,154,606	26,345,430	35,202,012	41,327,985
	Comparison	-43,266,172	-40,887,984	-34,286,985	-32,592,740
	Bulky	-13,256,643	-12,662,096	-11,011,846	-10,582,352
B	***Convenience***	112,248,784	119,038,476	137,516,300	150,420,932
	Comparison	24,525,984	29,641,276	43,562,300	53,284,532
	Bulky	3,702,003	4,981,244	8,462,640	10,893,993

Table 51 Scenario 3: Future Available Expenditure (Low Growth)

Catchment		2009	2011	2016	2019
A	*Convenience*	21,030,799	22,595,530	26,877,234	29,658,978
	Comparison	-44,849,091	-43,682,864	-40,491,619	-38418326.4
	Bulky	-13,652,372	-13,360,816	-12,563,004	-12,044,681
B	*Convenience*	107,840,188	111,090,676	120,011,676	125,889,804
	Comparison	21,204,588	23,653,476	30,374,476	34,803,004
	Bulky	2.871.382	3,483,804	5,164,604	6,272,099

Minus figures in the comparison and bulky categories indicate that Catchment A is not sustaining the extent of retailing within these categories alone. As such it can be taken as an indicator of the extent to which trade in these categories is drawn from Catchment B and beyond.

6.3.5 Assessment of Vacant Stock

A total of 28% of all retail stock within New Ross is vacant of which 16 % is afforded to comparison and 12% to bulky goods.

The current level of vacant stock within the town's retail core area is 4,322sq.m which is 35% of the overall retail floor space of the town core and 14% of the town's total retail provision. The extent of vacant floor space outside the town core amounts to 4,970sq.m which is the equivalent of 26% of all available stock outside the town core and 16% of the towns total retail provision.

Currently, 60 % of the town's total retail provision is located outside the town core.

6.3.6 Future Retail Floor Space Requirements for New Ross Town

Estimates on future floor space requirements for high, medium and low growth scenarios are achieved by dividing future available expenditure figures by turnover per square metre figures established by the County Retail Strategy. These figures are indicative and should not function as a cap or upper limit on future retail provision. They should instead function as a guide or indicator of the scale of new floorspace required to meet the needs of existing and future population and expenditure in the town.

6.3.6.1 Scenario 1

Under the high growth scenario, there is sufficient headroom to accommodate an additional foodstore (convenience) of 3,000sq.m floor area over the lifetime of the plan to serve the immediate 15 minute drivetime catchment. With regards to comparison and bulky goods, minus figures recorded specific to the 15 minute catchment indicate an overprovision of floor space within both categories.

When comparing the requirements for comparison floor space across both catchments it is clear that by 2011 the overprovision of catchment A is offset by the demands of catchment B. Between 2011 and 2016 demand for additional comparison floor space will recover and be in the region of 5,662 sq.m. However, considering the level of vacancy recorded by the survey of existing retail floor space provision (8,802sq.m) this demand can be met by existing underutilised floor space.

With regards to bulky goods the overprovision of catchment A will not be offset by the requirements of catchment B until 2016 with demand for additional space being in the region of 568sq.m. Again, given the level of vacancy recorded by the survey of existing retail floor space provision (8,802sq.m) this demand can be met by existing underutilised floor space.

Table 52 Scenario 1 Future Floor space Requirements

Catchment		2009	2011	2016	2019
A	***Convenience***	2,528	3,015	4,388	5,390
	Comparison	-9472	-8647	-6321	-4624
	Bulky	-5358	-4795	-3913	-3136
B	***Convenience***	11,665	12,107	14,968	17,022
	Comparison	6,328	7,084	11,983	15,501
	Bulky	1,888	2,235	4,481	6,094

6.3.6.2 Scenario 2

Requirements under the medium growth scenario highlight sufficient scope for a foodstore of 3000sq.m drawing from both catchments over the lifetime of the plan. Between 2011 and 2016 an additional foodstore would be supported by Catchment A alone.

With regards to comparison floor space the overprovision of catchment A will not be offset by the demands of catchment B until 2016 where additional demand will be in the region of 2108sq.m. This demand can be accommodated by existing vacant units.

For bulky goods under the medium growth scenario, the demands of catchment B will not offset the over provisions of catchment A until 2019.

Table 53 Scenario 2 Future Floor space Requirements

Catchment		2009	2011	2016	2019
A	***Convenience***	2,315	2,634	3,520	4,132
	Comparison	-9,833	-9,292	-7,792	-7,407
	Bulky	-5,523	-5,275	-4,588	-4,409
B	***Convenience***	11,224	11,903	13,751	15,042
	Comparison	5,574	6,736	9,900	12,110
	Bulky	1,542	2,075	3,526	4,539

6.3.6.3 Scenario 3

Under the low growth scenario, there is sufficient headroom across both catchments to accommodate an additional foodstore of 3,000sq.m over the lifetime of the plan. With regards to comparison floor space, the overprovision of Catchment A will not be offset by the demands of Catchment B until 2019. There is no scope for additional bulky goods floor space under the low growth scenario with an over provision of 2891sq.m recorded for 2019.

Table 54 Scenario 3 Future Floor space Requirements

Catchment		2009	2011	2016	2019
A	***Convenience***	2,103	2,259	2,687	2,965
	Comparison	-10,192	-9,927	-9,202	-8,731
	Bulky	-5,688	-5,567	-5,234	-5,018
B	***Convenience***	10,784	11,109	12,001	12,588
	Comparison	4,819	5,375	6,903	7,909
	Bulky	1,196	1,451	2,151	2,613

6.4 Conclusions

The above figures clearly indicate that there is sufficient scope across the high, medium and low growth scenarios to accommodate an additional foodstore (convenience) of 3,000sq.m to serve both catchments. Over the lifetime of the plan, this additional convenience floor space will be supported by Catchment A alone under both the high and medium growth scenarios.

With regards to comparison and bulky goods, there is no demand for additional floor space when the current level of vacancy of existing stock is considered. The extent of over provision across both catchments would suggest that for bulky goods in particular, that trade is currently being drawn from the 15 minute catchments of Wexford, Waterford and Kilkenny. Considering the hierarchy of the National Spatial Strategy the additional demands for bulky goods and comparison goods of Catchment B should be accommodated in these larger urban centres.

Therefore, additional comparison floor space should only be considered within existing vacant stock or as a complementary element of proposals for additional convenience floor space.

Section 7 Policies and Actions

7.1 Introduction

This section sets out key policies to encourage and accommodate future retail development in New Ross.

7.2 Key policies and objectives

I. The town centre should continue to develop its retail function to meet the shopping needs of its existing and future residents.

II. The principal location for future convenience and comparison development will be concentrated in the town centre. Careful consideration should be given to the potential impact of large scale retail development outside of the town centre on the impact on the town centre.

III. The areas designated as primary and secondary retail frontages should be retained as key locations for retail development.

IV. The re-use and redevelopment of existing derelict and vacant building stock in the town centre should be prioritized and encouraged.

V. Existing convenience and comparison shopping floor space on primary shopping frontages should be protected in the interests of maintaining the vitality and vibrancy of the town centre.

VI. Favourable consideration can be given to banks and other professional services, office uses, restaurants, bars, off licences, takeaways and other entertainment on the primary shopping frontages provided:

- The proposals would not individually or cumulatively cause demonstrable harm to the function, character or appearance of the frontage concerned or to the town centre as a whole.
- There would be no significant loss of residential accommodation at upper floor levels.
- The use, taken together with existing or permitted uses would not result in an unacceptable multiplicity of such uses in any one area.

VII. Encourage the use of ground floors of buildings fronting onto The Quay for retail and related uses.

VIII. Continue the environmental improvement of the town centre in order to enhance its attractiveness, vitality and viability. This can be achieved by:

- Encouraging the retention and maintenance of traditional shop fronts and timber sash windows.
- Encouraging property owners in the town centre to keep their properties well maintained.
- Encouraging the use of good urban design in the design of new buildings in the town centre,
- Prioritise the redevelopment of brownfield sites within the town centre-these sites offer the opportunity to deliver modern retail floor space in the town centre.
- Encouraging the development of infill sites and backlands within the town centre as locations for retail, car parking and public spaces.
- Encourage greater pedestrian permeability throughout the town centre and the Quay.
- Promote ‘Living over the shop’ in the town centre to encourage activity/vibrancy.

Section 8 Criteria for Assessing Future Retail Development

8.1 Introduction

This section provides recommendations regarding the assessment of future planning applications for retail development. The assessment of new retail developments shall be carried out in accordance with the requirements of the Retail Planning Guidelines (DoEHLG), January 2005 save as may be amended by any subsequent guidelines issued by DoEHLG with regard to retail development.

8.2 General criteria for assessing future retail development.

8.2.1 All applications for significant retail development should be assessed against a range of criteria, which are set out below.

8.2.2 It is recommended that retail impact statements should not necessarily be required for developments less than 1,000sq.m-net area, unless it is considered that they would have a material impact on the vitality and viability of an existing retail centre.

8.2.3 The Sequential Test

The Retail Planning Guidelines define the sequential approach to the location of retail development as the following[2]:

[2] Retail Planning Guidelines for Planning Authorities, DoEHLG, 2005, pp20-21.

"*The preferred location for new retail development where practicable and viable, is within a town centre (or district centre 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 consideration 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 the 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".

All applications for large retail development (in excess of 1,000sq.m-net area) should be subject to the sequential test. Where an application for a large retail development (in excess of 1,000sq.m-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 developments that are restricted to the sale of bulky goods as it is identified in the Retail Planning Guidelines that such developments are better suited to peripheral locations on the edge of the town centre.

8.3 Impacts on vitality and viability

The Retail Planning Guidelines require an applicant to address the following criteria and demonstrate whether or not the proposal would:

- Support the long term strategy for the town centre as established in the development plan and not materially diminish the prospect of attracting private sector investment into the town centre.
- Cause an adverse impact on the town centre, either singly or cumulatively with recent developments or other outstanding planning permissions, sufficient to undermine the quality of the centre or its role in the economic and social life of the community.
- Diminish the range of activities and services that the town centre can support.
- Cause an increase in the number of vacant property in the primary retail area that is likely to persist in the long term.
- Ensure a high standard of access both by public transport, foot and private car so that the proposal is easily accessible by all sections of society.
- Link effectively with an existing town centre so that there is likely to be commercial synergy.
- In relation to large-scale out of town retail developments, a transport assessment showing how trips to and from the proposed development might affect the road network and public transport links.

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

- That there is a quantative and qualitative need for the development,
- The contribution of the development towards the improvement of the town centre in terms of urban design
- The contribution of the development in improving the competiveness of the town against other competing centres, and
- Compliance with development plan policies and objectives.

8.4 Criteria for assessing particular types of development

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

8.4.1 Convenience Food Shopping

Where practicable new convenience retail development should be located within the 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 3,000sq.m. net sales as stated in the Retail Planning Guidelines.

8.4.2 Discount Food Stores

Discount Food Stores typically have a floor area of approximately 1,500-1,800sq.m and are served by a surface car park with approximately 80-100 spaces. The preferable location for such development is again the town centre, district centre or neighbourhood centre. The potential role that discount food stores have in anchoring small centres or Neighbourbood centres is recognised in the Retail Planning Guidelines and thus it is appropriate to permit such development within neighbourhood centres.

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

8.4.3 District Centres

District centres cater for newly developing residential estates and can play an important role in retail offer, especially in the convenience provision. The development of such centres should only be considered in areas where large scale residential expansion is envisaged. It is unlikely that there will be demand for the development of these centres in New Ross given the envisaged population growth.

8.4.4 Retail Warehouse Parks

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

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

8.4.5 Factory Outlet Centres

The Retail Planning Guidelines state that the success of these centres depends on drawing customers and visitors from a wide catchment area, including tourists, 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.

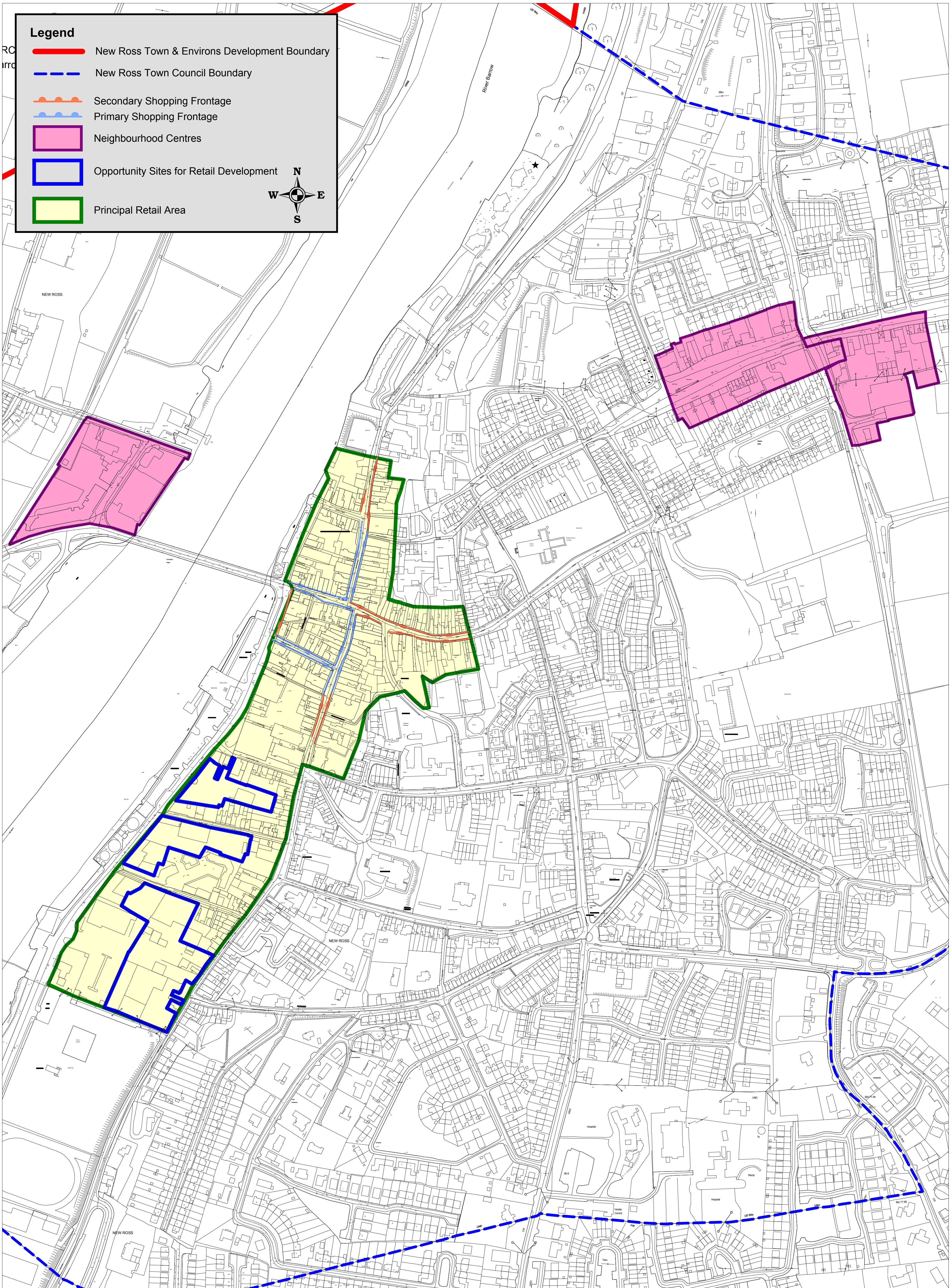
8.4.6 Retail Warehouse Clubs

Retail Warehouse Clubs as defined 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 quantatively. 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 facilities must also be served by adequate car parking.

8.4.7 Local Shops and Petrol Filling Stations

Local shops play an important role in providing for daily top up shopping. The development of such local shops should be encouraged in residential areas in the suburbs of large estates. Such developments should be easily accessible to all sections of society.

Local shops attached to petrol filling stations are a growing sector of the retail market. Care should be given to the development of these facilities on the edge of town centres as they may have a negative impact on established convenience outlets within the town centre. The Retail Planning Guidelines state that the size of such retail units should not exceed 100sq.m.



New Ross Town & Environs Development Plan 2011 - 2017

Title: Principal Retail Areas	
Drawn by: NK	Checked by: PD, DH.
Date: 14.02.2011	Map No: 4