

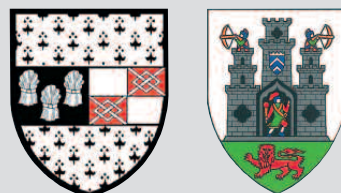
Kilkenny County Development Plan

Kilkenny City & Environs Development Plan

2008 - 2014

Appendix B:

Review of Kilkenny City &
County Retail Strategy 2007



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APPENDICES

Appendix A Retail Impact Assessment Guidance Notes

A Report by

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1 INTRODUCTION

- 1.1 Kilkenny County Council (the County Council) and Kilkenny Borough Council (the Borough Council) adopted as policy the first Kilkenny City and County Retail Strategy into the Development Plans for the City and County in 2002. In both plans a key recommendation was that the Retail Strategy be reviewed after three years. In compliance with this recommendation, DTZ Piedad Consulting was appointed in March 2004 to assist the Councils in their review of the 2001 Retail Strategy for the City and County. The Review of the Kilkenny City & County Retail Strategy undertaken in 2004 (the 2004 Review) was incorporated into the Development Plans by a variation (Variation No.3) in October 2004.
- 1.2 The Councils appointed **DTZ Piedad Consulting** in January 2007 to undertake a second review of the Kilkenny City & County Retail Strategy (the 2007 Review).

THE REPORT

- 1.3 This document provides a review of the Kilkenny City and Retail Strategy (the Strategy). It forms part of the process of the 2008 – 2014 County and Kilkenny City and Environs Development Plans.

CONTEXT

- 1.4 The context for the review of the Strategy is set by the following:
- i. The Department of Environment, Heritage and Local Government (DoEHLG) Retail Planning Guidelines for Planning Authorities, December 2000 (revised in January 2005); and
 - ii. The 2004 Review of the Kilkenny City and County Retail Strategy 2004, as adopted as Variation No 3 in the current City and County Development Plans.
- 1.5 Since the 2004 Review was prepared, a number of key data and other guiding documents have been issued which have implications for the retail planning and potential of the City and County and require to be considered in the 2007 Review of the Strategy. These are:
- National Development Plan 2007 – 2013
 - The 2002 Census of Population
 - The final results of the 2006 Census of Population

- The DoEHLG's review of national and regional population projections issued in February 2007.

1.6 In addition, the commitment in the Development Plans to review the Strategy at this stage reflected the Councils' recognition that the retail sector was one of the most dynamic in the economy and there was a need to ensure that planning policies and objectives and the baseline which they were founded on remained up to date and valid. The brief for the 2007 Review is, therefore, the same as that for the 2004 Review and is as follows:

'The objective of the review of the study is to ensure that both local authorities continue to have a strong and rational basis for their decision making and that there is certainty for the retail development industry within the County.'

1.7 An important part of the review was updating the baseline information in the 2004 Review of the Strategy. This included the following:

- i. Review of population figures and forecasts in the light of the results of the 2006 Census of Population, the May 2005 CSO Regional Population Projections and the recently published DoEHLG national and regional population projections;
- ii. The updating of the floorspace surveys in the 2004 Review, incorporating new floorspace that has been built and is trading for more than a year based on planning permissions that have been granted in the interim;
- iii. The commissioning of new household and shopper surveys to ascertain any changes in shopping patterns and the inflow and outflow of retail expenditure in the County;
- iv. A broad capacity assessment of the requirement for additional retail floorspace looking at convenience, comparison and bulky goods;
- v. Updating the health checks of Kilkenny City, Callan, Castlecomer, Graiguenamanagh and Thomastown and the review of the main competing centres and their county retail strategies;
- vi. Updating the comparative review of other similar counties and their county towns to provide a baseline for assessing how the City and County are performing;
- vii. Publicly advertising the review and requesting submissions from the public, including parties with an interest in the retail planning of the City and County; and
- viii. Holding workshops with Elected Members and Officers of the County and Borough Councils.

OBJECTIVE OF THE REVIEW

- 1.8 The objective of the review is to update the Kilkenny City and County Retail Strategy and incorporate any changes in policy in the emerging City and County Development Plans. The review is required to meet the requirements of the *Retail Planning Guidelines for Planning Authorities* (RPG) as set out under paragraph 36 of the guidelines (as revised) which identifies that the following matters should be included in all future Development Plans:
- *'Confirmation of the retail hierarchy, the role of centres and the size of the main town centres*
 - *Definition in the Development Plan of the boundaries of the core retail area of town centres*
 - *A broad assessment of the requirement for additional retail floorspace*
 - *Strategic guidance on the location and scale of retail development*
 - *Preparation of policies and action initiatives to encourage the improvement of town centres*
 - *Identification of criteria for the assessment of retail developments.'*
- 1.9 With key retail developments underway and emerging in Kilkenny City and the Waterford Environs, the 2007 Review has examined the future potential of Kilkenny City and also has had as an important focus a detailed examination of the County's four District Towns of Callan, Castlecomer, Graiguenamanagh and Thomastown.

STRUCTURE OF REPORT

- 1.10 The structure of the remainder of the report is as follows:
- **Section 2:** provides an overview of the policy framework that underpins the Retail Strategy
 - **Section 3:** outlines the economic context, the population trends, scenarios and forecasts that underpin the capacity assessment
 - **Section 4:** presents an update of the 2004 Retail Strategy baseline retail floorspace and household and shopper surveys
 - **Section 5:** provides the revised floorspace capacity assessment
 - **Section 6:** provides updated health check information on Kilkenny City and the District Towns

- **Section 7:** details our assessment of competing centres and their retail strategies
- **Section 8:** gives our comparative assessment of the City and County's performance against other similar counties and their county towns
- **Section 9:** examines the basis for the retail hierarchy and the core retail area
- **Section 10:** summarises the key issues and considerations in relation to the main centres in the County and their implications for the City and County Retail Strategy
- **Section 11:** outlines the aims, strategic framework and policies and proposals of the City and County Retail Strategy.

2 POLICY REVIEW

2.1 There is a large number of policy frameworks that inform the review and preparation of a retail strategy. These span national, regional and local policy levels. In this section, we identify the current and emerging relevant plans, policies and proposals across the hierarchy in the following order:

- i. National;
- ii. Regional; and
- iii. Local.

NATIONAL

2.2 There are a number of national level plans, strategies and guidelines that are of particular relevance to the shape of the City and County's Retail Strategy and the direction that it takes. These are:

- Retail Planning Guidelines for Planning Authorities 2005
- National Development Plan 2007 – 2013
- National Spatial Strategy 2002.

Retail Planning Guidelines for Planning Authorities

2.3 The RPG were issued in December 2000 as Ministerial guidelines under Section 28 of the Planning and Development Act 2000 (Planning Act 2000). Section 28 indicates the planning authorities and An Bord Pleanála (the Board) shall have regard to Ministerial guidelines in the performance of their functions. They were revised in January 2005 to incorporate specific provisions for large scale retail warehouses being permissible in Integrated Area Plan (IAP) areas in National Spatial Strategy (NSS) Gateways, subject to particular assessment criteria being met. The revised provisions are, therefore, not applicable to any part of the City or County.

2.4 The RPG were prepared in response to the increasing pressure for retail development in recent years. They sought to provide a framework to enable the future development that is projected to be accommodated in a way that is '*efficient, equitable and sustainable*'.

- 2.5 The guidelines recognised that the detail and complexity required to address retail planning issues varies depending on the extent of urbanisation, population density and number of centres. They state that:

'In Metropolitan Dublin, Cork and other major urban centres, there is a far greater requirement for detailed development plan policies than in largely rural centres.'

- 2.6 As the Kilkenny County is part of the Greater Waterford Area in the RPG, the Borough and County Council are required to prepare a **detailed retail strategy** which is more detailed than that necessary for more rural locations in the country. This was the basis on which the 2001 City and County Retail Strategy and the 2004 Review were prepared and is that which forms the framework for this Review.
- 2.7 The RPG also highlight that in some locations it will be necessary for counties to co-operate with each other in the preparation of retail strategies and identify where this would be appropriate. The Greater Waterford Area is identified as one such area in the RPG and comprises the counties of Kilkenny, Waterford and Wexford plus the cities of Kilkenny and Waterford. Although there is recognition by the different local authorities in the wider South East Region of the value of taking a more co-ordinated strategic regional approach to retail planning and a commitment to prepare a combined strategy for the area, this has not yet happened to date. However, the need for such an approach was included as a policy objective in the 2004 Review of the Strategy.
- 2.8 Whether a detailed or general strategy is necessary, the retail policies and proposals that emerge from the retail strategies require to be incorporated into development plans. The matters that are to be included in all future development plans are those set out under paragraph 36 of the RPG which have been identified in paragraph 1.8 as the framework for the review of the Strategy.
- 2.9 The RPG were published to provide a comprehensive framework to assist local authorities in preparing development plans and assessing planning applications for retail development and also to help retailers and developers in formulating development proposals. Their importance in respect of the Retail Strategy and its subsequent reviews is summarised in the 2001 Strategy and remains the foundation of retail planning in the City and County.

National Development Plan 2007 – 2013

- 2.10 The National Development Plan (NDP) *'Transforming Ireland – A better quality of life for all'* sets out an ambitious and coherent seven year investment programme of €184 billion supported by a quantified multi-annual investment commitment. Of specific importance to the City and County and their accessibility and connectivity,

the largest share of investment is programmed for economic infrastructure. Within this priority spending area, some €32 billion is to be invested in transport with over €13 billion programmed for the upgrading and building of new national roads, €12.9 billion for public transport for the Greater Dublin Area (GDA) and €4.3 billion for non-national roads. In addition to this, the delivery of road and public transport systems will run in line with the timetable set out in the Department of Transport's (DoT) Transport 21.

2.11 At a regional level, the NDP focuses on strengthening gateways and hubs designated in the NSS. Kilkenny City is designated as a 'Hub' under the NSS. Specifically, it has been targeted for balanced patterns of growth, supported by towns that link the capabilities of the gateways to other areas. The NDP states that in order to drive the process of strengthening the hubs, it will be vital that national investment is partnered with local vision and leadership and the attraction of private investment. Investment priorities for hubs under the NSS include the following:

- i. Delivery of enhanced connectivity in terms of the rollout of Transport 21 in roads, public transport and in further support for regional air services and the continuing delivery of high capacity broadband under the MANS programme;
- ii. Continuing the progress being made in the physical regeneration and renewal of town centre areas through the urban renewal and social housing investment programmes;
- iii. Strengthening the hubs as centres for high levels of regional innovation through, where appropriate, the strategic innovation fund, third-level education and lifelong learning and to ensure that the hubs and their wider regions can participate and benefit from Ireland's transition towards a knowledge based economy; and
- iv. Measures to ensure strong linkages between the hubs and their wider rural catchments through targeted investment, such as that in strategic non-national roads, rural public transport and rural broadband initiatives.

National Spatial Strategy

2.12 The NSS was published by the DoEHLG in November 2002. Following on from Government recommendations, as outlined under the NDP, the NSS provides a national planning framework for the future spatial development of Ireland over the period to 2020. Balanced regional development is the core theme of the NSS which founds its policies on:

- A better balance of social, economic and physical development
- Population growth between the regions
- A better quality of life for people
- A strong, competitive economic position
- An environment of the highest quality.

- 2.13 The strategy states that in order to achieve balanced regional development, a greater share of economic activity must take place outside the GDA. Founded on these principles, 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. Consistent with the NDP, these centres have been divided into two categories – Gateways and Hubs.
- 2.14 As highlighted, Waterford City was designated as a Gateway in the NDP and is the only Gateway in the South East Region. The growing strength of Waterford suggests that there is potential to attract development from the GDA through enhancing the size and concentration of population and the level of services and facilities that could be sustained. It is identified that this critical mass can be achieved with the cooperation and supporting infrastructure within the Hubs, County and Larger Towns in the Region.
- 2.15 Nine 'strategically placed' Hubs, as well as two 'Linked Hubs', have been designated in the NSS to support and be supported by the Gateways and to provide the link with rural areas. Kilkenny City, along with Wexford Town, has been designated as a Hub. Within the South East Region, the NSS encourages the growth of a Waterford/Wexford/Kilkenny 'growth triangle' which 'needs to be supported by a coordinated and integrated approach that builds on their complementary strengths'.
- 2.16 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. The Gateway and Hub framework is set to provide a 'strong platform' for balanced development throughout the Region. Appendix V of the NSS sets out the rationale for Kilkenny's designation as a Hub as follows:
- 'Kilkenny is a centre with a substantial population base, a highly successful tourism sector, improving accessibility due to a location on the national road and rail networks with links to an international seaport, and a strategic location between Dublin and Waterford. Kilkenny also has substantial capacity for development in land and water services terms and is a centre with both the critical mass and distance from Dublin to be capable of being successful in sustaining itself in employment terms, thereby resisting the tendency towards commuter driven development.'*
- 2.17 Thomastown is the only other town in the County which is recognised in the NSS. It is identified as a town of the same importance in the Region as Tipperary Town, Cahir and Cashel (South Tipperary), Bagnelstown and Tullow (Carlow) and Gorey (Wexford), being a town with a population of 1,500 – 5,000. The strategy advises that the strengths of these towns should be capitalised on through, amongst other things, planning and development promotion activities.

- 2.18 The NSS provides the framework for the preparation of Regional Planning Guidelines by each Regional Authority in the State. These are examined in the context of the review below. Of particular importance to the review is that, so far as is practicable, Section 9(6) of the Planning Act 2000 requires development plans to be consistent with the NSS and this has been fully embraced in the preparation of the review of the City and County Retail Strategy.

REGIONAL

- 2.19 At the regional level, there are two key policy frameworks that are of particular importance to the planning and development of the City and County and therefore this review. These are:
- i. Regional Planning Guidelines for the South Eastern Region 2004; and
 - ii. Waterford Planning Land Use and Transportation Study 2001.

Regional Planning Guidelines for the South East Region

- 2.20 Under Section 24(4) of the Planning Act 2000, the South East Regional Authority has prepared Regional Planning Guidelines for the South Eastern Region (SERPG) which is the Region within which the City and County sit. There are four other counties that with Kilkenny form the South East Region. These are: Carlow, South Tipperary, Waterford and Wexford. The guidelines provide the spatial framework for the Region to 2020 and are intended to strengthen local authority development plans by addressing issues of settlement, transportation, industrial development, community facilities and environmental protection. Importantly, as with the NSS, development plans have to be compliant with the SERPG and, as such, they are an important material consideration in the review of the City and County Retail Strategy.
- 2.21 The guidelines outline some strategic goals for Waterford as the Gateway which include it becoming a city of 70,000 with in excess of 50,000 living within a 20 minute commuting belt. They also state that linkages between the Gateway and its Hubs, County Towns and larger settlements need to be enhanced to enable better integration of land use and transportation within the Region. It is envisaged that 35,000 new jobs can be created over the period of the guidelines in various economic sectors, including the retail sector.
- 2.22 After Waterford City, Kilkenny is the second largest urban settlement in the Region. The SERPG set a Regional Settlement Strategy and re-affirm the importance Kilkenny's role as prescribed in the NSS. In this capacity, Kilkenny is set to grow as one of the '*strategic urban centres that support and are supported by the Gateway and reach out to wider rural areas of the region*'. Furthermore, the SERPG target the Hubs '*for significant levels of growth*'.

- 2.23 The SERPG identify Thomastown as the next most important town to Kilkenny in the County in the Regional Settlement Strategy. It is designated as a 'District Town' in the guidelines. The SERPG define District Towns as towns with a population between 1,500 – 3,000. These towns will perform an important role in driving the development of a particular spatial component of the overall Region. Thomastown is recognised as a District Town that has well developed services and community facilities capable of supporting additional residential development in the Carlow/Kilkenny area. Other towns at this fifth level in the Regional Settlement Strategy are Cahir, Cashel, Bagenalstown, Tullow and Dunmore East.
- 2.24 In terms of retailing, the guidelines highlight how the retail sector '*contributes significantly to the growth in employment and to the economic growth of the region*'. In examining and assessing this, they:
- Identify how larger retail outlets are concentrated in cities and towns with the greatest concentration in Waterford City
 - Highlight the fact that leakage of retail expenditure outside of the Region is a problem which has to be addressed
 - Summarise the Region's strengths and opportunities and point towards the developing retail sector as an opportunity to reduce expenditure leakage.
- 2.25 The SERPG set a number of **Strategic Goals** for the future development of the Region, which include:
- i. To support the development and combine the strengths of the cities and towns in the Region, to achieve sufficient critical mass to compete with larger urban centres. This includes planning and providing for population growth in each of the two Hubs of Kilkenny City and Wexford Town;
 - ii. To broaden and strengthen the economic base of the Region by seeking to achieve greater economic competitiveness and growth, with associated social progress;
 - iii. To progress towards an accessible Region with efficient and fully integrated transport systems; and
 - iv. To maintain the character and vitality of rural areas, promote rural sustainability and conserve the Region's characteristic landscape and heritage assets.
- 2.26 In terms of implementing the guidelines, nine critical enabling investment priorities have been identified, the following of which relate directly to the City and County. These are:
- **CEIP1:** *Development of a high quality dual carriageway roadway, improved public transport services, road and rail, along the central strategic transportation corridor, as identified in Section 3 of the National Spatial Strategy, to link Waterford City with Dublin via Kilkenny and Carlow.*

- **CEIP2:** *Supporting the development of the internal road network between the Gateway and the Hubs in the region and between the Gateway, Hubs and the County Towns. Development of the N8 South West Corridor that links Limerick and Cork to Dublin via Cahir, Cashel and Urlingford.*
- **CEIP5:** *A targeted land servicing measure, in terms of water services and access investments to release serviced land for residential and commercial purposes in the Gateway, Hubs and county towns.*
- **CEIP7:** *Targeted investment in the development of first class business locations at the Gateway, Hubs and County Towns with first class infrastructure capable of facilitating new indigenous start-ups in advanced sectors and attracting Foreign Direct Investment against competing locations nationally and internationally.*

2.27 The guidelines are, therefore, very important to the future planning of the City and County. They provide a longer term time horizon than what has guided development plans to date and this is important when looking forward to retailing and retail potential. The SERPG are, thus, are important to the review of the Retail Strategy.

Waterford Planning, Land Use and Transportation Study

2.28 The Waterford Planning Land Use and Transportation Study (PLUTS) was commissioned by Waterford City Council in February 2001. It was commissioned 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 the direction of the NSS and supports and fosters balanced spatial development at a local, city and regional level. Areas outside of Waterford and its immediate environs within Waterford and Kilkenny were not considered in any detail in the study. However, two policy areas are of particular importance to the review of the Strategy. These are:

- i. Settlement planning; and
- ii. Retail objectives.

2.29 The PLUTS envisages Waterford and Environs accommodating an additional 29,500 people by 2020 and the entire PLUTS area growing to a total population of 163,278 over this period. It proposes a compact, vibrant, sustainable spatial framework for the growth of the city and its environs. The PLUTS identifies five neighbourhoods in Waterford and a sixth in the Ferrybank area. This area is north of the River Suir and part of which is within the County. These neighbourhoods are to be the focus of new residential development. On the northern side of the river new residential areas will include Ferrybank, Rockshire, Abbeylands and Christendom. The PLUTS promotes that these new residential areas should be strongly linked to the retail, commercial and service opportunities in the city centre via a high quality public bus based transport corridor called the Green Route.

2.30 The retail policy objective of the PLUTS study is:

'To strengthen the retail position of the City and to ensure the maintenance of a healthy City Centre'.

2.31 The PLUTS states that this policy objective was informed by *'the well defined and clearly articulated policies within the development plan'* (Waterford City Development Plan), requisite zonings and the large volume of additional space in comparison shopping which will be required in the city over the study period, including retail warehousing. In support of the concept of a compact city, sustainable development and provisions of the RPG, it is proposed that the majority of new comparison shopping should be retained within the city centre and phased in accordance with the requirements of the development plan.

2.32 It states that locations which need to be further investigated for comparison shopping include the City Centre, South Quays and North Quays. In relation to convenience shopping, it is proposed to restrict large scale floorspace outside the city centre and provide appropriately scaled local retail and service centres in existing and new residential areas, in accordance with the relevant development plan and/or any joint retail strategy. The PLUTS states that bulky comparison shopping is still largely city based although in the future demand will have to be met in out of centre locations to allow for car based access with opportunities being provided along the Waterford Bypass and the outer ring road. At present, these locations are not encouraged by the current development plan. However, the PLUTS states that the Joint Retail Strategy proposed (as noted above under the RPG) for the Greater Waterford Area will identify the number and locations of these retail opportunities. In addition to the Joint Retail Strategy, the PLUTS states there must also be integration of housing and office development policies across city and county boundaries.

2.33 The PLUTS, therefore, reflects the existing retail planning policies of the Waterford City Development Plan. Issues relating to the timing and location of retail warehousing north of the river will require to be addressed in the preparation of the Joint Retail Strategy and are noted in the review of the Kilkenny City and County Retail Strategy.

LOCAL

2.34 At the County and more local level, the plans and strategies which have an influence, or will have an influence, on the Retail Strategy and the outcome of the review of the Strategy are:

- Kilkenny County Development Plan 2002
- County Kilkenny Environs Development Plan 2002
- Kilkenny City and Environs Development Plan 2002
- Kilkenny City Centre Local Area Plan 2005
- The Environs of New Ross Local Area Plan 2005
- Waterford City Development Plan 2002
- Draft Waterford City Development Plan 2008
- Other development plans/local area plans
- Kilkenny 2002 – 2012: A Strategy for Economic, Social and Cultural Development.

Kilkenny County Development Plan: Volume 1

2.35 Although the County Development Plan is currently under review, the current plan continues to have weight in the formulation of the retail policies and objectives of the Retail Strategy. Volume 1 of the County Development Plan provides the statutory framework for development throughout the County. It sets out the County wide retail policies as derived from the 2001 City and County Retail Strategy and incorporates the 2004 Review as Variation No 3 to the Plan. In addition, there are other policies in the Plan which will have an influence on the County's retail sector. In summary, these include:

- i. To facilitate the development of the existing towns and villages and smaller settlements of the County by providing services and amenities in order to consolidate and strengthen the population base in those settlements and facilitate the maximum economic use of their physical and social infrastructure;
- ii. To retain the rural population of the County and to support the sustainable development of rural communities and their services (such as schools, small shops etc.) in order to maintain the vitality of such communities;
- iii. To facilitate the development of the national road network in accordance with the NDP and with the policies of the National Roads Authority (NRA) as they apply to the provision of national routes from Dublin to Cork (N8) and Dublin to Waterford (N9 & N10) and ancillary roads and services;

- iv. Seek the improvement of rail services to and from Kilkenny City, in particular the provision of commuter services between major urban centre and towns within the County and the Region and to and from Dublin City for the benefit of the commercial and tourism sectors;
- v. To encourage the use of public transport that is accessible by all, in preference to the private car, on grounds of sustainability and proper planning and development;
- vi. To contribute to the vitality of the towns and villages in the County's rural areas through the Urban and Village Renewal Programme;
- vii. To ensure that the Council's housing policy and objectives are linked with the aim of improving the quality of life and the attractiveness of the County's towns, villages and open countryside;
- viii. To improve the attractiveness of the built environment in rural towns and villages as places in which to work and live and as locations for industry, services and tourism investment;
- ix. To investigate the development of a comprehensive bus service for Kilkenny City and Environs; and
- x. To extend the eastern bypass (Kilkenny City) from the Dublin Road (N9) to the Castlecomer Road (N77) within the period of the Plan.

Kilkenny County Development Plan: Volume 2

- 2.36 Detailed policies are provided for Callan, Castlecomer, Graiguenamanagh, Thomastown, Waterford City Environs and the Environs of New Ross in Volume 2 of the County Development Plan. Within each of the development plans for the District Towns, each settlement's role in the retail hierarchy, the thresholds above which retail development should be assessed and a general policy to maintain and enhance its role as local service centre are stated. Of the four towns only Thomastown includes an additional policy to widen the extent of specialist retail uses within the town.
- 2.37 The Waterford Environs section of Volume 2 proposes a District Centre at Ferrybank East along with new local centres at Rockshire, Belmont and Rathculliheen/Abbeylands. It states that the new District Centre at Ferrybank East will cater for the planned 12,000 population for the area. The Plan recognises that there are some existing neighbourhood facilities at Rockshire but, in view of the nature of the area and the growth in population envisaged, some additional services may need to be provided. Both Belmont and Rathculliheen/Abbeylands neighbourhoods are envisaged to each accommodate a population of 4,000. Currently, there are no facilities in these areas and this will require to be responded to as their populations grow. Only limited shopping and local services are envisaged in all of these neighbourhoods with the District Centre in Ferrybank East being

identified and designated as the main centre for the area. In accordance with the objectives of the Plan, a District Centre is now under construction in Ferrybank.

Kilkenny City & Environs Development Plan

- 2.38 As with the County Development Plan, the City and Environs Development Plan is under review. However, its policies and objectives continue to have weight and importance in the formulation of retail policies and objectives. The Plan incorporates the retail policies, objectives and recommendations of the 2001 City and County Retail Strategy and the 2004 Review was adopted as Variation No 3 to the Plan.

Kilkenny City Centre Local Area Plan

- 2.39 A Local Area Plan (LAP) for the City Centre has been prepared in response to the major challenges and opportunities that Kilkenny City Centre faces in terms of its future development. The Plan was adopted in 2005. It seeks to provide an integrated strategy for the future sustainable development of the City Centre to ensure its continued vitality and viability and to strike a balance between preserving its architectural and archaeological heritage and facilitating modern living. The Plan sets out guidance for the future of the City Centre in relation to issues such as traffic management, car parking, urban design, retail development and open spaces.
- 2.40 It is stated that the LAP, along with the City and Environs Development Plan, will be the main instrument to guide and control development in the area and thus it has key implications for the future growth of the City. Specifically in relation to retail development, the Plan seeks to maintain and enhance the vitality and viability of the Core Shopping Area of the City Centre and sets out policies to achieve this, such as the control of the types of retail development to be permitted at ground floor level.

The Environs of New Ross Local Area Plan

- 2.41 The New Ross Environs LAP was adopted by the County Council in 2005. At present, the Plan Area is relatively undeveloped but the LAP provides for residential development with supporting small scale local services. A local service centre is zoned on lands proposed for residential development in the vicinity of Millbanks. The scale of this is restricted as the LAP recognises and supports the role of New Ross Town Centre as the location for the majority of convenience shopping. This is set out in the following policy objective of the Plan:

'To restrict the development in the local service centre to locally required services that are appropriate to the level of residential development being serviced and that will not have a negative impact on the vitality of the New Ross Town Centre.'

- 2.42 The Wexford County Retail Strategy has been completed and reviewed since the 2004 Review of the Kilkenny City and County Retail Strategy. It thus requires to be considered in terms of its potential implications for the LAP area. The Review of the Wexford Retail Strategy highlights the fact that recent developments in the town centre have led to a loss of retail floorspace but that the environs of the town have seen a significant amount of retail development including an Aldi and a Tesco store as well as retail warehousing. These new developments are on the eastern side of the town. As such, the western area of the town, including the environs, is poorly served by shopping and other local services. The LAP sets down policies which will serve to sustain this position over the period of the Plan. In respect of meeting the needs of the existing and expanding population, this position requires to be monitored to ensure that needs are met in a way that is *'efficient, equitable and sustainable'*.

Waterford City Development Plan

- 2.43 The 2002 Waterford City Development Plan sets out the development strategy for Waterford City and its environs. The Plan is currently under review. Although Waterford City Council has no jurisdiction or planning powers for the part of Waterford City Environs that are located in the County, the City Development Plan incorporates a retail strategy which designates Ferrybank for a Local (or Neighbourhood) Centre. The policy for Local (Neighbourhood) Centres outlines floorspace limits for retail provision, with such centres restricted to a maximum of 650m² net retail sales space, of which not less than 90% should be devoted to the sale of convenience goods. In relation to retail warehousing, it is stated in the Plan that the provision of retail warehousing in the city will be strictly controlled. A clear set of criteria has been identified that need to be satisfied in order for retail warehousing to be permitted.

Draft Waterford City Development Plan

- 2.44 As stated above, the Waterford City Development Plan is under review and this covers the period 2008 – 2014. The Draft Plan and proposed amendments to it are currently on public display. The Draft Plan incorporates a retail strategy which recognises the role of Waterford City as the primary retail centre in the Region and the focus for comparison retail floorspace. In relation to retail warehousing, the Plan indicates that there will be expansion in expenditure in categories of goods that may not be readily accommodated within the central shopping area. It is stated that unless the range of goods on offer in retail warehousing floorspace is restricted to bulky goods then they can have an undermining effect on the city centre. Therefore, sites outside of the city centre have been identified for retail parks but it is stated that strict controls will be implemented on the volume of floorspace to be provided, on the range of goods to be offered and on the size of individual units.

- 2.45 Specific sites have been identified for the future provision of neighbourhood and district centres to cater for the suburban populations. Reference is made in the Draft Plan to the Ferrybank area and the developing suburbs of Abbeylands and Rockshire which are located in County Kilkenny and that these areas will cater for the residential population to the north of the River Suir.

A Strategy for Economic, Social and Cultural Development

- 2.46 The County Development Board (CBD) strategy describes Kilkenny City as a major centre for financial and business services set within a strong agricultural area in the South East Region. It identifies that much of the City's workforce reside in the County and, with other surrounding towns such as Carlow, Athy, New Ross, Carrick-on-Suir, Clonmel and Waterford City, it has a commuting hinterland of some 250,000.
- 2.47 The strategy recognises that the County has a distinctive settlement pattern characterised by one large town with a high proportion of well dispersed small towns and villages. The bulk of growth is envisaged to take place in the environs of Kilkenny and Waterford with limited additional growth also being accommodated in Thomastown and Callan. It highlights that the rural nature of the County presents challenges for the equitable delivery of public services to rural communities.

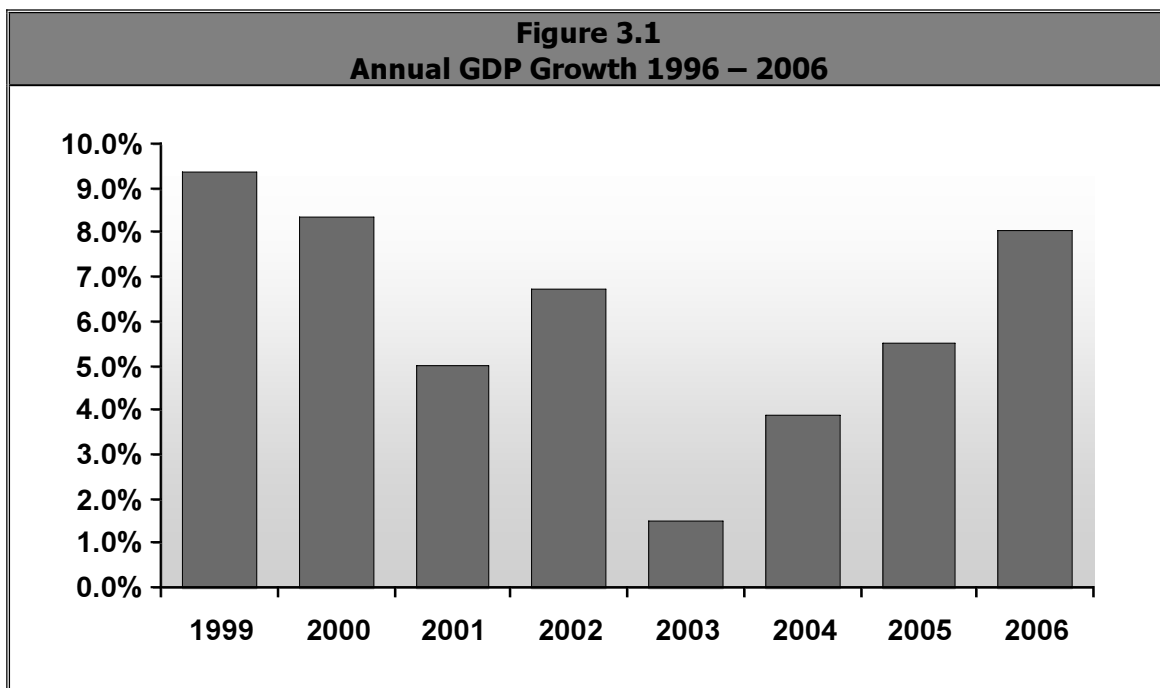
3 NATIONAL ECONOMY, POPULATION TRENDS, ESTIMATES & FORECASTS

3.1 This section reviews the baseline economic context for the review of the Retail Strategy by addressing trends in the national economy and population growth. This has informed our population forecasts in the review.

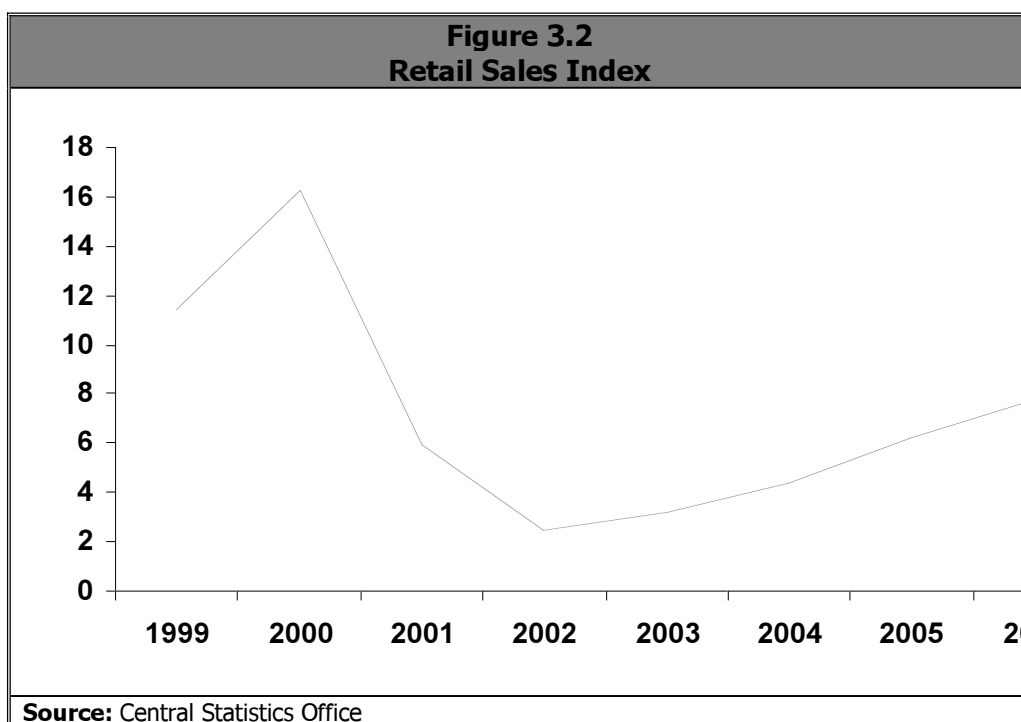
NATIONAL ECONOMIC PROFILE

3.2 As is well documented, Ireland has experienced a period of significant economic growth. While the economy has recently slowed down, it remains one of the fastest growing economies of the European Union (EU). This economic growth took place against a backdrop of low inflation and falling interest rates. Global economic growth was strong, particularly in the US, and Ireland was a substantial beneficiary of Foreign Direct Investment (FDI) from the US throughout this period. The quality of jobs created primarily provided employment for graduates and highly skilled workers. This resulted in higher average incomes being paid. The effect of this was that there was a substantial decline in people leaving the country in search of employment and large inflows of nationals returning to take up jobs in the booming economy.

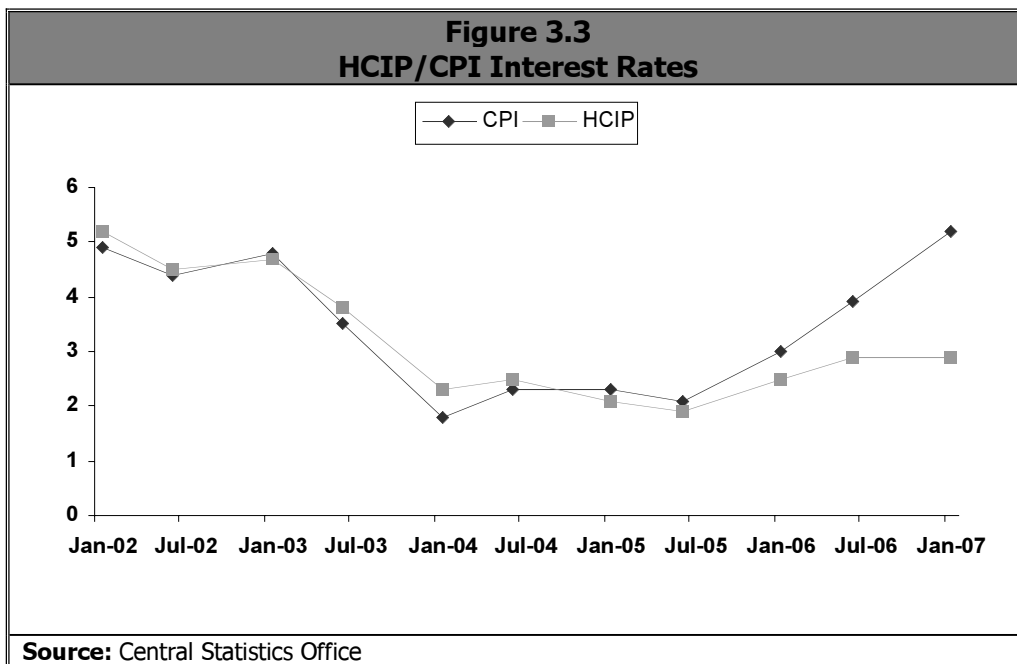
3.3 Economic growth in Ireland is strongly influenced by the Government's low taxation policy. Corporation Tax of 12.5% is central to the competitiveness of the Irish economy. In tandem with this, the levels of personal income tax decreased. This was the basis for substantial rises in personal disposable income which fed through to growth in retail sales and increasing availability of income to invest in housing.



- 3.4 Figure 3.1 shows that annual Gross Domestic Product (GDP) growth rates are recovering again after a slump in growth in the early years of the millennium. The GDP growth figure of 8.1% for 2006 compares very favourably with a growth rate of 3.3% observed for the Euro zone as a whole.
- 3.5 A further area of improvement in the current economy is the strengthening of export performance. Weakness of exports, which contracted by 12.4% on a year-on-year basis in 2003 are now growing with a year-on-year increase of 2.8%, 2.9% and 2.1% reported in 2004, 2005 and 2006 respectively. This provides a sound platform for external trade for the remainder of 2007 and is evidence of the Irish economy's continuing international competitiveness. Imports fell by a very significant 14% in 2003 but have rallied since then posting strong growth to bring imports above the pre-2003 level with imports rising by 6.8%, 12.5% and 5.2% in 2004, 2005 and 2006 respectively.
- 3.6 Figure 3.2 illustrates that the latest retail sales figures show annual growth of 7.8%. This is another signal that the economy is growing strongly after the downturn at the turn of the century. Consumer expenditure remains strong despite rising interest rates due to the maturation of SSIA accounts. The improving outlook for consumers has also been assisted by the turnaround in the unemployment rate which has started to decline since its August 2003 peak of 4.9%. By 2006, the rate stood at 4.4%. This is almost at the level which would be termed 'full employment'.



- 3.7 Rising interest rates, as illustrated in Figure 3.3, have also increased inflation growth in Ireland. This was pushed up above the EU average in 2006 due mainly to increase in mortgage repayments following interest rate rises in 2006. While the interest rate rises are not included in the EU measure of inflation (Harmonized Index of Consumer Prices (HICP)), they are in Ireland and this resulted in the Irish Consumer Price Index (CPI) increasing from 2.5% to 4% cent in 2006.



Demographic Influences

- 3.8 Throughout this period of strong economic growth, demographic influences have played a key part in property market demand. The population increased steadily from a low level in the early 1960s and growth became particularly apparent throughout the 1980s and onwards. In 1971, the population of the country was under 3 million. By 2002, this had increased to over 3.9 million and the results of the 2006 Census of Population reveal that the population is currently over 4.2 million. As a consequence of the stronger growth than envisaged, the DoEHLG issued revised national and regional population projections in February 2007. These projections forecast that the population of the country will be 5.3 million at 2020. It is important to note that the projection in the 2002 NSS was 4.4 million and this was contended at the time to be overly optimistic.
- 3.9 Ireland has one of the youngest populations in Europe with 54% of the population under the age of 35 and only 15% over 60. Such an age profile results in considerable demand in the economy for goods and housing and provides an ongoing increase in labour force supply from both school leavers and college

graduates. The labour force is benefiting from the net migration apparent in the market since the late 1990s. Over the last number of years, over 50% of immigrants (including returning Irish nationals) to Ireland have been in the 25 – 44 age group. This is the age group most active in the labour market and is helping to create increased demand for products and housing. The total workforce has doubled since the early 1990s from approximately 1 million to over 2 million by 2006.

Considerations for the Future

- 3.10 Economic performance over the last decade has been characterised by a virtuous circle that was initially precipitated by public sector pay restraint and tax incentives to attract foreign multinationals. A combination of high levels of FDI, a sharp drop in interest rates from the introduction of the Euro in 1999 along with transfers from the EU have all boosted economic growth. This allowed the Government to reduce public debt and taxes, in turn boosting consumer demand. Higher employment and disposable incomes, combined with loose monetary conditions and a youthful demographic profile, have led to a housing boom.
- 3.11 However, new challenges have emerged. The Irish economy is heavily dependent on the health of the US economy, both in terms of providing inward investment but also in terms being a market for our exports. In the 2005 – 2012 Mid Term Review, the ESRI highlighted that a correction to the US current deficit is inevitable in the coming years and will certainly affect the Irish economy adversely, although the severity of this impact is difficult to judge.
- 3.12 The sudden strong growth posted in the 1990s has highlighted the deficiency of public infrastructure. High levels of public investment expenditure have been directed towards addressing this in recent years and, as previously stated, it is behind programme and further progress will be necessary if the issues and constraints are to be redressed.
- 3.13 The key challenges for the medium to long term will be to control public sector spending and maintain attractive conditions for FDI. The latter includes low corporate taxes which, it is important to note, are threatened by moves towards Euro zone tax harmonisation. Inward FDI is also threatened by the trend for international companies to look to low cost locations such as the recent Eastern Europe EU accession countries and, further a field, China and India. Nevertheless, strong cultural and linguistic ties with the US should sustain inward investment for the foreseeable future.

POPULATION TRENDS & FORECASTS

- 3.14 The future need for retail floorspace in the City and County is influenced by projected population and personal income growth and therefore understanding national, regional and local population trends and projections is important. In the paragraphs that follow, recent trends in population growth and the distribution of population across the South East and other regions are examined. Population projections for the emerging 2008 – 2014 City and County Development Plans period and the longer timeframe of the NSS to 2020 are also set out.

Recent Trends in Population Growth

- 3.15 Table 3.1 illustrates the population growth of counties in the South East Region between 1996, 2002 and 2006. Over the period 1996 – 2002, the population of the Region grew by 8.2%. The Region experienced an 8.8% growth between 2002 – 2006 and this compares with population growth of 8.2% for the State as a whole over the same time period.

County	1996	2002	2006	% Change 1996-2002	% Change 2002-2006
Carlow	41,616	46,014	50,349	10.6	9.4
Kilkenny	75,336	80,339	87,558	6.7	8.9
South Tipperary	75,514	79,121	83,221	4.8	5.2
Waterford	94,680	101,546	107,961	7.3	6.3
Wexford	104,371	116,596	131,749	11.7	12.9
Total	391,517	423,616	460,838	8.2	8.8

Source: CSO, Census of Population, 2002 and Census of Population, 2006

- 3.16 Within the Region, between 2002 and 2006, Kilkenny's population grew by 8.9%. Over the period, Wexford experienced the highest growth rate in the Region with 12.9%, while South Tipperary had the lowest population increase with 5.2%. Population growth in the Region between 2002 and 2006 at 8.8% was greater than that over the period 1996 to 2006 which was 8.2%. This is more clearly demonstrated when average per annum increases of 2.05% (2002 – 2006) and 1.46% (1996 – 2002) are compared.
- 3.17 The higher percentage growth of Wexford and Carlow can be partly explained by the high cost of housing within the Dublin conurbation and improving road/rail linkages

between the Region and the Dublin area increasing the attraction of peripheral areas to commute from/live in due to lower housing costs. This has resulted in increasing commuting to Dublin and increased demand for residential development and housing. The City and County currently sit on the edge of the GDA commuter belt and as a consequence have witnessed slower growth rates. Nonetheless, the County has witnessed considerable population growth over the period, in particular within the Kilkenny City Environs and the Ferrybank area of the Waterford City Environs.

- 3.18 Table 3.2 illustrates that the Region is performing well in the national context, with only the Mid East and Midland Regions having experienced higher growth rates.

Table 3.2 Population and Population Change, Regional Areas, 1996-2006					
Regional Area	1996	2002	2006	% Change 1996-2002	% Change 2002-2006
Border	407,295	432,534	468,375	6.2	8.3
Dublin	1,058,264	1,122,821	1,187,176	6.1	5.7
Mid East	347,407	412,625	475,360	18.8	15.2
Midland	205,542	225,363	251,664	9.6	11.7
Mid-West	317,069	339,591	361,028	7.1	6.3
South-East	391,517	423,616	460,838	8.2	8.8
South West	546,640	580,356	621,130	6.2	7.0
West	352,353	380,297	414,277	7.9	8.9
Total	3,626,087	3,917,203	4,239,848	8.0	8.2
Source: CSO, Census of Population, 2002 and Census of Population, 2006					

Distribution of Population

- 3.19 The growth in population has not been evenly spread within the County and, as with the remainder of the State, illustrates increasing urbanisation and growth in towns/villages in close proximity to the main urban centres. Waterford's City and County position is incorporated as a comparator. The population trends since 1996 are provided in Table 3.3 and benefit from the recent publication of the Central Statistics Office's (CSO) Small Area Population Statistics (SAPS) derived from the 2006 Census of Population.
- 3.20 The population of the County was 87,558 in 2006 which, as noted above, was an increase of 8.9% since the 2002 Census. Over the 10 year period between 1996 and 2006, the population of the County grew by 16.2%. County Waterford had a higher growth rate (7.3%) than Kilkenny during the period 1996 to 2002 with but it fell below the County to 6.3% between 2002 and 2006.

- 3.21 Between 1996 and 2006, Kilkenny City's (the City and Environs) population grew by 18.6% which was above that of the County (16.2%), Region (17.7%) and State (16.9%). The greatest growth (10.9%) was between 1996 and 2002 with it falling to 7.0% between 2002 and 2006. As with the majority of large towns and cities in the country, there was low growth in the central areas largely due to limited availability of land and buildings for substantial new residential and other development but significant expansion and development in the environs and suburbs of these main centres. Although through densification of development will serve to increase population in and around the City Centre, in general growth will continue to be primarily in the City's environs. Over the ten year period, the population of the City's environs grew by a significant 32.7%. While there was a slowdown in growth between 2002 and 2006, compared with 1996 to 2002, the City is on course to achieving its NSS target population of 30,000 by 2020. This will be further enhanced by the strategic transportation improvements which are either underway or programmed and by the opening up of the City's suburbs through the completion of the Outer Relief Road.

Table 3.3 Population and Population Change, Main Centres in County Kilkenny, 1996-2006						
Area	1996	2002	2006	% Change 1996-2002	% Change 2002-2006	% Change 1996-2006
County Kilkenny	75,336	80,399	87,558	6.7	8.9	16.2
Kilkenny City & Environs	18,696	20,735	22,179	10.9	7.0	18.6
Kilkenny City	8,507	8,591	8,661	1.0	0.1	1.8
Kilkenny Environs	10,189	12,144	13,518	19.2	11.3	32.7
Thomastown	1,581	1,600	1,837	1.2	14.8	16.2
Castlecomer	1,380	1,482	1,531	7.4	3.3	10.9
Callan	1,224	1,325	1,771	8.3	33.7	44.7
Graigueenamanagh	1,113	1,166	1,097	4.8	-5.9	-1.4
County Waterford	94,680	101,546	107,961	7.3	6.3	14.0
Waterford Environs (Kilkenny)	1,615	2,142	3,465	32.6	61.8	101.5
Waterford City	42,540	44,594	45,748	4.8	2.6	7.5
Source: CSO, Census of Population, 2002 and Census of Population, 2006						

- 3.22 The table illustrates the very different levels of growth which have occurred in the County's District Towns since 1996. Although the numbers are low relative to the City and County, the trends are important indicators of the performance of each of the towns. Thomastown is the largest of the District Towns and, following very limited growth (1.2%) between 1996 – 2002, has substantially grown (14.8%) above national, regional and County trends in the 2002 – 2006 period. Callan is the District

Town which has witnessed the most significant growth achieving a population increase of 44.7% between 1996 and 2006, with the majority in the period 2002 to 2006. It is well on course to become the largest District Centre in the County. Growth in Castlecomer has slowed down to 3.3% between 2002 – 2006 from the 7.4% achieved in the period 1996 – 2002 and is indicative of the economic issues which the town has been facing. The population decline of 5.9% in Graiguenamanagh between 2002 and 2006 is matter of concern which is well recognised by the County Council, particularly in a period of generally positive growth in the remainder of the Count

Population Projections

- 3.23 An updated population projection exercise is required to take account of revised national and regional population projections. A number of published data and population projections have been released since the 2004 Review of the Retail Strategy and this fact has informed the requirement for revised population projections. The key influences in terms of revising the population projections for the review of the Retail Strategy are identified as:
- i. Report of the 2006 Census; and
 - ii. DoEHLG National and Regional Population Projections 2006 – 2020.
- 3.24 Both of these sources of baseline population and population projections are authoritative sources for developing accurate and scientific forecasts on which policy formulation and implementation across the country is based.
- 3.25 Our analysis of the prospects for future population growth has been based on the County population of 87,558 established by the results of the 2006 Census. Three scenarios for County population growth have been modelled, a low, medium and a high scenario. The assumptions regarding the low, medium and high scenarios for population growth have been agreed with Colin Buchanan Associates (the consultancy which is preparing the Housing Strategy for the County) to ensure consistency of population projections in the City and County Development Plans. The rationale for estimating each of these scenarios is set out below.

Low Scenario

- 3.26 The low population growth scenario was derived by applying the growth rate of 1.7%, established for the South East Region by the DoEHLG population projections, to the baseline of the County's 2006 population.

- 3.27 As has been highlighted, in February 2007 the DoEHLG circulated revised population projections for all of the regions of the country to Regional and Local Authorities. This was in response to the results of the 2006 Census which indicated that on the whole population growth across the country was stronger than anticipated in the projections provided to Regional Authorities for the preparation of the 2004 Regional Planning Guidelines. These increased the 2002 NSS national 2020 projection from 4.4 million to 4.7 million. The 2007 guidance raises the projection to 5.3 million and Regional Authorities have been requested to review and update their Regional Planning Guidelines in the light of the revised projections. Additionally, the guidance recommends that local authorities take into consideration the revised projections in reviews of their development plans, housing strategies and retail strategies.
- 3.28 The DoEHLG projections are founded on assumptions on migration that are based on the 2002 – 2006 period when migration accelerated sharply to an average of 45,000 per annum. However, for our low scenario we have assumed a lower rate of migration levels to reflect the potential for decline in this rate of migration in the forthcoming years. The low scenario, therefore, amends the DoEHLG projections and incorporates CSO 2004 projections of net migration of 30,000 per annum to the year 2016, and 20,000 per annum between 2016 and 2020.

Medium Scenario

- 3.29 The medium growth scenario has been derived from straight application of the DoEHLG population projections for the South East. It is, therefore, based on the migrations trends observed between 2002 and 2006. The medium growth scenario is taken as the most likely position and has been used as the basis of the housing demand assessment undertaken as part of the review of the City and County Development Plans.

High Scenario

- 3.30 A high population growth scenario has been projected to represent the position should population growth continue at the rate at which has been observed in the County between 2002 and 2006, as indicated by the results of the 2006 Census. The incorporation of a high growth trend based scenario responds to the fact that in recent years population growth has exceeded projections and thus this scenario accommodates this continuing to prevail. Additionally, it takes due account of the weight and influence of the following:
- The designation of Kilkenny City as a Hub in the NSS and SERPG
 - The continuing improvements to the accessibility of the City and County bringing them increasingly into the commuter belts of Dublin and Waterford
 - The attraction of the City and County and quality of life factors increasing their desirability as places to live in.

Population Growth Projections

3.31 Founded on application of these different assumptions and considerations, Table 3.4 sets out the derived population projections for the County for the Low, Medium and High population growth scenarios. The table illustrates that the population of the County is set to grow from 87,558 in 2006 to 110,053, 110,797 and 117,334 under the Low, Medium and High scenarios respectively by 2020.

Table 3.4						
Population Projections for the County 2006 - 2020						
Scenario	2006	2008	2014	2020	Projected Change 2006 - 2020	% Change
Low	87,558	90,320	99,699	110,053	22,495	25.7
Medium	87,558	91,457	101,996	110,797	23,239	26.5
High	87,558	91,151	103,417	117,334	29,776	34.0
Source: Recent Population Trends identified through the Report of 2006 Census, Regional Population Projections identified by DoEHLG						

4 BASELINE FOR THE STRATEGY

4.1 The key baseline information underpinning the Retail Strategy has been reviewed and revised to ensure that the most up to date information is taken due account of and responded to in the review. This section sets out and examines the key baseline information in respect of:

- i. Retail floorspace; and
- ii. Shopping patterns.

RETAIL FLOORSPACE

4.2 The original retail floorspace surveys of Kilkenny City, Callan, Castlecomer, Graiguenamanagh and Thomastown were undertaken in 2000 as part of the preparation of the 2002 Retail Strategy. The review of the Retail Strategy has updated these original floorspace data with information of any new retail developments that had been completed since the time of the 2000 survey. This is as identified through information obtained during the 2004 Review and from information on extant planning permissions provided by Council Officers in February 2007. Floorspace information has also been updated through observations made during our town centre health checks on the number of vacant units within the centres. Tables 4.1, 4.2 and 4.3 present a summary of floorspace broken down by retail category for the City and the four District Towns for 2000, 2004 and 2007 respectively.

Table 4.1					
Net Retail Floorspace Breakdown Trading in 2000 (m²)					
Town/Townland	Vacant	Convenience	Comparison	Retail W'housing	Total
Kilkenny City ⁽¹⁾	1,460	8,240	34,842	5,765	50,307
Callan	150	1,190	851	0	2,191
Castlecomer ⁽¹⁾	100	1,323	1,333	0	2,756
Graiguenamanagh	60	810	955	0	1,825
Thomastown	116	1,658	1,154	0	2,928
Total	1,886	13,221	39,135	5,765	60,007
Source: Kilkenny Retail Strategy 2000 Floorspace Surveys					
Note: 1: Small differences between this are due to adjustments to floorspace following input from submissions to the 2001 Retail Strategy. These include adjustments for Dunnes Stores and Superquinn in Kilkenny and SuperValu in Castlecomer.					

Table 4.2					
Composition of Net Retail Floorspace, Trading as at May 2004 (m²)					
Town/Townland	Vacant	Convenience	Comparison	Retail W'housing	Total (m²)
Kilkenny City	-	11,267	37,930	13,062	62,259
Callan	-	1,765	1,325	-	3,090
Castlecomer	-	1,336	1,333	-	2,669
Graigenamanagh	-	810	955	-	1,765
Thomastown	-	1,780	1,419	559	3,758
Total	1,886⁽¹⁾	16,958	42,962	13,621	75,427

Source: Kilkenny Retail Strategy 2001 and 2004 Health Check Surveys

Note: 1 Based on information from our health checks of the major centres, there was no discernable change in the general level of vacancies, and so we have assumed that the amount of vacant floorspace is the same as that found in the 2001 floorspace survey.

2 The figures set out for the 4 District Towns within this table vary slightly from the 2004 figures set out in Section 6. This is as a result of Table 4.2 being updated with extant planning permissions and Tables 6.2, 6.3 and 6.4 being updated by health check surveys in the 2004 Review. The 2007 review has updated all tables with 2007 floorspace information based on health checks and extant planning permissions.

Table 4.3					
Composition of Net Retail Floorspace, Trading as at March 2007 (m²)					
Town/Townland	Vacant	Convenience	Comparison	Retail W'housing	Total (m²)
Kilkenny City	1,458	11,307	39,656	17,659	70,080
Callan	569	1,880	1,938		4,387
Castlecomer	238	1,381	1,383		3,002
Graigenamanagh	583	870	1,010		2,463
Thomastown	1,481	2,867	1,637	559	6,544
Total	4,329	18,305	45,624	18,218	86,476

Source: Kilkenny Retail Strategy 2001 and 2007 Health Check Surveys

4.3 The tables enable a comparative analysis of changes in floorspace quantum and other patterns over the period since 2000. The key headline is that the retail floorspace of the County has increased by 44.1% from 60,007m² to 86,476m² between 2000 and early 2007 which is a significant increase. Noting this, we examine the detail of what has happened through our comparative analysis of the trends under the following headings:

- Patterns by market sector
- Kilkenny City and Environs
- The District Towns.

Patterns by Market Sector

- 4.4 Overall, the County's floorspace has increased by 11,049m² (18.4%) between 2004 and 2007 and by a significant 26,469m² (44.1%) since 2000. Broken down by market sector, the pattern is as follows:
- i. **Convenience:** increased by 1,347m² (7.9%) between 2004 and 2007 and 5,084m² (38.5%) since 2000. It was 14.8% of the total increase in floorspace between 2004 – 2007 and 19.6% of the total since 2000;
 - ii. **Comparison:** increased by 2,662m² (6.2%) between 2004 and 2007 and 6,489m² (16.6%) since 2000. It was 17.3% of the total increase in floorspace between 2004 – 2007 and 21.1% of the total since 2000; and
 - iii. **Retail Warehousing:** increased by 4,597m² (33.7%) between 2004 and 2007 and by 12,453m² since 2000, representing more than a twofold increase. It was 41.6% of the total increase in floorspace between 2004 and 2007 and 47.0% of the total since 2000.
- 4.5 Although there have been healthy increases in both convenience and comparison floorspace over both the periods 2004 – 2007 and since 2000, the analysis confirms the overwhelming dominance of retail warehousing in the new floorspace which has been delivered. This is relatively typical of the trends being observed in/around other large town and city centres across the country. The pattern is set, however, to change with the introduction of the McDonagh Station and Ferrybank schemes into the County's retail landscape.
- 4.6 In general, the increases in convenience and comparison floorspace have largely been introduced through the review of extant planning permissions of significant retail developments. In terms of the increase in convenience floorspace, this has largely come about through the introduction of a supermarket development in Thomastown. Changes and introduction of new floorspace relating to smaller units have been identified through our health checks of Kilkenny City and the District Towns. These have been found to represent relatively small changes to overall retail floorspace.
- 4.7 In terms of how the balance of floorspace has changed in the County since 2000, this can be summarised as follows:
- **Convenience:** was 22.0% of total floorspace in 2000 and has stayed relatively at the same percentage since then at 22.5% in 2004 and 21.2% in 2007.
 - **Comparison:** was 65.2% of total floorspace in 2000 but has seen its share of total floorspace decline in the interim period to 57.0% in 2004 and 52.8% in 2007.

- **Retail Warehousing:** was 9.6% of total floorspace in 2000 but has seen its share of total floorspace significantly increase in the interim period to 18.1% in 2004 and 21.1% in 2007.
- **Vacant Floorspace:** was very low at 3.1% of total floorspace in 2000, declined further to 2.5% at 2004 but is seen to have increased to 5.0% by 2007 – it is still not a level which would or should cause concern but is an issue which requires to be monitored. The increased rate of vacancies is largely explained through the vacant SuperValu unit in Thomastown as well as a mixture of small and medium sized stores in Kilkenny City Centre which are currently vacant. The level of vacancies excludes that which prevails in respect of new retail parks. These, in general, have still to establish their normal trading patterns and, thus, the floorspace to be fully let.

4.8 The analysis further reinforces how the new retail warehousing which has been introduced is changing the shopping profile of the County. However, as has been highlighted, the position will greatly change with the new floorspace which has been granted full planning permission or is in the pipeline is in place.

Kilkenny City & Environs

4.9 The tables illustrate that the majority of the increase in retail floorspace, as would have been anticipated, is within Kilkenny City and Environs. The comparative analysis of the data, broken down by market sector, provides the following key findings:

- i. **Overall:** at 2000, the City and Environs had a total floorspace of 50,307m². This was some 83.8% of the County's total floorspace and this predominance has continued with 82.5% at 2004 and 81.0% at 2007. The City and Environs floorspace increased by 7,821m² (12.6%) between 2004 – 2007 and a very significant 19,773m² (39.3%) since 2000 to present day;
- ii. **Convenience:** at 2000, the City and Environs had a total convenience floorspace of 8,240m². This was some 61.8% of the County's total floorspace and this predominance has continued with 66.4% at 2004 and 61.8% at 2007. The City and Environs convenience floorspace increased by a very limited 40m² (0.5%) between 2004 – 2007 but a significant 3,067m² (37.2%) since 2000 to present day;
- iii. **Comparison:** at 2000, the City and Environs had a total comparison floorspace of 34,842m². This was some 89.0% of the County's total floorspace and this predominance has continued with 88.3% at 2004 and 86.9% at 2007. The City and Environs comparison floorspace increased by an extremely limited 1,726m² (4.5%) between 2004 – 2007 but by 4,814m² (13.8%) since 2000 to present day;
- iv. **Retail Warehousing:** at 2000, the City and Environs had a total retail warehousing floorspace of 5,765m². This accounted for all of the bulky goods floorspace in the County at that time. With the exception of a limited quantum introduced in Thomastown (559m²), the City and Environs remains the only location in the County for bulky goods shopping. The City and Environs retail warehousing floorspace

increased by a significant 4,597m² (33.8%) between 2004 – 2007 and by an even more significant 12,453m² or nearly 2.2 times since 2000 to present day; and

- v. **Vacant Floorspace:** at 2000, the City and Environs vacant floorspace totalled 1,460m² which was 2.9% of the total retail floorspace. Vacancies were thus very low and indicative of a healthy retail sector. At 2007, it is estimated to be 1,458m² which is some 2.1% of the City and Environs total floorspace. Even when the retail warehousing is excluded from the equation, the level is only 2.8% which would not be a level which should cause concern – it is a situation which, however, requires to be monitored.

- 4.10 The comparative analysis confirms that, with the exception of retail warehousing, the City and Environs has witnessed relatively little enhancement of its retail offer since 2000. This issue is, however, set to be redressed with the McDonagh Station scheme and the emerging proposals for the Mart Site. These will serve to reinforce the importance of the City Centre as the primary location for shopping in the County and the City's significant attraction as one of the key Level 1 Tier 3 shopping destinations in the national and regional retail hierarchies.

The District Towns

- 4.11 The changes in the nature and profile of the four District Towns which have taken place since 2000 are summarised below:
- **Callan:** at 2000, had a total retail floorspace of 2,191m² and was the second smallest of the main centres in the County, with Graiguenamanagh being the smallest centre. Since 2000, relative to its original baseline, the town has witnessed a significant 2,196m² (100%) increase its total floorspace which has elevated Callan to being the third largest retail centre in the County after the City and Thomastown. The growth has been relatively evenly split between 2000 – 2004 and 2004 – 2007. Over the period since 2000, convenience floorspace has increased by 690m² (58.0%) with this largely being between 2000 – 2004 and comparison by 1,087m² from 851m² to 1,938m² which represents more than a doubling of the town's comparison floorspace. There has, however, been an increase in vacant floorspace from 6.8% to 12.9% but this is largely attributable to the relocation and expansion of existing businesses. It is, however, an issue which requires to be monitored.
 - **Castlecomer:** at 2000, had a total retail floorspace of 2,756m² and was the third largest of the main centres in the County. Since 2000, relative to its original baseline, the town has witnessed a very minor increase of 108m² (3.9%) in its total floorspace resulted in Castlecomer slipping in the County's retail hierarchy from the third to the fourth largest centre. The increase in floorspace over the period is almost evenly split between convenience and comparison floorspace. Additionally, there has been an increase in the vacant floorspace in the town centre from 3.6% to 7.9%. Levels of vacant floorspace below 10% are not normally a concern but they are when considered in respect of small centres. It is thus, an issue which requires to be addressed in the policies and objectives for the town in the Retail Strategy.

- **Graiguenamanagh:** at 2000, had a total retail floorspace of 1,825m² and was the smallest of the main centres in the County. This is the position of the town today with its floorspace having increased by only 115m² (6.3%) since 2000. Of considerable concern is the fact that vacancies have increased from a low 3.3% to 23.8%. The issues facing the town are well recognised by the County Council, as evidenced by its joint commissioning with Carlow County Council of an economic study of the town and neighbouring Tinnahinch. The comparative analysis of the 2000 and 2007 floorspace data add further weight to the recognised need for the issues which prevail in the town being redressed.
- **Thomastown:** at 2000, had a total retail floorspace of 2,928m² and was the second largest of the main centres in the County after the City. This remains the position in 2007. Since 2000, relative to its original baseline, the town has witnessed a significant 2,019m² (68.9%) increase in its total floorspace. The growth has been relatively split almost 40:60 between 2000 – 2004 and 2004 – 2007 respectively. Over the period since 2000, convenience floorspace has increased by 977m² (58.9%) with this largely being between 2004 and 2007 and comparison by 483m² (41.8%) which is a relatively modest quantum of increase but large in percentage terms. There has been a very significant increase in vacant floorspace from 3.9% to 22.6%. This is almost wholly attributable to the relocation of SuperValu to new and larger premises. At the time of writing, a planning application for the redevelopment of the site for a healthcare facility was being considered by the County Council.

SHOPPING PATTERNS

- 4.12 Household and shopper surveys were undertaken by **Ipsos Mori**, one of the leading market research companies in the country, during February 2007. A total of **517** household telephone interviews were undertaken covering the whole County and some **230** face-to-face on-street shopper interviews in Kilkenny City Centre. The size of the survey populations mirror those conducted in the 2004 Review which comprised 506 household telephone interviews and 222 shopper face-to-face on-street interviews. The shopper survey 'population' size also equates with the 2000 survey although the household survey is approximately half of that (1,000) conducted as part of the preparation of the 2002 Retail Strategy. The size of the household survey is still large and valid. The key fact is that, through the commissioning of the surveys, the Councils have an informed basis for monitoring changes in shopping patterns in the City and County over the period since 2000. It is important to highlight that no other County has the same time series information. Given the changes in the retail landscape of the City and County which have emerged since the 2000 consumer surveys, the 2007 surveys provide vital and important information to inform the strategic response to the retail planning of the City and County over the remaining periods of both Development Plans, the next Development Plan timescale (2008 – 2014) through to the NSS horizon of 2020.
- 4.13 The objective of the surveys was to identify current shopping patterns in the County. The surveys play an important role in the capacity assessment by informing the estimates of:

- i. **Market Share** – the proportion of retail expenditure by persons living in the County spent and retained in the County; and
- ii. **Trade Draw** – the proportion of turnover in retail outlets in the County attributable to persons living outside the County.

4.14 In addition, the surveys provide an indication of:

- Where people shop
- Where people come from to shop in Kilkenny
- Travel preferences
- Other factors that may influence shopping patterns.

4.15 The surveys only provide shopping patterns at one point in time. However, by having 2000, 2004 and 2007 surveys, we are able to identify what changes have taken place in the interim that require to be redressed or harnessed in the review of the Retail Strategy. We, therefore, provide an analysis of the 2007 household and shopper surveys and a comparison of each with the results of the 2000 and 2004 surveys.

HOUSEHOLD SURVEY: KEY FINDINGS

4.16 In the paragraphs that follow, we highlight the main findings that have emerged from the household survey. The key questions asked in the household survey relate to the following topics:

- i. Main Food Shopping;
- ii. Top Up Shopping;
- iii. Clothing and Footwear Shopping;
- iv. Bulky Goods Shopping;
- v. Shopping in Kilkenny City;
- vi. Internet Shopping; and
- vii. Evening Entertainment.

Main Food Shopping

- 4.17 Main food shopping destinations as identified through the household shopper surveys are set out in Table 4.4.

Location	Store	Respondents	%
Kilkenny City	Dunnes, Kieran Street	96	18.6
	Superquinn, Market Cross Shopping Centre	63	12.2
	SuperValu, Lough Boy Business Park	40	7.8
	Lidl, Lough Boy Business Park	18	3.5
Ballyragget	SuperValu	4	0.8
Callan	SuperValu	10	1.9
Castlecomer	EuroSpar	17	3.3
Graiguenamanagh	SuperValu	15	2.9
Mooncoin	Centra	10	1.9
Piltown	Centra	9	1.7
Thomastown	SuperValu	20	3.9
Carlow	Tesco, Fairgreen Shopping Centre	10	1.9
Tipperary	SuperValu, Carrick On Suir	32	6.2
	Tesco, Clonmel	4	0.8
Waterford	Tesco, Ardkeen Shopping Centre	12	2.3
	Superquinn, Tramore Road	7	1.4
	Tesco, Waterford	6	1.2
	Tesco, Lisduggan Shopping Centre	5	1.0
	SuperValu, Morgan Street	4	0.8
Wexford	Tesco, New Ross	5	1.0
Total within County		352	68.1
Total outside County		164	31.9
Total		516	100
Source: Ipsos Mori Household Survey, 2007			
Note: Table excludes unknown locations.			

- 4.18 Dunnes Stores on Kieran Street was highlighted as the most popular destination for main grocery shopping by 18.6% of respondents, followed by Superquinn in the Market Cross Shopping Centre by 12.2% of respondents. Nearly one-third (31.9%) of respondents travelled to a destination outside the County for their main food shopping. SuperValu in Carrick-on-Suir accounted for over 6% of this expenditure leakage.
- 4.19 Table 4.5 provides a breakdown of shopping destinations and the area from which the respondents originated. It can be seen from the table that the top destinations for main food shopping corresponded with the area from which household's set out

from. The majority of main grocery shopping within these towns was conducted within the County. The exceptions to this were in Castlecomer and Graiguenamanagh where some households undertook their grocery shopping in Carlow and Wexford counties respectively.

Area	Destination	Store	Respondents	% of Area
Kilkenny City	1. Kilkenny City	Dunnes Stores	50	36.2
	2. Kilkenny City	Superquinn	32	23.2
	3. Kilkenny City	SuperValu	27	19.6
Callan	1. Callan	SuperValu	10	25.0
	2. Kilkenny City	Dunnes Stores	9	22.5
	3. Kilkenny City	Superquinn	4	10.0
Castlecomer	1. Castlecomer	EuroSpar	17	28.8
	2. Kilkenny City	Dunnes Stores	15	25.4
	3. Carlow	Tesco	8	13.6
Graiguenamanagh	1. Graiguenamanagh	SuperValu	11	52.4
	2. Wexford	Tesco	3	14.3
	3. Kilkenny City	Dunnes Stores	1	4.8
Thomastown	1. Thomastown	SuperValu	18	45.0
	2. Kilkenny City	Lidl	5	12.5
	3. Kilkenny City	Superquinn	4	10.0

Source: Ipsos Mori Household Survey, 2007

- 4.20 Travelling by car remains the principle form of transport for those undertaking a main food shopping trip. Some 90% of respondents travel by car when undertaking a main food shopping trip with 77% driving themselves and 14% travelling as a passenger. The survey revealed that only 7% walk when doing their main food shopping while internet shopping for groceries accounted for mere 0.6% of households surveyed.

Top Up Shopping

- 4.21 Table 4.6 illustrates that a wide range of top up shopping locations are used by shoppers in the County with no centre being predominant. This would be expected as it is a trip which is generally undertaken at the most local level. At the County level, Loughboy Shopping Centre was found to be the most popular top up shopping destination with 4.9% of all respondents going there. This was closely followed by Kieran Street, Newpark Shopping Centre and James Street. Looking at the County by area, it was found that Green Street, Callan and Main Street, Castlecomer accounted for 2% and 2.4% of the total top up expenditure respectively.

Table 4.6 Primary Top Up Shopping Locations			
Location	Store	Respondents	%
Kilkenny City	Loughboy Business Park	25	4.9
	Kieran Street	12	2.4
	Newpark Shopping Centre	11	2.2
	James Street	10	2.0
Callan	Green Street	10	2.0
	Main Street	6	1.2
Castlecomer	Castlecomer	12	2.4
	Kilkenny Street	6	1.2
	Market Square	6	1.2
Graigenamanagh	Main Street	6	1.2
Thomastown	Thomastown	8	1.6
	Dublin Road	4	0.8
Source: Ipsos Mori Household Survey, 2007			

Clothing & Footwear Shopping

- 4.22 Table 4.7 shows the main clothing and footwear shopping destinations as derived from the household surveys. Of the 517 telephone interviews, 64 or 12.4% of respondents did not specify a location. Of the total survey population, some 58.2% identified Kilkenny City Centre, or different locations in the City Centre, as where they did their clothing and footwear shopping.
- 4.23 High Street in Kilkenny City Centre was the primary specific destination for the majority (23.8%) of respondents for clothing and footwear shopping. Kieran Street was second specific destination with 13.7% of respondents while the City Centre as a whole came in third with 10.3% of households undertaking their clothing and footwear at this location. Centres outside of the County where comparison expenditure was leaking to were identified as:
- **Waterford City:** some 17% of respondents conducting their clothing shopping at the City Square Shopping Centre
 - **Carlow:** the Fairgreen Shopping Centre in Carlow attracted 2.9% of clothing and footwear shopping expenditure
 - **Carrick-on-Suir:** was identified as attracting some 2.5% of clothing and footwear expenditure from the County
 - **Dublin:** was identified as only being a minor clothing and footwear destination for the respondents with Henry Street ranked highest, accounting for 1.2% of households surveyed.

Table 4.7			
Primary Clothing/Footwear Shopping Locations			
Location	County	Respondents	%
Kilkenny City Summary	Kilkenny		
High Street	Kilkenny	123	23.8
Kieran Street	Kilkenny	71	13.7
Kilkenny City Centre	Kilkenny	53	10.3
City Square Shopping Centre	Waterford	88	17.0
Market Cross Shopping Centre	Kilkenny	37	7.2
Fairgreen Shopping Centre	Carlow	15	2.9
Carrick On Suir	Tipperary	13	2.5
Main Street	Kilkenny	11	2.1
Clonmel	Tipperary	9	1.7
Main Street	Waterford	7	1.4
Henry Street	Dublin	6	1.2
Parliament Street	Kilkenny	6	1.2
Carlow	Carlow	5	1.0
Dublin City	Dublin	5	1.0
Liffey Valley Shopping Centre	South Dublin	4	0.8
No Location Provided		64	12.4
Source: Ipsos Mori Household Survey, 2007			

Bulky Goods Shopping

4.24 Table 4.8 identifies the main places where people do their bulky goods shopping.

Table 4.8			
Primary Bulky Good Shopping Locations			
Store	Location	Respondents	%
Electro City	Kilkenny City	70	14.4
DID	Kilkenny City	31	6.4
Kelly & Dollard	Waterford	20	4.1
Other	Kilkenny City	19	3.9
Greenwoods	Kilkenny City	18	3.7
Woodies	Kilkenny City	17	3.5
Other	Waterford	16	3.3
Dunnes Stores	Kilkenny City	15	3.1
Butlers Electrical	Carrick-on-Suir, Tipperary	13	2.7
County Kilkenny	County Kilkenny	12	2.5
Kilkenny City	Kilkenny City	11	2.3
Don't know	Don't know	11	2.3
Sherwoods	Kilkenny City	10	2.1
Waterford	Waterford	9	1.9
Other	Carrick-on-Suir, Tipperary	9	1.9
Source: Ipsos Mori Household Survey 2007			

- 4.25 The table illustrates that Electro City in Kilkenny City was the main destination for bulky goods shopping (14.4%), with DID Electrical being the second most popular location (6.4%) for respondents. Some 4.1% of the households travelled outside the County to Kelly and Dollard in County Waterford, with 3.3% purchasing bulky goods from other stores in Waterford. Butlers Electrical of Carrick-on-Suir was identified by 2.7% of respondents as a location for bulky goods shopping.

Additional Key Findings

- 4.26 The following provides a summary of the additional key findings found from the household survey:
- i. Almost 65% of respondents carry out their main grocery shopping once a week while 23% conduct main food shopping twice a week or more;
 - ii. Some 29% of households surveyed revealed that they undertake top up shopping everyday. More than 21% do top up shopping twice a week while 18% conduct top up shopping three times a week;
 - iii. Approximately 25% of respondents had made purchases over the internet during the last six months. The main internet purchases included: Holidays, CD's/Videos, Concert Tickets, Books and Clothing;
 - iv. A good choice of shops (33.8%), being located close to home (24.8%) and the high quality of shops (4.6%) ranked as the key attractions for clothing and footwear shopping destinations in the survey;
 - v. Over 23% of respondents when asked for their opinion on the key improvements that would increase that attractiveness of Kilkenny City as a shopping destination stated no improvements were needed. Almost 21% said that more parking provision was required while 7.4% stated better access by car was necessary;
 - vi. Some 48% of respondents visited Kilkenny City for shopping purposes once a week or more. Just under 10% visited Kilkenny City once a month, while appropriately 8% visited the City twice a month; and
 - vii. More than 20% of households have gone out for a meal or drink in the evening once a week, with Kilkenny City being the primary destination. Almost 18% have gone out once a month while 16% went out twice a month.

Comparison of Household Surveys 2000, 2004 and 2007

- 4.27 The key findings from a comparative analysis of the 2000, 2004 and 2007 household surveys are highlighted in Table 4.9. The table compares the expenditure outflows within the County for 2000, 2004 and 2007.

Table 4.9 Comparative Analysis – Outflows of Expenditure	
Surveys	Outflows (%)
2000 – Kilkenny Retail Strategy*	
Convenience	19.8
Comparison	35.6
2004 – Kilkenny Retail Strategy Review	
Convenience	27.0
Comparison	30.0
2007 – Kilkenny Retail Strategy Review	
Convenience	30.5
Comparison	32.3
Source: Kilkenny Retail Strategy Review 2004 and 2007	
Note: *2000 was the year the survey was undertaken for the 2001 Strategy	

Convenience Expenditure Leakage

- 4.28 The table illustrates that since 2000 the convenience expenditure leakage from the County has increased from 19.8% to 30.5%. This reflects the fact that there has been no significant level of new modern format convenience floorspace delivered in the County in the interim period and as a result people are increasingly going to other centres such as Carlow, Carrick-on Suir and Waterford. Workshops with Elected Members have also highlighted the draw and attraction of new floorspace in New Ross which was attracting shoppers from the south east of the County. As it is generally accepted that convenience shopping is undertaken locally, with retention in urban areas being more of the order of 10%, the level of convenience expenditure leakage is significant. The large modern format convenience floorspace being developed as integral components of the McDonagh Station and Ferrybank Shopping Centre schemes will serve to help redress the issue but, even with these emerging developments, the facts indicate that the City and County require to further enhance and strengthen their main food convenience offers. It is an issue which requires to be responded to in the Retail Strategy.

Comparison Expenditure Leakage

- 4.29 Table 4.9 indicates that, in contrast to patterns in convenience shopping, since 2000 the County as a whole has witnessed a relatively small decrease in comparison expenditure leakage. It can be accepted that, given that Kilkenny City is the only major comparison shopping centre in the County, people will travel to other centres – although this will be on a less frequent basis – to undertake their comparison shopping. The role of the Retail Strategy is, therefore, to provide the framework for enhancing the City and County's comparison offer and maximising the retention of spend.

SHOPPER SURVEY: KEY FINDINGS

4.30 The key questions posed by the shopper survey related to the following topics:

- Shopper origin
- Reason for visiting the shopping location
- Actual/expected expenditure on goods or services
- Main stores visited
- Mode of transport
- Principle attractions of the particular destination
- Principle improvements to Kilkenny City.

Shopper Origin

4.31 The survey identified the following key information in respect of shoppers in the City Centre:

- i. The majority of shoppers surveyed came from Kilkenny City and County accounting for over 85% of the sample; and
- ii. The remaining shoppers travelled from the surrounding counties of: Tipperary (4.8%), Carlow (3.5%), Laois (1.3%), Kildare (1.3%) and other locations (3.7%).

Reasons for Visiting Kilkenny City

4.32 In respect of the reasons for visiting the City, the responses indicated the following:

- Almost 48% of respondents identified that main grocery shopping was the principle reason for visiting Kilkenny City.
- Shopping for women's clothing (11%) was the second most common reason for travelling to Kilkenny City while other grocery shopping was indicated by 9% of the respondents.
- Kieran Street was the primary destination in Kilkenny City for shoppers with 43% of the respondents stating that it was the area they intended to visit or had visited. High Street and Market Cross Shopping Centre were next main shopping destinations with 22.3% and 22.2% respectively.

Shopper Spend on Goods & Services

4.33 Table 4.10 summaries the shopper expenditure on convenience, comparison and other goods.

Table 4.10 Shopper Spend %				
Origin	Convenience	Comparison	Other (Cinema/ Hairdresser etc.)	Total
Kilkenny Residents	90.2	58.5	74.4	79.1
Non-Residents	9.8	41.5	25.6	20.9
Total	100	100	100	100

Source: Ipsos Mori Household Survey, 2007

4.34 The key findings from the table are:

- i. Over 90% of convenience expenditure in the survey was spent by Kilkenny residents with only 9.8% undertaken by non-residents. This would indicate that Kilkenny is not viewed as a prime location for grocery shopping by people living outside of the County;
- ii. Non-residents accounted for 41.5% of the comparison spend with the majority (58.5%) of the expenditure on comparison goods be attributed to people from the County;
- iii. Over one-quarter of the expenditure on other goods (including services) was by non-residents with the remainder by Kilkenny residents;

4.35 Additionally, as would be anticipated, the table indicates that non-residents are more likely to shop in Kilkenny for comparison goods compared to convenience or other goods.

Mode of Transport

4.36 The findings in respect of how people travel to the City can be summarised as:

- The car was the most common form of transport (73%) used to travel to the City
- Walking was ranked second with over 21% of respondents stating they walked to their shopping location
- Only 4.3% used public transport – essentially the bus – to conduct their shopping.

Principle Attractions of the Particular Destination

- 4.37 In terms of the attraction of the City Centre for shopping and other activities, the survey results found the following:
- i. The principle attractions the City as a shopping destination were identified as: Being close to home (45.2%); Good choice of department/variety stores (13%); Good choice of clothing/footwear shops (10.4%); and, Easy to get to by car (5.7%); and
 - ii. 3.5% of respondents were attracted to the City by the Castle/Heritage and the City's tourist attractions.

Principle Improvements to the Kilkenny City

- 4.38 The survey identified that shoppers sought the following key improvements to the City Centre:
- The key improvement which would make the City Centre more attractive for shopping was identified as the provision more car parking spaces (24.8%)
 - This was closely followed by cheaper/free parking which accounted for 22.2% of responses
 - A better and more frequent bus service was indicated by 10% of respondents while more shops were cited by 5.2%.

Comparison of Shopper Surveys 2000, 2004 and 2007

- 4.39 This section provides a comparative analysis of the shopping expenditure inflows into County Kilkenny from the surrounding areas. Table 4.11 illustrates the changes that have occurred in expenditure inflows between 2004 and 2007.

Table 4.11 Comparative Analysis – Inflows of Expenditure	
Surveys	Inflows (%)
2000 – Kilkenny Retail Strategy*	
Convenience	6.3
Comparison	28.8
2004 –Kilkenny Retail Strategy Review	
Convenience	19.8
Comparison	35.6
2007 – Kilkenny Retail Strategy Review	
Convenience	9.8
Comparison	41.5
Source: Kilkenny Retail Strategy Review 2004 and 2007	
Note: * 2000 was the year the survey was undertaken for the 2001 Strategy	

4.40 From the table it can be seen that convenience expenditure inflows have dropped from 19.8% in 2004 to 9.8% in 2007. Although inflows remain above their 2000 level (6.3%), they would be anticipated to be higher. The drop can be attributed to the lack of large modern format food store floorspace which has been developed in the County in comparison to say Carlow. The issue is set to be redressed with the emerging schemes that are granted or in the pipeline. In contrast, comparison expenditure inflows can be seen to have steadily grown since 2000. Given that there has been no significant new mainstream/high street comparison floorspace then the increase can be partly attributed to the retail warehousing schemes which have been delivered. However, the offer and attraction of mainstream comparison shopping is also an important factor in the equation and has played a key role in the increase in comparison inflows. The figures confirm that the Retail Strategy's objective in sustaining the competitiveness of the City and County in the regional and national retail economies has been achieved.

4.41 Table 4.12 provides a comparative breakdown of the 2004 and 2007 shopper expenditure patterns by residents and non-residents of the County.

Table 4.12								
Proportion of Shopper Spend in 2004 & 2007(%)								
Origin	Convenience		Comparison		Other*		Total	
	2004	2007	2004	2007	2004	2007	2004	2007
Kilkenny Residents	80.2	90.2	64.4	58.5	70.8	74.4	68.9	79.1
Non-Residents	19.8	9.8	35.6	41.5	29.2	25.6	30.2	20.9
Total	100	100	100	100	100	100	100	100
Source: Kilkenny Retail Strategy Review, 2004								
Note: *Cinema, hotels, restaurants, hairdressers etc								

4.42 The table illustrates that convenience expenditure by non-residents as a proportion of total convenience has decreased by 10.0% from 19.8% to 9.8% between 2004 – 2007 whereas comparison spend has increased by nearly 6.0% to 41.5% over the period. The important fact is that the City Centre has increased its attraction as a comparison shopping destination even in the absence of any significant improvement in the comparison offer. In terms of overall non-resident expenditure, there has been a drop of 9.3% as a proportion of total spend. This is surprising given the improvements which have continued to take place in the City Centre's supporting services and tourism infrastructure.

5 CAPACITY ASSESSMENT

- 5.1 The 2001 Retail Strategy covered the period 2001 – 2007. This review covers the 2008 to 2014 period of the emerging City and Environs and County Development Plans and, as with the 2004 Review, takes a longer term timescale to take into account the 2020 planning horizon of the NSS and SERPG.
- 5.2 One of the key requirements of the RPG is that retail strategies should provide a broad assessment of the additional retail floorspace required in counties over the lifetime of their strategies. This section reviews and updates the floorspace capacity assessment presented in the 2004 Review taking account of the changes to the population and population forecasts and updated information on expenditure, retail floorspace and extant planning permissions and the findings of the 2007 household and shopper surveys.
- 5.3 The approach adopted recognises that the information collected, collated and analysed in the preparation of the 2004 Review was current at that time. The commitment to review, monitor and update the Strategy's baseline information on an ongoing basis recognised that changes occur and the Strategy requires keeping pace with these if it is to remain credible and valid. The review and update of the capacity assessment presented in this section, therefore, takes due account of the changes that have taken place in the interim period.

PRINCIPLES & OBJECTIVES

- 5.4 The capacity assessment is the mechanism used to estimate the amount of additional expenditure that will occur in the County over the period of the Strategy (to 2014) and beyond the Strategy timescale to 2020. The inclusion of consideration of capacity up to 2020 is for the following reasons:
- i. Given Kilkenny City's designation as a Hub under the NSS and SERPG and the large increase in population projected over the period of both to 2020, then it is important for strategic land use planning purposes that a longer term view/vision is taken; and
 - ii. The review of the City and County Retail Strategy will become part of the emerging City and County Development Plans, both of which have to be compliant with the NSS and SERPG which provide spatial and policy planning guidance to 2020.
- 5.5 This assessment identifies the type and amount of additional floorspace that will be required to accommodate additional expenditure over the timescale of the Retail Strategy. At the same time, allowances are made for:
- New retail outlets that are planned to come on-line, identified by extant planning permissions.

- Increases in sales in existing stores due to improvements in turnover efficiency.
- Expenditure in alternative forms of retailing – this includes e-retailing, mail order sales and market stalls. It excludes wholesale retail and car sales outlets, as laid down by the RPG.

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

- i. **Step 1:** Population and Expenditure Estimates;
- ii. **Step 2:** Turnover Estimates;
- iii. **Step 3:** Turnover Ratios;
- iv. **Step 4:** Gross Additional Expenditure Potential;
- v. **Step 5:** Future Sources of Retail Sales; and
- vi. **Step 6:** Capacity Potential.

STEP 1: POPULATION & EXPENDITURE ESTIMATES

5.7 The first step is to calculate the total amount of expenditure on convenience and comparison goods by the resident population of the County up to 2020. To derive this, the estimated per capita levels of expenditure are multiplied by the County population forecasts. The per capita expenditure estimates for comparison and convenience goods are derived from the CSO's 2004 Annual Services Inquiry (ASI), the latest year for which information is available. Per capita expenditure estimates for convenience and comparison goods are projected forward based on recent personal consumption growth estimates. The more recent information reflects the rapid growth in spending by individuals over recent years. The population estimates follow the discussion presented in Section 3 and with the expenditure estimates are presented in Table 5.1.

5.8 The analysis of retail expenditure is only concerned with expenditure that occurs within retail outlets: i.e. expenditure related to retail floorspace only. As a result, the per capita expenditure figures exclude expenditure that does not occur in retail outlets e.g. via the internet. Recent increases in internet shopping have been served by existing retail floorspace rather than dedicated distribution facilities aimed at the internet shopping market. Consequently, over the medium term it is reasonable to assume that further growth in internet shopping will not be at the expense of retail floorspace.

Table 5.1
Expenditure by the Resident Population (2004 prices, €m)

Year	Per Capita Expenditure (€/cap)		Population			Total Expenditure (€m)					
	Conv- enience	Comp- arison				Convenience			Comparison		
			Low	Med	High	Low	Med	High	Low	Med	High
2007	2,723	3,435	88,971	89,426	89,253	242	244	243	306	307	307
2008	2,764	3,555	90,583	91,457	91,151	250	253	252	322	325	324
2014	3,023	4,446	98,560	101,996	103,417	298	308	313	438	454	460
2020	3,305	5,639	104,764	110,795	117,334	346	366	388	591	625	662

Sources: derived from CSO Annual Services Inquiry 2004, and County Incomes and Regional GDP 2004
Population is based on growth implied by the DoEHLG Regional Guidelines for the South East Region and historical population trends in Kilkenny County (see Section 3)

STEP 2: TURNOVER ESTIMATES

- 5.9 The household and shopper surveys, presented in Section 4, enable the estimation of the extent of expenditure on goods in retail outlets in the County. They allow an estimate of the total amount of turnover for retail outlets in the County or, put another way, the total amount of expenditure on goods sold by retailers in the County to be derived. The estimates for total turnover in the County for the current year (2007) and projected estimates for 2008, 2014 and 2020 are set out in Table 5.2.
- 5.10 An estimated 69.5% of convenience expenditure (**market share**) by the resident population is spent in retail outlets located in the County. This compares with the 82.8% and 73.0% in the 2001 Strategy and 2004 Review respectively. Of the residents doing their main food shopping outside the County, the majority of this expenditure leakage was to Waterford City and South Tipperary locations, followed by Carlow Town and to a lesser extent New Ross. The large increase in leakage suggests that the attractiveness of Kilkenny to residents in some parts of the County for food shopping has further decreased since 2004. As has been highlighted, new large format convenience floorspace which is under construction plus schemes which are in the planning process should serve to help redress this.
- 5.11 The comparison market share of resident's expenditure is 67.7% which is small decrease of 2.3% since the 2004 Review. Again, the draw is Waterford City with smaller percentages being lost to the other main centres of Carlow, Clonmel, Carrick-on-Suir and Dublin. The household survey has indicated that Carrick-on-Suir has become more important in terms of expenditure leakage from the County since 2004. The enhanced draw of the town may be partly explained by the recently completed expansion of the Blarney Woollen Mills store at the former Tipperary Crystal site and the upgrading of the SuperValu store in the town centre.

- 5.12 Persons living outside the County account for an estimated 9.8% of total convenience turnover (**trade draw**) and 41.5% of the total comparison turnover of the County's retail outlets. The inflows came from a number of neighbouring counties, predominantly from South Tipperary, Carlow, Laois and Kildare. The figures illustrate a substantial decrease in convenience expenditure inflows and a further increase in comparison inflows since the 2004 Review.

Table 5.2 Projected Turnover of Retail Outlets Located in County 2007 – 2020 (2004 prices, €m)								
Year	Convenience			Comparison				
		Low	Med	High		Low	Med	High
2007								
Resident Expenditure		242.3	243.5	243.1		305.6	307.2	306.6
Less Expenditure Outflow	30.5%	73.9	74.3	74.1	32.3%	98.7	99.2	99.0
Spend by Residents on Outlets in County		168.4	169.3	168.9		206.9	207.9	207.5
Add Imported Expenditure	9.8%	18.3	18.4	18.4	41.5%	146.8	147.5	147.2
Spend in Retail Outlets in County		186.7	187.7	187.3		353.7	355.5	354.8
2008								
Resident Expenditure		250.4	252.8	252.0		322.0	325.1	324.0
Less Expenditure Outflow	10.0%	25.0	25.3	25.2	15.0%	48.3	48.8	48.6
Spend by Residents on Outlets in County		225.4	227.5	226.8		273.7	276.4	275.4
Add Imported Expenditure	20.0%	56.3	56.9	56.7	41.5%	194.2	196.0	195.4
Spend in Retail Outlets in County		281.7	284.4	283.5		467.9	472.4	470.8
2014								
Resident Expenditure		297.9	308.3	312.6		438.2	453.5	459.8
Less Expenditure Outflow	10.0%	29.8	30.8	31.3	15.0%	65.7	68.0	69.0
Spend by Residents on Outlets in County		268.1	277.5	281.3		372.5	385.5	390.8
Add Imported Expenditure	30.0%	114.9	118.9	120.6	41.5%	264.2	273.5	277.3
Spend in Retail Outlets in County		383.0	396.4	401.9		636.7	658.9	668.1
2020								
Resident Expenditure		346.3	366.2	387.8		590.7	624.8	661.6
Less Expenditure Outflow	10.0%	34.6	36.6	38.8	15.0%	88.6	93.7	99.2
Spend by Residents on Outlets in County		311.6	329.6	349.0		502.1	531.1	562.4
Add Imported Expenditure	30.0%	133.6	141.2	149.6	41.5%	356.2	376.7	399.0
Spend in Retail Outlets in County		445.2	470.8	498.6		858.4	907.8	961.3

- 5.13 To calculate turnover, the amount spent by the residents of the County in retail outlets located outside the County is subtracted from the total amount of potential retail expenditure by residents of the County. This provides the expenditure by residents in retail outlets located inside the County. In the case of convenience expenditure, this accounts for 91.2% of total turnover in retail outlets in the County. Therefore, the additional 9.8% of total expenditure due to persons living outside the County needs to be added, which gives the total turnover of retail outlets located in the County. This is the process used in calculating the turnover figures presented for 2007, 2008, 2014 and 2020 in Table 5.2.
- 5.14 Convenience expenditure market share should be higher and both it and comparison market share will improve due to the extant planning consents in the pipeline and other schemes that have reached an advanced stage in the planning process. As such, it is reasonable to build the following assumptions into the capacity assessment as a planning objective:
- Convenience market share improving to 90% by 2008
 - Comparison goods market share increases to 85% by 2008
 - Convenience trade draw increasing to 20% by 2008 and 30% by 2014.
- 5.15 The targets set out above are broadly in line with those set out within the 2004 Review of the Retail Strategy. The target for an increased convenience market share of 90% has, however, been brought forward to 2008 to reflect the increased attraction that will be introduced through the McDonagh Station scheme. The target for an increased comparison market share of 85% has been brought forward to 2008 based on the same rationale. A planning target of 20% by 2008 and 30% by 2014 has been newly introduced in relation to convenience trade draw, to reflect the need to attract visitor expenditure in order for the County to fulfil its retail planning objectives.

STEP 3: TURNOVER RATIOS

- 5.16 The turnover figures for 2007 set out in Table 5.2 are an estimate of the amount of expenditure that will be sustained by the estimated amount of floorspace in the County at the beginning of the Retail Strategy period. For example, in 2007, the County has approximately 19,468m² of convenience floorspace that was generating turnover of €187.2m and approximately 68,542m² of comparison (including bulky goods) floorspace that was generating €354.7m. Looking at the indicative turnover ratios (turnover divided by floorspace) this would imply convenience sector turnover of €9,616 per m² while comparison turnover ratios are calculated to be about €5,175 per m². With respect to the convenience turnover ratio, existing convenience floorspace – a mix of both older and modern formats – should be trading on average at €13,000 per m². This would indicate therefore that there is undertrading in the

existing convenience floorspace, which indicates that there is either an excess of floorspace to expenditure potential or that the existing offer is generally outdated and underperforming. Given the substantial increase in the outflows of resident's convenience expenditure and decrease in non-resident inflows then it can be concluded that it is the latter and this is an issue which the Retail Strategy should seek to redress.

- 5.17 Based on industry standards, the generally accepted turnover ratio for existing comparison floorspace is of the order of €5,000 per m². The current comparison turnover ratio approximates to this and, therefore, there is no evidence of either under or overtrading in comparison floorspace.

STEP 4: GROSS ADDITIONAL EXPENDITURE POTENTIAL

- 5.18 Using the derived turnover estimates, it is possible to estimate the growth in spare expenditure capacity that will occur in the County between 2008 and 2014 with 2020 provided to give a longer term picture. This is illustrated in Table 5.3.

Period	Convenience			Comparison		
	Low	Medium	High	Low	Medium	High
2008-2014	101.3	112.0	118.4	168.8	186.5	197.3
2014-2020	62.2	74.4	96.7	221.6	248.8	293.2
Total 2008-2020	163.5	186.4	215.1	390.5	435.4	490.5

Source: DTZ Piedad Consulting, 2007

STEP 5: FUTURE SOURCES OF RETAIL SALES

- 5.19 The spare expenditure figures that have been estimated for the County are gross estimates and need to be adjusted to take account of expenditure that may occur via new retail developments (extant planning permissions) that are due to come on stream post 2007, through increases in turnover efficiency and the possibility of growth in internet retailing. All of these future sources of spend have been factored into the derivation of the net expenditure that is available for additional retail floorspace.

STEP 6: CAPACITY POTENTIAL

- 5.20 From the estimates of gross additional expenditure potential in Table 5.3, the expenditure accounted for by the extant planning permissions and turnover efficiency growth is subtracted. This results in estimates of net expenditure capacity as detailed in Table 5.4.

Table 5.4						
Net Expenditure Capacity in County (2004 prices, €m)						
Period	Convenience			Comparison		
	Low	Medium	High	Low	Medium	High
2008-2014	28.6	39.3	45.7	58.7	76.4	82.2
2014-2020	62.2	74.4	96.7	189.5	216.7	261.1
Total 2008-2020	90.8	113.7	141.4	247.2	292.1	343.3
Source: DTZ Pieda Consulting, 2007						

- 5.21 The final part of the capacity assessment is to determine the amount of floorspace that is required to accommodate this anticipated increase in expenditure over the timescale of the Retail Strategy and forward to 2020. This is achieved by applying 2004 Price Year median weighted turnover ratios to the expenditure figures. For the convenience and comparison floorspace, turnover ratios of €14,452 per m² and €6,606 are used respectively. Applying these turnover ratios to the net expenditure capacity growth provides the estimates of the net floorspace potential available in the County. This is set out in Table 5.6.

Table 5.6						
Indicative Net Floorspace Potential in the County (2004 prices, €m)						
Period	Convenience			Comparison		
	Low	Medium	High	Low	Medium	High
2008-2014	1,968	2,699	3,144	8,886	11,563	12,439
2014-2020	4,274	5,119	6,649	28,680	32,802	39,520
Total 2008-2020	6,242	7,818	9,794	37,566	44,365	51,959

- 5.22 The floorspace capacity assessment indicates that there is spare capacity for additional convenience and comparison floorspace to 2014 but of a lesser quantum than that between 2014 and 2020. This is in view of the planning consents that have already been granted which capture a proportion of the potential gross expenditure that is available over the period to 2014. There is, however, substantial additional capacity post-2014. This is important to highlight as any large scale retail schemes that are not well advanced in the planning process now are likely to have their Design Years (the year post opening when normal trading patterns have been

established) after 2014. It is important to understand and acknowledge this now as it has important implications for the City delivering the objectives of its designation as a Hub and the Ferrybank area contributing to Waterford City achieving its role as a national Gateway.

CONCLUSIONS

- 5.23 Since the preparation of the 2001 Retail Strategy and the 2004 Review, the County has witnessed a considerable improvement in the competitiveness of its retail offer and this important progress is set to stay on course in view of the schemes which have already been granted, with McDonagh Station and Ferrybank being key achievements of retail planning policy since 2001. These consents, combined with the residual capacity for additional retail floorspace, will ensure that the County's role, profile and competitiveness in the national and regional retail hierarchies is sustained and enhanced over the period of the 2008 – 2014 City and County Development Plans. However, there is a need to look further forward if the framework for retail planning in the County to 2020 is to be put in place and this is why the capacity potential post-2014 is important. The potential of the County and the key locations where additional major new floorspace should be located requires to be considered now to ensure that decisions today do not prejudice future potential.
- 5.24 The figures presented in the capacity assessment provide a broad assessment of the requirement for additional new floorspace. They should thus be taken as indicative and as guidance on the quantum that will be required and are in no way intended to be prescriptive. It is not the purpose of the capacity assessment to place a cap on the scope for future retail developments in the County. In developing the Retail Strategy's objectives, as with the 2004 Review, the capacity assessment needs to be viewed in the context of the following factors and issues:
- i. The strengths and weaknesses of the City and County's retail profile and how these are best harnessed and addressed respectively;
 - ii. The actions required to sustain and grow retail activity particularly in the light of the increasing attraction of Waterford City for residents in the south of the County;
 - iii. The apparent strength, evidenced by high trade draw, of Kilkenny City for clothing and footwear;
 - iv. The importance of tourism related retailing and the importance of retailing to the City and County's overall tourism offer; and
 - v. Transportation improvements (e.g. M9/N8) which will make it easier for the County's residents to go to competing centres.

6 HEALTH CHECKS

6.1 In the review, the health checks undertaken for the 2004 Review of the Retail Strategy were updated. The centres are Kilkenny City and the four District Towns and the health checks are summarised in the following order:

- i. Kilkenny City;
- ii. Callan;
- iii. Castlecomer;
- iv. Graiguenamanagh; and
- v. Thomastown.

6.2 For comparisons to be drawn with the findings of the 2001 Strategy and the 2004 Review, the centres were assessed in 2007 under broadly similar headings to those used in the original health checks. These include:

- Character of the Centre
- Diversity of Uses
- Retail Representation
- Pedestrian Flows
- Physical Structure
- Recent Development.

KILKENNY CITY

Character of the Centre

6.3 Kilkenny City Centre is dominated by the High Street/Parliament Street which links The Parade to the old Irishtown district of the City that is dominated by St. Canice's Cathedral. Kilkenny's medieval heritage is most visible in the number of small streets and lanes which branch off from High Street and Parliament Street and provide for good pedestrian access in all directions, including towards John Street. The pedestrianisation of Kieran Street has further aided the retail development of this area and there has been the introduction of additional cafes and restaurants which have further enhanced the ambience of the street. The western edge of the City Centre has continued to witness a revival with Ormonde Street linking Patrick Street

directly onto New Street and providing a number of retail units, apartments, a hotel and a multi-storey car park.

Diversity of Uses

- 6.4 The City Centre continues to offer a wide diversity of functions reflecting its role as the administrative centre and key centre of the County. The diversity is also founded in the centre's historical importance and its role as one of the top visitor destinations in the country.
- 6.5 The role of Kilkenny as a vibrant tourist and cultural location is witnessed by the ever increasing number and quality of licensed premises, hotels, bed and breakfasts and hostels in the City Centre. The range of bars includes traditional Irish pubs to modern larger public houses. The popularity of Kilkenny as a centre for evening entertainment is evidenced by the number of nightclubs, including: The Venue at the Ormonde Hotel on Ormonde Street; Club Life on John's Street; Langton's on John Street; Zoo on Parliament Street; and, Nero's at Kyteler's Inn on Kieran Street.
- 6.6 Kilkenny is renowned as a centre of artistic excellence and is home to the Kilkenny Design Centre and National Craft Centre, both of which are located opposite the Castle in the Castle Yard complex. The Kilkenny Arts Festival and the Cat Laughs Comedy Festival have succeeded in carving out a unique popularity for the City in the contemporary cultural and artistic scene. Live theatre has long been a traditional part of Kilkenny's cultural life, with the Watergate Theatre and several public houses hosting an eclectic year long programme of events.

Retail Representation

- 6.7 The City Centre has a strong retail base with a large variety of national and international retail brands located in and around the Core Shopping Area and a considerable selection of independent retailers. Convenience shopping is largely centred on the Dunnes Stores complex on Bateman Quay/Kieran Street and on Superquinn, located in the Market Cross Shopping Centre. Additional convenience floorspace is provided through a variety of independent retailers sprinkled throughout the City Centre.
- 6.8 As found in the 2004 Review, comparison retailing is the dominant form of business pursued by independent traders in the City Centre. Many of these businesses are family owned and have developed in tandem with the City Centre over the past number of decades, for example Winston's on Kieran Street and Good's on High Street. Several multiple stores also offer comparison retailing, such as Barratt's Shoes (Market Cross Shopping Centre) and Benetton (High Street). The offer and

attraction of the City Centre is set to be enhanced by the McDonagh Station scheme which is currently under construction. The development provides the first wave of the planned expansion of the City Centre. The shopping centre component of the development will be anchored by a Dunnes department store and will provide the range of retail formats and footprints which cannot be delivered in the traditional heart of the City Centre. The scheme is set to attract a range of new national and international comparison operators to the City.

6.9 Additionally and importantly, the development will provide a catalyst for the regeneration of John Street which has witnessed increased vacancies in recent years. Heavy traffic and pedestrian unease, despite the installation of pedestrian crossings, have to date militated against drawing shoppers away from the High Street area. This position should be redressed with John Street becoming the key pedestrian link between the traditional City Centre and the new McDonagh Station scheme. An additional characteristic of John Street which has evolved is the fact that it has become home to several of Kilkenny's most popular hotels, bars and nightclubs and, as a consequence, it has become more of an attractive evening destination. In addition to the commercial uses which prevail, the vitality of the area is greatly enhanced by the pedestrian footfall generated by the County Council Headquarters which are an important draw to the area.

6.10 Table 6.1 summarises the changes in both convenience and comparison floorspace in the City and Environs over the period 2001 – 2007. Since the 2001 Strategy, the City's floorspace has increased by 39.3%. Convenience floorspace has increased by 37.2% but with almost all of this taking place between 2004 and 2007. The table illustrates that mainstream comparison floorspace has only increased by 13.8% since the 2001 Strategy, with only 4.5% being between 2004 and 2007. The most significant change is the major increase of 2.2 times the City's retail warehousing floorspace between 2001 and 2007. There has been a small decrease from 2.9% to 2.1% in vacant floorspace since the 2001 Strategy was prepared. When retail warehousing floorspace is excluded from the floorspace total, vacancies in the City Centre alone are nearly 2.8%. This is not a level which should cause concern particularly given that it is generally spread around the City Centre.

Year	Convenience	Comparison	Retail W'housing	Vacant	Total
2001 Strategy	8,240	34,842	5,765	1,460	50,307
2004 Review	11,267	37,930	13,062	1,460 ⁽¹⁾	63,719
2007 Review	11,307	39,656	17,659	1,458	70,080

Source: DTZ Sherry Fitzgerald Surveys, 2000 and DTZ Pieda Consulting Surveys, 2004 & 2007

Pedestrian Flows

- 6.11 Pedestrian flows were greatest around the Market Cross Shopping Centre and High Street. Kieran Street and John Street Upper were also busy. The main areas of traffic congestion centred on: the James Street/High Street junction where significant congestion was witnessed; and, the High Street/Patrick Street junction where the development of Ormonde Street and on street parking on Lower Patrick Street have resulted in considerable traffic congestion, particularly during the early morning and evening peak periods. Traffic flows continue to be very heavy along John Street with subsequent congestion. Development work at McDonagh Station has led to increased traffic congestion approaching the City Centre from both the Dublin and Hebron Roads. This should be resolved when construction works are complete and the development becomes operational.

Physical Structure

- 6.12 The City Centre has succeeded in maintaining its unique medieval character despite the development of major new centres and its continued popularity as both a tourist and cultural centre. Pedestrian crossings and wider pavements on High Street, combined with outdoor seating and traditional style signposting, have enhanced the ambience and visual attraction of the City Centre although pedestrian/vehicle conflict remains an issue. The shop fronts in the City Centre represent a fine combination of traditional elegance and contemporary design and reflect the City's achievement of successfully merging old and new styles and influences. The covered area of the Town Hall ('Tholsel') on the High Street is the City's traditional meeting point and remains popular as a point of social interaction. The park surrounding the Castle ('Castle Park') provides a renowned leisure amenity, including walks and a children's playground. The Parade, highlighted in the 2004 Strategy as an area in need of attention, has been drawn towards the City Centre with the development of Ormonde Street. Major environmental improvement works are now programmed for the Parade which will better harness the asset of this important space.

Recent Development

- 6.13 Since 2004, additions to retailing have occurred primarily on the outskirts of the City. The main developments/schemes which have been delivered or are underway are:
- i. Smithsland Retail Park, adjacent to Loughboy Industrial Estate has Woodies DIY as anchor tenant. Additional units are currently under construction;
 - ii. A new office/retail block has been completed on New Street;
 - iii. There is evidence of further development taking place adjacent to the Lidl store (off the Waterford Road);

- iv. A new apartment complex has been completed on Friary Street;
- v. There are a significant number of residential schemes underway in all areas of the City's Environs. There are two schemes under construction in the western Environs area and also residential development taking place off the Waterford, Kells and Bennettsbridge Roads;
- vi. New units have been developed in the Hebron Industrial Estate; and
- vii. A new swimming and leisure complex is under construction at Scanlon Park.

CALLAN

- 6.14 Callan is located 16 kilometres (10 miles) south west of Kilkenny City and 27 kilometres (17 miles) from Clonmel on the Kilkenny/Clonmel N76 National Secondary Road on the banks of the Kings River. Based on the results of the 2006 Census, the town's population is 1,771. The substantial 44.7% population increase that has occurred since 1996 reflects the extent of residential development which has taken place in recent years.
- 6.15 It is the third largest retail centre in the County, after Kilkenny City and Thomastown. The growing role of Callan as a popular market centre for its immediate hinterland is indicated by the extension of SuperValu, the town's only symbol group store, since the 2004 Review was prepared. Other convenience shopping is provided by several independent retailers. The comparison offer of the town has been considerably enhanced by the new Co-Op store and other small scale independent retail units including a veterinary supply shop and a textile shop. The importance of Callan as a local agricultural centre is evidenced by the existence of the Co-Op store and several garages specialising in agricultural repairs.
- 6.16 There is a very low level of vacancies along Green Street but there are numerous vacancies on Bridge Street. This can be largely attributed to the constraints of the very narrow streetscape which removes the scope for on street parking. The level of vacancies has increased since the 2004 Review. However, there is revitalisation of the northern part of the town through the extensive new residential development that has taken place which should have beneficial effects on the vitality of Bridge Street. Housing is the predominant land use in the town. There are several light industrial enterprises located off the new bypass which provides for easy access away from the town. Callan has a very limited services infrastructure to meet local needs with the town having no hotels and a limited offering of restaurants.
- 6.17 Pedestrian flows were greatest in the Green Street area near SuperValu and the branches of the Bank of Ireland and Allied Irish Bank. The Callan bypass has greatly alleviated traffic congestion and has removed the vast majority of heavy goods

vehicles from the centre of town. This has resulted in a high degree of pedestrian mobility, an improved environment for local shoppers and a quiet town atmosphere. On street parking was most prevalent on Green Street. No on street parking is permitted on Bridge Street due to the lack of space whereas it is permitted along West Street to the junction of Green Street.

- 6.18 Two new residential developments have been constructed to the north of the town centre, one on the lands of the old Westcourt Demesne and the other on the old Kilkenny Road. The primary schools and both secondary schools are located in this area. In general, there is a large extent of residential development under construction in the area surrounding the town centre and there is land zoned for further housing in the wider north and south of the town.
- 6.19 Table 6.2 summarises the changes in both convenience and comparison floorspace in Callan over the period 2001 – 2007. Since the 2001 Strategy, the town’s floorspace has doubled. Convenience floorspace has increased by 58.0%, with the majority of this taking place between 2004 and 2007. The table illustrates that comparison floorspace has increased by a significant 127.7% since the 2001 Strategy, with this almost wholly being between 2004 and 2007. The town has no retail warehousing floorspace. Vacancies at 2007 are 12.9% which is an increase from the 6.8% and 12.4% levels of the 2001 Strategy and 2004 Review respectively. It is a significant level of vacancies for a centre the size of Callan but it is important to highlight that the majority of these increased vacancies are along Bridge Street. Although Callan can be characterised as a centre which is in transition and becoming increasingly vibrant, the level of vacancies in Bridge Street is a matter of concern which requires to be addressed.

Year	Convenience	Comparison	Retail W’housing	Vacant	Total
2001 Strategy	1,190	851	0	150	2,191
2004 Review	1,227	862	0	295	2,384
2007 Review	1,880	1,938	0	569	4,387
Source: DTZ Sherry Fitzgerald Surveys, 2000 and DTZ Pieda Consulting Surveys, 2004 & 2007					

- 6.20 A planning application is currently under consideration by the County Council for a new Tesco store on the outskirts of the town. Consultations with Elected Members have also indicated that there is market interest in the town from a number of other key national multiples. There is a number of opportunities for the re-use and regeneration of sites for retail and other town centre uses within the town centre, including the Bridge Street properties that are currently under development, run-down buildings on Mill Street and the vacant Co-Op building on Green Street.

CASTLECOMER

- 6.21 Castlecomer is located just over 19 kilometres (12 miles) north of Kilkenny City on the N78 National Secondary Road to Athy and the junctions of the R426 to Portlaoise and the R694 to Ballyragget and Freshford. Based on the results of the 2006 Census, Castlecomer's population has increased by 10.9% to 1,539 since 1996 which while positive is below County, regional and national trends.
- 6.22 Retail activity in the town is centred on High Street where two of the town's three symbol group stores and the Bank of Ireland are located. The two symbol group stores are Eurospar (which has replaced the SuperValu store since the 2004 health check) and Londis. Convenience floorspace also comprises the Gala/Texaco store on Kilkenny Street and a number of independent retailers spread along High Street, Barrack Street and Kilkenny Street. Independent businesses provide a variety of shops and services including a coffee shop, hardware store, several pharmacies, butchers and dry cleaners. There is also a limited range of comparison stores which includes Hennessy's Giftware on High Street and the Book Shop and Central Furniture on Kilkenny Street.
- 6.23 Pedestrian flows are concentrated primarily along High Street and in the vicinity of the Glanbia Co-Op at the junction of Chatsworth Row. Lesser pedestrian flow was observed along Barrack Street and Kilkenny Street. There is a constant high level of traffic flow through the town mainly on the N78 Kilkenny-Athy Road. This results in a very busy High Street/Barrack Street/Chatsworth Row intersection. There are no pedestrian crossings to alleviate the issues for shoppers and other pedestrians. On street parking is available throughout the town and there is a dedicated car park located along High Street. Castlecomer is on the Kilkenny-Athy-Dublin bus route.
- 6.24 All primary and secondary school facilities are located away from the main town centre. Local industry is mainly based in the Castlecomer Enterprise Centre and the Castlecomer Business Park, both of which are located on the Kilkenny Road. Light engineering and textile manufacturing predominate. At the time of the 2007 health check, there were units for sale within the Business Park. IJM, a timber frame housing manufacturer, has moved into the former 'Comer' International Factory site, located just off the Portlaoise Road. The Ormonde Brick factory site, on the Athy Road, is also an important source of employment and industry in the town. The Castlecomer Estate Yard is also located along the Athy Road and this is host to a selection of specialist arts and crafts attractions.
- 6.25 Castlecomer's tourism offer and infrastructure have been significantly enhanced in recent years with the opening of Castlecomer Discovery Park and the Castlecomer Estate Yard. The Discovery Park is the re-branded name for Castlecomer Demesne Project and incorporates all aspects of the town's demesne. This includes 80 acres

of mixed woodland with 6 kilometres of walks, two rainbow trout fishing lakes, a children's play ground, exhibition centre and the design yard of craft shops and the Jarrow Café and Giftshop. Castlecomer also benefits from being located near to Kilkenny City, the Dunmore Caves and the Jenkinstown Park and amenity area and there is scope for this to be better harnessed and promoted to the benefit of the town and its economy.

- 6.26 Table 6.3 summarises the changes in both convenience and comparison floorspace in Castlecomer over the period 2001 – 2007. Since the 2001 Strategy, the town's floorspace has witnessed a very limited 8.4% increase. Convenience floorspace has only increased by 3.4% and this has been since 2004. The table illustrates that there has only been a 3.8% overall increase in comparison floorspace since the 2001 Strategy. However, this can be taken to be fairly positive given that between 2001 – 2004 comparison floorspace decreased by 12.7%. It indicates that the town centre is beginning to revitalise and regenerate. The increases and decreases, however, have to be put into the context of the relatively small quantum of floorspace involved – one shop closing can have an important effect on the percentage figures. The town has no retail warehousing floorspace. Vacancies at 2007 are 7.9% which is a substantial increase from the 3.6% and 4.9% levels which prevailed at the time of the 2001 Strategy and 2004 Review respectively. It is a relatively high level of vacancies for a centre of Castlecomer's size. However, the vacant units are generally small and do not generally detract from the vibrancy of the town centre.

Year	Convenience	Comparison	Retail W'housing	Vacant	Total
2001 Strategy	1,336	1,333	0	100	2,769
2004 Review	1,336	1,164	0	130	2,630
2007 Review	1,381	1,383	0	238	3,002

Source: DTZ Sherry Fitzgerald Surveys, 2000 and DTZ Pieda Consulting Surveys, 2004 & 2007

GRAIGUENAMANAGH

- 6.27 Graiguenamanagh lies nestled in the steep sided Barrow valley on the banks of the River Barrow, bounded on one side by Mount Leinster and on the other by Mount Brandon. It lies 32 kilometres (20 miles) south east of Kilkenny City, 19 kilometres (12 miles) north of New Ross and over 33 kilometres (21 miles) west of Enniscorthy at the junction of the R705 and R703 regional roads. Based on the 2006 Census, Graiguenamanagh has a population of 1,097. It is a town which is witnessing population decline. Between 2002 and 2006, the population decreased by the order of 5.6% and overall since 1996 by some 1.4%. This contrasts significantly with the performance of the County as a whole and is an issue which has been recognised and responded to by the County Council. This is summarised in the paragraphs which follow.

- 6.28 It is a market town servicing its immediate hinterland. Additionally, Graiguenamanagh has a range of tourism infrastructure and amenities to respond to the needs of its visitor market. This is founded on the town's heritage, the nationally and internationally important Duiske Abbey and its location on the Barrow Navigation and at the intersection of two National Waymarked Ways. Duiske Abbey Glass has achieved a worldwide reputation and attracts many visitors to its factory shop on High Street. There is a tourist/gift shop and small museum just off Abbey Street very close to Duiske Abbey. Graiguenamanagh is also part of the 'Kilkenny Craft Trail' and a major festival was held in summer 2004 to celebrate its eight hundred year anniversary. In addition, the town has been generating a calendar of important events including the annual book festival and boating regatta. The tourism asset and potential of the town is a real opportunity which, while being developed, is still not being fully harnessed.
- 6.29 It is the smallest retail centre in the league of the District Towns and the gap in its comparative quantum and offer has increased over the period since 2001. There are two symbol group stores in the town, SuperValu located on Lower Main Street and a Top Shop/Petrol Station located west of the town on the Borris Road. Retail activity is centred along the Main Street and High Street axis. Additional convenience floorspace is limited to several independent traders and general grocers. Comparison shopping is also limited and again is largely located in Main Street and High Street. It primarily comprises a clothes shop, book stores, a number of hardware stores and several gift shops. The Cushendale Woollen Mills Shop, selling distinctive Irish made textiles, is trading to the south of the town centre on Mill Road. A Bank of Ireland branch with ATM is located on Upper Main Street. The town's primary and secondary schools are located outside the town centre.
- 6.30 Pedestrian and traffic flow is heaviest in the Lower Main Street area where SuperValu is located. On street parking and the very narrow streetscape cause serious congestion problems and also difficulties for pedestrian mobility. There are no pedestrian crossings to mitigate the conflicts. Traffic congestion should be alleviated following the completion of R705 Graiguenamanagh Relief Road which is due for completion in early 2008. Once the road is completed, it is envisaged that a Traffic Management Plan, including identification of off street parking, will be prepared for the town.
- 6.31 Several new housing developments are located on the east bank of the river running parallel to the St Mullins Road and there is also a new scheme underway on the Kilkenny Road. There are a large number of derelict buildings located along The Quay, High Street, Turf Market and Main Street, all of which greatly detract from the overall potential visual attractiveness and ambience of the town. Although a number of sites and buildings came under the 2000 Town Renewal Scheme, very few of the opportunities were delivered. Some of these sites are currently being dealt with through the provisions of the Derelict Sites Act 1990 which seeks to encourage owners to tidy up derelict sites.

- 6.32 The considerable issues which prevail in the town have been well recognised by the County Council and in 2005, with Carlow County Council, it jointly commissioned DTZ Piedad Consulting to prepare an economic and development potential of the town and neighbouring Tinnahinch. This study provided a framework for action and investment as a joint initiative between the local authorities, other public agencies, local businesses and the local community. Although the framework is in place to help secure sustainable regeneration of both Graiguenamanagh and Tinnahinch, consultations with local Elected Members identified that the town centre is continuing to further decline.
- 6.33 Table 6.4 summarises the changes in both convenience and comparison floorspace in Graiguenamanagh over the period 2001 – 2007. Overall, since the 2001 Strategy, there has been a 35.0% increase in total floorspace. This figure, however, masks what has been happening in the interim period. Between 2001 – 2004, convenience floorspace decreased by 11.7% but recuperated to an overall increase of 7.4% at 2007 and comparison floorspace, after a significant 43.4% increase between 2001 – 2004, decreased by 26.3% between 2004 – 2007 resulting in only a 5.7% increase since 2001. Although it can be acknowledged that the quantum of floorspace involved is relatively small, it is important given the size of the town. The town has no retail warehousing floorspace. Vacancies at 2007 are an extremely significant 23.7% which is a very substantial increase from the 3.3% and 7.2% which prevailed at the time of the 2001 Strategy and 2004 Review respectively. In towns with a high dependence on the tourism industry, very significant levels of vacancy are generally found in the off peak season. However, it is normally very evident that these units are closed for the winter, noting that the health check was undertaken in February 2007. This was not the general conclusion in respect of Graiguenamanagh – the vacancies appeared to be more permanent in nature and this has been confirmed by local Elected Members. There are, therefore, very inherent issues in Graiguenamanagh which require to be addressed in not only the Retail Strategy but within wider economic and community planning frameworks.

Table 6.4					
Net Floorspace Graiguenamanagh 2001 – 2007 (m²)					
Year	Convenience	Comparison	Retail W'housing	Vacant	Total
2001 Strategy	810	955	0	60	1,825
2004 Review	715	1,370	0	161	2,246
2007 Review	870	1,010	0	583	2,463
Source: DTZ Sherry Fitzgerald Surveys, 2000 and DTZ Piedad Consulting Surveys, 2004 & 2007					

THOMASTOWN

- 6.34 The historic market town of Thomastown is located on the N9 National Primary Road linking Waterford to Dublin. It is some 16 kilometres (10 miles) south west of Kilkenny City and 32 kilometres (20 miles) north east of Waterford City. The Mount Juliet Estate and Championship Golf Club are nearly 6.5 kilometres (4 miles) to the east of the town. Thomastown is located on the main Waterford/Dublin bus route and train line. The results of the 2006 Census show the population of the town to be 1,837, which represents a population growth of 16.2% since 1996.
- 6.35 Although Thomastown experienced limited population growth between 1996 and 2002, it is a centre which has been identified as having greater strategic potential and importance than the other District Towns. It was recognised and named in the NSS, has been designated as a *District Town – Expansion Opportunity* in the SERPG and is the location for the decentralisation of the Health and Safety Authority bringing 110 new jobs to the town. These policies and initiatives are set to have an impact on the future potential and attraction of Thomastown as well address the issues which have prevailed in respect of population growth.
- 6.36 Thomastown is the second largest retail centre in the County and, as such, is an important convenience shopping centre for its immediate hinterland and for passing tourist traffic. It has two symbol group stores, SuperValu and Centra. There is also a range of comparison stores including Murray's Fashions, builders providers, various hardware stores, two antique shops, chemists and gift shops. Market Street has a Bank of Ireland (with ATM) and an Allied Irish Bank branch. Additionally, Thomastown benefits from a County Council Area Office and a District Headquarters for the Gardai.
- 6.37 The town grew from its location as an important crossing point on the River Nore. Retail activity is focused on the Kilkenny side of the river in an area encompassing a square including Logan, Low, Market and Pipe Streets. This provides a pleasant shopping environment, and at the time of the 2007 health check, witnessed a high level of pedestrian footfall. The 2004 health check identified that Marsh Street, located at the junction of Pipe Street and Market Street, also served as a main retail destination in the town centre due to the attraction of the SuperValu store. However, this supermarket has subsequently relocated to an edge of centre location, leaving a large vacant unit and resulting in substantially less pedestrian footfall along Marsh Street. This noted, there is a current planning application for the demolition of the store and associated storage buildings and its replacement with a three-storey primary healthcare facility which will incorporate a number of consultation/treatment rooms, offices and retail floorspace. The new SuperValu store is located, along with a number of other small retail units, including a pharmacy, in Cloghabrody, to the north west of the town. Traffic generated through the development is managed through a one way traffic system around the town. Dedicated car parking is provided for shoppers.

- 6.38 The town forms part of the 'Kilkenny Craft Trail' and is home to a number of craft and pottery shops. As a consequence, Thomastown also has a number of restaurants serving both visitors and the local market. Freshwater fishing is available along the banks of the River Nore and its importance and attraction is evidenced by a number of shops selling fishing tackle and associated products in the town centre.
- 6.39 Car parking is available in a public car park on Marsh Street and in on street parking on both sides of Market Street and Logan Street and also on The Quay, Chapel Lane and Mill Street. Very little pedestrian movement was observed past the Logan Street/Pipe Street junction on the Dublin Road. This may be as a result of the serious traffic congestion at this junction and the inadequate footpath provision.
- 6.40 There are several new residential developments in and around Thomastown including those recently completed off the Dublin Road, Chapel Lane and the Mall on the Waterford side of town. At the time of the 2004 health check, planning permission was being sought for a commercial/retail development at the existing St. Mary's Church site which fronts onto Market Street and dominates the Market Street area. This scheme was granted planning permission. The proposal seeks to both restore and remodel the listed building which could greatly improve the visual appearance/ambience of the entire Market Street area. The now disused Comerford's Bakery site in the centre of the town is currently being redeveloped with a mix of residential and small retail units. The old Garda station, located on Low Street and currently vacant, represents another potentially important opportunity for a mixed use residential and retail development. The potential of the town and its catchment area is recognised in the market, as evidenced by the planning application for a Lidl store on the outskirts of the town. This is currently on appeal to An Bord Pleanála (the Board).
- 6.41 Table 6.5 summarises the changes in both convenience and comparison floorspace in Thomastown over the period 2001 – 2007. Since the 2001 Strategy, the town's floorspace has almost doubled and the increase has been almost evenly split between 2001 – 2004 and 2004 – 2007. Convenience floorspace has increased by a considerable 58.9% since 2001 with this largely taking place between 2004 and 2007. The increase can almost wholly be attributed to the new SuperValu store.

Table 6.5					
Net Floorspace Thomastown 2001 – 2007 (m²)					
Year	Convenience	Comparison	Retail W/housing	Vacant	Total
2001 Strategy	1,658	1,154	0	116	2,928
2004 Review	1,646	1,669	559	211	4,085
2007 Review	2,867	1,637	559	1,481	6,544
Source: DTZ Sherry Fitzgerald Surveys, 2000 and DTZ Pieda Consulting Surveys, 2004 & 2007					

- 6.42 The table also illustrates that there has been a substantial 41.8% increase in Thomastown's comparison offer since 2001 although there has been a 1.9% decrease in the period 2004 – 2007. The new floorspace comprises mainly of two hardware stores, two antiques shops and a craft shop. The town has a limited quantum (559m²) of bulky goods floorspace which has not increased since the 2004 Review. Vacant floorspace at 2007 is very significant at 22.6% and predominantly comprises the former SuperValu store. It is a very significant increase when set against the levels of 3.9% and 5.2% which prevailed at the time of the 2001 Strategy and 2004 Review. However, as has been highlighted above, this issue is set to be redressed through the planning application for redevelopment and regeneration of the land and buildings as a primary healthcare facility which is currently being considered by the County Council. As the former SuperValu store is a prominent building in the town centre, its redevelopment and regeneration require to be progressed and addressed as a priority.

7 ASSESSMENT OF COMPETING CENTRES

7.1 The household and shopper surveys that have been undertaken to inform the 2007 Review have indicated an increased level of both convenience and comparison expenditure leakage to surrounding counties and their main centres. To address this issue, an important part of the review was to update the assessment of competing centres presented in the 2001 Strategy and 2004 Review and to also examine what the objectives and policies were in place in the respective retail strategies for these centres. The baseline was derived on the whole from in house information rather than new primary research. The competing centres that have formed the basis of the comparative analysis since 2001 are:

- i. Carlow;
- ii. Clonmel;
- iii. New Ross;
- iv. Portlaoise;
- v. Thurles; and
- vi. Waterford City.

7.2 It has become clear in the intervening years that New Ross is not a centre which is of the same level, importance and potential of Kilkenny or any of the other competing centres. As such, New Ross has been removed from the review of competing centres.

CARLOW

7.3 Carlow, like Kilkenny, is designated as a Level 1 Tier 3 centre in the RPG national retail hierarchy and is a County Town. However, unlike Kilkenny it is not a designated Hub or Gateway in the NSS or SERPG. At 2006, the town and environs had a population of 20,724, some 93% of that of Kilkenny Borough and Environs. It experienced significant population increases of 23% between 1996 and 2002 and 12.1% between 2002 and 2006 which were well above the national and regional averages over both of these timescales. To put this in context, over the same periods Kilkenny City and Environs grew by 10.9% and 7% respectively. The higher population growth is a reflection of Carlow's closer proximity and accessibility to Dublin and the town's location on both national road and rail corridors. The SERPG indicate in its settlement strategy that Carlow has the potential to accommodate a population of at least 28,000 by 2020. Importantly, this figure is not too unlike the critical mass population identified for designated Hubs, regionally and nationally.

- 7.4 The Carlow Town Retail Study, published in February 2005, indicates that total floorspace in Carlow Town was 32,873m², approximately 43% of that of Kilkenny City and Environs in 2007. The total comparison floorspace (mainstream comparison and retail warehousing), which is critical in terms of competitiveness, was approximately 40% that of the City and Environs. Large new developments that have helped to increase the competitiveness of Carlow in recent years include Hanover Retail Park (or Carlow Retail Park) (12,635m² gross) anchored by Woodies DIY (6,016m² gross) and the Fairgreen Shopping Centre (14,000m² gross). The latter is anchored by Tesco and has outlets such as Heaton's, Pamela Scott, Barrett's, Best Menswear, A-wear with Phase 2 of the centre including large format Next and River Island stores. Additionally, since the 2004 Review, other developments have opened around the town which further serve to enhance its attraction and competitiveness. These include the Dunnes Stores and Aldi developments in Graiguecullen.
- 7.5 The Carlow Retail Strategy estimates that the current comparison expenditure leakage from Carlow catchment area to competing centres is 20% (€22.9m per annum). Although it does not provide an estimate of convenience expenditure leakage, the strategy does promote the provision of additional retail space in Carlow Town to counter the leakage which occurs. Other recent and emerging retail developments which will assist in retaining expenditure and attracting additional expenditure from competing centres include:
- **Shamrock Business Park:** there are units for rent or sale in the park, which includes the relocated Doyle Builder Merchants from Shamrock Square. These sites may be used for retail uses.
 - **Carlow Business Park:** includes 6,000m² in eight units available for mixed use which includes retail uses. The new Dunnes Stores is located here and has been trading since mid 2006.
 - **Barrowside Business Park:** has three units totalling 2,300m² which can accommodate mixed use including retail uses. There is already a Zokia furniture store on the business park.
 - **Hanover Shopping Centre Redevelopment:** a planning application has been submitted for demolition of the existing shopping centre and the construction of a mixed use development in the town centre comprising 1,661m² net convenience floorspace and 11,652m² net comparison floorspace.
 - **Barrow Track:** permission has been granted for a mixed use development on the former Minch Norton site which incorporates some 3,000m² of net convenience floorspace and 5,547m² of comparison.
- 7.6 The granted and emerging schemes indicate that the predominant new floorspace is retail warehousing. It is generally recognised that there is a saturation of retail warehousing floorspace market and much of what has been granted will not actually be delivered. Additionally, the quantum of retail floorspace which has been granted

is acknowledged as having the potential to undermine the scope for new comparison floorspace in the town centre. Given both the fact that not all the retail warehousing will be delivered and the policy objective of focussing new comparison floorspace in the town centre, the Town and County Councils have accepted the principle of retail warehousing being excluded from consideration of the expenditure/floorspace capacity for the regeneration of the Hanover Shopping Centre.

- 7.7 Rental levels in Carlow have improved substantially since 2001 when locations in the prime retail area yielded €380 per m². They now range between €538 and €603 per m². Although rental levels have improved, they remain well below what is being achieved in prime locations in Kilkenny City (€700 – €860 per m²) which would point to the continued strength and attraction of the City as the more important retail centre.
- 7.8 The household surveys undertaken as part of this review indicated that 1.9% respondents do their main food shopping in Carlow. This remains consistent with the trends observed in 2004. Since the 2001 Strategy, there has been an increase and improvement of main food shopping in Carlow with the opening of the new Tesco supermarket at Fairgreen and the Dunnes Stores and Aldi supermarkets in Graiguecullen. Despite the large amount of comparison floorspace that has been delivered around Carlow since 2001, just 2% of households in Kilkenny are found to undertake their comparison shopping in Carlow. This is the same as was found in the 2004 Review. It should be noted that 3.5% of shoppers identified in the 2007 Kilkenny City Centre shopper survey were from Carlow whereas the survey in the 2004 Review identified that there were no residents of Carlow shopping in the City Centre.
- 7.9 Our review of what has happened or is happening in Carlow Town reveals that, while it is a rapidly improving centre, it is not as yet having any measurable or significant retail impacts on the City or County. In fact, there are signs that Kilkenny City is improving as an alternative shopping destination for residents of County Carlow.

CLONMEL

- 7.10 Like Carlow, Clonmel is also a Level 1 Tier 3 centre in the national retail hierarchy and a County Town but is not designated as either a Hub or Gateway in the NSS or SERPG. However, the NSS does cite it as a town as having an 'urban strengthening opportunity' due to its strategic location between the Gateways of Limerick/Shannon and Waterford. The SERPG confirm that county towns are critical to the achievement of critical mass and balanced development across the Region. In 2006, the town had the equivalent of 77% of Kilkenny City and Environs population. Between 1996 and 2002, the town and environs witnessed a 4.5% population increase to 16,910 which was a slower growth rate than that of the county as a

whole (4.8%). Over the period 2002 – 2006, the population growth of the town and environs (0.6%) continued to lag behind national and regional trends. In terms of looking forward, the SERPG conclude that, given the availability of land and services, Clonmel has the potential to increase its population to 23,000 by 2020. Although it is thus not anticipated to be a town of the same order of size as Kilkenny City, it will continue to be an important large town in both a regional and national context and, therefore, have the potential to have an effect on shopping patterns in the County.

- 7.11 Our work on the 2007 Review of the 2003 South Tipperary County Retail Strategy has identified that the total net retail floorspace in the town and its environs is 51,408m². Therefore, the level of retail floorspace exceeds that of Carlow but is only 66.7% of that of Kilkenny City. Clonmel's comparison (clothing and footwear) floorspace is 48.2% of the comparison floorspace in the City. This is a slight decline on the position in 2004 when Clonmel had some 49.3% of that of the City. In respect of retail warehousing, Clonmel has 69.0% of that of the City which is a significant increase on the 8.0% which prevailed at the time of the 2004 Review. The 2003 Retail Strategy for South Tipperary stated that Clonmel did not have the range, quality, proportion and profile of national and international comparison operators compared to Kilkenny. This deficiency has only partially been redressed in the interim with the completion of Poppy Fields Retail Park which has introduced operators such as Woodies DIY, Harry Corry Home Furnishings and Tubs & Tiles to the town. The key issue that remains, and is affecting the town's competitiveness, is the extent of vacancies in the Core Retail Area and lack of national and international operators. Going forward, Clonmel will be aiming to secure a higher representation of high street multiple retailers in the town centre to sustain and enhance its role in the national retail hierarchy. Rental levels in the town have risen from those observed in 2004 (between €340 and €400 per m²) to between €376 per m² in the town centre and €800 per m² in the new retail park. Although the town centre's levels are low when compared Kilkenny City Centre, the high levels being achieved in the retail park indicate the strength of this new development over the traditional town centre.
- 7.12 There were no updated household and shopper surveys undertaken as part of the current review of the South Tipperary Retail Strategy. The most up to date information is, therefore, from the 2003 strategy. The household surveys undertaken in 2002 revealed that, although the county was retaining the large majority of its convenience shopping, there was leakage of expenditure for both clothing and footwear and bulky goods. The proportions of this going to County Kilkenny were identified as 1.6% and 2.5% respectively. The shopper surveys revealed that 4.3% of those interviewed in Clonmel Town Centre came from other parts of the country. In terms of expenditure inflows to South Tipperary, the 2003 strategy indicated that the county experienced inflows of 6.3% convenience and 18.8% comparison. Expenditure outflows were 14.2% for convenience shopping and 18% for comparison. The household survey, undertaken as part of the 2007 Kilkenny City and County Retail Strategy Review, revealed that there is 1% convenience expenditure leakage to Clonmel.

- 7.13 In terms of our analysis of Clonmel as a competing centre to the City, we would conclude that the position is relatively unchanged from 2004. It is an attractive and improving centre but for it to seriously compete with Kilkenny City then it will have to see further introduction of national and international high street comparison retailers in advance of any of the major proposals for the City coming forward. Although there are relatively large scale convenience proposals emerging in the town (such as redevelopment of Dunnes Stores and a new Tesco store), there are limited proposals for new comparison floorspace in the town centre. Hence, the overall competitiveness of Clonmel over Kilkenny is not set to enhance significantly in the immediate future.

PORTLAOISE

- 7.14 Portlaoise is a Level 1 Tier 3 centre in the national retail hierarchy but is not designated as a Hub or a Gateway under the NSS. However, the NSS does identify the potential of Portlaoise as a 'national transport hub', an 'inland distribution port' of national significance and a town with an 'urban strengthening opportunity'. The Regional Guidelines for the Midland Region (MRPG) recognise that Portlaoise provides links with the adjoining regions in terms of employment, trade and services and supports outlying local settlements and rural areas for higher order services, administrative functions and employment. Like Carlow, it exceeded both the national (8%) and regional (9.6%) rates of population growth with a significant increase of 28.0% between 1996 and 2002. This growth is derived from the substantial volume of residential development which has taken place as a result of the town's accessibility to Dublin. The results of the 2006 Census showed a further substantial increase (20.5%) of the town's population to 14,613 between 2002 and 2006. Although Portlaoise has experienced significant population growth, at 2006 the town's population was only approximately 66% that of Kilkenny City and Environs. Acknowledging that it is the administrative town for County Laois, the settlement strategy contained within the MRPG proposes Portlaoise as one of the towns in its five town growth model. The guidelines identify the Southern Area of the Midland Region around Portlaoise as accommodating an additional 20,000 population by 2020.
- 7.15 The town's total floorspace at the time the Laois County Retail Strategy was published (2003) was estimated to be of the order of 22,363m² which is approximately 29% of Kilkenny City and Environs current total floorspace. Since then, there has been additional retail floorspace delivered through the completion of the Kyle Shopping Centre (approximately 8,000m²) and out of town retail warehousing, although the extent of this new floorspace has not been quantified. With the Kyle Shopping Centre, the Portlaoise retail floorspace would represent approximately 40% of that in Kilkenny City and Environs. However, it must be noted that the retail strategy floorspace was largely based on the 1988 Census of Services data and, therefore, is not directly comparable and there are issues with the accuracy of the baseline. Additionally, it is important to highlight that strategy states

that Portlaoise's relative geographic isolation is a contributing factor to the current low rental valuations of its prime sites which are significantly less than those found in Kilkenny. Noting this, rental levels in Portlaoise, like Carlow, have improved greatly since 2001 when retail units achieved between €230 and €250 per m². Along High Street and in the shopping centre, they have now improved to in the range of €538 – €603 per m² which is still well below what is being achieved in the City.

- 7.16 The surveys undertaken as part of the 2001 Strategy indicated that Portlaoise had a minimal draw on expenditure from the County. In terms of convenience expenditure leakage in 2004, the household survey confirms that this still remained the case. The 2004 Kilkenny City Centre shopper survey identified that shoppers from County Laois account for some 3.1% of shoppers to the City, with 1% of these coming from Portlaoise itself, so they are not a sizeable proportion of shoppers to the City and County. The 2007 household surveys did not highlight Portlaoise as a draw on expenditure from the County and the shopper's survey identified only 1.3% of shoppers from County Laois coming to Kilkenny City Centre.
- 7.17 It is clear that Portlaoise is a smaller centre that does not have the range, quality and profile of shopping that Kilkenny City has. There are obvious pressures/market demand for additional floorspace but it is unlikely to become a true competitor to Kilkenny City in the short, medium or longer term.

THURLES

- 7.18 Thurles is a Level 2 Tier 3 centre in the RPG retail hierarchy and one of the two growth centres in North Tipperary. It is not designated in the NSS as a Hub but is highlighted as a town with 'urban strengthening opportunities'. The Regional Guidelines for the Mid West Region (MWRPG) designate Thurles as a key town in East Tipperary and indicate that this area is influenced by both Kilkenny City and Dublin. As with New Ross, which is now removed from the review, Thurles is a much smaller town than the other comparators. Its population was 7,682 in 2006. The results of the 2002 Census had indicated a rise of 6.5% since the 1996 Census and reflected a reversal in the population decline that had occurred previously. Although population growth had continued between 2002 and 2006, this occurred at a slower rate (3.5%) than over the 1996 to 2002 period. This noted, the MWRPG envisage Thurles growing to a population of 10,000 by 2020.
- 7.19 The 2003 North Tipperary Retail Strategy identifies that total retail floorspace in Thurles and Environs was 23,714m². A strategic review of planning permissions granted since 2003 reveals that a limited amount of additional retail floorspace has emerged since this time. Nonetheless, this is a large quantum for the size of the town and reflects its role and importance in this rural county. It is also a reflection of its distance from the Limerick Metropolitan Area. The total is some 31% of that

currently in Kilkenny City and Environs. Although some 65% of the retail floorspace is comparison, there are few national and international operators. Rental levels around town average at approximately €€30 per m². They are clearly levels that are substantially lower than those achieved in Kilkenny City.

- 7.20 There are opportunities for expansion of the town centre but these are difficult and constrained by multiple site ownerships/site assembly. Added to this, there is limited market interest in the town for further retail floorspace although it is understood that Tesco is seeking to find a site for a new store given the constraints of the existing outlet in the town centre. Improving accessibility through the major road improvements programmed/underway are increasing threats to the competitiveness of Thurles and it is increasingly being overshadowed by nearby Nenagh which is growing at a pace and a focus of retailer demand. The competitiveness of Nenagh is set to improve further through the upgrading of the Nenagh Bypass which was announced in late 2006.
- 7.21 The 2001 household surveys indicated that there was little or no penetration of Thurles into the Kilkenny retail market. In 2004, it was found that Thurles attracted 2% of convenience expenditure from the County. It was also found that 2% of the household survey sample stated that they travelled to Thurles to undertake bulky goods shopping. Some 6.6% of respondents in the shopper survey stated that they had travelled to Kilkenny from a location in Tipperary, with 4% coming from Thurles. The 2007 household surveys did not indicate any expenditure leakage to Thurles from County Kilkenny residents.
- 7.22 Thurles is sustaining its importance as a key centre in East Tipperary at present. In the 2004 Review, it was recognised that the town's retail offer would need to be greatly improved if Thurles was to retain its role and importance in the county retail hierarchy. As no significant retail development has occurred since 2004, our analysis is that Thurles is still not a centre that can be viewed as a direct competitor to Kilkenny City Centre.

WATERFORD CITY

- 7.23 Waterford City is the regional capital of the South East Region. With the other regional capitals, it is designated as a Tier 2 centre in the national retail hierarchy and it is the only designated Gateway in the Region in the NSS and SERPG. The City Council's administrative area had a population of 44,594 in 2002, an increase of 4.8% since the 1996 Census. The results of the 2006 Census indicate that it has only had risen by 2.6% to 45,748 between 2002 and 2006. This low growth rate is generally common to most of the country's main urban centres, including Kilkenny City, as most of the new residential development has taken place in the expanding suburbs/environs due to the lack of opportunities in more central areas. It is

confirmed by the fact that the population of the Waterford Environs (including those parts within County Kilkenny) increased by 61.8% between 2002 and 2006. As one of the four regional capitals, Waterford has a different role and function to centres lower in the hierarchy and this is recognised and promoted in the NSS and the SERPG.

- 7.24 The 2009 – 2014 Draft Waterford City Development Plan includes a retail strategy. This indicates the floorspace capacity available but does not provide detailed information on the quantum or breakdown of retail floorspace in the city and its suburbs. Noting this, the Waterford PLUTS estimates that the city has 35,000m² of comparison floorspace, the majority of which is concentrated in the city centre. In respect of convenience floorspace, in recent years this has predominantly been developed in the city's southern suburbs and this is also true of new bulky goods/retail warehousing floorspace. Based on our review of a variety of sources of information, we can derive that total retail floorspace in the city and environs is of the order of 60,000m² – 70,000m² which is relatively comparable to that of Kilkenny City and Environs based on our 2007 floorspace survey. This we would suggest is an underestimate of what is in fact there but without a comprehensive floorspace survey then the facts cannot be ratified. This is a large gap in the understanding of the retail composition and performance of the Region.
- 7.25 Waterford City has greatly improved its offer and attraction in recent years but there remains further scope for enhancement. New retail developments include Ardkeen comprising the recently opened Tesco, Next and Homebase DIY stores. There are two large scale proposals under construction, including a mixed use development at Railway Square, which will include approximately 3,079m² of retail floorspace (nearing completion) and the Ferrybank proposal on the north side of the River Suir in the County Kilkenny part of the city's environs. The redevelopment of the Lisduggan Shopping Centre represents another large scale emerging proposal.
- 7.26 The PLUTS identifies that Waterford and Environs could increase its population by 30,000 by 2020. This will necessitate supporting services and infrastructure on both the north and south side of the river. The PLUTS identifies the North Quays area of the city, close to the proposed City Centre Bridge, as suitable for additional comparison retail floorspace which will assist the renewal and regeneration of the city centre and the riverside. Construction of the Waterford Bypass and the Outer Ring Road will provide development opportunities for retail and housing although retail development is currently restricted in the current Development Plan zoning objectives. In relation to convenience shopping, appropriate scaled local retail centres will be provided to service existing and new residential areas in accordance with the relevant development plan and/or any joint retail strategy.
- 7.27 Rental levels vary within the Core Retail Area of the city from €900 to €1,000 per m². Against these figures, Kilkenny City Centre is performing well and, given the level of

market interest in large new edge of centre schemes, will continue to do so for the foreseeable future.

7.28 The 2007 household survey identifies that the greatest expenditure leakage from the County is to Waterford City. However, the 2007 household survey results indicate that, with the exception of bulky goods, leakage has decreased since the 2004 survey as follows:

- i. **Main Food Shopping:** has decreased by approximately 5% to almost 7% between 2004 – 2007; and
- ii. **Clothing and Footwear:** has decreased from 24% to 18% between 2004 and 2007.

7.29 In respect of bulky goods shopping, the 2007 household survey reveals that some 9.3% of the County's residents carried out their bulky goods shopping in Waterford City which was a slight increase from the 7% in 2004. These facts and figures illustrate that, on the whole, there are decreasing outflows of expenditure to Waterford City and Environs from the County. Against this, the Kilkenny City Centre shopper survey indicates no/limited inflows to the City and County from Waterford, a position that has not changed since 2004.

7.30 In comparing the City against Waterford City (and Environs), it has to be recognised that Waterford is the regional capital and, as such, one of the main shopping and commercial centres in the country. Kilkenny City sits at the tier below this and outflows of shopping expenditure, predominantly comparison, to the regional capital centre should therefore be anticipated and even accepted. However, against the 2004 picture, it is clear that Waterford's importance in the County's shopping patterns is decreasing. It was an objective of the 2004 Review to ensure that the County reduced its leakage of expenditure (particularly of convenience) to Waterford City and the household findings indicate that this objective has been met.

SUMMARY

7.31 Table 7.1 summarises the key findings of the competing centre review.

Table 7.1 Competing Centres Summary					
Centre	Population 2002	% Growth 1996-2002	RPG Designation	NSS Designation	Rental Levels per m²
Kilkenny	20,735	10.9	T3 L1	Hub	860
Carlow	18,487	23.4	L1 T3	-	603
Clonmel	16,910	4.5	T3 L1	USO	800
Portlaoise	12,127	28.0	T3 L1	USO & Inland Distribution Port	538
Thurles	7,425	6.5	T3 L2	USO	430
Waterford City	44,594	4.8	T2	Gateway	907
Note: USO – Urban Strengthening Opportunity					
Source: Various					

8 COMPARATIVE REVIEW

8.1 In this section, we examine further the City and County's performance relative to comparable centres and counties founded on the data and findings from our retail work around the country. The objective of the analysis is to look beyond the immediate area and set the performance and potential of the City and County against comparators at the national level and derive facts, figures and lessons that can assist in maximising the potential of both. As with the competing centres assessment, the comparative review is founded on in house data with no new primary research having been undertaken. The review is structured by the following questions:

- i. How the County's performance matches or otherwise that of comparator counties;
- ii. How the City compares with centres currently on the same level in the retail hierarchy; and
- iii. What lessons can be learned and taken forward from the comparative analysis to enable the City and County to sustain and enhance their attraction and competitiveness.

THE COMPARATORS – THE COUNTIES

8.2 Although our work has included both metropolitan and rural counties, our review and analysis is drawn mainly from the more rural and hence more comparable counties. The counties we have included in our analysis are:

- Clare
- Donegal
- Limerick County
- Meath
- North Tipperary
- South Tipperary
- Westmeath
- Wicklow.

8.3 The review focuses on the following key quantitative information:

- i. Population size and forecasts;

- ii. Average incomes per capita;
- iii. Retail floorspace – size and breakdown; and
- iv. Inflow and outflows of expenditure.

Population Size & Forecasts

8.4 Table 8.1 sets out county population data and percentage changes for each of the comparator counties and Kilkenny. It illustrates that the County had a population at 2006 of 87,558 which represents a population increase of nearly 9% since 2002 and just over 16% since 1996. From the table, it can be seen that Kilkenny is one of the smaller counties in the analysis and that it generally performed better in terms of population growth against other more rural comparator counties. Only Meath, Westmeath and Wicklow experienced larger growth rates but these can be directly attributed to their proximity to the major metropolitan area of Dublin. In contrast with the trends observed in 2002, Kilkenny witnessed higher population growth than that observed in Limerick County and County Clare. This is an important point to note indicating the strong growth of Kilkenny in comparison to these areas which were influenced by the Limerick Metropolitan Area.

County	1996	2002	% Change '96-'02	2006	% Change '02-'06	% Change '96-'06
Kilkenny	75,336	80,339	6.64	87,558	8.9	16.2
Clare	94,006	103,277	9.86	110,950	7.4	18.0
Donegal	129,994	137,575	5.83	147,264	7.0	13.3
Limerick County	113,003	121,281	7.33	131,516	8.4	16.4
Meath	109,732	134,005	22.12	162,831	21.5	48.4
North Tipperary	58,021	61,010	5.15	66,023	8.2	13.8
South Tipperary	75,514	79,121	4.78	83,221	5.2	10.2
Westmeath	63,314	71,858	13.5	79,346	10.4	25.3
Wicklow	102,683	114,676	11.68	126,194	10.0	22.9

Source: CSO, Census of Population, 2002 & Census of Population, 2006

Average Incomes per Capita

8.5 Per capita income of each of the counties as a proportion of the State per capita income is illustrated in Table 8.2. Again, the table illustrates the influence of proximity to the metropolitan areas with counties closest to Dublin and Limerick performing better in respect of this indicator. Counties close to Dublin have sustained high per capita income levels, although Meath and Wicklow have experienced slightly reduced income levels since 2001. The levels are high for those counties close to Limerick and have increased since 2001. Limerick is performing

above the State largely due to the major investment that has taken place, specifically in the IT sector. Kilkenny has witnessed a slight improvement, but is experiencing a lower order of per capita income levels than most of the other counties. This should be redressed as the County grows and develops around the City's role and importance as a Hub in the NSS and SERPG and being part of the Region's growth triangle.

County	1995	2001	2004
Kilkenny	89.2	86.9	87.2
Clare	94.1	95.0	95.8
Donegal	87.2	83.3	85.2
Limerick*	100.2	100.2	100.4
Meath	95.7	97.2	93.8
North Tipperary	99.0	95.2	97.5
South Tipperary	89.5	88.0	92.0
Westmeath	96.6	93.6	95.7
Wicklow	95.0	97.5	96.5
Note: * includes City and County population			
Source: CSO County Incomes and Regional GDP, 2004			

Floorspace Size & Breakdown

- 8.6 Retail floorspace quantum and breakdown across the different counties is summarised in Table 8.3. In all of the counties, the baseline floorspace surveys were specially commissioned as opposed to updating the 1988 Census of Services, hence the standard format for the information. Surveys were largely conducted between 2000 and 2001 as part of the production of the retail strategies for each of the counties. Kilkenny is one of the few counties where there has been an up to date review published. Therefore, a comparable up to date floorspace baseline is not available for all of the comparator counties. It is, however, noted that there have been updates of some of the strategies since the baseline cut off point for the 2007 Review. Additionally, the review of the South Tipperary County Retail Strategy is currently underway. It is not yet publicly available and, thus, the new data cannot be incorporated at present.
- 8.7 An important fact to highlight is that, as with the City and County Retail Strategy, not all floorspace in each county was surveyed. A threshold settlement population was used as the cut off point for surveys which largely depended on each county's settlement structure. The issue of the cost of commissioning the surveys was also a factor that limited fuller coverage. These factors will therefore result in a degree of underestimation but will be minimal when set against the information that is

available for the main centres. Additionally, it has to be recognised that in the absence of a national level audit – which consultations with the DoEHLG have indicated is not on the agenda even although the potential for one is indicated in the RPG – this is the best information that is available.

Table 8.3					
Retail Size and Breakdown in County and Comparator Counties					
(Net m²)					
County	Vacant	Convenience	Comparison	Retail Warehousing	Total
Kilkenny	1,886	13,221	39,135	5,765	60,007
July 2001					
May (2004)	(1,886)	(16,958)	(42,962)	(13,621)	(75,427)
April (2007)	(4,329)	(18,305)	(45,624)	(18,218)	(86,476)
As % of the County	3.1	22.0	65.2	9.6	100.0
	(2.5)	(23.5)	(57.0)	(18.1)	(100.0)
	(5.0)	(21.2)	(52.8)	(21.1)	(100.0)
Clare	2,795	12,687	23,804	8,649	47,934
May 2002					
<i>As % of the County</i>	<i>5.8</i>	<i>26.5</i>	<i>49.7</i>	<i>18.0</i>	<i>100.0</i>
Donegal	5,803	34,295	54,269	10,188	104,556
Dec 2001					
<i>As % of the County</i>	<i>5.6</i>	<i>32.8</i>	<i>51.9</i>	<i>9.7</i>	<i>100.0</i>
Limerick*	4,832	14,600	22,322	11,228	52,982
May 2002					
<i>As % of the County</i>	<i>9.1</i>	<i>27.6</i>	<i>42.1</i>	<i>21.2</i>	<i>100.0</i>
Meath**	4,881	23,878	35,138	6,893	70,790
Nov 2001					
<i>As % of the County</i>	<i>6.9</i>	<i>33.7</i>	<i>49.6</i>	<i>9.7</i>	<i>100.0</i>
North Tipperary	1,437	21,443	30,024	4,246	57,149
May 2002					
<i>As % of the County</i>	<i>2.5</i>	<i>37.5</i>	<i>52.5</i>	<i>7.4</i>	<i>100.0</i>
South Tipperary	3,247	21,486	33,584	2,904	61,222
June 2002					
<i>As % of the County</i>	<i>5.3</i>	<i>35.1</i>	<i>54.9</i>	<i>4.7</i>	<i>100.0</i>
Westmeath***	13,672	27,341	34,039	30,976	106,140
September 2002					
<i>As % of County</i>	<i>12.9</i>	<i>25.8</i>	<i>32.1</i>	<i>29.2</i>	<i>100.0</i>
Wicklow	-	32,224	35,935	5,636	73,795
February 2004					
<i>As % of County</i>	<i>-</i>	<i>43.7</i>	<i>48.7</i>	<i>7.6</i>	<i>100</i>
Note:	* Refers to Limerick County only.				
	**Since November 2001 10,083m ² of gross retail floorspace has received planning permission in Meath.				
	*** Westmeath Retail Strategy 2003				
Source:	Floorspace Surveys DTZ Sherry FitzGerald				

8.8 It is important that the following facts are highlighted in respect of the surveys that were undertaken:

- The high level of floorspace in Donegal can be attributed to the fact that surveys were undertaken in over twenty different centres many of them smaller than the 2000 population threshold applied in other counties. The retail strategy was reviewed in 2005 – 2006 but this did not extend to the updating of the floorspace survey.
- Surveys in Clare were only undertaken in Ennis, Shannon and Kilrush.
- The figure for Limerick County excludes the city and outside of the metropolitan area surveys were only undertaken in Newcastlewest.
- More comprehensive surveys were undertaken in Meath and Wicklow as part of the major Retail Planning Strategy for the GDA. This strategy is about to be reviewed but there will be no new floorspace surveys. The approach to be adopted is that applied to the 2007 Review of the City and County Retail Strategy – the original baseline will be updated with planning consents that have been developed since 2001.
- In North Tipperary, surveys were conducted in four centres – Nenagh, Roscrea, Templemore and Thurles.
- Surveys in South Tipperary extended to the six main centres.
- Westmeath has two large main centres, both with a substantial quantum of floorspace. The 2002 retail strategy has been reviewed. The revised strategy was published after the cut off date for the baseline for the 2007 Review.

8.9 The survey results are valuable but it has to be acknowledged that different coverage results in the figures not providing a wholly equal basis for comparison. Acknowledging the comments on the different surveys, Kilkenny can be seen to be performing well in terms of the quantum of floorspace in the county against the comparators. From the table, the following key facts/observations emerge:

- i. At 2001, the County had a relatively low level of convenience floorspace when compared to other counties and it represented a considerably lower proportion of total floorspace. Given the limited new convenience floorspace introduced since then, the balance has only slightly changed and it still remains low in comparison to other counties;
- ii. Comparison floorspace, excluding bulky goods, forms the major part of the County's floorspace and at 2001 was well above that in other counties. The position had changed to a degree between 2001 – 2004 as the majority of new floorspace since then comprised convenience and bulky goods. Between 2004 and 2007, there has been a predominance of bulky goods floorspace delivered in the County. The high level reflects the dominance of Kilkenny City. It is positive as comparison floorspace attracts inflows of expenditure;
- iii. In terms of the quantum and proportion of retail warehousing, the former was relatively low in comparison to other counties but the proportion was at the higher end of the spectrum. Both have greatly increased since 2001 and 2004 against the comparators but we know that large permissions have also come through in the

interim in Limerick County and North and South Tipperary with the latter increasing by some 15,000m²; and

- iv. Vacancies in the county are low, with only North Tipperary performing better accepting that levels in all of the comparators are not high.

- 8.10 Table 8.4 collates the population figures against the floorspace information to give per capita figures. They compare the 2000/2001 data against the position at 2004 and 2007 for the County against that prevailing in the other counties at 2004 and 2007, with the 2004 figure derived from the 2004 Review. The 2007 figure for the different counties is provided in brackets. Although these are not the most up to date floorspace data for the comparator counties, the assessment still remains valuable. The table illustrates that the County is performing well against the comparators in respect of total floorspace per capita. Although convenience floorspace per capita in the County has improved, it is not matching Donegal, North Tipperary, South Tipperary, Westmeath or Wicklow but it is significantly outperforming the comparator counties in terms of comparison and bulky goods floorspace.

Centre	Population 2006	Per capita total	Per capita convenience	Per capita comparison	Per capita bulky
Kilkenny2001		0.76	0.16	0.49	0.07
2004	87,558	0.95	0.21	0.53	0.17
2007		0.99	0.21	0.52	0.21
Clare	110,950	0.76 (0.43)	0.25 (0.11)	0.39 (0.21)	0.07 (0.08)
Donegal	147,264	0.46 (0.71)	0.12 (0.23)	0.23 (0.37)	0.08 (0.07)
Limerick County	131,516	0.44 (0.40)	0.12 (0.11)	0.18 (0.17)	0.09 (0.08)
Meath	162,831	0.53 (0.43)	0.18 (0.14)	0.26 (0.22)	0.05 (0.04)
North Tipperary	66,023	0.94 (0.86)	0.35 (0.32)	0.49 (0.45)	0.07 (0.06)
South Tipperary	83,221	0.77 (0.74)	0.27 (0.26)	0.42 (0.40)	0.04 (0.03)
Westmeath*	79,346	0.68 (1.34)	0.38 (0.34)	0.47 (0.43)	0.43 (0.39)
Wicklow	126,194	0.64 (0.58)	0.22 (0.25)	0.31 (0.28)	0.08 (0.04)
Note: *based on Westmeath Retail Strategy 2002					

Inflows & Outflows of Expenditure

- 8.11 The household and shopper surveys have provided new information on inflows and outflows of expenditure for the County in 2007. While comparable up to date information is not available for most of the other counties, the figures provide a valuable insight to the relative attractions and strengths of different centres for both convenience and comparison shopping. This is illustrated in Table 8.5.

Table 8.5 Inflow and Outflow of Total Expenditure				
County	Inflow (%)		Outflow (%)	
	Convenience	Comparison	Convenience	Comparison
Kilkenny 2001 (2004) (2007)	6.3 (19.8) (9.8)	28.8 (35.6) (41.5)	17.2 (27.0) (30.5)	26.0 (30.0) (32.3)
Clare	10.0	25.0	21.3	41.6
Donegal	7.6	16.6	5.5	18.0
Limerick City & County	17.6	31.7	6.3	6.8
Meath	10.0	14.0	7.0	42.0
North Tipperary	13.1	19.2	12.4	30.2
South Tipperary	20.6	44.1	1.9	15.1
Westmeath*	-	-	8.0	37.0
Wicklow	24.0	4.0	2.0	40.0

Note: *based on Westmeath Retail Strategy 2002. Inflows into the County were estimated to be 20% however it does split this between convenience and comparison expenditure.
Source: Household and Shopper Surveys, Lansdowne Market Research & MORI MRC

8.12 The key findings from the table are:

- **Convenience Inflows:** at 2001, the County was experiencing far lesser inflows of convenience expenditure than all the comparator counties, this was redressed by 2004 but has decreased below all but Donegal at 2007.
- **Convenience Outflows:** only Clare had greater convenience spend outflows at 2001. At 2004 and 2007, the County's outflows significantly exceed trends in the comparator counties.
- **Comparison Inflows:** at 2001, the county was performing below Limerick City and County and South Tipperary but above all of the other comparator counties. At 2004, only South Tipperary had greater comparison inflows and this is the position which remains at 2007. In general, the data show how strongly Kilkenny is performing against the other comparators.
- **Comparison Outflows:** the table shows that at 2001, the County had greater outflows than Donegal, Limerick City and County and South Tipperary but considerably less than the other comparator counties. However, the County's comparison outflows have increased and at 2007 only Clare, Meath, Westmeath and Wicklow have greater outflows predominantly due to the proximity to and influence of the Limerick (Clare) and Dublin (the other counties) metropolitan areas respectively.

8.13 The information on inflows and outflows of expenditure was derived from household and shopper surveys that were commissioned as part of the county retail strategies. Some were undertaken at different times during the year and hence may not capture

the visitor attraction of a county. This has been taken into account in the capacity assessments and adjustments made as appropriate. Below we summarise some of the headline findings.

- 8.14 **Clare:** retail development in the south of the county suffers from its proximity to Limerick City and the convenience and comparison offer available in the city's environs and its impact on the retention of resident expenditure. The county does, however, benefit from the regional, national and international attraction of Ennis, the County Town. North and West Clare experience large swells of population during the summer months thus the retail offer in both areas is largely confined to convenience and speciality comparison goods. People need to travel to the larger centres of Limerick, Galway and Ennis for clothing and footwear. The Galway Retail Strategy states that there is a degree of clothing and footwear leakage to Ennis.
- 8.15 **Donegal:** there were considerable concerns about leakage from the county to competing centres in Northern Ireland and to Sligo Town. The figures illustrate that these were relatively unfounded when the County is compared with others, particularly in respect of outflows/leakage. We have noted that the county retail strategy seeks to strengthen the County's position in both convenience and comparison shopping.
- 8.16 **Limerick City & County:** shopping patterns in the county are dominated by Limerick City and the large shopping centres within the Limerick Metropolitan Area. The further from the regional capital then there is greater local retention of spend, particularly for convenience shopping. Centres closer to the metropolitan area are becoming increasingly urbanised and there are increasing expenditure flows to Limerick City and its suburban shopping centres.
- 8.17 **Meath:** apart from outflows of comparison expenditure, the county has relatively high retention levels of convenience spend. The comparison leakage is as a result of accessibility to the main centres of the GDA and to a degree those in Louth. The County Council is promoting Navan, the County Town and main centre, as a new city to further enhance the retail role and profile of the town and redress the levels of leakage. However, additionally, it is also promoting the enhanced potential and importance of its Sub County Town Centres.
- 8.18 **North Tipperary:** has a number of strong centres serving wider hinterlands. The shopping patterns illustrate that, apart from comparison spend, it is relatively successful in securing retention of resident spend. The loss of comparison spend reflects the County's proximity to Limerick City Centre and the metropolitan area shopping centres and this will continue as road infrastructure and the offer of the regional capital continues to improve. However, Nenagh is emerging as a strong centre and one where there has been and is considerable market interest in new retail floorspace – convenience, comparison and bulky goods.

- 8.19 **South Tipperary:** like North Tipperary, South Tipperary has a number of strong urban centres Carrick-on-Suir, Tipperary Town, Cahir and Cashel catering for their local populations with the County Town, Clonmel, catering for a larger catchment area. Of the other counties examined, South Tipperary has the highest retention of convenience expenditure. There is some leakage of expenditure for both bulky goods and clothing and footwear however this is quite low when compared to the other counties. The county retail strategy revealed that a small proportion of the population travel to the cities of Waterford, Limerick, Kilkenny and Cork to carry out their clothing and footwear shopping and bulk goods shopping.
- 8.20 **Westmeath:** has two main centres – Athlone and Mullingar, with the strongest being Mullingar. The increasing draw of Galway and Dublin respectively on both is having an impact on comparison expenditure outflows although convenience outflows are low and of a level that should be expected for County Kilkenny. Detailed information is not available from the county retail strategy on expenditure inflows as surveys dealt only with numbers and not spend. Expenditure outflows should be reduced with the new Athlone Town Centre scheme and major proposals for Mullingar Town Centre.
- 8.21 **Wicklow:** suffers from a combination of its proximity to Dublin and the range and quality of its retail floorspace. The exception is Arklow, a Sub County Town in the county retail hierarchy, which due to its distance from the conurbation is performing well and attracting considerable new investment and market demand. A priority is to sustain and enhance the role and performance of Bray, the County's Major Town Centre, and proposals are in the pipeline for a major expansion of the town centre with the predominant focus being comparison high street shopping. There is, however, also considerable market interest in Greystones which is one of the most rapidly growing towns in the county and large scale proposals are due to be submitted.
- 8.22 **Focus on Kilkenny:** unlike all of the comparator counties, Kilkenny is dominated by one main centre. Kilkenny City is a centre of regional, national and international attraction, hence the high comparison spend inflows to the County. There are outflows to counterbalance this but these reflect that residents will choose to shop elsewhere, albeit on a less frequent basis, due to the quality and offer of Kilkenny City. A key objective of the Retail Strategy since 2001 has been to enhance this further. The fact that although levels of market share are slightly below those which prevailed at 2001, they have improved since the 2004 Review. This is very positive and reflects the effects of the new comparison floorspace that has been delivered. The fact that the McDonagh Station and Ferrybank schemes are now under construction should result in the original objectives of the 2001 Strategy, which have been reinforced in the 2004 and 2007 Reviews, being further ratified and enhanced. The level of convenience spend outflows is significantly above that found in the comparator counties and is an issue which requires to be redressed.

County Retail Strategies

- 8.23 The information set out in this analysis has greatly informed the response of the comparator counties in their retail strategies. Review of the strategies reveals a suite of common objectives. These, in summary, are:
- i. Sustaining and improving the county's competitiveness;
 - ii. Reducing leakage and enhancing expenditure inflows;
 - iii. Meeting local needs and reducing the need to travel; and
 - iv. Achieving all of the above within the timeframe of the retail strategy.

THE COMPARATORS – KEY CENTRES

- 8.24 Our identification of the comparator centres is primarily founded on the following key attributes and characteristics – rural location, population size, quantum and nature of retail floorspace. All towns examined are the County Town within their respective counties except Thurles which until relatively recently has been viewed and promoted as a centre of equal standing to Nenagh but this position has been gradually eroding. Noting these parameters, the comparator centres that we consider Kilkenny City's performance against are:

- Clonmel
- Ennis
- Letterkenny
- Mullingar
- Navan
- Nenagh
- Thurles
- Wexford.

- 8.25 As part of our analysis, we would highlight that we have included Wexford (Town) given that it is also designated as a Hub under the NSS and the SERPG. The comparative analysis is founded on review of the following:

- i. NSS and RPG designations;
- ii. Population size;

- iii. Retail floorspace – size and breakdown; and
- iv. Rental levels.

NSS & REGIONAL PLANNING GUIDELINE DESIGNATIONS

8.26 Table 8.6 sets out each of the comparator’s designations in the NSS and position in the national retail hierarchy, as defined in the RPG. The table illustrates that under both national designations and against comparator centres Kilkenny (City), with Wexford, is a centre of considerable importance in national and regional strategic development and in the country’s retail hierarchy.

Table 8.6 Designation in the NSS and RPG		
Centre	NSS	RPG
Kilkenny	Hub	Tier 3 Level 1
Clonmel	Urban Strengthening Opportunity	Tier 3 Level 1
Ennis	Hub	Tier 3 Level 1
Letterkenny*	Linked Gateway*	Tier 3 Level 1
Mullingar**	Linked Gateway	Tier 3 Level 1
Navan	Primary Development Centre	Tier 3 Level 2
Nenagh	Urban Strengthening Opportunity	Tier 3 Level 2
Thurles	Urban Strengthening Opportunity	Tier 3 Level 2
Wexford	Hub	Tier 3 Level 1
Note: * Letterkenny is a unique gateway under the NSS as it is linked with Derry in Northern Ireland ** Mullingar is linked with Athlone and Tullamore		
Source: NSS 2002 and Retail Planning Guidelines for Planning Authorities 2005		

Population

8.27 Table 8.7 identifies the towns, sets out their populations and what the trends have been between 1996 and 2006. It can be seen that until 1996 Kilkenny was the largest town in the group but in the interim it has been overtaken by Ennis and Navan, largely as a result of these towns’ proximity to the growing Limerick Metropolitan Area and Greater Dublin Area respectively. Population growth has increased above the State average but is well below that for Navan, Nenagh, Mullingar, Letterkenny and, to a lesser extent, Ennis. The key influence on Navan, Mullingar, Ennis and Nenagh has been their proximity to their respective metropolitan areas although we would suggest for different reasons. The growth in Ennis and Nenagh can be attributed to quality of life priorities while that of Navan and Mullingar is more to do with the affordability of housing. Letterkenny and its exceptional growth has been a phenomenon which does not have any real explanation although increasing urbanisation of Donegal’s population, proactive economic development initiatives and the impact of the Peace Process may provide some of the answers.

Table 8.7					
Population in Main Towns 1996, 2002 and 2006					
Centre	1996	2002	2006	% change 96-02	% change 02-06
Kilkenny & Environs	18,696	20,735	22,719	10.9	9.6
Clonmel & Environs	16,182	16,910	17,008	4.5	0.6
Ennis & Environs	17,726	22,051	24,253	24.4	10.0
Letterkenny & Environs	11,996	15,231	17,586	27.0	15.5
Mullingar & Environs	12,492	15,621	18,416	25.0	17.9
Navan & Environs	12,810	19,417	24,851	51.6	28.0
Nenagh & Environs	5,913	6,454	7,751	9.1	20.1
Thurles & Environs	6,939	7,425	7,682	7.0	3.5
Wexford & Environs	15,862	17,235	18,163	8.7	5.4
Source: CSO, Census of Population, 2002 & Census of Population, 2006					

Retail Floorspace

8.28 Table 8.8 summarises the key floorspace information for each of the comparator centres. It illustrates that Kilkenny is by far the largest retail centre in the group of comparators followed by Mullingar. It also indicates the greater predominance of the City as the key location for shopping in the County – other centres are part of a more balanced and distributed hierarchy. Reviews of the different categories of floorspace further confirm the City's profile and dominance. The key focus of the comparative analysis is, therefore on the quantum of the different categories of retail floorspace. From this, we would highlight the following:

- Kilkenny had the same quantum of convenience floorspace as the other centres at 2000/2001, with Clonmel being the only centre with a substantially greater level. There have been additions to many of the centres since then but the City and Environs has kept pace. The percentage of convenience floorspace as a proportion of the City's total would be at the lower end of the spectrum but this reflects Kilkenny's role as a main centre in the national retail hierarchy. However, given its dominance and importance in County shopping patterns, then there requires to be further enhancement of convenience floorspace particularly when the levels of convenience expenditure leakage from the County are brought into the equation. This has not occurred in the 2004 – 2007 period. The McDonagh Station scheme will greatly help to redress this but there is scope for further enhancement and the Mart Site, which has long been a strategic objective, is confirmed as the most appropriate location for this to be achieved.
- The City had the greatest quantum of comparison floorspace when compared with other centres. While there have been and are pending additions in the other centres, this position will remain the same and confirms the City's role as one of the key shopping locations in the country, next to the regional capitals.
- The City had one of the highest levels of retail warehousing floorspace at 2000/2001 and, while there have been or will be substantial increases in other centres, it has

continued to grow between 2004 and 2007. Retail warehousing now represents a higher proportion of the City's floorspace, reducing the proportion of more mainstream city centre comparison floorspace. Mullingar also has a high level of retail warehousing, largely as a result of the major Lakepoint Retail Park which sits adjacent to the N4. Although Clonmel has seen a large increase in retail warehousing floorspace through the opening of Poppyfield Retail Park, Kilkenny City still exceeds the overall retail warehousing floorspace of the town given the extent of development that has happened in this area since 2004.

- Kilkenny had one of the lowest vacancy rates in 2001 and 2004 and this position remains at 2007 although none of the centres had rates that were of a level to raise concern.

Table 8.8
Retail Size and Breakdown in Comparator Centres (Net m²)

Centre	Vacant	Convenience	Comparison	Retail Warehousing	Total
Kilkenny	1,460	8,240	34,842	5,765	50,307
(2004)	(1,460)	(11,267)	(37,930)	(13,062)	(63,719)
(2007)	(1,458)	(11,307)	(39,656)	(17,659)	(70,080)
<i>As % of the County</i>	<i>77</i>	<i>62</i>	<i>89</i>	<i>100</i>	<i>84</i>
(2004)	(77)	(66)	(88)	(96)	(83)
(2007)	(33.7)	(62)	(87)	(97)	(81)
<i>As % of Kilkenny</i>	<i>3</i>	<i>16</i>	<i>69</i>	<i>11</i>	<i>100</i>
(2004)	(2)	(18)	(60)	(21)	(100)
(2007)	(2)	(16)	(51)	(25)	(100)
Clonmel	1,401	10,378	18,722	1,050	31,552
<i>As % of the County</i>	43	48	56	36	52
<i>As % of Clonmel</i>	4	33	59	3	100
Ennis	1,981	7,326	18,198	8,311	35,816
<i>As % of the County</i>	71	58	76	96	75
<i>As % of Ennis</i>	6	20	51	23	100
Letterkenny	1,269	7,396	15,289	7,756	31,711
<i>As % of the County</i>	22	22	28	76	30
<i>As % of Letterkenny</i>	4	23	48	24	100
Mullingar	3,908	8,841	14,137	15,857	42,743
<i>As % of the County</i>	28.6	32.3	41.5	51.2	40.3
<i>As % of Mullingar</i>	9.1	20.7	33.1	37.1	100.0
Navan	1,110	8,018	18,040	5,193	32,361
<i>As % of the County</i>	23	34	51	75	46
<i>As % of Navan</i>	3	25	56	16	100
Nenagh	346	8,240	9,153	0	17,739
<i>As % of the County</i>	24	38	30	0	31
<i>As % of Nenagh</i>	2	46	52	0	100

Thurles	857	7,322	13,475	2,059	23,971
<i>As % of the County</i>	60	34	45	48	42
<i>As % of Thurles</i>	4	31	56	9	100
Wexford**	-	8,711	12,689	-	21,400
<i>As % of the County</i>	-	27	27	-	31
<i>As % of Wexford</i>	-	41	59	-	100
Note: *Based on the Westmeath Retail Strategy ** Based on Draft Wexford Retail Strategy					
Source: DTZ Pieda Consulting research					

Per Capita Ratios

8.29 Table 8.9 collates the population figures against the floorspace information to give per capita figures for the City and the comparator centres. As set out earlier, updated county retail strategies are not yet available to enable a definitive review of the table. We have, however, reviewed the current floorspace of the City against the 2006 population for comparative purposes.

Centre	Population 2006	Per capita total	Per capita convenience	Per capita comparison	Per capita bulky
Kilkenny – 2001		2.42	0.40	1.68	0.28
2004		3.07	0.54	1.83	0.63
2007	22,719	3.08	0.50	1.75	0.77
Clonmel	17,008	1.85	0.61	1.10	0.06
Ennis	24,253	1.48	0.30	0.75	0.34
Letterkenny	17,586	1.80	0.42	0.87	0.44
Mullingar*	18,416	2.32	0.48	0.77	0.86
Navan	24,851	1.30	0.32	0.73	0.21
Nenagh	7,751	2.29	1.06	1.18	0.00
Thurles	7,682	3.12	0.95	1.75	0.27
Wexford **	18,163	1.18	0.48	0.70	0.00
Note: *based on Westmeath Retail Strategy 2002 ** based on Draft Wexford Retail Strategy					

8.30 The key findings from the table are:

- i. **Total Per Capita:** since 2001, the City has overtaken all of the comparator centres in terms of total per capita floorspace with only Thurles achieving a per capita above 3;

- ii. **Convenience Per Capita:** the City and Environs per capita has improved since 2001 but, even when the 2007 convenience floorspace is set against the 2002 population, it still is below that for Nenagh, Clonmel, and Thurles;
- iii. **Comparison Per Capita:** the City and Environs per capita has improved since 2001 and is outperforming all of the comparator centres at 2007; and
- iv. **Bulky Goods Per Capita:** there has been a significant improvement in the City and Environs per capita since 2001 and it is outperforming the bulky goods per capita of the comparator centres at 2007.

Rental Levels

8.31 As has been highlighted, the prime pitch rent on High Street Kilkenny is €860 per m². At the time of the 2004 Review it was €753 per m². The 2007 rentals in the Core Shopping Areas of the comparator centres are set out below with the 2004 figure in brackets:

- Clonmel – €376 per m² (€400) – they are double this in the new retail park
- Ennis – €650 per m² (€615)
- Letterkenny – €645 per m² (€590)
- Mullingar – €860 per m² (€480)
- Navan – €600 per m² (€350)
- Nenagh – €430 per m² (€400)
- Thurles – €430 per m² (€340)
- Wexford – €860 per m² (€700).

8.32 The figures illustrate that Kilkenny rentals are continuing to perform well against the comparator centres. However, in the interim period since the 2004 Review, both Mullingar and Wexford have caught up, with each experiencing percentage improvements above that prevailing in the City Centre. Additionally, there are emerging major proposals for both town centres which are illustrative of the demand for space in both towns. Clonmel has witnessed a decline in rentals since the 2003 strategy was prepared which is illustrative of the lack new floorspace in the town centre. Although Navan has rental levels almost 70% those of Kilkenny, there has been a significant improvement since 2004. Thurles has also a higher percentage increase in rentals than Kilkenny but they are half those prevailing in the City Centre. All of the other comparator centres experienced percentage increases below that of Kilkenny. The comparative figures confirm the health and attraction of the City for shopping and its importance in the national retail hierarchy but that other key centres are catching up.

REVIEW OF THE KEY FINDINGS

8.33 A summary of performance indicators in the comparator centres is provided in Table 8.10. Kilkenny City is one of the largest of the comparators and, although population increase has been below that of centres more closely related to the main metropolitan areas, the City and Environs look to continue their growth. As a Hub, it is competing with other Hubs and Linked Gateways, for major investment and how this materialises will require to be monitored. It is clear that in terms of retail attraction and demand, as reflected in rental levels, the City is performing well above its comparators.

Centre	Population 2006	% Growth 1996-2006	RPG Designation	NSS Designation	Rental Levels per m² (€)
Kilkenny	22,719	21.5	L1 T3	Hub	860
Clonmel	17,008	5.1	L1 T3	USO	376
Ennis	24,253	36.8	L1 T3	Hub	650
Letterkenny	17,586	46.6	L1 T3	Linked Gateway	645
Mullingar	18,416	47.4	L1 T3	Linked Gateway	860
Navan	24,851	94.0	L2 T3	Primary Development Centre	600
Nenagh	7,751	31.1	L2 T3	USO	430
Thurles	7,682	10.7	L2 T3	USO	430
Wexford	18,163	14.5	L1 T3	Hub	860
Note: USO – Urban Strengthening Opportunity					
Source: Various					

8.34 The comparative analysis has confirmed that the City is sustaining the growing strength of its comparison retail offer but indicates that there continue to be deficiencies in its convenience offer. These are deficiencies which require to be redressed. Against the comparator centres, the review has identified that the City and Environs have a significant quantum of bulky goods/retail warehousing floorspace with mainstream comparison floorspace not having been enhanced to the same level. In respect of sustaining the competitiveness of the City and County, it is the mainstream sector of the comparison floorspace market which requires to be the priority in the strategic retail planning of the City and County.

9 THE RETAIL HIERARCHY & CORE SHOPPING AREAS

9.1 In this section, we address items (i) and (ii) of the RPG requirements set out under paragraph 36 of the guidelines, namely:

- i. *'Confirmation of the retail hierarchy, the role of town centres and the size of main town centres; and*
- ii. *Definition in the development plan of the boundaries of the core shopping area of town centres.'*

COUNTY RETAIL HIERARCHY

9.2 The definition of what the County Retail Hierarchy comprises was examined in detail in the preparation of the 2004 Review. The role of the current review is to confirm whether this hierarchy remains appropriate and best serves the needs of the County, taking due account of factors and influences that have changed since the adoption of the 2004 Review as a variation of the City and County Development Plans. We examine these under the following headings:

- The RPG
- The NSS
- The Regional Planning Guidelines for the South East Region
- Comparison of the Regional Settlement Strategy and County Retail Hierarchy
- The role and importance of the retail hierarchy.

Retail Planning Guidelines

9.3 The RPG were revised in 2005, however, the review did not address the national retail hierarchy and hence the designations which were set in December 2000 remain in place. Under this:

- i. **Kilkenny** – as we have noted previously – is designated as a Level 1 Tier 3 centre, the highest level of centre after Dublin and the regional capitals;
- ii. Based on the 2002 Census, **Thomastown** was the only one of the four District Towns that was within the population range of a Tier 4 centre (1,500 – 5,000). Based on the results of the 2006 Census, **Castlecomer** and **Callan** now have populations which elevate the towns into the Tier 4 category of centre in the national retail hierarchy but **Graiguenamanagh** will still remain below the threshold; and

- iii. **Ferrybank/Waterford Environs** – was not examined under the RPG hierarchy in the 2004 Review although it was incorporated as a District Centre in the 2001 Strategy and the 2004 Review County Retail Hierarchies. At 2006, the population of the area has substantially increased to 3,465, which would place it as a Tier 4 centre in the national retail hierarchy.

- 9.4 The 2004 Review highlighted that the RPG definition of Tier 5 centres in the national retail hierarchy did not capture the scale and importance of the Callan, Castlecomer and Graiguenamanagh's retail offers and, while accepting that they were below the population threshold, they more aptly met the Tier 4 centre definition which is small towns:

'most of which provide basic convenience shopping, either in small supermarkets or convenience shops and in some cases, lower order comparison shopping such as hardware, pharmaceutical products and clothes.'

- 9.5 This is the position which remains today and, with the populations of Callan and Castlecomer being anticipated to have exceeded the 1,500 Tier 4 threshold, it is the approach which remains unchanged.
- 9.6 In terms of Ferrybank/Waterford Environs, the RPG acknowledge that in areas where there are existing or emerging large populations then these such areas would be appropriate for district centres. District centres are recognised as being part of the retail hierarchies of the cities and major towns but they are not incorporated in the national retail hierarchy. As such, the designation of such areas in city or county retail hierarchies is a function of the respective retail strategies.

National Spatial Strategy

- 9.7 The designation of Kilkenny as either a Gateway or Hub under the NSS was anticipated during the preparation of the 2001 Strategy. Its designation as a Hub is confirmed in the NSS. This designation recognises the national and regional importance of the City within the different settlement hierarchies. Thomastown is recognised as a town of the same importance in the Region as Tipperary Town, Cahir and Cashel (South Tipperary), Bagnelstown and Tullow (Carlow) and Gorey (Wexford) being a town of 1,500 – 5,000. The strategy advises that the strengths of these towns should be capitalised on through, amongst other things, planning and development promotion activities.

Regional Planning Guidelines for the South East Region

- 9.8 As development plans require to be consistent with the Regional Planning Guidelines and the Retail Strategy forms part of the City and County Development Plans then it

should also be consistent with the guidelines. In respect of reviewing the County Retail Hierarchy, an important consideration in the 2004 Review was the impact and influence of the **Regional Settlement Strategy** set by the SERPG on the shape of the hierarchy. The settlement strategy defines six different categories of urban centre with Waterford as the Region's Gateway and the top level in the settlement hierarchy. Below, as in the 2004 Review, we examine the County's main centres in the context of the SERPG settlement strategy's designations.

- 9.9 Kilkenny City is the second largest urban settlement in the Region, underlining its importance in the Region's settlement structure. With Wexford, it is one of the two **Hubs** in the South East and is set to grow as one of the '*strategic urban centres, that support and are supported by the Gateway and reach out to wider rural areas of the region*' furthermore, these Hubs are the centres that the SERPG '*are targeting for significant levels of growth*'. **County Towns**, excluding Kilkenny and Wexford, are the third level in the settlement strategy.
- 9.10 **Larger Towns** are the fourth level in the settlement strategy and are those towns with a population in excess of 5,000 people whose development should seek to support the role of the Gateways, Hubs and County Towns rather than try to compete with them for growth. There are no Larger Towns in the County.
- 9.11 The Regional Guidelines identify District Towns as towns with a population between 1,500 and 3,000. These towns will perform an important role in driving the development of a particular spatial component of the overall Region. Thomastown is recognised as a **District Town** that has well developed services and community facilities capable of supporting additional residential development in the Carlow/Kilkenny area. Other towns at this fifth level in the settlement strategy are Cahir, Cashel, Bagenalstown, Tullow and Dunmore East.
- 9.12 The final level in the settlement strategy is **Other Towns and Villages**. These are identified as playing important roles as service/retail/residential centres and act as Local Service Centres assisting the long term vitality and viability of rural areas. Callan, Castlecomer, Graiguenamanagh and the smaller villages in the County Retail Hierarchy would sit at this level in the Regional Settlement Strategy.
- 9.13 The SERPG does not specifically recognise areas such as Ferrybank in the Regional Settlement Strategy. It would be viewed as comprising part of the Regional Gateway.

Comparison of the Regional Settlement Strategy & County Retail Hierarchy

- 9.14 The 2004 Review provided a comparison of the Regional Settlement Strategy against the County Retail Hierarchy to inform the review of the County Retail Hierarchy and

whether amendments should be made to the hierarchy. Below, we undertake the same exercise as part of the 2007 Review.

- 9.15 The NSS/Regional Guidelines **Hub** designation is the equivalent to the County Retail Hierarchy **Level 1 Major Town Centre/County Town**. Kilkenny City is recognised as the key centre in the County and also within the wider Region and country. The County Retail Hierarchy designation of the City as the Level 1 centre in the County therefore remains appropriate.
- 9.16 As noted, there are no **Larger Towns**, as defined in the SERPG, located in the County.
- 9.17 Thomastown is the only centre in the County which is a fourth level centre – **District Town – Expansion Opportunity** in the Regional Settlement Strategy. It is also the only other centre apart from the City which is specifically identified in the NSS. Additionally, it has been identified as the location for the decentralisation of the Health and Safety Authority bringing an additional 110 jobs to the town. This has the potential to increase the population by between 250 and 300 which would be an important boost to the town, its attraction and potential. Given the NSS and SERPG designations, the potential of decentralisation and the fact that the town has a larger quantum of retail floorspace than the other District Towns, in the 2004 Review it was agreed appropriate for Thomastown to be designated above Callan, Castlecomer and Graiguenamanagh in the County Retail Hierarchy. As a consequence of these influences, to distinguish Thomastown from the other District Towns the **Level 2 Sub County Town Centre** tier in the County Retail Hierarchy was split into two tiers – **Tier 1 Level 2 Sub County Town Centre** and **Tier 2 Level 2 Sub County Town Centre** – with Thomastown being designated as the only Tier 1 Level 2 Sub County Town Centre. The town continues to have these attributes and has witnessed both population growth and a substantial increase in its retail floorspace since 2004. It is, therefore, appropriate for Thomastown to remain designated as a Tier 1 Level 2 Sub County Town Centre.
- 9.18 In respect of the other three District Towns – Callan, Castlecomer and Graiguenamanagh – they, along with Mullinavat, Slieverue, Upper and Lower Kilmacow and Urlingford are all at the **Other Towns and Villages** level in the Regional Settlement Strategy but at differing levels in the County Retail Hierarchy. In the 2004 Review, the former group were designated as **Tier 2 Level 2 Sub County Town Centres** and the latter **Level 4 Village Centres**. There is a big distinction between the District Towns and these smaller villages in terms of population size, quantum of retail floorspace and diversity of uses. As such, they should not be at the same level in the County Retail Hierarchy and the differentiation in the 2001 Strategy should remain in force. However, it is important to examine whether all of the three District Towns should remain as Tier 1 Level 2 Sub County Town Centres or whether one or more should join Thomastown as a Tier 1 Level 2

Sub County Town Centre. In respect of the three other District Towns, the 2007 Review has identified the following changes and trends:

- **Callan:** has experienced considerable population growth between 1996 and 2006. Additionally, the retail floorspace of the town has continued to increase and sustain Callan's position as the third largest centre in the County, after Kilkenny City and Thomastown. This position is set to continue based on the market interest which currently prevails. At present, Callan has 80.2% of the retail floorspace of Thomastown.
- **Castlecomer:** at the time of the 2006 Census the town had the fourth largest population in the County, after Kilkenny City, Thomastown and Callan. Between 2001 and 2004, it fell from the third to the fourth largest retail centre in the County, behind Kilkenny City, Thomastown and Callan and, this is the position which holds in 2007. Although Castlecomer has witnessed an increase in its retail floorspace since 2001, it has been a relatively limited increase and, unlike either Callan or Thomastown, there is no evidence of market interest in delivering additional floorspace. At present, it has 57.8% and 72.2% of Thomastown and Callan's retail floorspace respectively.
- **Graigenamanagh:** the 2006 Census results show that population has declined in the town between 2002 and 2006. It is the smallest retail centre of the District Towns and has witnessed a very limited increase in retail floorspace since 2001. There is no evidence of market interest in new floorspace. At present, it has 39.2%, 48.9% and 67.7% of Thomastown, Callan and Castlecomer's retail floorspace respectively.

9.19 On the basis of the above review and analysis, it is clear that Callan is establishing itself a strong and growing third retail centre in the County and Castlecomer and Graigenamanagh are showing low and slow retail floorspace growth. Callan, with Thomastown, is growing into a fairly substantial Sub County Town Centre. This is in contrast to Castlecomer which has stayed relatively static in the quantum and quality of its retail offer. Graigenamanagh is certainly performing below the level of the other District Towns. In terms of the County Retail Hierarchy, there is, therefore, a case for Callan to be redesignated as a Tier 1 Level 2 Sub County Town Centre with the position in respect of Castlecomer being monitored in the next review of the City and County Retail Strategy.

9.20 The other designation within the County Retail Hierarchy is:

- i. **Level 4 Neighbourhood Centre:** Poulgour Townland in Kilkenny City Environs and Ross Road Rockshire Hill, Belmont Centre and Rathculliheen/Abbeylands in the Waterford City Environs.

9.21 As has been highlighted, district centres do not readily fit into the Regional Settlement Strategy structure and this equally applies to neighbourhood centres. However, both are important centres/locations within the growing suburbs of Waterford and Kilkenny. The granted Ferrybank shopping centre scheme is

significantly larger than the retail floorspace of any of the District Towns and, therefore, it is inappropriate that it should be designated as a lower level centre in the County Retail Hierarchy. The final designation will be determined on completion of the Joint Retail Strategy for the Greater Waterford Area. With respect to Neighbourhood Centres, their designation and level in the County Retail Hierarchy remains appropriate for the roles that they play/will play in the City and County's shopping patterns for the foreseeable future.

ROLE & IMPORTANCE OF THE RETAIL HIERARCHY

- 9.22 The County Retail Strategy requires dealing with retail issues of a strategic nature and an important mechanism for helping to achieve this is the County Retail Hierarchy. It sets out to identify the role and importance of different centres within the hierarchy and provide guidance for the distribution of new floorspace with the emphasis being on the distribution of **major** new retail floorspace. As such, its primary focus is on the upper levels of the hierarchy namely the Major Town Centre/County Town (Kilkenny City), Sub County Town Centres (Callan, Castlecomer, Graiguenamanagh and Thomastown) and Ferrybank shopping centre. This objective is not set to deter or discourage smaller scale retail development and investment in smaller centres in the County. It is however important that the hierarchy set is clear as the distribution of new floorspace should be linked to the retail hierarchy for the County and should be appropriate in scale and character to the hierarchical role of the centre. In response, the hierarchy set out above is deemed clear and provides the guidance necessary for the distribution of new floorspace. This noted, Table 9.1 provides guidance on the type of shopping that is appropriate to different levels of the hierarchy. This is not intended to be prescriptive and our emphasis is on the word **guidance**.

Table 9.1					
Appropriate Shopping Provision					
Type of Centre	High Order Comparison	Middle Order Comparison	Low Order Comparison	Superstore	Supermarket
Major Town Centre/County Town Centre	g	g	g	g	g
Sub-County Town Centre		g	g		g
District Centre		g	g	g	g
Village Centre/Neighbourhood Centre			g		g

- 9.23 In terms of appropriate shopping provision, it is highlighted that both the Sub County Town Centres and District Centre are identified as appropriate for middle order comparison floorspace but only the District Centre is appropriate for major convenience. It is not envisaged that there will be any significant quantum of middle

order comparison floorspace in the Sub County Town Centres, although there is planning permission for a large amount of low to middle order comparison and bulky goods floorspace in the Ferrybank Shopping Centre. In respect of both, it allows for tourism related goods and niche speciality shopping in the Sub County Town Centres and the element of comparison and bulky goods floorspace being delivered in the Ferrybank Shopping Centre.

- 9.24 The table also indicates that major convenience floorspace is not appropriate for the Sub County Town Centres. This reflects the limited catchment area potential of the Sub County Town Centres. Applications will however be treated on their merits and be subject to the assessment criteria for large retail developments set out in Section 11.

DEFINITION OF CORE SHOPPING AREAS

- 9.25 In the 2001 Strategy, a **Core Shopping Area** was only defined for Kilkenny City Centre as the four District Towns were viewed as being of too small a scale to warrant such an approach. This was the conclusion of the 2004 Review of the Retail Strategy. The issue has been revisited as part of the 2007 Review and we would confirm that the position should continue to remain the same with only Kilkenny City having a defined Core Shopping Area.

- 9.26 An important focus of the 2004 Review was to examine whether the City Centre Core Shopping Area defined in the 2001 Retail Strategy remained appropriate, particularly in the light of the emerging edge of centre schemes on the McDonagh Station and Mart sites. The 2004 Review concluded, following examination of the case for retention or expansion, that it was in the best interests of the retail future of the City Centre – and as such the City and County as a whole – for the 2001 Core Shopping Area to be retained with key considerations in arriving at this conclusion being identified as including:

- The larger the defined core or prime shopping area then the greater scope to diffuse retail floorspace around a wider area
- This could bring policy conflicts and a potential wider distribution of floorspace
- The result could be a real threat of weakening not strengthening the prime shopping area.

- 9.27 The 2007 Review would reaffirm that this remains the appropriate conclusion and that the 2001 Strategy designated Core Shopping Area should be retained. It is, however, important for completeness to reiterate what the basis for designating core shopping areas is and why they are important in the retail planning of larger centres. As with the 2004 Review, we address this under the following the following headings:

- i. What characteristics define Core Shopping Areas?; and
- ii. Why is it important to define them?

Characteristics that define Core Shopping Areas

- 9.28 The Core Shopping Area of a centre is normally defined as the area including and immediate to the 'prime pitch'. That is the area which achieves the highest rentals, best yields, is highest in demand from retailer/operators/developers and investors, is overwhelmingly retail floorspace and has the highest footfall of shoppers. Outside of this area, there may be other important retail areas or freestanding shopping centres. In respect of the former, retail floorspace would be only one of the town centre uses. The mix of uses normally would be commercial leisure, service related or residential and such areas are termed the secondary and tertiary retail areas of larger centres. The latter will only normally be a feature of larger centres. In fact, it is important to highlight that some smaller centres, such as the District Towns, may not have what can be defined as a Core Shopping Area as the centre may be fragmented and the retail market more locally driven.

Why is it important to define Core Shopping Areas?

- 9.29 The RPG set down the **Sequential Approach** to the determination of retail applications. This essentially recognises the importance of sustaining the retail importance, vitality and viability of town centres. The emphasis in the RPG is on town centres, their redevelopment and expansion. Proposals for major retail schemes are required to take due cognisance of this as follows:
- In the first instance, the priority should be in locating new retail development within town centres.
 - If town centre locations are not readily available within a reasonable and realistic timescale then edge of centre sites should be looked to. In the RPG, these are defined as sites that are within 300 – 400 metres of the **Core Shopping Area**.
 - Only after the options for town centre and edge of centre sites are exhausted should out of centre locations and sites be considered.
- 9.30 Therefore, in order to be able to undertake the Sequential Approach, the starting point is the definition of the Core Shopping Area of main centres.

10 RETAIL DEVELOPMENT POTENTIAL

10.1 The preceding sections of this report have set out the baseline facts and information to inform the assessment of retail development potential in the County. As with the 2004 Review, the following have been identified as of being of particular importance:

- i. Providing the retail land use and planning policy framework to ensure that the City and County fully play their role in achieving the objectives and targets of the NSS and SERPG;
- ii. Current and pending strategic infrastructure investment;
- iii. Ensuring that the current strength and importance of Kilkenny City and Environs in County, Regional and National shopping patterns is sustained and enhanced;
- iv. The strengths and weaknesses of the City and County against both competing and comparable counties and centres are harnessed and addressed;
- v. That the increasing outflows of both convenience and comparison expenditure are redressed by providing the means to improve the attractiveness of the City and County's retail offer for residents of the City and County;
- vi. That the decreasing inflows of convenience expenditure are addressed through the enhancement of the City and County's convenience offer;
- vii. That the increasing inflows of comparison expenditure from visitors to the County from neighbouring counties and further a field are sustained and enhanced; and
- viii. The foundations for the future of retail planning in the City and County are strong and defensible in respect of the emerging City and County Development Plans and the timeframes of the NSS and SERPG to 2020.

10.2 Additional issues which have been identified from the baseline review and consultations with Elected Members and Council Officers as being of considerable importance which also require to be examined are:

- The vitality and viability of the District Towns and the measures required to sustain and enhance this
- The role of retail warehousing in the City's retail offer.

10.3 In addressing each of these, the review has been informed by:

- i. The policies and objectives of the 2004 Review;
- ii. The progress that has been made in implementing the policies and objectives of the 2004 Review, with reference as appropriate to the 2001 Retail Strategy;
- iii. Meetings and workshops with Elected Members and Officers from the Borough and County Councils;

- iv. Submissions received on the review of the City and County Development Plans; and
- v. Our experience from assisting both the Borough and County Council on major retail planning applications and that from our work on other retail strategies around the country.

10.4 The 2007 Review of retail potential of the City and County is structured by the following:

- Overview of progress since the 2004 Review
- Assessment of the retail potential of Kilkenny City and Environs
- Assessment of the retail potential of the District Towns
- Assessment of the retail potential of the Waterford City Environs
- Assessment of the retail potential of the New Ross Environs.

OVERVIEW OF PROGRESS

10.5 The baseline review and analysis has confirmed that proposals have now been advanced in a number of the key locations identified for **additional major new retail floorspace** in the 2004 Review. These are:

- i. **Kilkenny City:** McDonagh Station – construction is underway;
- ii. **Kilkenny City Environs:** a mix of local shopping and services are currently under construction in the Poulgour Townland. This is the first phase of a Neighbourhood Centre which was an objective of the 2001 Strategy and 2004 Review. It is anticipated that the Neighbourhood Centre will be constructed in the lifetime of the emerging City Development Plan;
- iii. **Kilkenny City Environs:** Smithsland and Ormonde Retail Parks – retail floorspace has been developed and is trading. There are, however, issues in respect of some of the types of occupier with mainstream comparison and not solely bulky goods operators locating on the parks. This is an issue which requires to be addressed in the Retail Strategy; and
- iv. **Waterford City Environs:** Ferrybank Shopping Centre – construction is underway.

10.6 Additionally, contrary to what was anticipated, there has been the introduction of a relatively large quantum of new retail floorspace and considerable market interest in additional new floorspace in both **Callan** and **Thomastown**.

10.7 LAPs have been prepared and adopted for Kilkenny City Centre and the New Ross Environs. These have provided the detailed land use planning frameworks for new retail developments.

KILKENNY CITY & ENVIRONS

10.8 In reviewing the potential of the City and its environs, as with the 2004 Review, the structure is provided by the Sequential Approach:

- City Centre
- Edge of Centre
- Out of Centre.

City Centre

10.9 As with the 2001 Strategy and 2004 Review, the starting point in the appraisal of retail potential is the City Centre reflecting its role and importance in the hierarchy and the need for it to be the priority location for additional floorspace. The review of potential sites and locations, conducted with Council Officers, overall confirmed the findings of the 2001 Strategy and 2004 review, namely:

- i. There are **no** sites or buildings of any substantial size available for retail development within what is termed the **Core Shopping Area**;
- ii. The Conservation Area policies covering the City Centre effectively remove any potential now and in the future for major redevelopment of space within the City Centre; and
- iii. There is potential for improvement and enhancement of the City Centre offer, both retail and leisure, by utilisation of vacant floorspace, conversions and gap infilling and this can be addressed under normal development control policies and procedures.

10.10 The above noted, there is only one site/area within the City Centre that is of key importance in terms of the enhancement of the retail attraction of the City and County and that is **Bateman Quay**. This site has been identified as a prime City Centre retail location since 2001. It has been earmarked for civic and cultural uses but there has been increasing recognition of the site's role and potential in the consolidation and expansion of City Centre retailing. Although it was envisaged that the retail component of the project would be important in the overall equation, it was agreed that it would be ancillary to the major enhancement of retail floorspace in and around the City Centre. However, in the interim, there has been increased recognition of the need for the site to provide a City Centre retail counterbalance to the major emerging McDonagh Station and Mart Site schemes as a mechanism for protecting the vitality, viability and attraction of the City Centre as the premier location for shopping in the City. Over the timescale of the 2008 – 2014 City and Environs Development Plan, the development and delivery of mixed use proposals for Bateman Quay – including a large component of high order comparison and speciality shopping – must be a priority retail planning objective. Importantly the

momentum is gathering pace for the project to proceed with some €2 million being awarded to the Kilkenny Integrated Cultural Facility (KIFC) by the Department of Arts, Sport and Tourism (DoAST) in April 2007.

- 10.11 An additional area which to date has not been given due recognition in its importance, largely in view of its potential to deliver any significant quantum of retail floorspace, is **The Parade**. This is an established honey pot for local people and visitors alike in view of the nationally and internationally renowned profile anchor of the Kilkenny Design Centre. There is scope to build on this by ensuring that planning policies provide the framework and mechanisms for this to be achieved.

Edge of Centre

- 10.12 Looking beyond the Core Shopping Area, given that the McDonagh Station scheme is now underway, the only other key edge of centre site is the **Mart Site**. As identified in both the 2001 Retail Strategy and the 2004 Review, the Mart Site – with the McDonagh Station site – provides the potential for the expansion of the City Centre and meeting the demand and need for additional retail floorspace and other City Centre activities/uses. This objective is incorporated in the 2005 City Centre LAP. The identification and zoning of the two sites underpins the objective of no one site dominating the retail landscape of the City or providing an alternative to the City Centre/Core Shopping Area. This principle has founded the Borough Council's approach to proposals for amendments to the McDonagh Station parent application and remains the Borough Council's retail strategy for the City.
- 10.13 The Livestock Mart Site – the 'Mart' site – is located on the north side of the River Nore bounded by the N77 Castlecomer Road, Barrack Street, Wolfe Tone Street and New Road. The 2004 Review identified that it provided the basis for the second phase of the expansion of the City Centre and this position is confirmed and re-endorsed in the 2007 Review. A planning application for the mixed use regeneration of the Livestock Mart Site – CityMart – was lodged in mid 2006. It is currently the subject of a clarification of the applicant's response to the Borough Council's August 2006 Further Information Request (CFIR). Subject to all matters in the response to the CFIR being addressed, the scheme should be completed and open for trading in the timescale of the emerging City and Environs Development Plan.

Out of Centre

- 10.14 Within the City's environs, over the timescale of the City and County Development Plans, the 2007 Review has identified issues and opportunities in respect of:
- Convenience floorspace
 - Bulky goods/ retail warehousing floorspace.
- 10.15 **Convenience Floorspace:** the environs of the City are rapidly expanding and there is a need to ensure that convenience shopping and local services needs around the area are met in an '*efficient, equitable and sustainable way*'. This objective will be met through the construction of the Neighbourhood Centre at Poulgour Townland, which is anticipated to be provided over the lifetime of the City Development Plan as the residential population expands. There remains potential for the Neighbourhood Centre at Poulgour to grow into a District Centre but this requires to be considered in the wider context of the planning of the City and its environs. Of particular importance in this equation is the Borough Council's commitment to prepare a LAP for the Loughmacask area which is anticipated to include provision for a Neighbourhood Centre. A key issue in the determination of whether a Neighbourhood or District Centre is appropriate Poulgour will be that of expenditure capacity for additional convenience floorspace particularly given the proposals for the Mart Site. For the foreseeable future, in view of the residential development that is taking place, the location for additional floorspace is the western rather than the eastern suburbs of the City.
- 10.16 **Bulky Goods/Retail Warehousing Retail Parks:** a range of sites and locations for the expansion of existing retail parks and for new retail parks were identified and examined in the 2004 Review. To protect the City Centre, the 2001 Strategy introduced restrictions on the size of retail parks which were permissible. These were adjusted in the 2004 Review in the light of the following considerations:
- i. It constrained the potential of retail warehousing development in and around the City and County;
 - ii. It was not consistent with the approaches in neighbouring counties and, therefore, had the potential to weaken the competitiveness of the City and County;
 - iii. It was not consistent with the RPG guidelines which did not set a cap on the size of retail parks but instead indicate the range in size that may be appropriate;
 - iv. Responding to market demand, the cap inhibited securing the necessary anchor tenants to attract other operators; and
 - v. Responding to consumer demand, at 2004 some 25% of the County's residents were travelling to other locations to meet their bulky goods retail needs.

- 10.17 The removal of the cap was adopted as policy. However, the principle that retail parks should be the location for bulky goods operators has not been comprehensively followed with a level of mainstream comparison retailers locating on the parks. This has been identified as a matter of concern by Elected Members in respect of the potential impact on the City Centre and the other main centres in the County. To redress this issue, it is therefore recommended that all future retail warehousing proposals are more strictly restricted to the range and nature of the goods which can be sold. It is a matter which should be made explicit in all pre-planning consultations with applicants and set as a condition in all planning permissions. Additionally, to ensure that no issues emerge, it should be a condition in any planning permission that the applicant submits the names and nature of tenants of bulky goods floorspace for the approval of the Borough or County Council prior to lease agreements being finalised. These recommendations are wholly consistent with the objectives of the 2001 Strategy and 2004 Review and the guidance provided in the RPG.
- 10.18 The sites identified in the 2004 Review were considered in terms of their immediate, medium and long term potential for development. The priority sites for retail warehousing floorspace were identified as Smithslands and Ormonde Retail Park. These proposals have now been delivered or are on course for delivery. They have resulted in the City significantly improving its retail warehousing offer. However, for the following reasons, the 2007 Review recommends that no further retail warehousing parks are granted in and around the City for the foreseeable future:
- The constraints on the expenditure capacity for additional comparison floorspace over the period 2008 – 2014
 - The priority that new comparison floorspace should be located in City Centre and edge of centre sites to enhance the attraction and competitiveness of the City and County in the national and regional retail hierarchies
 - The overrepresentation of bulky goods floorspace in the comparison offer of the City
 - The concerns that the retail warehousing floorspace is competing with the comparison offers of the City Centre and the District Towns
 - The issue of saturation of the retail warehousing market around the City and concerns that not all of the space will be built out.
- 10.19 This position and recommendation should be monitored and reviewed in the next review of the City and County Retail Strategy. Exceptions to this guidance would be where it can be proven that a proposal unequivocally introduces uniqueness and innovation to the City and County's retail offer which cannot be met in the City Centre or on edge of centre locations.

10.20 The above noted, the 2007 Review looks forward to 2020 and, as such, the guidance provided in the 2004 Review still holds true but the timescales have been revised to take due account of greater focus on the City Centre and the issues of the expenditure capacity for additional retail floorspace. The position requires to be reviewed and monitored in the next review of the City and County Retail Strategy. Future potential locations are, thus, confirmed as:

- i. **Hebron House Site:** is a site of considerable strategic importance given its location on both the N10 Link Road and the City Ring Road Extension. It has potential for retail warehousing and is appropriately zoned for this use. The potential of the area will be enhanced with the implementation of the two strategic road proposals. It should be highlighted that this potential does not relate to the Hebron Industrial Estate which is zoned as Industrial/Warehousing where retail warehousing is not a permitted use or open for consideration;
- ii. **De Loughrey Site:** this area is recognised as a potential location for retail warehousing but this will require the delivery of the first phase of the Inner Relief Road to be implemented before proposals can be considered;
- iii. **EPA/Council Yard Site:** was identified in the 2004 Review as having potential for a small neighbourhood centre. It is still recognised as an important site given its strategic location on the proposed Inner Relief Road. However, the need for a Neighbourhood Centre here will need to be revisited in the light of the proposals emerging from the Loughmacask LAP; and
- iv. **General:** the 2007 Review confirms the following strategic principles of the 2001 Strategy and 2004 Review as follows:
 - Over time, but unlikely to be in the timescale of the emerging 2008 – 2014 City and County Development Plans, retail warehousing parks should be located in all quarters of the City's Environs
 - Provision of infrastructure to ensure traffic impacts are minimised should be a key determining factor in the selection of appropriate sites, with public transport and other modes of access also being achievable
 - Relocation and upgrading of existing operations should be encouraged.

THE FOUR DISTRICT TOWNS

10.21 The baseline review and consultations with Elected Members and Council Officers has identified that, given that the key sites prioritised in the 2001 Strategy and 2004 Review have come or are coming to fruition, the 2007 Review requires to provide a greater emphasis on providing a framework for ensuring that the vitality and viability of the four District Towns is not only sustained but enhanced. To this end, our health checks of the towns have identified that there are some key opportunities for the re-use of existing town centre buildings/sites in the four District Towns which will serve to consolidate their retail offers and, importantly, provide the mechanism for the effective regeneration of these profile sites. It should be highlighted that other

sites should not be precluded from development but that each site should be considered on its individual merits and potential contribution to sustaining and enhancing the vitality and viability of the towns.

Callan

- 10.22 The recent extension to the SuperValu store has resulted in a positive knock on effect with small sized stores and other investment emerging on Green Street. The establishment of the new Co-Op Store to the west side of the town has resulted in the vacation of the former Co-Op building on Green Street. This represents a prime opportunity for town centre regeneration which should be promoted and pursued. There are also a number of individual buildings on Mill Street which have the scope and potential for restoration for new town centre uses. Given the substantial residential development which is taking place north of King's River, there would appear to be scope for a new convenience store in/around Bridge Street to cater for the growing population on this side of the town. The scope of these sites, however, requires to be considered in terms of their site size and potential for meeting the development requirements of modern operators. What is appropriate will be determined by the tests set by the assessment criteria of the City and County Retail Strategy with the priority being the consolidation and regeneration of the town centre.

Castlecomer

- 10.23 Castlecomer has seen its position in the County Retail Hierarchy decline with little new investment having taken place since 2001. This issue requires to be redressed. The former Co-Op store in the middle of the town is noted as a prominent landmark building which is currently vacant. The re-use and redevelopment of this site and building requires to be actively progressed and pursued before edge of centre and out of centre sites are considered.

Graiguenamanagh

- 10.24 The issues prevailing in Graiguenamanagh extend beyond its retail offer and have been recognised in the commissioning of the 2006 economic and development potential study of the town and neighbouring Tinnahinch by the County Council, in partnership with Carlow County Council. The study provides a detailed assessment of the town and its potential with its unique tourism potential being identified as the key driver for the regeneration of Graiguenamanagh. It identifies a suite of actions and initiatives which require to be driven forward in partnership by the public and private sectors and the local community in a holistic approach to the regeneration of the two towns. It is known that the local community, led by local Elected Members, is being proactive in pursuing market interest. The approach adopted by the County

Council and the local community is endorsed as being the appropriate one. The key emphasis must be on ensuring that the resources – both staffing and financial – are in place to help realise the regeneration and potential of the town. It is clear that the focus should be on the town centre and the high level of vacant properties which prevail. The issues are complex in view of landownership issues and the size of the development footprints. They are, however, challenges which require to be met.

Thomastown

- 10.25 Thomastown is the second most important centre in the County. Since 2001, its retail floorspace has increased by nearly 60% from 2,928m² to 4,947m², with the most significant increase being in convenience floorspace. The most important investment has been the edge of centre relocation of SuperValu with a range of ancillary shops and non retail services outlets. The consequence of this is that the former SuperValu store, which was an important anchor and attractor in the town centre, is now vacant which has greatly increased the vacancy levels of the town. However, as has been highlighted, the redevelopment and regeneration of this important site is currently the subject of a planning application which will include some retail floorspace. Another important site is the old Garda station. Importantly, there is considerable market interest in the town as evidenced by the permission for the remodelling of the St Mary's Church site on Market Street, the proposals for the redevelopment of the Comerford's Bakery site in the town centre and the recent grant of planning permission for a Lidl store on the outskirts of the town which is currently on appeal to the Board. Thomastown appears to be generating its own market momentum but the redevelopment and regeneration of the former SuperValu building/site must be a priority if the vitality and viability of the town centre is to be sustained and enhanced.

WATERFORD CITY ENVIRONS

- 10.26 The requirement for a District Centre in the Ferrybank area of the Waterford City Environs to meet the needs and potential of this significantly expanding suburb of Waterford City was identified in both the 2001 Strategy and the 2004 Review. Following refusal for the initial scheme by the Board, full planning permission was granted by the County Council for a smaller district centre and bulky goods floorspace. As has been highlighted, this scheme is currently under construction. As the area is set to grow to at least 4,400 households which will amount to 25% of the SERPG population target for the city, there is scope and potential for the quantum permitted to be increased if needs are to continue to be met in an '*efficient, equitable and sustainable way*'. Ideally what this potential is requires to be set in the context of a Regional Retail Strategy which the 2004 Review confirmed as an objective of the County Council and which is also an objective of this Development Plan. In the absence of a Regional Retail Strategy, this potential requires to be considered and assessed under the objectives of the SERPG but also, importantly,

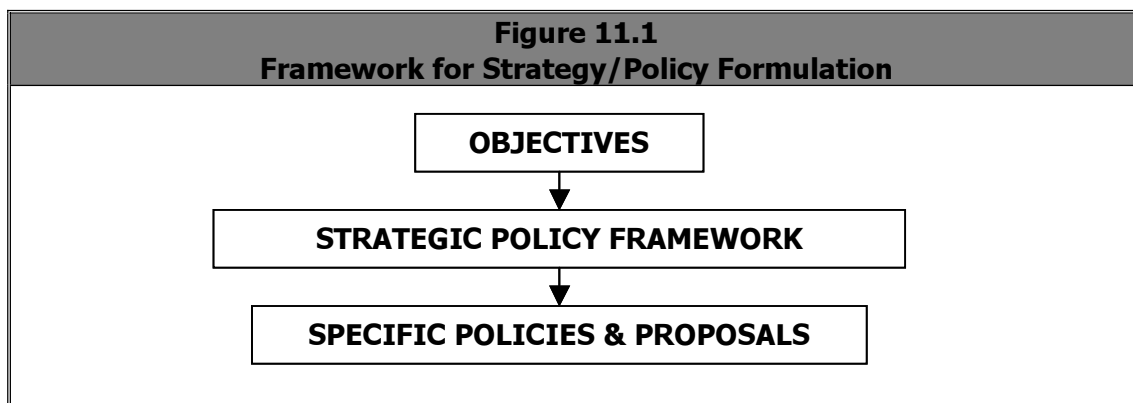
under the assessment criteria for major retail developments set down in the assessment criteria of the City and County Retail Strategy.

NEW ROSS ENVIRONS

- 10.27 The 2005 New Ross Environs LAP restricts the quantum of retail development which is permissible in the LAP area to a local or neighbourhood centre level. The 2007 Review would confirm that this is appropriate at present but would recommend that the position is monitored to ensure that the retail needs of the expanding western suburbs of the town are met in an '*efficient, equitable and sustainable way*'. This recommendation is important given the lack of retail floorspace serving the existing and growing population of this side of the town and the issues of accessibility and congestion which prevail.

11 STRATEGIC RESPONSE – THE RETAIL STRATEGY

- 11.1 Every retail planning strategy must be clear as to its purpose and what it is intended to achieve. This was achieved in the both the 2001 Retail Strategy and the 2004 Review and this is built on in the 2007 Review. We have, therefore, taken the key considerations that provided the foundations of the 2001 City and County Retail Strategy and its 2004 Review and set them in step by step framework. This is summarised in Figure 11.1 below.



AIMS

- 11.2 The objectives of the Retail Strategy set the framework for the strategic policies and specific policies and proposals. They provide a clear definition of the purpose of the Strategy and what it is intended to achieve in the City and across the County over the period 2008 – 2014 and beyond to 2020. On the whole, they replicate the objectives of the 2004 Review but a specific additional objective (Objective 7) has been introduced in respect of the District Towns. This noted, the objectives are:
- **Objective 1:** To sustain and improve the retail profile and competitiveness of Kilkenny City and County within the retail economy of the South East Region and beyond
 - **Objective 2:** To provide the retail land use and planning policy framework that responds to the potential of Kilkenny City's role as a Hub within the national and regional economies and to ensure that the City and County fully play their role in achieving the objectives and targets of the NSS and the SERPG
 - **Objective 3:** To confirm a hierarchy which assists in achieving the County and Regional Settlement Strategies and their objectives and provides clear guidance on where major new retail floorspace would be acceptable

- **Objective 4:** To ensure that the retail needs of the City and County's residents are met as fully as possible within the County, taking due cognisance of the Regional Retail and Settlement Hierarchy
- **Objective 5:** To address leakage of retail expenditure from the County by providing the means to strengthen the range and quality of its retail offer
- **Objective 6:** To ensure an equitable, efficient and sustainable spatial distribution of main centres across the County
- **Objective 7:** To sustain and enhance the vitality and viability of the role and potential of the four District Towns within the County Retail Hierarchy and facilitate the means by which this can be achieved
- **Objective 8:** To encourage and facilitate the preservation and enhancement of the retail role of smaller villages and centres around the County
- **Objective 9:** To encourage and facilitate innovation and diversification in the County's retail profile and offer
- **Objective 10:** To encourage and facilitate the re-use and regeneration of derelict land and buildings for retail uses, with due cognisance to the Sequential Approach as indicated in the RPG
- **Objective 11:** To promote and sustain the importance of retailing in the County's tourism economy
- **Objective 12:** To provide the criteria for the assessment of retail development proposals.

STRATEGIC POLICY FRAMEWORK

11.3 To achieve the Strategy's objectives requires due cognisance to be taken of the strategic policy framework that underpins specific policies and proposals. As with the 2004 Review, this framework is set by:

- i. The retail hierarchy;
- ii. The core shopping areas;
- iii. The sequential approach;
- iv. Spatial distribution of new retail development;
- v. Consideration of need; and
- vi. Responding to the implications of the NSS and SERPG.

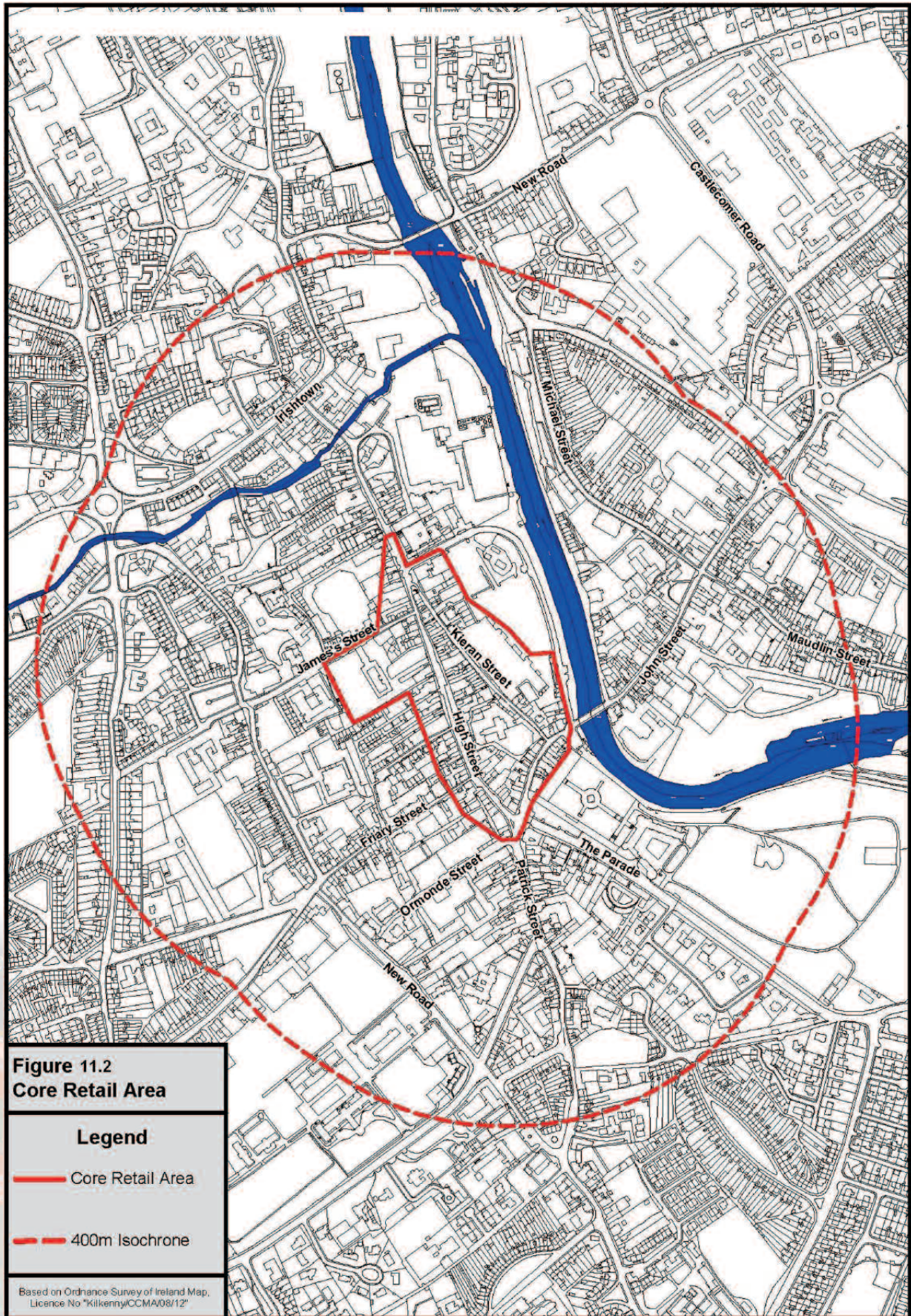
The Retail Hierarchy

- 11.4 Following review of the County Retail Hierarchy against the factors and influences that have changed since the adoption of the 2004 Review of the City and County Retail Strategy, it is recommended that the revised County Retail Hierarchy set out in Table 11.1 is adopted. The modification recommended is the redesignation of Callan as a Tier 1 Level 2 Sub County Town Centre. This recognises the increasing strategic retail importance of Callan against the other Sub County Town Centres.

Table 11.1 County Retail Hierarchy	
Level/Retail Function	Centre
Level 1: Major Town Centre/County Town	Kilkenny City
Tier 1 Level 2 Sub County Town Centre	Thomastown Callan
Tier 2 Level 2 Sub County Town Centre	Castlecomer Graigenamanagh
Level 3 Town	No Designated Centre
Level 4 Village Centre	Mullinavat Slieverue Upper and Lower Kilmacow Urlingford
Level 4 Neighbourhood Centre	Poulgour Townland Loughmacask LAP Area Ross Road Rockshire Hill Belmont Centre Rathculliheen/Abbeylands

Core Retail Areas

- 11.5 The review of the main centres in the County – Kilkenny City and the four District Towns – confirms that, as with the 2001 Strategy and 2004 Review, the **Core Shopping Area** relates only to Kilkenny City Centre and that the four District Towns are of too small a scale to warrant such an approach. The Core Shopping Area for Kilkenny City Centre and the 400 metre **Edge of Centre** boundary are illustrated in Figure 11.2.



- 11.6 This has been reviewed in the light of the case for retention or expansion of the area defined in the 2001 Strategy in the 2004 Review. The 2007 Review has confirmed the conclusions of the 2004 Review which were that it was in the best interests of the retail future of the City Centre, and as such the City and County as a whole, for the 2001 Core Shopping Area to be retained. Key considerations in arriving at this conclusion include:
- The larger the defined core or prime shopping area then the greater scope to diffuse retail floorspace around a wider area
 - This could bring policy conflicts and a potential wider distribution of floorspace
 - The result could be a real threat of weakening not strengthening the prime shopping area.
- 11.7 The Core Shopping Area comprises the following streets: Parliament Street/Market Cross, High Street, The Market Yard/St Kieran's Street and Rose Inn Street. These streets are the main retail frontage areas in the City Centre. Although not all can be termed the **Core Shopping Area**, in view of their importance to the overall retail environment of the City Centre, they have been included in the area.

Sequential Approach

- 11.8 In meeting the aims of the Strategy, policies and proposals in respect of the location of retail development must be in accordance with the principles set by the **Sequential Approach** in the RPG. It defines that:
- i. The preferred location for new retail development, where practicable and viable, is within a town centre (or district or major village centre);
 - ii. Where it is not possible to provide the form and scale of development that is required on a site within a 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 is taken to be one that is unlikely to be more than 300 – 400 metres from the edge of the prime shopping area, and less in smaller settlements. The distance considered to be convenient will however vary according to local circumstances; and
 - iii. Only after having assessed the size, availability, accessibility and feasibility of developing sites and premises, firstly within a town centre and secondly on the edge of a town centre, should alternative out of centre sites be considered where it can be demonstrated that there are no town centre or edge of centre sites which are suitable, viable and available.
- 11.9 In formulating specific policies and proposals, it is recognised that in general retail warehouses and bulky convenience stores do not fit easily in to town centres given their size requirements and the need for good car parking facilities and ease of

servicing. As such, in some instances it may be possible to locate retail warehouse groups on the edge of town centres.

The Spatial Distribution of New Retail Development

11.10 The City and County Retail Strategy, in accordance with the RPG, provides the strategic policy framework for the spatial distribution of new retail development. The emphasis is on strategic guidance on the location and scale of major retail development. The Strategy does not seek to inhibit small scale retail development in centres around the County, particularly in smaller centres. It should be taken to be implicit in the aims of the Strategy that such developments should be encouraged and facilitated to enhance the sustainability, vitality and viability of smaller centres, including smaller main centres in the County Retail Hierarchy. The following provides guidance on how the Retail Strategy defines the distribution of strategic and non-strategic retail floorspace within the Retail Hierarchy:

- **Level 1:** major convenience and comparison
- **Level 2:** middle order convenience and tourism related comparison in Sub County Town Centres and major convenience and middle order comparison, including bulky goods floorspace in designated District Centres
- **Level 3:** no centres are currently identified at this level in the County Retail Hierarchy
- **Level 4:** predominantly additional convenience but not excluding tourism related comparison.

11.11 Additionally, the Strategy recognises the need to ensure that local needs, primarily convenience shopping and local services, are met in an '*equitable, efficient and sustainable way*' in major existing or new residential areas in and around main settlements through the designation of locations for District or Neighbourhood Centres in development plans.

Consideration of Need

11.12 Table 11.2 sets out the indicative floorspace potential of the County over the next City and County Development Plans and the NSS and SERPG to 2020. The table illustrates that there is scope for additional convenience and comparison floorspace to 2014 but of a lesser quantum than that between 2014 and 2020. This is in view of the planning consents that have already been granted which capture a proportion of the potential gross expenditure that is available over the period to 2014. There is, however, substantial additional capacity post-2014.

Table 11.2						
Indicative Net Floorspace Potential in the County (2004 prices, €m)						
Period	Convenience			Comparison		
	Low	Medium	High	Low	Medium	High
2008-2014	1,968	2,699	3,144	8,886	11,563	12,439
2014-2020	4,274	5,119	6,649	28,680	32,802	39,520
Total 2008-2020	6,242	7,818	9,794	37,566	44,365	51,959

11.13 The need to look beyond the timescale of the 2008 – 2014 City and County Development Plans is important as any large scale retail schemes that are not well advanced in the planning process now are likely to have their Design Years (the year post opening when normal trading patterns have been established) after 2014. It is important to understand and acknowledge this now as it has important implications for the City delivering the objectives of its designation as a Hub and the Ferrybank area contributing to Waterford City achieving its role as a national Gateway.

11.14 The guidance in respect of how the floorspace potential of the City and the remainder of the County should be translated is set out in the paragraphs which follow.

Kilkenny City & Environs

11.15 Consistent with the RPG, while a capacity assessment should inform the guidance on the additional quantum of floorspace required, other factors should also be taken into account with need, market interest, regeneration and strategic policy objectives being on the whole more important issues in the equation.

11.16 In accord with the objectives of the 2001 Strategy and 2004 Review, the City has successfully witnessed a significant improvement in the quality and quantum of its bulky goods retail offer. Since 2001, retail warehousing floorspace – with the developments in the pipeline – will have increased by of the order of 30,000m² or over six times. In contrast, the mainstream comparison offer of the City Centre – again including the extant permissions – will have increased by less than 15,000m² over the same period. Mainstream comparison floorspace has decreased from over 69% of the total floorspace in the City and Environs in 2001 to 51.5% in 2007 and when the extant permissions are added in then the share decreases further to 47.5%. In parallel, the retail warehousing/bulky goods sector has grown from 11.4% in 2001 to just over 29% in 2007 and with the extant permissions included the share increases to 34%.

- 11.17 As a consequence of the large quantum of retail warehousing floorspace which has been developed, or is in the pipeline, the competing centres and comparative reviews – undertaken as part of the 2007 Review – have identified that the City and County have substantially greater levels of per capita bulky goods floorspace than other centres and counties. Set against this, with retail parks being developed around the main centres of the South East Region and the rest of the country then bulky goods shopping is no longer the draw that it was.
- 11.18 The attraction and competitiveness of a centre instead rests on what is in the city or town centre – the mainstream comparison offer and other supporting tourism, leisure and cultural infrastructure. The City Centre is performing well in terms of its market attraction to people from outside the County but the County is losing a continually increasing level of resident’s comparison expenditure. It is highlighted that this also applies to convenience spend leakage. For the City to continue to sustain and enhance the former (**trade draw**) and redress the latter (**market share**), it has to continue to improve and renew its offer and attraction in the light of the new schemes emerging in competing centres and further afield. There is, therefore, a need for additional convenience and mainstream/high street comparison floorspace in the City Centre/expanded City Centre over the period of the emerging City and County Development Plans. It is these rather than additional retail warehousing floorspace which require to be the priority in terms of additional new floorspace over the period of the 2008 – 2014 City and County Development Plans.
- 11.19 Even before the 2001 Strategy was prepared, there was strong market interest from retailers, developers and investors in the City as a key retail location. As has been highlighted above, in the interim period, market demand has predominantly been met in the retail warehousing market sector rather than the mainstream comparison sector. This has largely been because the McDonagh Station, Mart and Bateman Quay sites are complex sites which have take time to bring forward, in contrast to the predominantly greenfield retail warehousing sites. These difficult edge of centre and City Centre sites are now, however, coming forward driven by keen market interest, accepting that Bateman Quay is still in its developmental and vision phase. To ensure that there is both consolidation and expansion of the City Centre, the Mart Site and Bateman Quay are identified as the priority locations the development of new comparison floorspace over the short and medium term. This responds to the requirement for these needs to be met within and around the City Centre and the fact that there is deemed to be no requirement for additional retail warehousing floorspace in the City and Environs for the foreseeable future. The latter is a position which requires to be monitored in the next review of the City and County Retail Strategy.
- 11.20 An important attribute of the McDonagh Station scheme is that it is realising the mixed use regeneration of a key IAP priority area which will serve to deliver the first phase of the retail expansion of the City Centre. This is consistent with Objective 10 of the Retail Strategy which seeks to encourage and facilitate the re-use and

regeneration of derelict land and buildings for retail uses. The retail dimension of the scheme is vital to its dynamics and ambience and is an inherent component of the lively new City Quarter which is being created. These attributes and potential equally apply to the delivery of the regeneration of the Mart Site. For the benefits to be maximised for the City, retail floorspace requires to be a critical component of the development mix of the Mart Site and the floorspace capacity requires to be available for this to be achieved.

The District Towns

- 11.21 With the major strategic sites having come forward or being well advanced in the planning and development process, the 2007 Review has placed a greater emphasis on ensuring that the framework is in place to assist needs being better met in the four District Towns of Callan, Castlecomer, Graiguenamanagh and Thomastown. This is reflected in a specific objective for the District Towns being introduced in the aims of the Retail Strategy. This objective (Objective 7) seeks the framework to be provided that will serve to sustain and enhance the vitality and viability of the role and potential of the four District Towns and to ensure that this is not compromised by the growth of Kilkenny City and Environs or any other competing centre.
- 11.22 In respect of the vitality and viability of the four towns, it is important that needs are met in a way which is '*efficient, equitable and sustainable*'. It not appropriate to prescribe what the capacity potential for additional floorspace is in the towns. In general, subject to the assessment criteria for retail developments being met where proposals are above the 500m² (gross) threshold set for both convenience and comparison floorspace in the District Towns and other smaller settlements, then retail development should be encouraged and facilitated.

Waterford City Environs

- 11.23 The Ferrybank District Centre is now under construction and is set to meet the immediate convenience and comparison needs of this rapidly growing suburb of Waterford City. However, what now requires to be considered is whether the District Centre, which is of the order of what the Board Inspector advised was a '*small district centre*', will continue to be of the size and scale that is appropriate to meet needs over the timescale of the emerging County Development Plan given that the population of the area is set to grow to at least 15,000 which has been acknowledged as the size of many county and sub county town centres around the country. As was highlighted in the 2004 Review, this issue cannot be addressed in isolation to the role of the area in helping the Waterford Gateway achieve its targets and objectives, as set down in the NSS and SERPG. Therefore, again we review it and its implications under our consideration of the wider implications of the NSS and SERPG which follows.

New Ross Environs

- 11.24 The New Ross Environs LAP provides for substantial residential development with supporting small scale local services with a local service centre zoned on lands in the vicinity of Millbanks. The scale of retail development is restricted in the interests of supporting New Ross Town Centre as the location for the majority of convenience shopping. At present, the Plan Area is relatively undeveloped. As the population of the environs is set to substantially increase and the western side of the River Barrow is poorly served by shopping and other local services, although it is anticipated that the provision in the LAP is likely to meet needs over the 2005 – 2011 period of the Plan, this position requires to be monitored in the next review of the Retail Strategy to ensure that needs are met in a way that is '*efficient, equitable and sustainable*'.

Responding to the Implications of the NSS & SERPG

- 11.25 The 2001 Strategy was prepared and adopted in advance of either the NSS or the SERPG. As such, an important role of the 2004 Review was to examine and respond to what the implications of both these key spatial planning frameworks was likely to be on the retail planning of the City and County over the period to 2020 and how retail planning in the City and County should respond to planning for a greatly expanding City and it and the County's role in the spatial and economic development of the country and the Region, as prescribed in the NSS and SERPG. It was also recognised that an important part of this was the role of the Waterford City environs area that is within the County Council's jurisdiction and how this could or should contribute to the Waterford Gateway achieving its NSS and SERPG targets and objectives. There has not been an update or review of the NSS or SERPG in the interim period and, although the findings and conclusions of the 2004 Review on the whole remain appropriate, there have been changes in the City and County's retail landscape which have responded to the implications of the NSS and SERPG targets and objectives and also other factors which require to be taken into account as these have modified the strategic approach set down in the 2004 Review.
- 11.26 It should, however, be highlighted that the DoEHLG's February 2007 advice note to Regional Authorities and local authorities has requested that Regional Authorities across the country prepare 'Review and Update' reports on their respective Regional Planning Guidelines founded on the Department's revised national and regional population projections. These revised projections respond to the stronger than anticipated population growth which has prevailed, as evidenced by the results of the 2006 Census. They have been incorporated in the 2007 Review assessment of the requirement for additional retail floorspace and, as such, the Retail Strategy.

- 11.27 Taking the above factors and influences into account, below we summarise what the current position is in respect of the Retail Strategy responding to the implications of the NSS and SERPG under the following headings:
- i. How the City develops its status as a Hub;
 - ii. Sustaining and enhancing the competitiveness of the City and County; and
 - iii. The Waterford City Environs.

How the City Develops its Status as a Hub

- 11.28 Consistent with the 2004 Review, the 2007 Review forecasts and expenditure assessments provide a sound and defensible basis for the City achieving the objectives of both the NSS and SERPG in respect of retail expansion and policy. These are: the three major sites (McDonagh Station, the Mart Site and Bateman Quay) that will enable substantial expansion of the City Centre; an emerging framework for a network/hierarchy of district, neighbourhood and local centres to meet the needs of the residential expansion of the City's environs; and, key strategic locations have been delivered and identified for retail warehouse parks around the City. This framework is informed by the capacity assessment which looks forward to the 2020 timeframe of the NSS and SERPG.

Sustaining & Enhancing the Competitiveness of the City & County

- 11.29 A key issue which was identified in the 2001 Strategy and 2004 Review was the need to significantly enhance the quality and quantum of the City and County's retail warehousing offer in the interests of both sustaining and enhancing their competitiveness in the regional and national retail hierarchies. The 2007 Review has confirmed that this has been achieved and the priority now is focusing on the enhancement of the City and County's mainstream/high street comparison offer if the City is to continue to sustain and enhance its regional and national competitiveness. To this end, for the foreseeable future, no additional retail warehousing developments in the City and its environs will be permitted unless they can demonstrate that a proposal unequivocally introduces uniqueness and innovation to the City and County's retail offer which cannot be met in the City Centre or on edge of centre locations.

The Waterford City Environs

- 11.30 The Waterford City Environs, within the County Council's jurisdiction, are a key part of Waterford City achieving its potential and targets as a Gateway under both the NSS and SERPG. The 2004 Review confirmed that County Council's approach to date

had been right – it is a major expanding area of Waterford City’s suburbs and the needs of this community require to be met locally on a scale that is appropriate. The granting of planning permission for the Ferrybank District Centre was consistent with the 2001 Strategy and the zonings and objectives of the 2002 County Development Plan. The latter ensured that retail and other services provision would happen in tandem to residential development/population expansion. As has been noted, the construction of a small sized District Centre with a component of bulky goods floorspace is currently under construction.

- 11.31 However, the key gap that was identified in the 2004 Review which has not been redressed in the interim is the need for the Ferrybank area to be squarely put in its wider Waterford Gateway context and the contribution that the area can make to the Gateway’s NSS and SERPG targets and objectives being met. As with the 2004 Review, the 2007 Review would highlight that shopping is only one part of the equation. However, it is a very important part of the equation and in order that the proper planning and sustainable development of the Waterford City’s suburbs is achieved then there is an increased requirement for this issue to be redressed and resolved given the rapid residential and population expansion which is taking place.
- 11.32 The mechanism for achieving this was identified in the 2004 Review as the preparation of the Joint Retail Strategy for the Greater Waterford Area. This approach was in accordance with the requirements of the 2000 RPG guidelines. It was an approach that the 2004 Review incorporated as a specific policy of the Borough and County Councils but was extended to a wider Regional Retail Strategy and was also retained within the 2005 revision of the RPG. Given that the Ferrybank area of the Gateway is significantly growing and the 2007 Review has identified that the granted permission may potentially not wholly meet the needs of this major expanding suburb over the timescale of the emerging County Development Plan, then there is an immediate strategic need for the proper regional retail planning context for the area to be established.

SPECIFIC POLICIES & PROPOSALS

- 11.33 The specific policies and proposals of the City and County Retail Strategy are designed to facilitate achievement of the aims of the Strategy. As in the 2004 Review, they are formulated to ensure:
- Existing or emerging issues in the City and County’s retail profile have the policy framework to be addressed
 - The City and County have the policy framework to ensure strategic and local convenience and comparison shopping needs are met and the competitiveness of the County’s main centres is enhanced
 - The expenditure capacity potential for additional floorspace is harnessed over the timescale of the Strategy.

11.34 The policies and proposals are identified and reviewed in the following order:

- i. Kilkenny City and Environs;
- ii. The District Towns;
- iii. Waterford City Environs;
- iv. New Ross Environs;
- v. Greater Waterford Area Retail Strategy; and
- vi. General Policies.

Kilkenny City & Environs

11.35 The specific policies and proposals for Kilkenny City and Environs are detailed under the following headings:

- City Centre
- Edge of Centre
- Out of Centre
- Retail Hierarchy.

City Centre

11.36 It has been demonstrated that against competitor and comparator centres that Kilkenny City Centre is performing well and is sustaining its role, profile and importance as a Level 1 Tier 3 centre in the national retail hierarchy and within the South East Region. The City's designation as a Hub under the NSS and Regional Planning Guidelines further differentiates the importance of the City in the national and regional economy and provides the catalyst for the City to further enhance its importance in national and regional shopping patterns to the benefit of the City and County's population. The 2004 Review identified the mechanisms for this to be achieved and these have been identified as remaining appropriate in the 2007 Review. As such, it is confirmed that to achieve further enhancement of the City's retail importance will require a holistic approach and vision for the City and its future set by the following framework:

- i. Expansion of the City Centre;
- ii. Continuing improvement in the quality and quantum of its retail offer;
- iii. Continuing improvement of its cultural, arts and tourism/supporting tourism infrastructure;
- iv. Introduction and implementation of road programmes and traffic management initiatives;
- v. Signage and linkage;
- vi. Environmental improvements;
- vii. Heritage and interpretation strategies; and
- viii. Working in partnership.

- 11.37 **Expansion of the City Centre:** the 2004 Review of retail development potential confirmed that, as with the 2001 Strategy, there are not the size of sites available within the City Centre to accommodate the scale of new additional retail floorspace that the City requires to sustain and improve its retail profile and importance. Bateman Quay was identified in the 2001 Strategy and 2004 Review as the location for a new flagship civic and cultural building and was, thus, not available for any significant scale of retail development although it was anticipated that retail floorspace would form a component of the overall project. Founded on the 2004 Review and the 2005 City Centre LAP, there has been a re-evaluation of the potential of the location and its scope for the essential expansion of the very confined existing Core Shopping Area. Additionally, the importance of the Bateman Quay in providing a new hub for linkages between the emerging McDonagh Station and Mart Site schemes and the Core Shopping Area has been recognised. Over the timescale of the 2008 – 2014 City and Environs Development Plan, the development and delivery of mixed use proposals for Bateman Quay – including a large component of high order comparison and speciality shopping – is a priority retail planning objective if the City Centre is to retain its role as the premier shopping destination in the City and County.
- 11.38 **Continuing Improvement of the Quality and Quantum of the Retail Offer:** as set down in the 2004 Review, the 2007 Review confirms that expansion of the City Centre will enable substantial improvement in the City Centre's retail offer. However, in accordance with the Sequential Approach, the Core Shopping Area and areas immediately surrounding do remain and will remain the primary retail area. Through the regeneration and re-use of buildings for retail uses then the critical mass of shopping floorspace will be sustained and enhanced. Bateman Quay will provide an exciting opportunity for higher value and speciality shopping to complement the offer of the Core Shopping Area and provide linkages with the McDonagh Station scheme and future development at the Mart Site. The continuum of change should see McDonagh Station open for trading before or early in the timeframe of the emerging City and County Development Plans, the Mart Site developed and delivered in the middle to later stages of the plans and Bateman Quay at the end of the plan period/beginning of the next. The realisation of the all three sites plus further continued enhancement of the Core Shopping Area is, therefore, a key objective of the Retail Strategy. Reflecting the City's level in the national and regional hierarchies, the retail market is not infinite. As such, sustainable development of the key three sites will not be achieved unless there is an equitable distribution of new retail floorspace between the sites and this is an important principle by which all applications will be assessed.
- 11.39 The 2007 Review has identified the importance and latent potential of The Parade as a catalyst for both the extension of the Core Shopping Area and the regeneration of formerly traditional shopping streets/key buildings in its immediate locality. Central to this is the nationally and internationally renowned Kilkenny Design Centre and the role that this can play in attracting the critical mass of high quality indigenous craft and arts businesses. Reflecting the changing characteristics of the City and County

and the increasing competition from other centres, the City requires to sustain and enhance its unique selling point as a retail destination. The scope for this is through building on the existing strength and attraction of the indigenous craft and arts offer to create a critical mass which essentially forms a discrete quarter within the City Centre. To achieve this critical mass will require planning controls to be invoked which restrict the nature of uses in and around the area and this requires to be taken forward by the Borough Council.

11.40 Continuing Improvement of Cultural, Arts and Tourism/Supporting Tourism Infrastructure: while retailing will remain the predominant land use in the heart of the City Centre, the City's attraction to local people and visitors alike for culture, eating, meeting and greeting requires to be sustained and continually reviewed as part of the retail-leisure/tourism experience. This was an objective set in the 2004 Review with the Bateman Quay project identified as having the potential to make a significant new addition to the City's profile regionally, nationally and internationally. It is confirmed as a key objective in the 2007 Review and identified as a retail planning priority over the period of the emerging City and County Development Plans. The catalyst for the delivery of the project is now in place through the €2 million award for the KICF from the DoAST in April 2007.

11.41 Introduction and Implementation of Road Programmes and Traffic Management Initiatives: the 2004 Review identified that the congestion in the City Centre continues to grow and conflicts with pedestrians are increasing in parallel. Then as now, full traffic management planning and increased pedestrianisation/pedestrian priority measures can not come forward without programmed strategic road infrastructure being completed as this will reduce traffic through the City Centre. Progress has been made towards this goal with the line of the Inner Relief Road now adopted and the Eastern Ring Road Extension due for completion in October 2007. However, parking continues to be an issue and was a key area of dissatisfaction identified by Elected Members and the household and shopper surveys. To redress the issues, as identified in the 2004 Review, there requires to be:

- Continued progress with the programming of strategic road proposals
- A review of the potential interim traffic management measures that could be introduced
- The preparation of a car parking strategy for the City and environs.

11.42 Signage and Linkage: the 2004 Review identified that Kilkenny City, in common with the majority of centres, has poor directional signage and it detracts from the experience of the City. In the interim, the issue has been addressed in detail in the City Centre LAP and the 2007 Review recommends that the policies and proposals relating to signage and linkage in the LAP are given weight and priority. The issue relates to both vehicular and pedestrian signage and the former specifically in

respect of parking. At present, the City Centre is compact and easy to get around for the more mobile in the community. As it expands, then there will be a greater need to for the signage to be in place to achieve the linkages that will be required to ensure an integrated and cohesive City Centre and not a centre of parts. This has been highlighted as a particularly important issue in the context of the McDonagh Station and emerging Mart Site schemes, which will require clear signage and linkages with the Core Shopping Area.

- 11.43 **Environmental Improvements:** as identified in the 2001 Strategy and 2004 Review, there is a commitment in the City Centre LAP to prepare design briefs for environmental improvement and/or enhancement to John Street, St Kieran's Street and The Parade. Bateman Quay is excluded from the list as it requires a wider development and design brief for the project as a whole. John Street suffers from anti-social activity and the LAP seeks to redress this. The ambience of St Kieran's Street has been improved in recent times with the opening of a number of café/restaurant establishments. The Parade is a particularly important asset which currently poorly serves the City and this is being responded to with proposals for improvements to the public realm which includes the removal of the taxi rank from the area. These steps will enable the area to realise the potential for creating a high quality designed gateway to the City Centre and a more formalised location for visiting farmers, French and craft markets which was identified in the 2004 Review.
- 11.44 **Heritage and Interpretation:** the County and its towns have a wealth of history. This is an important asset in the national and international visitor market that is drawn to Kilkenny City in particular. In common with other centres around the country, the story is there but it is not being told as well as it could or creatively. To do this well would further distinguish the City and enhance its appeal. The 2007 Review, therefore, confirms the 2001 Retail Strategy and 2004 Review recommendation that a heritage and interpretation strategy is required which is linked to the environmental improvement/enhancement proposals to ensure an integrated approach is adopted.
- 11.45 **Working in Partnership:** the stewardship of the City Centre rests not only in the hands of the Local Authorities – local businesses, business and trade organisations, other agencies and groups and local people are all important stakeholders. The potential and vision for the City Centre will not be achieved by the Borough Council alone – it requires the Council and the different stakeholders to work in partnership to help deliver the expectations and targets of the City's designation as a Hub. This was a recommendation in the 2004 Review which remains as an objective in the 2007 Review.

Edge of Centre

- 11.46 With the construction of the McDonagh Station scheme underway, the only major edge of centre site is the **Mart Site**. As it is recognised that it is likely that Bateman Quay will have a longer lead in time, the Mart Site is identified as the key retail site in the City for the period of the emerging City and County Development Plans and, as such, provides for the next phase of the City Centre's planned expansion. A planning application is now in the planning process which should facilitate implementation of the mixed use regeneration scheme. Importantly, the City Centre LAP establishes the land use planning, design and linkages framework for the proper planning and sustainable development of the area which will ensure that the Borough Council's vision and objectives for this key site are squarely met.

Out of Centre – Retail Warehousing

- 11.47 The consideration of need has identified that the retail warehousing requirements of the City have been met and no new retail warehousing parks should be granted for the foreseeable future. This position and recommendation should be monitored and reviewed in the next review of the City and County Retail Strategy. Exceptions to this guidance would be where it can be proven that a proposal unequivocally introduces uniqueness and innovation to the City and County's retail offer which cannot be met in the City Centre or on edge of centre locations.
- 11.48 The priority over the period of the emerging City and County Development Plans will be ensuring that the existing space which has been developed or granted is fully taken up with bulky goods. In response to the concerns that not all existing retail floorspace is being occupied by bulky goods retailers, it is recommended that the following approach be adopted all planning applications related to retail warehousing:

Planning permissions for retail warehousing floorspace will contain clear planning conditions restricting the sale of non bulky goods as defined within the Retail Planning Guidelines. The compliance of occupiers with such planning conditions will be strictly enforced and monitored.

Out of Centre – Convenience

- 11.49 Consistent with the 2004 Review, it is recommended that to respond to the growing needs of existing and emerging residential areas around the City, a framework for a network/hierarchy of district, neighbourhood and local centres is identified. The following guidance is provided in respect of this policy:

- i. **District Centres:** are likely to be of the order of 10,000m² in size usually containing at least one supermarket/superstore, a range of local services and a limited quantum of lower/middle order comparison floorspace. The limitation on the nature and quantum of comparison floorspace distinguishes district centres from out of centre shopping centres;
- ii. **Neighbourhood Centres:** the RPG do not provide guidance on what size neighbourhood centres should be. In and around the City's environs, they are likely to comprise small anchor supermarket/discount store and a range of local services;
- iii. **Local Centres:** will meet the most local daily needs of an area and are likely to be anchored by a general grocery store; and
- iv. **Future Expansion:** in selecting locations and planning for district, neighbourhood and local centres, due consideration should be given to the potential of their future expansion.

11.50 As the greatest residential and population growth is taking place in the western suburbs of the City, this should be the location for the City's only District Centre over the timescale of the emerging City and County Development Plans. Scope has been identified for this being delivered through the expansion of the Poulgour Neighbourhood Centre. In other parts of the City, there is currently limited scope for more major centres in the retail hierarchy in view of the centres which have already been established and the lack of potential for any significant new residential development.

District Towns

11.51 The 2007 Review identifies the need for a greater focus being placed on facilitating the enhanced vitality and viability of the four District Towns. To achieve this, the following is recommended:

- **Callan:** the continued expansion of the town's retail offer should be encouraged and facilitated. The priority will be to consolidate retail activity within the town centre. However, this may not always be possible in view of the size of site and parking requirements of modern convenience operators. There is a need to consider better meeting the local shopping and services needs of the growing residential areas to the north of the King's River. This should doubly serve to help regenerate Bridge Street. In parallel, it is recommended that an environmental improvement/urban design strategy is prepared for the town centre which helps to create a sense of place and space.
- **Castlecomer:** requires to witness a substantial improvement in its retail floorspace and have as its objective over the timescale of the emerging City and County Development Plans achieving designation as a Tier 1 Level 2 Sub County Town Centre and, thus, parity with Callan and Thomastown in the County Retail Hierarchy. To achieve this, there requires to be enhanced awareness of the market potential of the town and its hinterland. Castlecomer requires to better harness its tourism potential which will serve to enhance the town's attraction as a place for living,

working, leisure and shopping. Key building blocks are its proximity to Kilkenny City, the Dunmore Caves and Jenkinstown Park with the asset of the Castlecomer Estate Yard being the catalyst for further retail and tourism supporting infrastructure. This recommendation should be pursued in conjunction with Kilkenny Tourism Board.

- **Graigenamanagh:** a holistic approach to the regeneration of the town is required and the framework for this is set down in the 2006 Graigenamanagh – Tinnahinch Development and Economic Study jointly commissioned by the County Council and Carlow County Council. The catalyst for the regeneration of the town centre is identified as being tourism market driven. The key assets are the town's heritage, its annual festivals and its location on the Barrow Navigation and two National Waymarked Ways. These are identified as having potential for Graigenamanagh to develop as a '*commercial services centre or hub*' within the local and regional tourism economies. By this means, there will be greater inflows of spend to help sustain and enhance the town's retail offer and attraction. An important recommendation is the need for environmental improvement and heritage interpretation strategies which will provide the springboard for regeneration.
- **Thomastown:** the continued expansion of the town's retail offer should be encouraged and facilitated to ensure that Thomastown fulfils its role in the NSS and as a designated District Town in the SERPG. The priority will be to consolidate retail activity within the town centre and secure the re-use and regeneration of key buildings and sites. However, this may not always be possible in view of the size of site and parking requirements of modern convenience operators. For the town to sustain its shopping and market attraction, there requires to be continued investment in the public realm and the streetscape.

Waterford City Environs

- 11.52 To meet the significant residential growth of this key suburb of Waterford City, land is zoned at Ferrybank within the County Council's administrative area for a District Centre. The District Centre is currently under construction. The Waterford Environs area is set to grow into a substantial area of population and what is required to serve this population needs to be strategically considered for the short, medium and longer term. As the area will increasingly form a larger and more important part of the Waterford Metropolitan Area, then the strategy for Ferrybank requires to be examined in detail with Waterford City Council and the other councils in the South East Region as part of the preparation of a Regional Retail Strategy. It has been highlighted that this recommendation from the 2004 Review was not implemented. In the absence of this framework, it is recommended that the population growth which has taken place and is set to take place in the Ferrybank area, with the latter founded on planning permissions and housing completions, is reviewed and an assessment made on whether the size of the District Centre remains appropriate to meet the needs of the area in a way which remains '*efficient, equitable and sustainable*' and how this should be responded to in the short, medium and long term.

New Ross Environs

- 11.53 The New Ross Environs LAP provides the framework for retail development within the area. The scale of retail development is restricted in the interests of supporting New Ross Town Centre as the location for the majority of convenience shopping. At present, the Plan Area is relatively undeveloped. As the population of the environs is set to substantially increase and the western side of the River Barrow is poorly served by shopping and other local services, although it is anticipated that the provision in the LAP is likely to meet needs over the 2005 – 2011 period of the Plan, this position requires to be monitored in the next review of the Retail Strategy to ensure that needs are met in a way that is *'efficient, equitable and sustainable'*.

Greater Waterford Area Retail Strategy

- 11.54 As adopted in the 2004 Review, it is the policy of the Borough and County Councils to work with the other local authorities in the South East Region in the preparation of a **Regional Retail Strategy** which is in accordance with the RPG which identify the Greater Waterford Area as an area where comprehensive retail and policies should be prepared by the constituent local authorities. As acknowledged, a Regional Retail Strategy has not been progressed. The 2004 Review recommended that it was important that a timescale for achieving this objective be agreed as soon as was practicable between the local authorities in the Region and this recommendation is endorsed as a priority action in the 2007 Review.

General Policies

- 11.55 In addition to the specific policies and initiatives, the 2004 Review of the Retail Strategy identified a range of general policies which should be incorporated in the Strategy. These are summarised in Table 11.3. The policies are confirmed as remaining appropriate in the 2007 Review.

Table 11.3 Summary of General Policies	
Policy	Objective
Corner Shops and Smaller Villages/Crossroads	<i>To retain, encourage and facilitate the retail role of corner shops and small villages around the County</i>
Enhancement of Towns and Villages	<i>To encourage and facilitate the enhancement and environmental improvement of the County's towns and villages</i>
Re-Use and Regeneration of Derelict Land and Buildings	<i>To encourage and facilitate the re-use and regeneration of derelict land and buildings</i>
Retailing in Tourism and Leisure	<i>To encourage and facilitate the development of retailing within the tourism and leisure sectors</i>
Innovation in the City and County's Retail Offer	<i>To encourage and facilitate innovation in the City and County's retail offer and attraction</i>

CRITERIA FOR ASSESSING FUTURE RETAIL PROPOSALS

- 11.56 All applications for significant retail development should be assessed against a range of criteria. Different thresholds were set in the 2001 Retail Strategy for Kilkenny City and its Environs and the four District Towns and, as with the 2004 Review, we recommend that these remain as follows:
- **Kilkenny City and its Environs/Waterford City Environs:** developments of 1,000m² (gross) convenience and 2,000m² (gross) comparison should be tested by the criteria
 - **District Towns/Other Settlements:** proposals for 500m² (gross) convenience and comparison developments should be considered against the criteria.
- 11.57 The 2004 Review criteria to be considered in the assessment of significant applications have been reviewed and are confirmed as remaining appropriate. These include:
- i. The expenditure capacity within the relevant catchment area, taking account of all extant planning permissions and development proposals/opportunities identified in the City and County Development Plans, including those for the District Towns and other settlements;
 - ii. The impact town and village centres, including cumulative impact;
 - iii. The baseline information and capacity/impact assessment is fit for purpose and transparent;
 - iv. There is demonstrable need for development;
 - v. The relationship of the application to any Development Plan allocation;
 - vi. Its contribution to town/village centre improvement;
 - vii. Its contribution to site and/or area regeneration;
 - viii. The quality of access by all modes of transport and by foot and bicycle;
 - ix. Its role in improving the competitiveness of the County, in particular Kilkenny City;
 - x. Its role in sustaining rural communities;
 - xi. The extent to which it is relevant to consider the imposition of restrictions on the range of goods permitted for sale; and
 - xii. Any other relevant Development Plan policies and allocations.

- 11.58 To assist in the determination of planning applications, where proposals exceed the assessment criteria thresholds, the Retail Strategy sets down that applicants are required to specifically address the criteria in their planning applications.
- 11.59 All significant development should also be subject to an assessment that follows the Sequential Approach. The objectives of this approach to development have been summarised previously. We would add the following to that summary:
- In all cases, to select the site which offers the optimum accessibility options by all transport modes, including walking and cycling
 - Particularly if a brownfield town centre site is not being promoted, to demonstrate that all town centre development options have been fully evaluated and that flexibility has been adopted in regard to the retail format.
- 11.60 If the retail proposal whether significant or not, accords with Development Plan policies and proposals in all material respects it should expect to meet with approval. In accordance with the RPG, in such instances, it should not be necessary for the applicant to provide additional supporting background studies. However, the onus is on an applicant to demonstrate convincingly that the proposal does comply closely with the Development Plan. Where there is doubt on any aspect of a planning application, local authorities should require a detailed justification related to the matter that is questionable.

RIS/RIA GUIDANCE TO APPLICANTS

- 11.61 The Borough and County Councils wish to ensure that retail proposals which accord with the relevant Development Plans and the City and County Retail Strategy proceed as expeditiously as possible through the planning process. To assist in achieving this, as part of the review of the 2004 Retail Strategy, the Councils requested that guidance notes to applicants be prepared on what should comprise a Retail Impact Statement (RIS)/Retail Impact Assessment (RIA) and what the sought outputs are. This objective is reinforced in the 2007 Review and the guidance notes provided in Appendix A. These should be given due weight and consideration by applicants in the preparation of RIS/RIA.

MONITORING & REVIEW

- 11.62 This report presents the second review of the 2001 City and County Retail Strategy. It was commissioned as part of the preparation of the 2008 – 2014 City and County Development Plans and in recognition of the fact that the retail sector is one of the most dynamic sectors of the economy and trends, influences and information change over time. This commitment to monitoring and review requires to be endorsed to ensure that:

- i. The Retail Strategy and its baseline are kept as up to date as possible;
- ii. There is a means of monitoring progress with the implementation of policies; and
- iii. There is a mechanism that can enable change that is responsive to emerging trends and opportunities.

11.63 To ensure that the Strategy and its policies remain valid and up to date, the following is recommended:

- There is annual monitoring of expenditure and population forecasts.
- The floorspace data should be kept up to date through monitoring of planning consents for both new retail floorspace and change of use. It could be adopted as a Development Control/Planning Office procedure.
- The Retail Strategy and its recommended policies and objectives should be reviewed again in 3 years.
- The household and shopper survey data should be up dated again at the next review.

APPENDIX A
RETAIL IMPACT ASSESSMENT
GUIDANCE NOTES

INTRODUCTION

1. The Retail Planning Guidelines for Planning Authorities (RPG) provide guidance on the six main steps that commonly comprise the assessment of retail impact. The guidelines do not prescribe that this is the only approach to Retail Impact Assessments (RIA)/preparation of Retail Impact Statements (RIS) but on the whole they have been accepted by Planning Authorities, the Board, Applicants and the industry.
2. The RPG were issued in December 2000 as Ministerial guidelines under Section 28 of the Planning and Development Act 2000 (Planning Act 2000). Section 28 indicates the planning authorities and An Bord Pleanála (the Board) shall have regard to Ministerial guidelines in the performance of their functions. They were revised in January 2005 to incorporate specific provisions for large scale retail warehouses being permissible in Integrated Area Plan (IAP) areas in National Spatial Strategy (NSS) Gateways, subject to particular assessment criteria being met. The revised provisions are, therefore, not applicable to any part of the City or County.
3. This guidance was largely undertaken in advance of the preparation and adoption of retail strategies around the country and therefore the detail of the information required to prepare robust and transparent RIA was generally not available. The Kilkenny Retail Strategy was one of the first published in the country and although the RPG guidance and the baseline information (in the Retail Strategy) are available to Applicant's, the County and Borough Councils deem that additional guidance be provided in the Review of the Kilkenny Retail Strategy to assist Applicants prepare RIA.
4. The County and Borough Councils do not intend that the guidance notes be prescriptive and Applicants are not obliged to follow the guidance. The purpose of these notes is to provide helpful guidance to Applicants in the preparation of RIA and to set out the range of information and analysis that the two Planning Authorities would expect Applicant's to provide. The aim is to help expedite a retail application's passage through the planning process by reducing the requirement for the Planning Authorities to request further information and clarification. Following the guidance notes does not guarantee either planning approval or that no further information will be requested from Applicants as each application and RIA will be assessed on their merits and compliance with the Retail Strategy's assessment criteria for retail developments.
5. The guidance notes have been prepared to be consistent with the RPG. They are only concerned with retail planning matters and do not extend to other supporting components of a planning application for a retail development such as Environmental Impact Statements (EIS).
6. The guidance note is structured as follows:

- i. The purpose of the Retail Impact Assessment;
- ii. Statutory Guidance;
- iii. Approach to Retail Impact Assessment; and
- iv. Common Problems Found in Retail Impact Assessments.

PURPOSE OF THE RIA

7. According to Annex 4 of the RPG:

'The purpose of an impact study is to provide clarity and guidance for decision makers. Clear, well reasoned and impartial submissions should be made which seek to address uncertainty and inform all parties' (Annex 4 Paragraph 3)'

8. With respect to retail planning matters, what decision makers are concerned with are:

- Understanding the quantum and nature of the proposed retail development
- Confirming that the proposed development is consistent with national, regional and local planning policies and specifically the relevant development plan and retail strategy
- Confirming that there is capacity for the amount of floorspace proposed
- Confirming whether or not the development will have an adverse retail impact or cumulative retail impact on one or more centres.

STATUTORY GUIDANCE

9. For planning applications made to Kilkenny County and Borough Councils, RIA must, at a minimum, be consistent with:

- i. The RPG;
- ii. The relevant Development Plan; and
- iii. The Policies and Objectives set out in the Kilkenny Retail Strategy and specifically the Criteria for Assessing Future Retail Developments.

APPROACH TO RETAIL IMPACT ASSESSMENT

10. A thorough and robust RIA relies on both a quantitative and qualitative assessment of the proposed retail development. The key elements of the quantitative and qualitative assessments are identified in the paragraphs that follow.

Quantitative Assessment

11. The preparation of a robust and transparent RIA requires the Applicant to gather and clearly present the following **baseline information**:
- Description of the entire development and its **proposed floorspace** including its gross floorspace area and net retail sales area, the types of retail goods proposed for sale as defined in Annex 1 of the RPG and the net:gross floorspace ratios used for convenience and comparison floorspace. These ratios should be consistent with the industry norm or explanation provided on why they deviate.
 - Presenting **turnover ratios** for the type(s) of floorspace envisaged from sources that are transparent and defensible. The ratios should be for new floorspace and not existing floorspace. The Kilkenny Retail Strategy is helpful in this regard as the ratios have been derived from research, analysis and consultations with the industry over a number of years.
 - Identification of the **retail design year** when the development has been trading for at least 12 to 24 months and a normal pattern of trading has emerged. This design year should be realistic and recognise the timescales generally involved in progressing through the planning process and the development of the scheme particularly in respect of major applications.
 - Identification of the proposed development's **catchment area**. While drive-times are commonly used to define catchment areas, other factors need to be taken into account such as the type of retail offer envisaged by the Applicant, the relative strength of centres that may compete with the proposed development, existing transportation infrastructure, the transportation infrastructure expected to prevail at the design year, and where possible, household survey data that illustrates actual shopping patterns of catchment area residents and how far residents are currently travelling to meet their current shopping needs. It should be recognised that the County is predominantly a rural county and residents will have to travel longer distances for the majority of their main shopping needs. In addition, it is anticipated that due to the strength and attraction of Kilkenny City then the catchment area for middle and higher order comparison goods will be likely to cross the County's boundaries.
 - A clear and transparent method of **estimating the catchment area's current population and projected population** at the design year relying as much as possible on recognised information sources such as CSO Census data, Regional Planning Guidelines and Development Plans.

- **Retail floorspace information for the key centres** in the catchment area, an estimate of the current turnover of these centres and an estimate of the growth in this turnover between the base year (year of application) and the design year. This is key information for the capacity assessment and the assessment of retail impact. Floorspace information is available for the main centres in the County in the Kilkenny Retail Strategy and may be available in the retail strategies prepared for neighbouring counties. The Applicant should ensure that where necessary supplementary information if appropriate is gathered.
- **Detail of extant planning permissions** for significant retail developments in the catchment area that includes identification of the nature and quantum of extant floorspace and an estimate the development's turnover. Where the catchment area extends into neighbouring counties then details of extant permissions for the relevant area will also require to be obtained and taken into account. While extant planning permissions (applications that have full planning consent) are required to be taken into account, it is good practice to identify significant emerging proposals, where sufficient detail is available. The precedent for this has been set by the Board.
- Ideally, **Household and Shopper Surveys** should be used to determine the current shopping behaviour of shoppers resident in the catchment area (Household Survey) and those (Shopper Survey) shopping in the catchment area. The Household Survey provides important information on expenditure leakage from the catchment area and a Shopper Survey can be a valuable source of information about retail expenditure inflows into the catchment area. These surveys have been undertaken in the preparation of the Kilkenny Retail Strategy and thus will provide valuable baseline information inputs to RIA. It is also available to different levels of detail for a number of neighbouring counties. However while there is likely to be good survey information available, the onus is on the Applicant to ensure that the surveys are relevant to the proposed development and its catchment area.
- **Health Checks:** it is important to the assessment of impact to understand the nature and offer of centres within the catchment area and that of the main centres adjacent to the catchment area as these are the centres that could be affected by a new retail development. The information collected should be guided by the checklist in Annex 2 of the RPG. It is however acknowledged that some of the detailed information (such as rents and yields data) are not available for smaller centres.

12. The baseline information gathered is an important input into the following:

- i. Capacity Assessment;
- ii. Retail Impact Assessment; and
- iii. Cumulative Impact Assessment.

Capacity Assessment

13. The purpose of a capacity assessment is to demonstrate whether or not there is sufficient expenditure capacity to support the proposed development. The Kilkenny Retail Strategy identifies the indicative floorspace capacity of the County as of March 2007. There are two principles that require to be highlighted in respect of the assessment of capacity for additional retail floorspace:
- The figures presented in the capacity assessment provide a broad assessment of the requirement for additional new floorspace. They should thus be taken as indicative and as guidance on the quantum that will be required and are in no way intended to be prescriptive. It is not the purpose of the capacity assessment to place a cap on the scope for future retail developments in the County.
 - As recognised in the RPG, the catchment areas of retail developments do not usually coincide with local authority boundaries. Different centres and developments will have different catchment areas and the size of this will depend on the importance and attraction of the centre/development. The capacity assessment for new retail developments should relate to the catchment area of the particular development. To assist transparency, it is recommended that the assessment for the proposal be put in the context of the overall expenditure capacity of the County and the reasons for the differences specifically identified.
14. The Kilkenny Retail Strategy provides the detail on how the capacity assessment should be constructed and the inputs required for the exercise. Applicants should ensure that the baseline and the inputs are the best and most up to date available. Where there are gaps in the information, the onus is on the Applicant to redress this and where professional judgement is applied then this should be explained in a simple and clear way.

Retail Impact Assessment

15. Retail impact is defined as the effect of a new development on the turnover of existing centres. The RPG are clear that planning authorities are not expected to be concerned about individual retail businesses and should focus upon the impact on the turnover of centres in the catchment area. Key to estimating retail impact is determining the pattern of trade diversion that will result from the development. The Applicant needs to make reasoned judgements about the share of the proposed development's turnover that will be diverted from existing centres. The basis for the pattern of trade diversion should be the health checks of the existing key centres, which should include an estimate of the current floorspace.
16. There are a number of ways of expressing retail impact, but the one approach is to express the retail impact on a centre, only when its turnover is driven below the base year turnover. In many cases, no retail impact will be registered

because turnover growth of a centre between the base year and the design year of the proposed development absorbs the trade diverted by the proposed development. Where the trade diverted does reduce the centre's turnover below its base year level, the reduction, or impact, is expressed as a percentage of the base year turnover.

Cumulative Retail Impact

17. Cumulative Retail Impact assessment is only required in cases where there are extant planning permissions for other significant retail developments in the catchment area. Where this occurs, the Applicant needs to consider how the proposed developments together, or cumulatively, with the relevant extant developments might have a retail impact on the key centres within the catchment area. In general, further extant developments will tend to increase the impact on individual centres, but this depends on the type of retail offer and the assumed pattern of trade diversion. Again, health check information provides a vital basis for justifying patterns of trade diversion, not just for the proposed development, but also for other significant developments that have been granted planning permission.
18. The Applicant is only obliged to consider planning permissions granted for significant retail developments in the catchment area. However, it is helpful and good practice to also take into account emerging developments where adequate and reliable information is available.

Qualitative Assessment

19. Consideration of retail applications is not solely a quantitative exercise, a full RIA should also address a range of qualitative material considerations. The following summarise the range of qualitative inputs that should be addressed. The list is provided as guidance and individual applications may require to consider other factors that are pertinent to the application. The key qualitative inputs are identified as:
 - i. Land Use Planning and Policy Review;
 - ii. Demonstration of the Sequential Approach;
 - iii. Presentation and interpretation of health check information;
 - iv. Presentation and interpretation of household and shopper survey findings; and
 - v. Addressing the relevant assessment criteria.

Land Use Planning and Policy Review

20. A policy review will usually be a component of the EIS accompanying major planning applications. EIS are however not always required for all retail planning applications. As RIS are normally freestanding documents then it is helpful for the land use and policy review to be provided within the RIS. The review should set out the policy framework under which the retail development will be assessed. The policy framework will be specific to individual applications and it is likely to change over time. The onus is on the Applicant to ensure that the policy framework is up to date. The range of policy guidance that will require to be considered will include:

- Review of the RPG.
- The Kilkenny Retail Strategy.
- The National Development Plan (NDP), National Spatial Strategy (NSS) and Regional Planning Guidelines for the South East Region.
- The relevant development plan covering the subject site.
- Any Local Area Plans or Action Area Plans covering the subject site.
- The Waterford Area Planning Land Use and Transportation Strategy (PLUTS).

21. The purpose of such a review is to establish the basis of case for the retail development by linking the features and characteristics of the proposed development with the Aims, Objectives and Policies presented in these planning policy documents. The Applicant should also take the opportunity to justify their proposal where it might be inconsistent with stated planning policy and where a variation to a development plan might need to be considered.

Demonstrating Application of the Sequential Approach

22. The Sequential Approach is established as a fundamental principle of retail planning and is clearly set out in the RPG. It is also incorporated in the Kilkenny Retail Strategy. In paragraph 59 of the RPG, the Sequential Approach is defined as follows:

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

23. The RPG state that the preferred location for new retail development where practical and viable is within a town centre or district centre or major village

centre. There will be instances where retail development of the nature and scale proposed cannot be located within existing centres and this is recognised in both the RPG and the Kilkenny Retail Strategy. In general, the different development plans covering the County and Kilkenny City identify and zone appropriate locations for edge of centre and out of centre retail development. Where alternative locations are identified by the Applicant then it will be important for the Applicant to objectively demonstrate that the Sequential Approach has been fully addressed.

Presentation and Interpretation of Health Check Information

24. The assessment of retail and cumulative impact requires an in depth understanding of the characteristics of the different centres within the catchment area of a proposed retail development as these are the centres that could potentially be adversely affected by the proposal. Some of this information will be available in the health checks undertaken in the preparation of the Kilkenny Retail Strategy and in the retail strategies of neighbouring planning authorities. The onus is however on the Applicant to ensure that health checks are undertaken of all relevant centres in the catchment area of the proposal and that the information is up to date.
25. The purpose of health check information is to help the Planning Authority determine whether or not a centre will be adversely affected by a proposed retail development. Guidance of what information should be incorporated in a health check is provided in Annex 2 of the RPG. It is acknowledged that all of the information, particularly that on rents and yields, may not be available for smaller centres. Where it is not available then this should be identified by the Applicant.
26. An important role of a health check is that it provides key baseline information to help inform judgements on the pattern of trade diversion from existing centres in the catchment area to the proposed development. This judgement will also be informed by information on current shopping patterns for different categories of shopping. For example, smaller centres on the whole are likely to be catering predominantly for daily needs and this will be evident from the nature and scale of their respective retail offers. Large higher order convenience or comparison developments are unlikely to result in any discernible increase in trade diversion from such centres as it is already happening – household and shopper surveys will confirm this. Without a health check then the basis of professional judgements on trade diversion, and ultimately retail impact, in general will not have a sound foundation.

Presentation and Interpretation of Household and Shopper Survey Findings

27. Household and shopper surveys provide valuable information on current shopping patterns. They provide key insights into the existing picture of the market share and trade draw of a centre/county for different types of shopping. Patterns change over time due to how different centres/counties are performing against other centres/counties which is directly linked to the offer and attraction of the centre/county against competing centres/counties.
28. Surveys have been undertaken in the preparation of the 2001 and 2004 Kilkenny Retail Strategies. They have also been undertaken within the majority of neighbouring counties as part of the preparation of their respective retail strategies. These surveys provide important qualitative baseline information to inform assessments of trade diversion and retail impact in RIS. The findings may be directly adopted/incorporated but this may not be appropriate for all emerging retail schemes. In such circumstances, it is advisable that surveys which are specific to the catchment area for the subject application are commissioned. The Kilkenny Retail Strategy provides examples of the survey questionnaires that could be adopted by applicants and a summary of the valuable information that can be derived to inform professional judgements on trade diversion and RIA.

Addressing the Relevant Assessment Criteria

29. Under paragraph 36, the RPG identify that the identification of criteria for the assessment of retail developments are one of the six matters which *'are to be included in all future development plans for Counties and County boroughs.'* The need for the identification of assessment criteria for retail developments in addition to the guidance and criteria set out in the RPG and the aims, policies and objectives for retail planning and development in development plans reflects a number of factors:
- i. The complexity of RIA and the different approaches to RIA which often lack the clarity and transparency to assist decision makers determine the whether a proposal will or will not have an adverse impact on one or more centres in the catchment area of a proposed development; and
 - ii. The need to specifically set out to Applicants what are the key factors that a planning authority deem are fundamental to its consideration of individual applications.
30. The RPG set out under paragraph 65 the six criteria that applicants should address in submitting evidence in relation to retail impact. In accordance with the RPG, the 2001, 2004 and 2007 Kilkenny Retail Strategies have identified the criteria that require to be addressed by applicants in support of retail applications. All retail applications should address both the RPG and Kilkenny Retail Strategy assessment criteria and in doing so demonstrate both

quantitatively and qualitatively whether the proposal will or will not cause an adverse impact on one or more centre.

31. In addressing the RPG and Kilkenny Retail Strategy criteria, the statements made by the Applicant should be defensible and reflect the evaluation process undertaken in the preparation of the RIS. This should include considering the facts and findings from:

- The RIA and cumulative impact assessment.
- The health checks.
- Household and shopper surveys.
- The land use planning and policy review.

32. The outcome of both exercises – addressing the assessment criteria of the RPG and Kilkenny Retail Strategy – should form a key input to the conclusions of the RIS and any Executive Summary that is produced. Below, the assessment criteria set out in the RPG and Kilkenny Retail Strategy are listed.

The RPG Assessment Criteria

33. The RPG state in Paragraph 65 that: *'In submitting evidence in relation to retail impact the applicant shall address the following criteria and demonstrate whether or not the proposal would:*

- i. Support the long-term strategy for town centres as established in the development plan and not materially diminish the prospect of attracting private sector investment into one or more towns;*
- ii. Cause an adverse impact on one or more town centres, either singly or cumulatively with recent developments or other outstanding planning permissions, sufficient to undermine the quality of the centre or its role in the economic and social life of the community;*
- iii. Diminish the range of activities that a town centre can support;*
- iv. Cause an increase in the number of vacant properties in the primary retail area that is likely to persist in the long term;*
- v. Ensure a high standard of access by both public transport, foot and private car so that the proposal is easily accessible by all sections of society; and*
- vi. Link effectively with an existing town centre so that there is likely to be commercial synergy".*

Kilkenny Retail Strategy Assessment Criteria

34. The Kilkenny Retail Strategy states that all applications for significant retail development should be assessed against a range of criteria. The thresholds for different types of development in the different centres of the County are identified in the Retail Strategy as follows:

- **Kilkenny City and its Environs/Waterford City Environs:** developments of 1,000m² (gross) convenience and 2,000m² (gross) comparison should be tested by the criteria.
- **District Towns/Other Settlements:** proposals for 500m² (gross) convenience and comparison developments should be considered against the criteria.

35. The criteria to be considered by Kilkenny Planning Authorities in the assessment of significant applications include:

- i. The expenditure capacity within the relevant catchment area, taking account of all extant planning permissions and development proposals/opportunities identified in the City and County development plans, including those for the District Towns and other settlements;
- ii. The impact town and village centres, including cumulative impact;
- iii. The baseline information and capacity/impact assessment is fit for purpose and transparent;
- iv. There is demonstrable need for development;
- v. The relationship of the application to any development plan allocation;
- vi. Its contribution to town/village centre improvement;
- vii. Its contribution to site and/or area regeneration;
- viii. The quality of access by all modes of transport and by foot and bicycle;
- ix. Its role in improving the competitiveness of the County, in particular Kilkenny City Centre;
- x. Its role in sustaining rural communities;
- xi. The extent to which it is relevant to consider the imposition of restrictions on the range of goods permitted for sale; and
- xii. Any other relevant development plan policies and allocations.